

Grant Management Amendments

E+ Jean Monnet Activities

Kick-off meeting Call 2021

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European Education and Culture Executive Agency 7th April 2022

Jean Monnet – Amendments

Type of Amendments

- Change of legal name, legal address, legal status
- Change of bank account
- Change of legal signatory (LSIGN and/ or PLSIGN)
- Change of Primary Contact Person (PCOCO)
- Change of value (amount) of workpackage (budget)
- Change of deliverables



Reminder - roles

Role allocation: Roles and access rights - Online Manual - Funding Tenders

Opportunities (europa.eu)

- @ organisation level:
 - LEAR & LSIGN (mandatory)
- @ project level:
 - Coordinator: PLSIGN & PCOCO (mandatory), COCO (back-up PCOCO recommended)

General: Connect with the email-address you linked to the profile!



Change of legal name, legal address, legal status

- Needs to be changed by the LEAR in FT&P by updating data and uploading the relevant supporting documents
- Data updates Online Manual Funding Tenders Opportunities (europa.eu)
- -> your LEAR should immediately update the information in the Participant Register (My Organisations > Actions > Modify Organisation) and, if possible, directly inform (via your Coordinator) your EU Project Officers in ongoing grants (Coordinator uses the Portal Messaging Facility: My Projects > Actions > Manage Project > Process communications > New message).



Reminder - roles

How to change the LEAR:

LEAR appointment - H2020 Online Manual (europa.eu)

Changing The LEAR Or His/Her Data?

- In case there is a need to replace an already validated LEAR, the organisation can designate a new LEAR by following
 the steps set out above under How to appoint a representative (LEAR). There is no alternative procedure specifically
 designed for replacing LEARs.
- If you are a LEAR and your e-mail address has changed, please inform the Validation Services via the 'messaging'
 option under the My Organisations menu, clicking on the "Actions" button > "Modify Organisation". The e-mail address
 will be updated by us.



Information Procedure

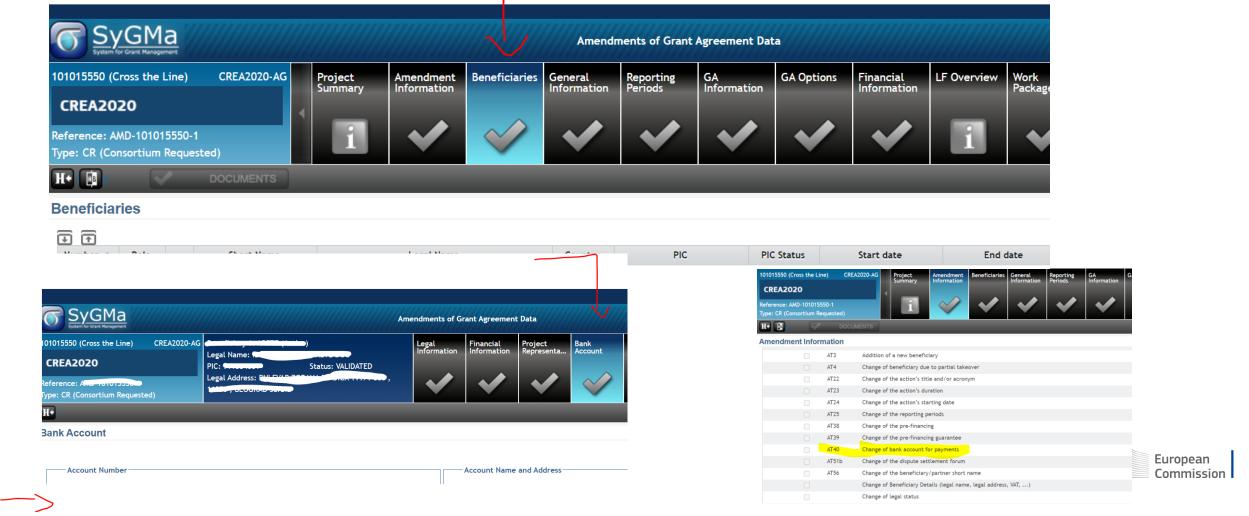


Change of bank account

- Needs to be changed by the LEAR in FT&P by indicating the new bank account records in the relevant section and uploading the relevant supporting document (copy of bank extract)
- Bank account registration and validation Online Manual Funding Tenders
 Opportunities (europa.eu)
- Once the bank account is validated, the PCOCO afterwards needs to introduce an amendment request and link the new bank account to the project



Change of bank account



Change of legal signatory (LSIGN and/ or PLSIGN)

