Grant Agreement Implementation and Reporting under H2020 in MSCA

Paris 8/6/2015

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Research Executive Agency
A - Grant Agreement Implementation
Structure of the Grant Agreement

- Core Grant Agreement – cca 75 pages
- Data sheet – summary of core information – duration, beneficiaries, budget, start date, etc.

- Annexes:
  - Annex I – Description of the action
    - Part A – structured data – Beneficiaries list, Deliverables, Milestones, Work packages, Ethics list
    - Part B – narrative part from the proposal
  - Annex II – Estimated budget of the action
  - Annex III – Accession forms
  - Annex IV – Model for the financial statement
  - Annex V and VI – not applicable for MSCA
Core Grant Agreement

- List of beneficiaries
- Duration
- Reporting periods
- Maximum EU financial contribution
- Pre-financing and Guarantee Fund
- Bank Account
- All provisions necessary for GA implementation (review, terminations, communication, ownership, etc.)
- Signature (electronic)

Copy to be given to the beneficiaries and the recruited fellows
Annex I: Description of the action

Joint research programme, recruitment planning, training, milestones and deliverables (no deviation allowed; before deciding on any modification please contact your PO)

All reports (Progress, Periodic, Final) will be assessed with respect to Annex I

Copy to be given to the beneficiaries and the recruited fellows
Annex II: Estimated budget of the action

- 1 line per beneficiary
- **Researcher moths multiplied by the rates** defined in the Work Programme
- Basis for reporting of costs

Copy to be given to the beneficiaries and the recruited fellows
### MODEL ANNEX 2 FOR H2020 MSC-ITN — MULTI

**ESTIMATED BUDGET FOR THE ACTION**

<table>
<thead>
<tr>
<th>Number of units (person-months)</th>
<th>Form of costs 5</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Costs per unit</td>
</tr>
<tr>
<td>1 [short name beneficiary]</td>
<td></td>
</tr>
<tr>
<td>2 [short name beneficiary]</td>
<td></td>
</tr>
<tr>
<td>3 [short name beneficiary]</td>
<td></td>
</tr>
<tr>
<td>...</td>
<td></td>
</tr>
<tr>
<td>Total consortium</td>
<td></td>
</tr>
</tbody>
</table>

| EU contribution |
|------------------|-----------------|
| Reimbursement rate % | Maximum EU contribution | Maximum grant amount 3 |

<table>
<thead>
<tr>
<th>Estimated eligible costs (per budget category)</th>
<th>Total costs</th>
</tr>
</thead>
<tbody>
<tr>
<td>A.1 Living allowance</td>
<td></td>
</tr>
<tr>
<td>A.2 Mobility allowance</td>
<td></td>
</tr>
<tr>
<td>A.3 Family allowance</td>
<td></td>
</tr>
<tr>
<td>B.1. Research, training and networking costs</td>
<td></td>
</tr>
<tr>
<td>B.2. Management and indirect 4 costs</td>
<td></td>
</tr>
</tbody>
</table>

1. See Article 6 for the eligibility conditions
2. This is the theoretical amount of EU contribution that the system calculates automatically (by multiplying all the budgeted costs by the reimbursement rate). This theoretical amount is capped by the 'maximum grant amount' (that the Commission/Agency decided to grant for the action) (see Article 5.1).
3. The 'maximum grant amount' is the maximum grant amount decided by the Commission/Agency. It normally corresponds to the requested grant, but may be lower.
4. The indirect costs covered by the operating grant (received under any EU or Euratom funding programme; see Article 6.3(b)) are ineligible under the GA. Therefore, a beneficiary that receives an operating grant during the action’s duration cannot declare indirect costs for the year(s)/reporting period(s) covered by the operating grant (i.e. the unit cost for management and indirect costs will be halved for person-months that are incurred during the period covered by the operating grant).
5. See Article 5 for the form of costs
6. Total = costs per unit x number of units (person-months)
7. The amount for the family allowance (250 EUR) represents the average unit cost (with family 500 EUR; without family 0 EUR). For the financial statements (Annex 4), the beneficiaries must adjust this amount according to the actual family status of the recruited researchers.
Annex III: Accession forms

- 1 per beneficiary (except of the coordinator)
- To be signed electronically by LSIGN within 30 days after GA signature
- Automatic reminder by the system
Annex IV: Financial statement

- 1 per beneficiary (including the coordinator)
- To be signed electronically by FSIGN when reporting period is due
- Automatic reminder by the system
## Annex IV: Financial statement

