

Grant Agreement Preparation

Presentation for the Beneficiaries

EACEA October 2021

Contents

- Overview of the process and context
- Before we start: useful resources for support
- The steps (end to end)



GAP – Grant Agreement Preparation Overview of the process and context



'iterative process' between you, as a Project Coordinator, and the Project Officer of the Agency.



Useful resources for support

More detailed information can be found on the Funding & Tender Portal under the Support tab by <u>following this link</u>.



Tjis presentation is based on the IT How to.



Useful resources for support



English EN How to access your project Register Login (1) Funding & tender opportunities Welcome Marianne PAREZ (parezmn) EN European Single Electronic Data Interchange Area (SEDIA) Commission 📃 Manage my area SEARCH FUNDING & TENDERS VHOW TO PARTICIPATE PROJECTS & RESULTS WORK AS AN EXPERT SUPPORT V A My Organisation(s) IT HOW TO **Online manual** My Project(s) M (IL) "Grant management "Grant management Grants \sim More info My Proposal(s) (2) My Project(s) Q Download excel list Search. Results: 1 (I) F My Formal Notification(s) CALL 🖨 ***** My Expert Area ACRONYM **^** PROGRAM 🖨 PROJECT 🖨 PHASE 🖨 ACTIONS (3) EACEA-30-2019 EPLUS2020 88888888 Actions 🔅 Project Consortium K ∢ 1 → N 10 ~ - (4) Manage Projects View Proposal



Grant Agreement Data Preparation and Submission

The Coordinator clicks on **Grant agreement data preparation** to edit and complete the necessary form. (1/3)



Grant Agreement Data Preparation and Submission

And the person in the organisation that has the role 'PLSIGN' signs the Declaration of Honour (DoH) electronically. (2/3)

Please note that if there are Affiliated Entities (Linked Third Parties) in the Consortium, the responsible Beneficiary will have a separate task for the DoH for each Affiliated Entity (you can find more information by following this link).



Grant Agreement Data Preparation and Submission

NB: for multi-beneficiaries Agreements, each one of them will have to sign. (3/3)



Grant Agreement Data Preparation and Submission Documents

Once the Coordinator has clicked the Grant Agreement Data preparation task, he or she can complete the necessary forms in the Grant Management Services tool, which opens with the **Project Summary screen**.



Grant Agreement Data Preparation and Submission Documents

The following **annexes** need to be uploaded under **Documents**:

Annex 1 - Description Of Action (part B) (mandatory)



Grant Agreement Data Preparation and Submission Project Summary

Once the grant has been signed, the 'entry into force date of the grant' will also be displayed.



Grant Agreement Data Preparation and Submission Beneficiaries screens

The **Coordinator** and the **Beneficiaries** are automatically listed after receiving the invitation letter.



Please check all missing information and warnings.



Grant Agreement Data Preparation and Submission Beneficiaries - Partner Summary

You are invited to hover along the screens and check the data (could be outdated).

'Read-only' data is validated (or to be validated) by the *EU Validation team.*

ERASMUS + EPLUSZ02 Benefic Call: EPLUS2020-EHEA09-2019 PIC: 39 Topic: KA3-EHEA-2019 Unit: EACEA/A/01	Etary 1: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
H•	· · · · · · · · · · · · · · · · · · ·
Partner Summary	
PIC	58556555 (validation status:
🔔 Short Name	RRRRRRRRRRRRRR
Legal Name	RBRRBRRRRRRRR
Legal address	RRRRRRRRRRRRRRRRRRRRRRRRRRRRRRRRRRRRRR
Phone:	
Fax:	
Email:	****************************
Website:	
VAT Number:	
Registration Data:	
Legal Status	Legal Person / Non Profit Public Body
Financial:	

Grant Agreement Data Preparation and Submission Beneficiaries- Project representatives

The Project Coordinator will appear as the contact person.

The legal signatory is selected in the Portal, under Manage Consortium.

XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Beneficiary 1: WAAAA2 424 (EASTAAA)	Partner	Financial Project	Bank Linked Third
ERASMUS +	Legal Name: WAWASE NEWEENSCHAFV W PIC: 59553558 Status: VALIE	DATED	Representa	Account
Call: EPLUS2020-EHEA09-2019 Topic: KA3-EHEA-2019 Unit: EACEA/A/	Legal Address: 2000/000/2000/2000/2000/ 01 262/0/00/			
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Project Representatives 실				
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Function	User ld ▲	Family Name	First Name	Email
Contact Persons				
User Id	Family Name		First Name	Email



Grant Agreement Data Preparation and Submission General Information

The **Project General Information** is automatically listed after receiving the invitation letter.

The **start date** needs to be completed.



Grant Agreement Data Preparation and Submission General Information



In case it's a specific date, a justification needs to be provided.

Grant Agreement Data Preparation and Submission Reporting Period

The **Project Reporting Periods** will be available.

The default reporting option is established in the call and will be displayed accordingly.

These reporting periods are linked to a payment.

This can be changed ONLY by the EU officer if necessary.

	Grant Management						Grant Agree	ment Data					
909151 (909151 PERMIT RECEIPTION Call: H2020-SCC-2014-2 Topic: SCC-02-2014	CSA Ber CSA CONCINCTING CON 2020 015 Unit: ENER/C/02	neficiaries General Informati	n Reporting Periods	GA Information	GA Options	Financial Information	LF Overview	Work Packages	Deliverables	Milestones	Reviews	Critical Risks	Ethics Info
Reporting Periods	DOCUMENTS				_			_		_	_		
This screen is only	editable by FU Officers											997	
	Reporting Period No.		F	rom Month				To Month				Duration	
	1			1				18				18	

Grant Agreement Data Preparation and Submission Project GA Information

The **Project Grant Agreement Information** will be available and is read-only.

Any missing fields will be completed by the EU officer.





Grant Agreement Data Preparation and Submission GA Options

The **Project Grant Agreement Options** will be available and are read-only.

Any missing fields will be completed by the EU officer.

These options are those that will appear in the Agreement (see earlier slide on Documents).

			ndevu	gen (EXTERNAL)
	Grant Manage	ment Grant Agreement Data		
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•	V DOC	UMENTS		
rant Agreen	nent Options			
This screen i	s only editable by	EU Officers		
UTOMATED	Reference	Description	View	Download
	GA09	Affiliated entities (AE) (Data Sheet, Article 8)		Dominoud
	GAO10	Associated partners (AP) (Data Sheet, Article 9.1)		
v	GA011	Third parties giving in-kind contributions (Articles 6.1, 6.3, 9.2)	2	
	GA012	Subcontractors (Article 9.3)		
	GAO13	Recipients of financial support to third parties (Article 9.4)		
	GA014	Non-EU participants (Article 10.1)		
~	GA015	International organisations (IO) (Data Sheet, Article 10.2)		
	GA016	Pillar-assessed participants (PA) (Data Sheet table, Article 10.3)		
~	GAO23	Personnel costs (Data Sheet 3, Article 6)	2	
-	GA033	Subcontracting costs (Data Sheet 3, Article 6)		
	GA034	Eligible cost country restrictions (Data Sheet 3, Article 6)		
	GAO36	Purchase costs (Data Sheet 3, Article 6.2.C)		
V	GAO38	Travel and subsistence costs (Data Sheet 3, Article 6)	2	
	GAO39	Equipment type of cost (depreciation/full) (Data Sheet 3, Article 6)	2	
1	GA083	Other goods, works and services costs (Article 6.2.C.3)		
	GAO40	Financial support to third parties (Data Sheet 3, Article 6)		
V	GAO42	Indirect cost base (Data Sheet 3, Article 6)		idate

Grant Agreement Data Preparation and Submission Project Financial Information (for Budget Based funding)

For projects being funded through a **Budget Based mechanisms**

the Project Financial Information is automatically listed after receiving the invitation letter:

Check whether the budget table is correct and whether all cost categories are present.

	Gr Ma	rant anagement				Grant Agreeme	ent Data				
15781 (2157	5781 SUBRSAR .	.) HORIZON Project	Beneficiari General Report	ing GA GA Options	Financial LF Overvie	ew Associated Work	Deliverables	Milestones Reviews Cr	itical Ethics Info Security		
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•	~	DOCUMENTS									
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refinancir	ing and guaran	itee									
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Grant Agreement Data Preparation and Submission Project Financial Information (for Lump Sum funding)

For projects being funded through a **Lump Sum** mechanism, the Project Financial Information is 'empty'.