- Needs to be changed by the LEAR in FT&P
 - LSIGN by the LEAR on organisation level
 - PLSIGN by PCOCO on project level
- The data will be synchronized automatically in Sygma after the change, please send an email via the communication centre to your project officer as there will be no formal notification
- For role allocation, please consult "How to revoke roles" zt the bottom of this link: Roles and access rights Online Manual Funding Tenders Opportunities (europa.eu)

Change of Primary Contact Person (PCOCO)

- Can only be changed by Project officer!
- Please inform your Project officer about the need to change the PCOCO providing new name and records (ECAS account needs to be in place)



Amendments to be launched by PCOCO via an "request for amendment" in FT&P:

- Change of value (amount) of workpackage (budget)
- Change of work packages
- Change of deliverables (a date of deliverable can be changed without an amendment by the Project officer, send him/her a message via the communication centre)
- Change of bank account (second part)

How to:

<u>Amendments - Online Manual - Funding Tenders Opportunities (europa.eu)</u>

Amendments - IT How To - Funding Tenders Opportunities (europa.eu)



Change of value (amount) of workpackage (budget)

- To be launch via amendment request
- Prepare revised budget table (excel) and send it to your project officer for verification
- Once budget ok, the project officer will upload the budget and will enable you in Sygma to revise the value of the work packages under "Financial information" (these fields/ screens are blocked and need to be deblocked by the project officer)

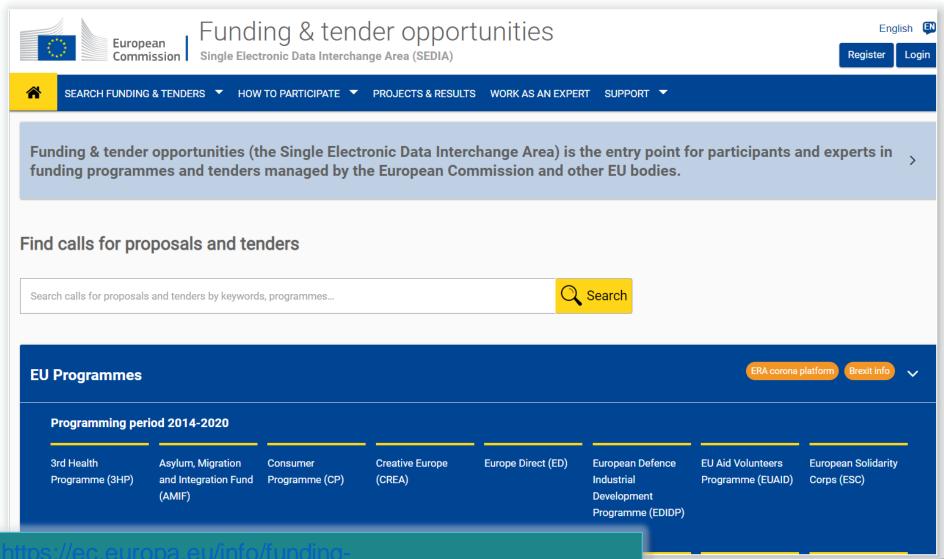


"request for amendment" in FT&P - steps to follow

- Launch the Amendment preparation in the Portal
- Compose Amendment in the F&T Portal
- Lock the data
- Press button EU Review
- Sign & Submit the Amendment to EU
- Possibility to cancel / withdraw (< F&T Portal)

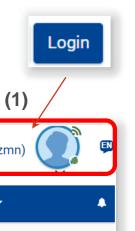


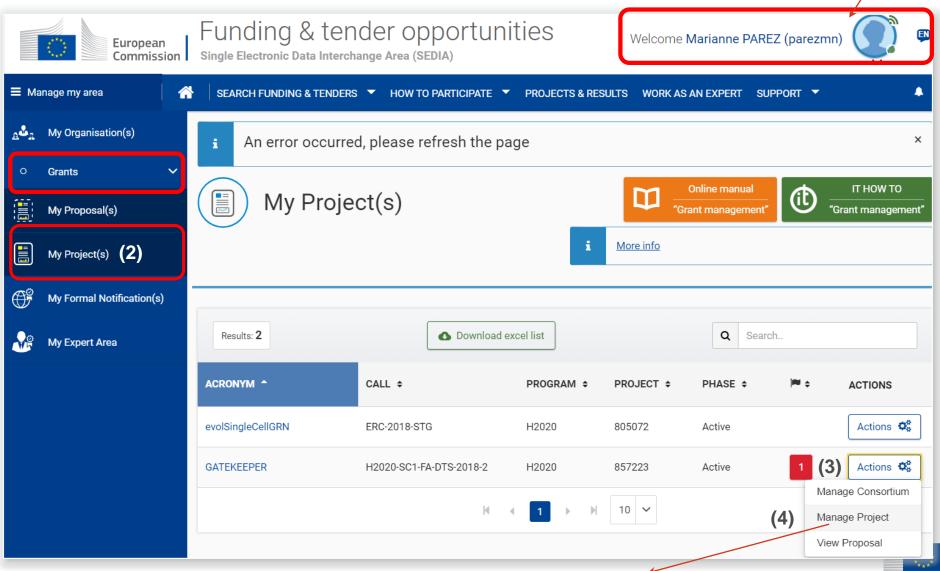
The Funding & Tender Portal technical part





