



Grant Management c. Reporting

E+ Jean Monnet Activities
Kick-off meeting Call 2021

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Jean Monnet 2021 Call

- Grant Management portal
- Continuous reporting module
- Amendments
- Reporting

Periodic / Final reporting

ARTICLE 6 — ELIGIBLE AND INELIGIBLE CONTRIBUTIONS

6.1 and 6.2 General and specific eligibility conditions

Lump sum contributions are eligible ('eligible contributions'), if:

- (a) they are set out in Annex 2 and
- (b) the work packages are completed and the work is properly implemented by the beneficiaries and/or the results are achieved, in accordance with Annex 1 and during in the period set out in Article 4 (with the exception of work/results relating to the submission of the final periodic report, which may be achieved afterwards; see Article 21)

They will be calculated on the basis of the amounts set out in Annex 2.



Pay special attention to subcontracting costs, if any (Art. 9.3)

- **IMPORTANT:** Avoid funding overlap between the E+JMO grant and any other source of funding (regional/national/international).

Final report template not available yet

Periodic Report - Template

[Template for reports](#) will be published in the **Funding & Tenders Portal** (but not available yet)

European Commission | Funding & tender opportunities
Single Electronic Data Interchange Area (SEDIA)

SEARCH FUNDING & TENDERS | HOW TO PARTICIPATE | PROJECTS & RESULTS | WORK AS AN EXPERT | SUPPORT

Key steps
Reference documents
Participant register
Partner search

Funding & tender opportunities (Single Electronic Data Interchange Area) is the entry point for programmes and tenders managed by the European Commission and other EU bodies.

- + Work programme & call documents
- + Grant agreements and contracts
- + Simplified cost decisions
- + Guidance
- Templates & forms
 - + Application forms
 - + Validation and LEAR appointment forms
 - + Grant agreement preparation templates
 - Project reporting templates
 - Progress report (CREA) >
 - Periodic report (CREA) >**
 - Certificate on the financial statements (CFS) >
 - Report on cumulative expenditure >
 - Time declaration >
 - Report on the distribution of payments (final payment) >
- + Funding & Tenders Portal

Programming period

2021-2027

Erasmus+ Programme (ERASMUS)

Clear filter

Reference Documents

Grants

This page includes reference documents of the programmes managed on the EU Funding & Tenders portal starting with

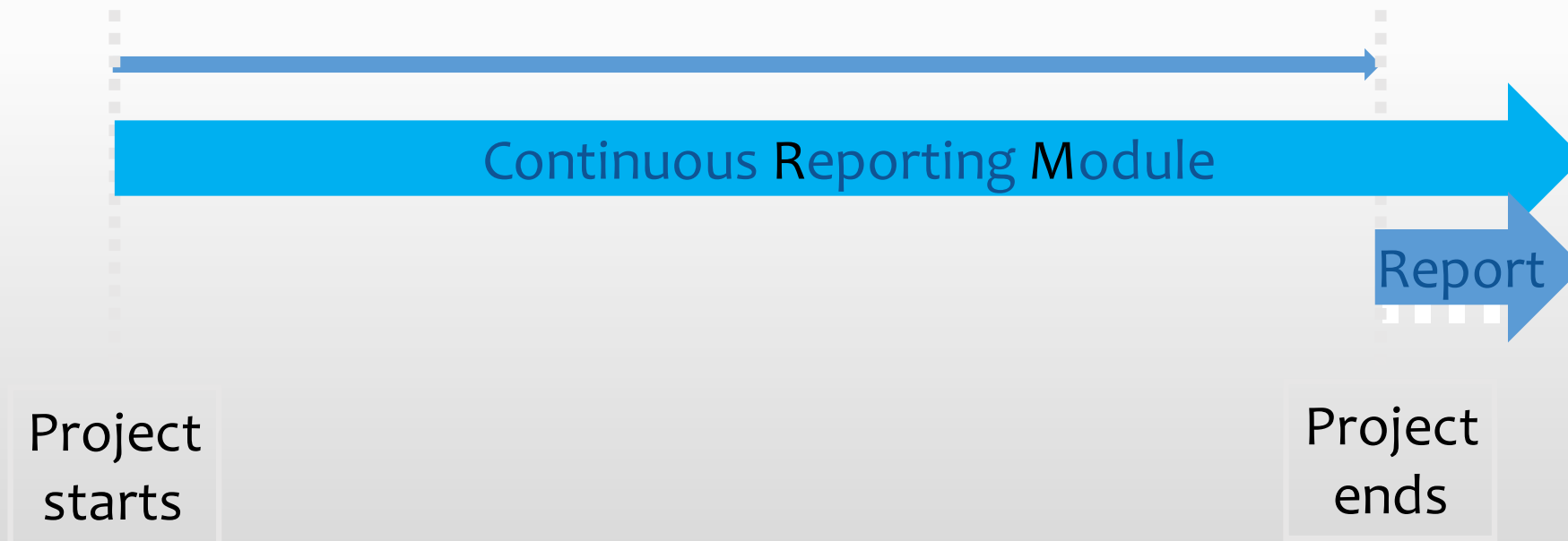
Please select the programme to see the reference documents.