You will have to **set up the Work Packages first** and associate the appropriate budget amount.

The system will build up the table automatically.





Grant Agreement Data Preparation and Submission Project LF Overview

The **Project LF Overview** will be available and is readonly.

It gives the legal and financial situation of each beneficiary of the project.

S Sy	/GMa to Circle Hanagement		Grant Ag	greement Data				gogu
1824 (HYBU	UILD) RIA Project ORIZON 2020 EEB-2016-2017 6-2017 Unit: RTD/D/02	es General Information	Reporting Periods	GA Information	GA Options	inancial iformation	Vork Packages	N.
gal and	DOCUMENTS	_	-	_	_			_
lumber 🔺	Legal Name	PIC	Role	Legal Information	Financial Information	Request for financial	Lear Appointment	Lear extended
▼1	COMSA CORPORACION DE INFRAESTRUCTURAS SL	972392409	со	Ð	Ð	R.	E	Ð
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2	UNIVERSIDAD DE LLEIDA	999838559	BEN -	The LEAR	has been a	ppointed and y	alidated	Ð
3	CONSIGLIO NAZIONALE DELLE RICERCHE	999979500	BEN	EV.	EØ	IG.	, D	Đ
4	AIT AUSTRIAN INSTITUTE OF TECHNOLOGY GMBH	999584128	BEN	E.	Ð		1	Đ
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						Hard Street		

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Grant Agreement Data Preparation and Submission Project Work Packages

The **Project Work Packages** are not automatically listed after receiving the invitation letter.

- Complete all necessary work packages.
- Please note that you can change the order of the work packages by dragging and dropping.
- Please reuse the naming and the order as declared in the application (easier to follow-up and cross-check).





Grant Agreement Data Preparation and Submission Project Deliverables (1/2)

The **Project Deliverables** are not automatically listed after receiving the invitation letter.

- Complete all necessary Deliverables.
- Please note that you can change the order by dragging and dropping.
- Please reuse the naming and the order as declared in the application.



Grant Agreement Data Preparation and Submission Project Deliverables (2/2)

The **Project Deliverables** are not automatically listed after receiving the invitation letter.

- Please edit the description
- Insert also the links of the deliverables once these have been set (see following slides).

Number	2			
Title	D1			
Lead Beneficiary	1. AST GmbH			
Туре	DEM – Demonstrator, pilot, prototy	pe 🔻		
Dissemination level				
Due Date (in months)	PU : Public			
Description	SEN : Sensitive R-UE/EU-R : EU Classified S-UE/EU-S : EU Classified C-UE/EU-C : EU Classified			
Links to WP			6	
number 🔺	title	leadBeneficiary		endMonth

Grant Agreement Data Preparation and Submission Project Milestones and Critical Risks

Although not Mandatory, please insert both Milestones and Risks as per your Application.



Grant Agreement Data Preparation and Submission SUBMIT

Once all forms have been completed, the **Coordinator** clicks the **Submit to EU** button.



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H2020 ONLINE MANUAL

Some other support resources (1/2)



👚 🚽 SEARCH FUNDING & TENDERS 🔻 HOW TO PARTICIPATE 👻 PROJECTS & RESULTS WORK AS AN EXPERT SUPPORT 🔫

Support overview

Support overview (europa.eu)

GRANTS TENDERS			Popular support topics					
Support by typ)e		EU Login	Online manual	Ш	How can I acquire roles and access rights for proposals, projects or organisations?	FAQ	Ş
	Ş		How to change the EU Login account details?	FAQ	Ş	How to update my organisation data?	FAQ	Ş
GUIDANCE	FAQ	HELPDESKS	What is a LEAR (Legal Entity Appointed Representative) and what are LEAR's rights and tasks?	FAQ	Ś	Where can I find more user guidance related to proposal submission?	FAQ	Ş
			How to assign PLSIGN?	FAQ	Ş	SME Self Evaluation	IT how to	•
			How do I fill in my bank account as an expert?	FAQ	Ş	Where can I find the National Contact Points (for Horizon Europe)?	Helpdesk	.::
			-					



Some other support resources (2/2)

- <u>Walk through all the steps to get your LEAR Approved</u>
- How to manage the roles in your project