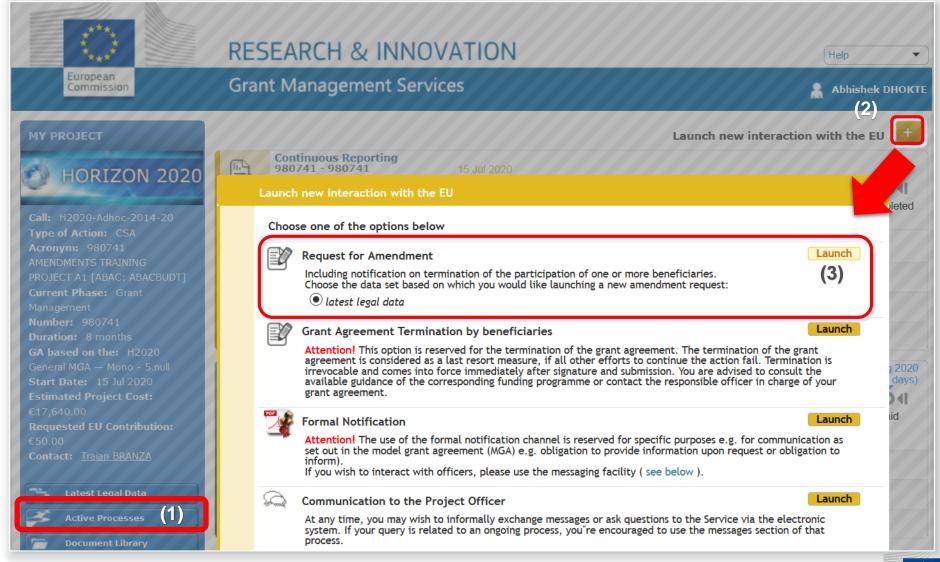
projects



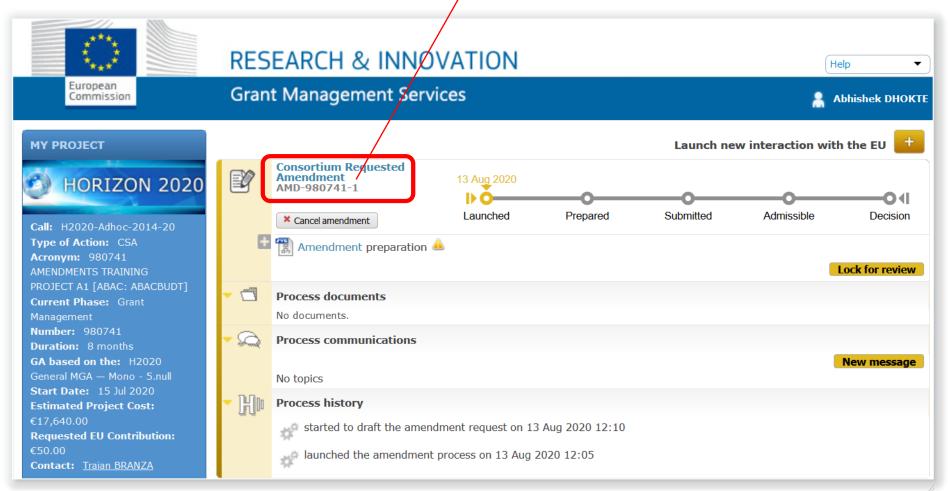


European Commission

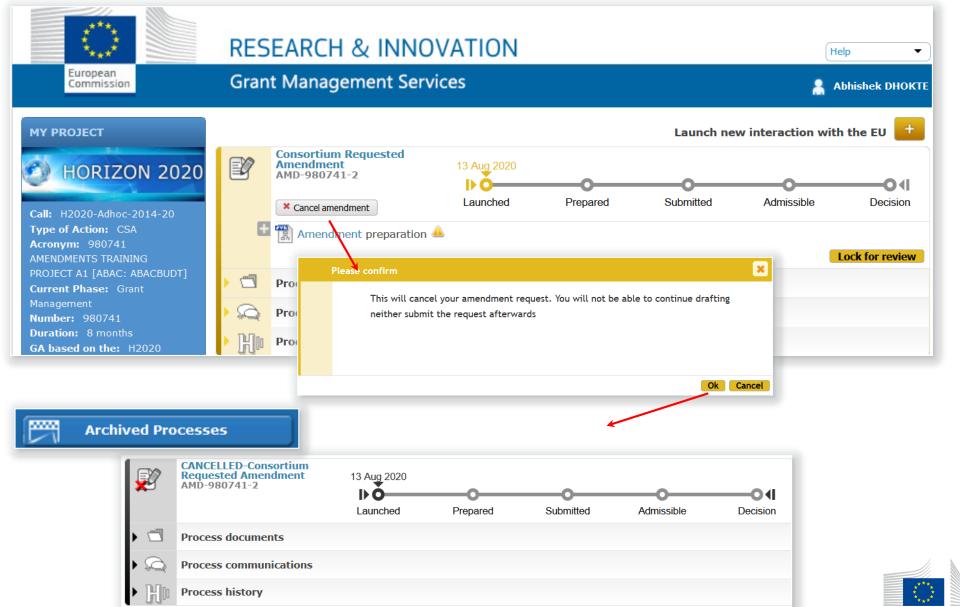