Procurement

Reference Documents related to tendering opportunities are published on TED eTendering in the calls for tenders.

How To – IT Tools

- **Continuous** Reporting Module
- **Periodic** Reporting Module (report linked to a payment)
- For Jean Monnet Activities: only one reporting period (final report) – due date of report: 2 months after the end of eligibility period



Periodic Reporting (Final reporting)

(activated after the end of each reporting period)

- *Beneficiaries complete on-line the (Financial) Statements including explanations on the Completion of the workpackages.*
- *Coordinator uploads the Part B of the Periodic Technical Report (Narrative part).*

Automatic activation except if an amendment is on-going or a previous periodic report is still open

At the time the Coordinator submits the periodic report, the IT tool will capture the information from the continuous reporting module in order to generate automatically the Part A of the Periodic report

Make sure the information in the continuous reporting module is complete and up-to-date before the periodic report is 'Locked for review'



Periodic Reporting – Steps –

1. Notification: all Project Coordinators receive a notification.
2. The Coordinator **approves & submits** the elements (Technical part and Work package Statements) of the Periodic Report. (Single Package submission once all ready and complete!)
3. The EU Services **review** the submitted Periodic Report and **accept** or **reject** it.
4. **After acceptance of the Periodic Report – the Payment of the balance or a recovery order is launched.**

Periodic Reporting – please consult !

[Reporting and payments - IT How To - Funding Tenders Opportunities \(europa.eu\)](#)

[Reports & payment requests - Online Manual - Funding Tenders Opportunities \(europa.eu\)](#)

Technical Part of Periodic Reporting

The screenshot displays the 'RESEARCH & INNOVATION Grant Management Services' interface. At the top, the European Commission logo and 'RESEARCH & INNOVATION Grant Management Services' are visible, along with a 'Help' dropdown and the user name 'Marianne PAREZ'. Below this, a 'MY PROJECT' section shows a timeline for 'Periodic Reporting' from 01/09/2018 to 31/05/2019, with stages for 'Draft' (01 Jun 2019) and 'Submitted' (31 Jul 2019, 11/60 days). A 'Launch new interaction with the EU' button is also present. The main content area is titled 'Project Periodic Report' and includes a 'goFund' logo. A navigation bar contains several tabs: 'Summary for publication', 'Deliverables Ethics, DMP, Other Reports', 'Milestones', and 'Tech. Report (Part B)', which is highlighted with a red box. Below this, the 'Technical Report (Part B)' section shows a table with one attachment: 'Explanation of the work - Overview of progress'. The 'Actions' column for this attachment includes 'No file selected' and an 'Upload' button with a green arrow icon. A red arrow points from the 'Tech. Report (Part B)' tab to the 'Upload' button.

| Number | Attachment | Actions | Template |
|--------|--|--------------------------|----------|
| 1 | Explanation of the work - Overview of progress | No file selected Upload | |

PDF format !!!

See next slide

Technical Part of Periodic Reporting

Lock For Review

The screenshot shows a software interface for periodic reporting. At the top, a timeline indicates the process stages: Draft (starting 13 Feb 2018), Submitted (14 Apr 2018, 31/60 days), and Paid. Below the timeline, a list of tasks is displayed:

- Technical Part contribution**: A yellow 'Lock for review' button is visible next to this task.
- Financial Part** shortname for 966984368 [PIC 966984368] drafting: A greyed-out 'Lock for review' button is visible.
- Periodic Report** composition: A greyed-out 'Submit to EU' button is visible.

On the left side, there are expandable sections for 'Process documents', 'Process communications', and 'Process history'. A blue callout box points to the 'Technical Part contribution' task.

Task to be performed by the Coordinator

Participant Contacts, Project Financial Signatories or Task Managers can contribute to the scientific report; the Coordinator Contact can finish the drafting and lock the data in order to review the generated report.