**MODEL ANNEX 4 FOR MSC ITN**

<table>
<thead>
<tr>
<th>Name of the fellows</th>
<th>number of units (researcher months)</th>
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<tr>
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<tr>
<td><strong>Beneficiary</strong></td>
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<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total Beneficiary</strong></td>
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</table>

<table>
<thead>
<tr>
<th>Form of costs</th>
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<th>unit</th>
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<th>unit</th>
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<td></td>
</tr>
</tbody>
</table>

**Eligible* costs (per budget category)**

- A. Costs of recruited researchers
  - A.1 Living allowance
  - A.2 Mobility allowance
  - A.3 Family allowance
- B. Institutional costs
  - B.1 Research, training and networking costs
  - B.2 Management and indirect costs

<table>
<thead>
<tr>
<th>Total costs</th>
<th>Reimbursement rate</th>
<th>Maximum EU contribution</th>
<th>Maximum grant amount</th>
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</thead>
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**EU contribution**

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<th>(c)</th>
<th>(d)</th>
<th>(e)</th>
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</thead>
<tbody>
<tr>
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</tbody>
</table>

**Checkbox**

I confirm that the total amount of the allowances used (including compulsory deductions) for the researcher is equal to or higher than the living allowance, the mobility allowance and the family allowance as set out in Annex 2 of the Agreement or any underpayments in Reporting Period 1 will be corrected by the end of the action.

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**Note:**

- The beneficiary must declare all eligible costs, even if - for actual costs, unit costs and fixed costs - they exceed the amounts indicated in the estimated budget (see Annex 2). Amounts not declared in the individual financial statement will not be taken into account by the Agency.
- See Article 6 for conditions for costs to be eligible.
- This is the theoretical amount of EU contribution if the reimbursement rate is applied to all the budgeted costs. The theoretical amount of EU contribution for the action is capped by the maximum grant amount.
- Total = Costs per unit x Number of units (researcher months)
- Name of the researcher and related units for living (A.1) and family (A.3) allowances will be prefilled on the basis of the information provided by the beneficiary in the "researcher declaration"
Role of the Coordinator

Article 41.2b of the GA
• Monitor implementation of the action
• Act as intermediary for all communication between consortium and the REA
• Request and review any document or information required by the REA
• Submit the deliverables and reports to the REA
• Ensure payment to other beneficiaries without delays
• Inform the REA of the amounts paid to each beneficiary, if required
• Etc.

Coordinator cannot delegate those tasks to other beneficiaries or subcontract to the third party
Role of the Beneficiaries

Article 41.2a of the GA
- Inform the coordinator if any events likely to affect the implementation of the action
- Submit to the coordinator timely
  - Individual financial statement
  - Data needed to draw up the technical reports
  - Researcher declaration and any other needed documents
  - Ethics committee documents and information
- Etc.

Beneficiaries are jointly liable for the technical implementation of the action, If a beneficiary fails to implement part of the action, other beneficiaries become responsible for it without any additional EU contribution,

Beneficiaries have individual responsibility for their own financial statement
B - Reporting
Participant Portal
is your entry point to submit:

- Project Reports
- Researchers declarations for all researchers
- Other documents (e.g. Notification of Starting date, Amendment)

"My Area" – "My projects" tab
Principles of submission in H2020:

- Forms and templates provided in the electronic exchange system (PP)

Two-step submission process:
1 - Beneficiary ➔ Coordinator
2 - Coordinator ➔ REA

- No paper signed document, only electronic submission
- Process more automated
Reporting:

1. Continuous reporting
   - during whole project life cycle, whenever needed
     - Researcher declaration
     - Deliverables
     - Publications
     - Questionnaires
     - etc.

2. Periodic reporting
   - Reports from art. 19 and 20 of the GA
   - Predefined templates in the system
My projects

This page enables you to access all your EU projects managed via the Participant Portal that have been selected and approved for funding.

Depending on your roles, you can view or manage the following project-related tasks:

- Prepare and sign your grant agreement
- Submit amendments to your grant agreement
- Manage your scientific and financial reports
- View or manage roles and access rights in your projects consortia

If you are LEAR and want to see the full list of your organisation projects, please go to My Organisations and click on the action button VP. LEAR can only view the list of projects in which their organisation is involved. If you want to see project details, your organisation main contact for this project or the project Coordinator has to give you access rights. For more details see the H2020 online manual.