Launch Request for Amendment



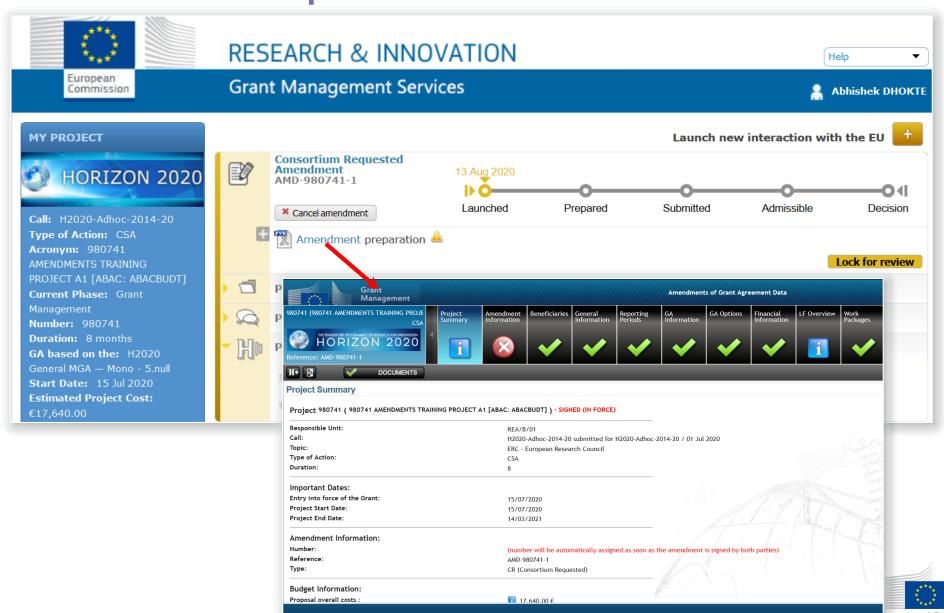
Amendment→ AMD request ID



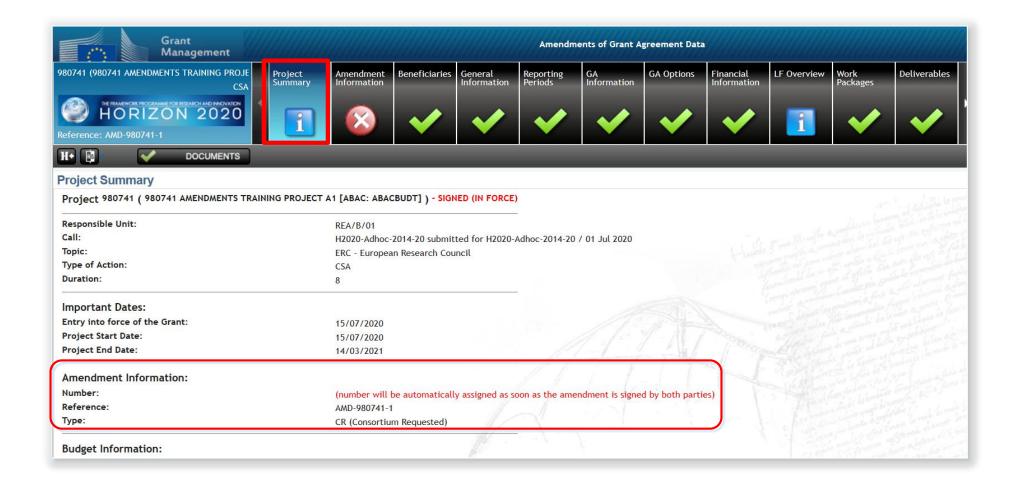
Cancellation possible if needed