Information has to be complete and up-to-date before the Technical Part of Periodic Report is 'locked for review'

Once all information for the **Technical Part** has been filled in, click on **Lock for review**
→ This action will freeze the data (prevent changes) and generate a pdf document (the generation of the PDF might take a few minutes)

Technical Part of Periodic Reporting

PDF Created

The screenshot displays a web interface for periodic reporting. On the left, a blue sidebar contains project details: Start Date (04 Jul 2015), Estimated Project Cost (€17,640.00), Requested EU Contribution (€3.00), and Contact (Colette RENIER). Below this are buttons for 'Latest Legal Data', 'Process List', 'Document Library', and 'Communication Center'. At the bottom of the sidebar are links for 'H2020 ONLINE MANUAL' and 'HOW TO'. The main content area features a progress bar at the top with stages: Draft (04 Mar 2016), Submitted (03 May 2016, 19/60 days), and Paid. A red box highlights the 'Technical Part of Periodic Report' review section. This section includes a 'review' link, 'Unlock to draft' and 'Accept & Include' buttons, and a list of PDF documents: PR_DELIVERABLES_1, PR_PUBLISHABLE_SU..., PR_CRITICAL_RISKS..., PR_CORE_1, PR_MILESTONES_1, and PR_QUESTIONNAIRE_... A red arrow points to the PR_CORE_1 document. Below the technical part, there are sections for 'Financial Part' (shortname for 966984368 [PIC 966984368] drafting) with a 'Lock for review' button, and 'Periodic Report composition' with a 'Submit to EU' button.

Technical Part of Periodic Reporting

Accept & Include

Periodic Reporting
REP-781643-1 - period
07/2015 > 03/2016

04 Mar 2016 (Draft) | 03 May 2016 (19/60 days) (Submitted) | Paid

Technical Part of Periodic Report review

Unlock to draft | **Accept & Include** | Lock for review

Financial Part shortname for 966984368 [PIC 966984368] drafting

Periodic Report composition

Submit to EU

Task to be performed by the Coordinator

Periodic Reporting
REP-781643-1 - period
07/2015 > 03/2016

04 Mar 2016 (Draft) | 03 May 2016 (19/60 days) (Submitted) | Paid

Financial Part shortname for 966984368 [PIC 966984368] drafting

Periodic Report composition

Lock for review

Periodic Report 1 project No 781643

Filter: All | Draft | Available | Included

| Report Element | Status | Action |
|--|----------|--------|
| Technical report | | |
| Technical Part of Periodic Report | Included | Redo |
| Financial report | | |
| Financial Statement RWB Water Services [PIC 966984368] | Draft | |

Reject this report item. The beneficiary will be requested to restart the drafting.

Periodic Reporting

Submit to EU

Coordinator submits to EU

Periodic Reporting
REP-781643-1 - period
07/2015 > 03/2016

04 Mar 2016
Draft

03 May 2016
(19/60 days)
Submitted

Paid

Periodic Report composition

Submit to EU

Periodic Report 1 project No 781643

You are about to submit the periodic report to the EU. Press submit to EU to proceed.

I agree with the conditions

Submit to EU

Once the elements of the Periodic Report are approved, the Periodic Report can be submitted to the EU Services in one single submission.
Only users with the role Primary Coordinator Contact and Coordinator Contact can perform this action

Periodic Reporting

Submitted

Launch new interaction with the EU +

Periodic Reporting
REP-761906-1 - period
01/02/2017 > 31/07/2017

01 Aug 2017
Draft

Submitted

23 Nov 2017
(0/90 days)
Paid

Process documents Expand All Collapse All

Periodic Report (1)

Periodic Report - 1 - 0

Periodic Report - 1 - 0

- PR_PUBLISHABLE_SUMMARY_1
- PR_QUESTIONNAIRE_1
- COVER_LETTER_1
- PR_FINANCIAL_STATEMENT_PARTNER_916545726_1
- PR_CORE_1

Process communications New messages (0)

Process history

- Ectin Research (SJÖBLOM-HALLÉN, Anna) submitted the report on 25 Aug 2017 14:41
- EU made the Periodic Report available to the Coordinator on 01 Aug 2017 01:32
- EU launched the periodic reporting on 01 Aug 2017 01:32

Please consult the manuals available :

[Continuous reporting on milestones & deliverables - Online Manual - Funding Tenders Opportunities \(europa.eu\)](#)

[Reports & payment requests - Online Manual - Funding Tenders Opportunities \(europa.eu\)](#)

[Reporting and payments - IT How To - Funding Tenders Opportunities \(europa.eu\)](#)

Thank you for your attention!