**Legend**

- AA: Access Amendment
- GP: Grant Preparation
- MP: Manage Projects
- FR: Financial Reporting
- PR: Periodic Reporting
- RD: Reporting & Deliverables
- PC: Project Consortium
- VP: View Proposal

**Table**

- **ACRONYM**: IMMUNOSHAPE
- **CALL**: H2020-MSCA-ITN-2014
- **PROG**: H2020
- **PROJECTID**: 642870
- **ROLES**: PC
- **PHASE**: Grant Management
- **ACTIONS**: MP

Showing 1 to 1 of 1 entries.
1 - Continuous Reporting:

- Possible to submit whenever during the project life cycle:
Researchers Declaration (RD):

- Art. 19 of the GA
- To be submitted by each beneficiary for all recruited/seconded researchers for
  - ITN
  - RISE
  - COFUND
- In FP7 DoC for ITN/IAPP and RRR for Cofund and IRSES

Contains:

- personal data (name, date of birth, nationality, gender, family charges, is researcher enrolled in PhD programmes, email of researcher, etc.
- Data related to the project allowances: start date and end date of secondment/recruitment, hosting institution, etc.
Researchers Declaration – step 1:

Project Researcher Library:

- Each beneficiary can add researcher and fill in all personal data
- It is saved in the project database
- Once RD needs to be created, researcher data are taken automatically

Advantages:

- consistency of the data
- time saving (especially for RISE)
### Project's Researcher Library

<table>
<thead>
<tr>
<th>Fellow Id</th>
<th>First Name</th>
<th>Last Name</th>
<th>Gender</th>
<th>Birthday</th>
<th>Nationality</th>
<th>Submitted Date</th>
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<td>FIRST</td>
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<td>M</td>
<td>20-02-2015</td>
<td>AD - Andorra</td>
<td>5</td>
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<tr>
<td>3</td>
<td>Meriadoc</td>
<td>Christmas</td>
<td>M</td>
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<td>1</td>
</tr>
<tr>
<td>4</td>
<td>Harry</td>
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<td>M</td>
<td>11-03-1111</td>
<td>CU - Cuba</td>
<td>0</td>
</tr>
<tr>
<td>5</td>
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<td>FR - France</td>
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<tr>
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<tr>
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<tr>
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</table>
Researchers Declaration – step 2:

Create RD:

- According to GA – to be submitted within
  - 20 days after recruitment (ITN)
  - 20 days of the secondment (RISE)
  - 20 days of the start of the research training activities (COFUND)

- For researchers that already exist in the project library (all personal data are automatically prefilled)
### Researcher Declaration

<table>
<thead>
<tr>
<th>No</th>
<th>Fellow Id</th>
<th>First Name</th>
<th>Last Name</th>
<th>Sending Organisation</th>
<th>Secondment Organisation</th>
<th>Start Date</th>
<th>End Date</th>
<th>Working Time Commitment</th>
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<tr>
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<tr>
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<td>23-03-2015</td>
<td>PART_TIME (3 %)</td>
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</table>
Deliverables:

- Art. 19 of the GA
- To be uploaded directly on the PP by the Coordinator
- All MSCA
- Scientific deliverables and other deliverables as defined in the GA Annex I
<table>
<thead>
<tr>
<th>WP No</th>
<th>Del No</th>
<th>Title</th>
<th>Est. Del. Date (annex I)</th>
<th>Receipt Date</th>
<th>Comments</th>
<th>Accept/Cancel Date</th>
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</table>
Questionnaires:

WHAT

Evaluation questionnaire - at the end of the secondment/recruitment
Follow-up questionnaire - two years after secondment/recruitment

• Each researcher (recruited / seconded)
• All MSCA

HOW
Via PP ➔ MP
2 - Periodic reporting
1. Progress reports (art. 19 of GA)

- **WHEN**
  
  ITN - Within **30 days after year 1**
  
  RISE - within **30 days after the end of** each year, except when the periodic and final reports are due (**year 1 and 3**)

  NO financial report required
  
  COFUND and IF – not applicable

- **WHAT**
  
  Template defined on the Participant Portal
  
  Attachments possible

- **HOW**
  
  via PP ➔ MP
2. Periodic Report (art.20 of GA) - for ITN, RISE, COFUND

- **WHEN**
  Within **60 days** following the end of each reporting period

- **WHAT**
  Periodic report includes:
  - **Technical report** (attachment) + **Continuous reporting**, including questionnaire (H2020 key indicators)
  - **Financial report** – Individual financial statement from each beneficiary + Periodic summary financial statement

- **HOW**
  Via PP ➔ MP
2. Periodic Report (art.20 of GA) - for IF

- **IF with 1 reporting period:**
  Within 60 days following the end the project
  "Report" containing:
  - Technical report (attachment) + Continuous reporting, including questionnaire (H2020 key indicators)
  - Financial report – Individual financial statement from beneficiary