Compose Amendment

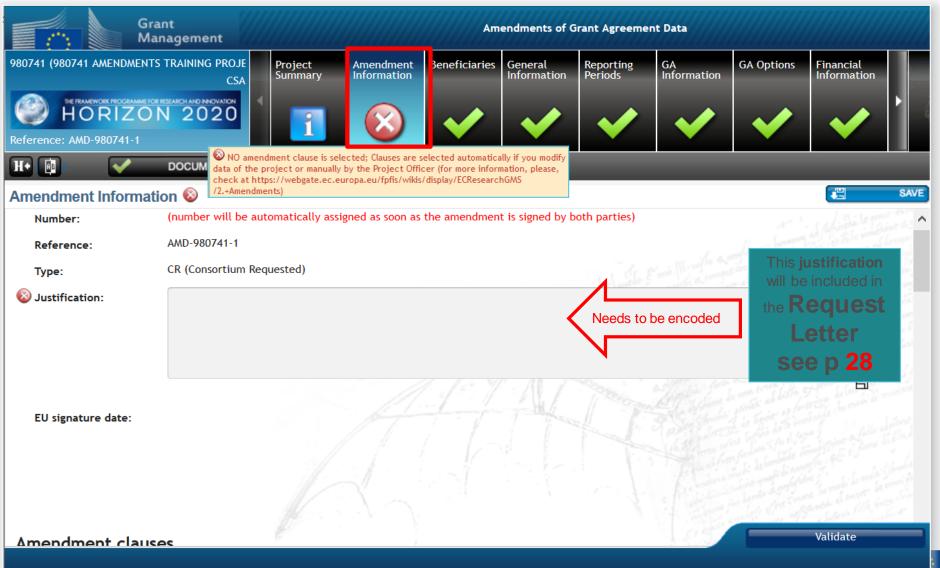


Project Summary Tab



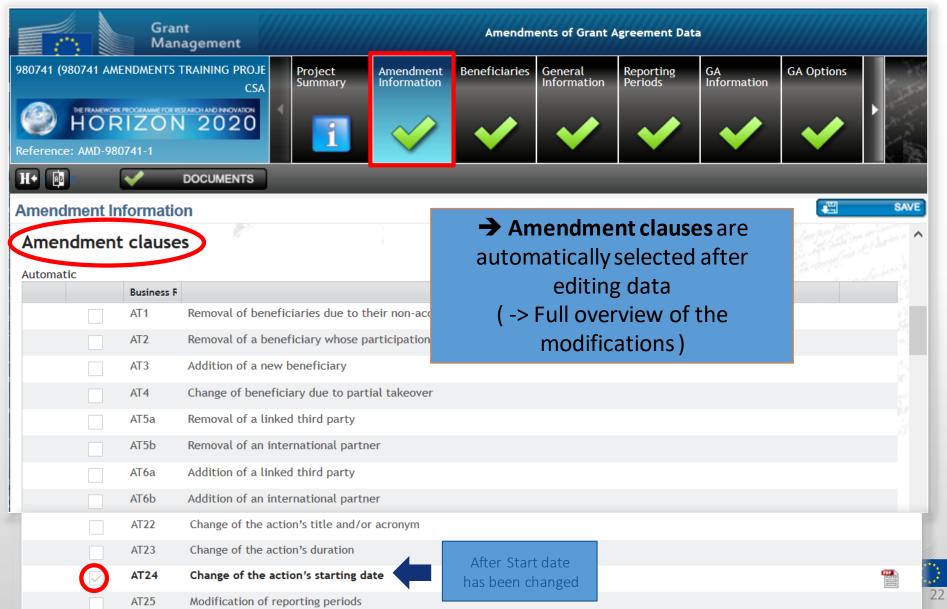
Amendment Information Tab

(Upper Part)



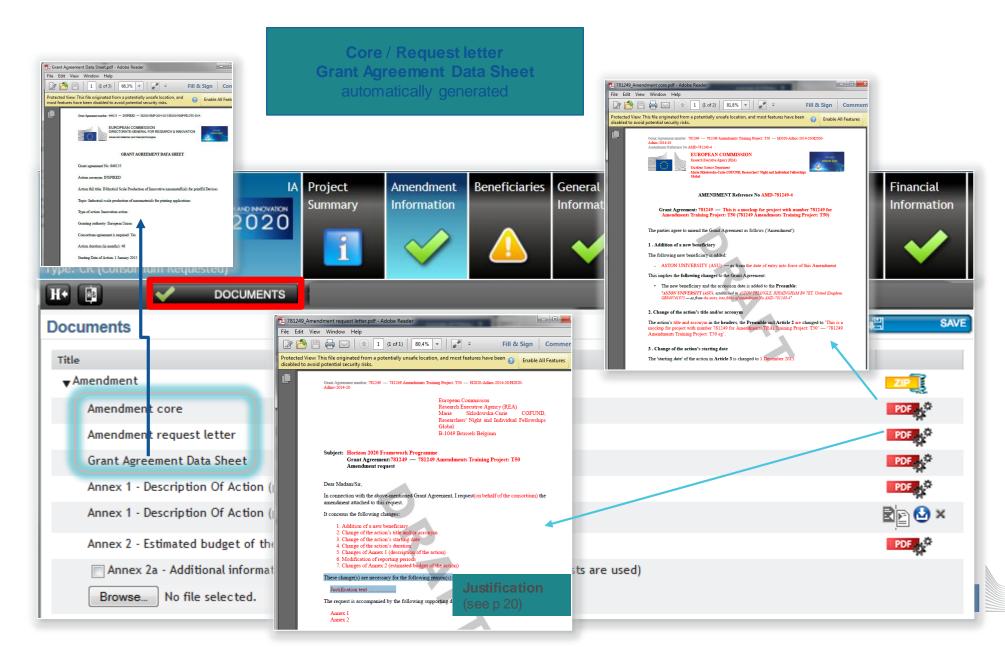
Amendment Information Tab

(Lower Part)