- **IF with more than 1 reporting period:**
  Within 60 days following the end of each RP
  "Periodic report" containing:
  - Technical report (attachment) + Continuous reporting, including questionnaire (H2020 key indicators)
  - Financial report – Individual financial statement from beneficiary

- **HOW**
  Via PP ➔ MP
3. Final report

**WHEN**
Within 60 days following the end of the last reporting period

**WHAT**
- Report covers whole project period
- **Final technical report**
- **Final financial report** (final summary financial statement created automatically by the electronic exchange system, consolidating the individual financial statements for all reporting periods)
- To be submitted together with Periodic report for last RP

**HOW**
Via PP ➔ MP

Applicable for:
- IF with more than 1 RP
- ITN
- RISE
- COFUND
No Funding distribution report

No Certificate on Financial Statement

Only specific cased – recovery, termination, audit, etc. defined in the GA
# Reporting Summary

<table>
<thead>
<tr>
<th>Reports</th>
<th>ITN</th>
<th>RISE</th>
<th>COFUND</th>
<th>IF with 1 RP</th>
<th>IF with more than 1 RP</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Progress report</strong></td>
<td>❌</td>
<td>❌</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Periodic report</strong> * (end of each reporting period)</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
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<td>❌</td>
</tr>
<tr>
<td><strong>Final Report</strong> * (end of the project)</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td></td>
</tr>
<tr>
<td><strong>Researcher Declaration</strong> * (for each researcher)</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td></td>
</tr>
</tbody>
</table>
Submission of Periodic report – H2020 principle:

- **Coordinator** prepares **Periodic Technical report**, based on the input from all beneficiaries
- **Beneficiaries** (including Coordinator) prepare their individual **Financial statements**, signed electronically (FSIGN) and submit to Coordinator
- Coordinator "marks for submission" all reports to be submitted to REA
- Coordinator submits all reports in one package – **Single Submission**.

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**NB:** In case of need coordinator can decide to submit package without some Form C (beneficiaries didn't submit Form C on time and blocking payment for whole consortium), those beneficiaries will not have any opportunity to submit their Form C within the same reporting period, only in the next reporting period!
Notifications:

WHAT
- LEAR directly via PP
- To notify about changes in the organization legal data - address, name, universal transfer of rights, etc.

HOW: via PP ➔ My Area ➔ My Organization

- Starting date notification – for IF only – art. 3 of the GA

HOW: via PP ➔ My Projects ➔ MP
WHO submits WHAT:

Coordinator:

• Progress report
• Periodic report
• Final report
• Amendments

Each beneficiary incl. Coordinator:

• Financial Statement – FORM C
• Researcher Declarations
• Notifications

Each researcher:

• Questionnaires
Amendments:

WHAT
• Changes in the Grant agreement (e.g. change in consortium, modification of Annex I, etc.)
• Normally with prior agreement of project officer

HOW
Via PP ➔ MP
After the grant agreement is signed by Coordinator and by REA
Choose one of the options below

Launch new Consortium Requested Amendment

You may launch a new amendment request to the Service. For termination of the grant, please choose the last option. Different requests can be launched in parallel although it is strongly recommended to limit the number of draft requests. Once an amendment is processed and accepted by both parties, draft requests can be updated or invalidated by the system in order to reflect the latest legal basis. The new amendment will be launched based on the grant agreement data.

Send a Formal Notification to the Service

At any time, you may wish to upload a PDF document and send it to the Service via the electronic system. The uploaded file will be sealed and sent to the officer in charge. The formal notification will be accessible from the document library.

Send an informal message or question to the Service

At any time, you may wish to informally exchange messages or ask questions to the Service via the electronic system. If your query is related to an ongoing process, you’re encouraged to use the messages section of that process.

Terminate the Grant Agreement

Use this option only in case you wish to terminate the Grant Agreement and release the requested budget. The option to terminate the grant cannot be rejected by the Service. You’ll be prompted to submit the last reporting period.
## Work Packages

<table>
<thead>
<tr>
<th>Number</th>
<th>Title</th>
<th>Lead Beneficiary</th>
<th>Start Month</th>
<th>End Month</th>
<th>Deliverables No.</th>
<th>Status</th>
<th>Actions</th>
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</thead>
<tbody>
<tr>
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<tr>
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</tr>
<tr>
<td>Total:</td>
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</tbody>
</table>
It is highly recommended to involve the PO during the amendment request preparation.
The Amendment Request can only be
• Rejected (the whole) (with comments)
• Accepted (the whole) - 45 days
• Withdrawn by the originated party
No other option; no 'negotiation'