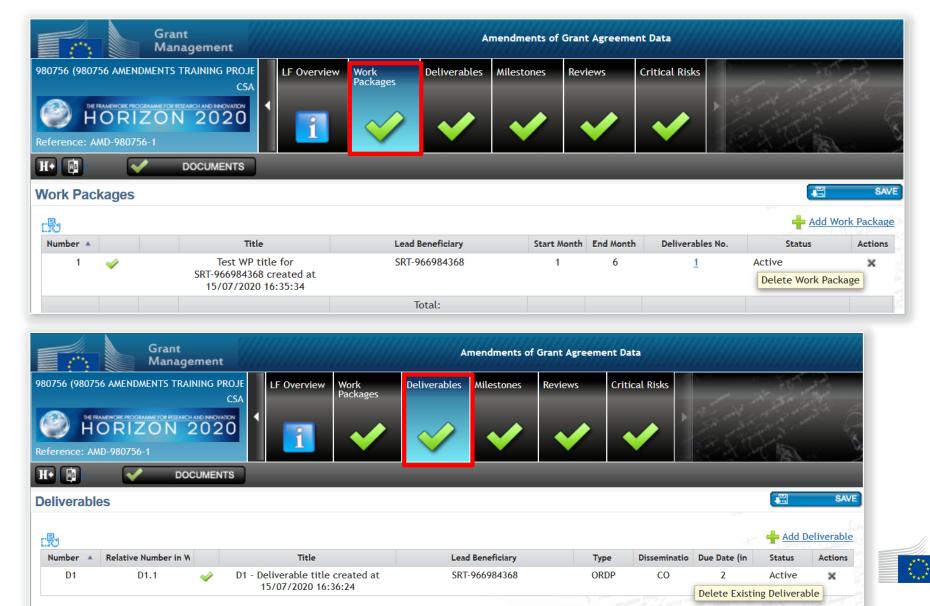
European

Documents Tab



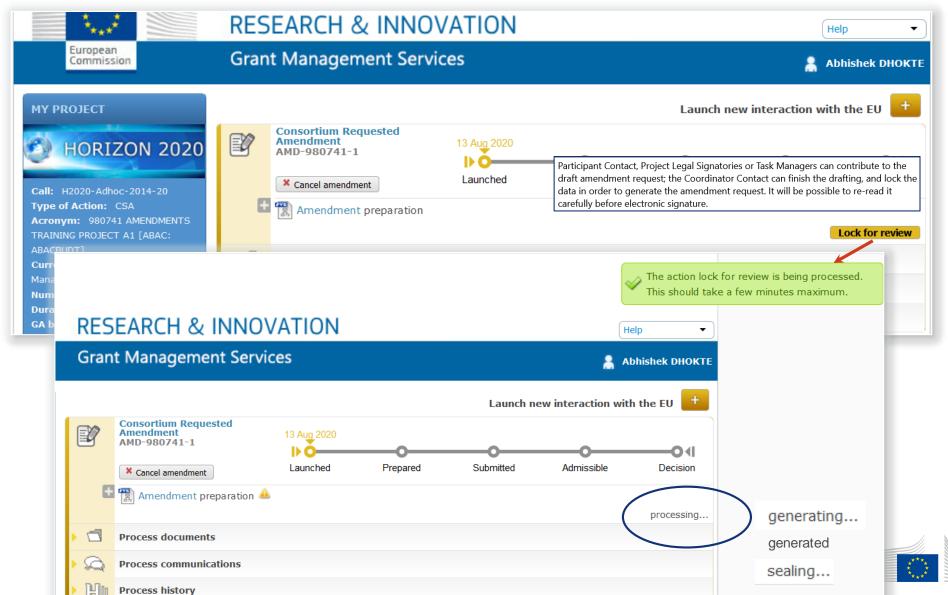
European

Work Packages, Deliverables Add, Delete, Modify



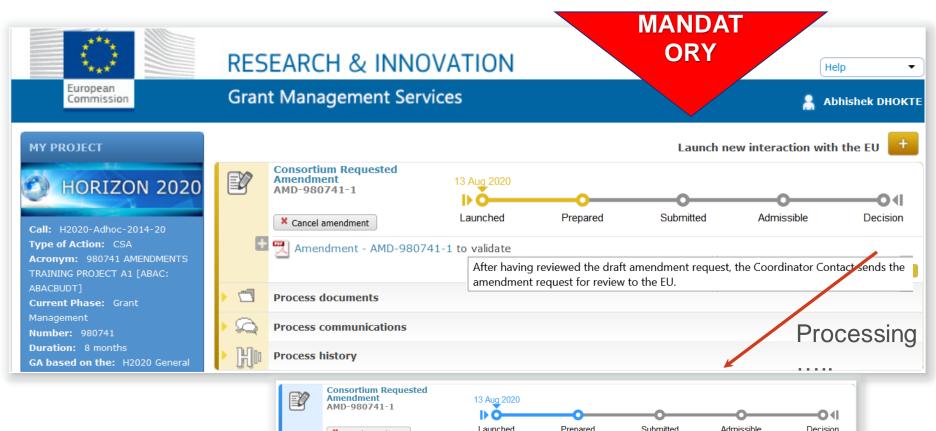
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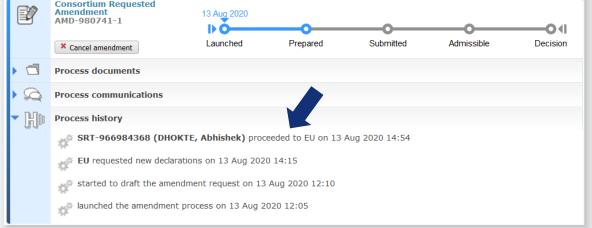
PORTAL — CONSORTIUM Data ready → Lock for REVIEW



European

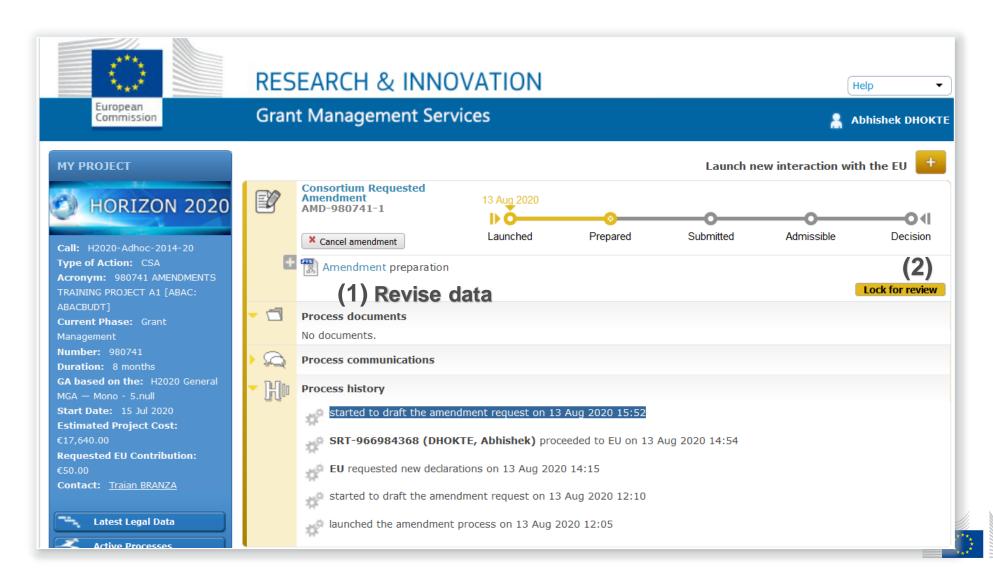
PORTAL - CONSORTIUM - EU REVIEW







CONSORTIUM - if EU Officer has sent back for revision → revise/modify data, Lock for review then → EU Review (next slide)



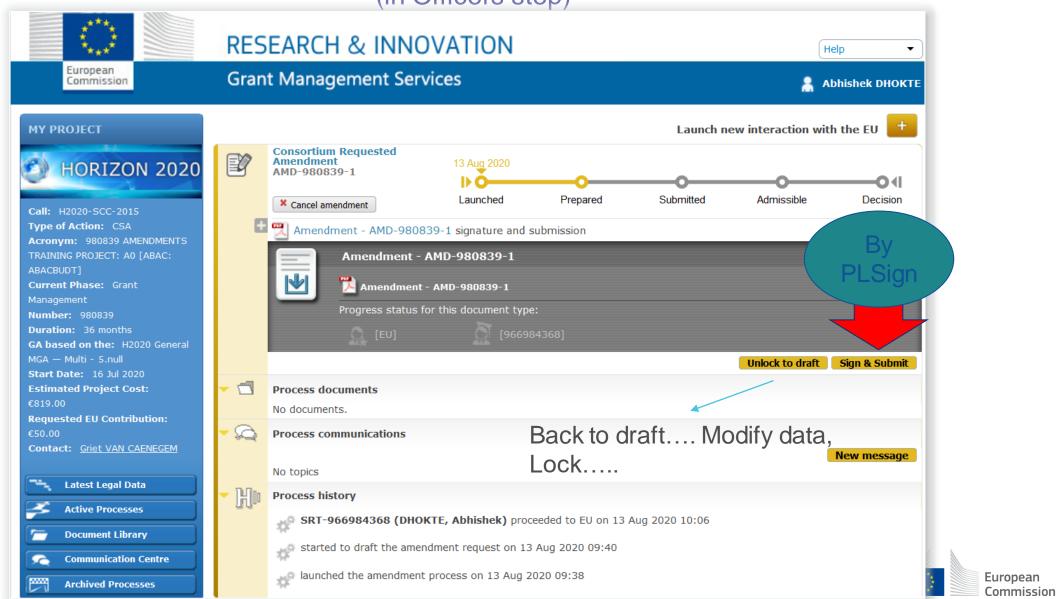
European Commission



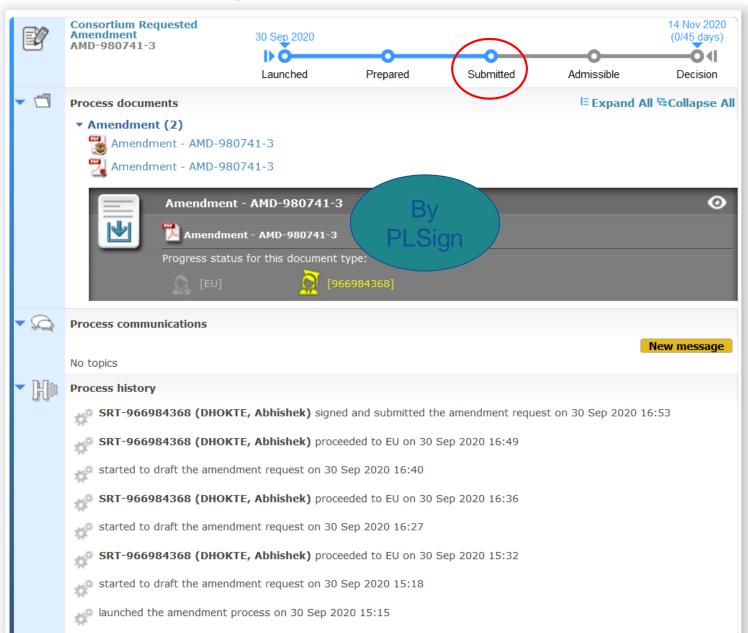
European Commission

CONSORTIUM - Data validated by EU

(in Officers step)



AMD request submitted to EU





Good Luck!

& and please consult the manuals available:

<u>Amendments - IT How To - Funding Tenders Opportunities (europa.eu)</u>

<u>Continuous reporting on milestones & deliverables - Online Manual - Funding Tenders</u> <u>Opportunities (europa.eu)</u>

Reports & payment requests - Online Manual - Funding Tenders Opportunities (europa.eu)

Reporting and payments - IT How To - Funding Tenders Opportunities (europa.eu)

