

H2020-ITN-2016 **Info Day**

Reporting under H2020

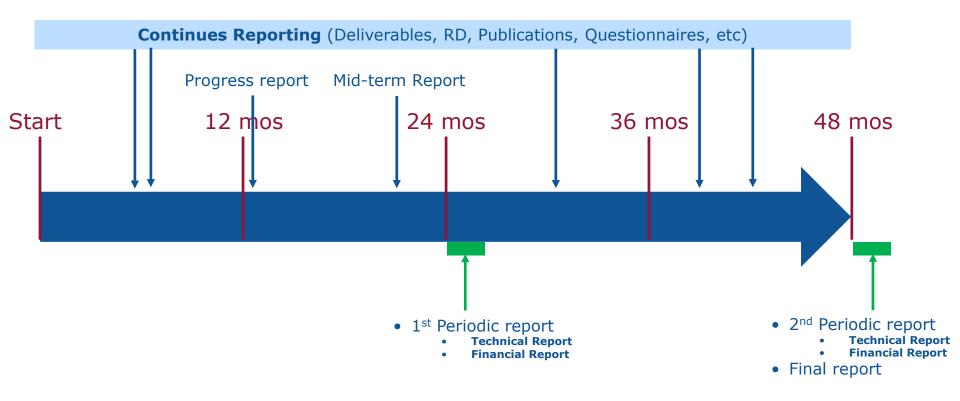
Nina Poumpalova

Research Executive Agency Unit REA-A1

Research Executive Agency



Monitoring Project Implementation







Participant Portal (PP)

is your entry point to submit :

- Project Reports
- Researchers declarations for all researchers
- Other documents (Amendment, any other formal notifications...)

"My Area" - "My projects" tab



RESEARCH & INNOVATION European Participant Portal Commission European Commission > Research & Innovation > Participant Portal > My Projects 🤮 MIKA LEVONEN 🦄 Q Y AREA HOME FUNDING OPPORTUNITIES HOW TO PARTICIPATE EXPERTS SUPPORT -Search PP My Organisation(s) H2020 ONLINE MANUAL HOW TO My projects FP7 REF. DOCS (1)My Proposal(s) My Project(s) This page enables you to access all your EU projects managed via the Participant Portal that have been selected and My Notification(s) approved for funding. My Formal Notification(s) Depending on your roles, you can view or manage the following project-related tasks: My Expert Area · 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 20 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. Access Amendment GP Grant Preparation Manage Projects Financial Reporting Legend Periodic Reporting Project Consortium VP View Proposal RD Reporting & Deliverables PC Search: Show 10 entries Hide closed projects ACRONYM CALL PROGRAM 🔿 PROJECT ACTIONS ≙. \diamond PHASE - _ ModCorn Shock H2020-H2020 642768 Active

Chauses 1 to 1 of 1 antring

MSCA-ITN-2014



Principles of submission in H2020

- Forms and templates provided in the electronic exchange system (PP)
- Two-step submission process for Financial report:
 - 1 Beneficiary → Coordinator
 - 2 Coordinator → REA
- No paper signed document, only electronic submission
- Process more automated





Continuous reporting





CONTINUOUS REPORTING

During whole project life cycle, whenever needed

General (for all type of actions)

- Deliverables
- Dissemination activity/Communication*
- Publications*
- Patents (IPR)*
- Publishable Summary (under development)
- Milestones (under development)
- Critical risks (under development)

Questionnaires

- Gender
- SME impact (only for projects flagged for SME)
- Innovation (only for projects flagged for Innovation)

Agency

* Beneficiary must make it visible that their action received H2020 funding Template is provided on Participant Portal Research Executive

Questionnaire Gender



Commission

Grant Pro	oject Continuous Report		Jan	JO <u>Eun</u> a		
2025 (NCPs CaRE) CSA 2025 (NCPs CaRE) CSA 2025 (NCPs CaRE) CSA 2020 IL H2020-SC5-2014-2015 2012 Deliverables Milestones Critical Risks Publications 2020 IL H2020-SC5-2014-2015 2020 IL H2020-SC5-19a-2014 Unit: RTD/I/01	Dissemination Patents (IPR) Innovation	Gender				
ender ender Dimension in the Project Does the project include a gender dimension in research? ender of R&D participants involved in the project ease include in the count the participants working for Third Parties (if appropriate)	th women and men into the	paid by the EU projec	t.	and have a		
Organisation	 Number of Female participants 	Number of Male participants	Total Number of participa	ants		
- FORSCHUNGSZENTRUM JULICH GMBH	2	1	3			
- IDRYMA PROOTHISIS EREVNAS	0	1	1			
- AGENCE DE L'ENVIRONNEMENT ET DE LA MAITRISE DE L'ENERGIE	2	0	2			
I - SUOMEN AKATEMIA	1	0	1			
i - AGENCIJA ZA MOBILNOST I PROGRAME EUROPSKE UNIJE	Please ent	er here numb	er 1			
- AGENZIA PER LA PROMOZIONE DELLA RICERCA EUROPEA						
- AGENCE BRUXELLOISE POUR L'ENTREPRISE		of female/male ESRs				
- CENTRO PARA EL DESARROLLO TECNOLOGICO INDUSTRIAL.	funded	by the project	1			
- CENTRUL PROIECTE INTERNATIONALE	Ζ		3			
0 - CENTRUM VEDECKO TECHNICKYCH INFORMACII SLOVENSKEJ REPUBLIKY	1	1	2			
1 - DIENST VOOR WETENSCHAPPELIJKE EN TECHNISCHE INFORMATIE- SERVICE D'INFORMATION SCIENTIFIQUE ET TECHNIQUI	E 0	1	1			
2 - SIHTASUTUS EESTI TEADUSAGENTUUR	1	0	1			
		0	1			
3 - VEREIN EURESEARCH	1					
	1	1	2			
4 - MINISTERIE VAN ECONOMISCHE ZAKEN	1 1 1	1 0	2			
4 - MINISTERIE VAN ECONOMISCHE ZAKEN 5 - FUNDACAO PARA A CIENCIA E A TECNOLOGIA	1 1 1 1		-			
4 - MINISTERIE VAN ECONOMISCHE ZAKEN 5 - FUNDACAO PARA A CIENCIA E A TECNOLOGIA 6 - FOUNDATION FOR RESEARCH AND TECHNOLOGY HELLAS	1 1 1 1 3	0	-			
 3 - VEREIN EURESEARCH 4 - MINISTERIE VAN ECONOMISCHE ZAKEN 5 - FUNDACAO PARA A CIENCIA E A TECNOLOGIA 6 - FOUNDATION FOR RESEARCH AND TECHNOLOGY HELLAS 7 - INSTYTUT PODSTAWOWYCH PROBLEMOW TECHNIKI POLSKIEJ AKADEMII NAUK 8 - LUXINNOVATION GIE 	1 1 1 3 2	0	1			
4 - MINISTERIE VAN ECONOMISCHE ZAKEN 5 - FUNDACAO PARA A CIENCIA E A TECNOLOGIA 6 - FOUNDATION FOR RESEARCH AND TECHNOLOGY HELLAS 7 - INSTYTUT PODSTAWOWYCH PROBLEMOW TECHNIKI POLSKIEJ AKADEMII NAUK	-	0 0 2	1 1 5			



Questionnaire SME Impact



European Commission

909647 (909647 TEST [ABAC: SME-2 PRAMER RIZED AND ADDRESS AND	Critical Risks Publications Dissemination Patents (IPR) Innovation
Impact on SMEs	Reference SAV
Questionnaire to measure the impact of H2020 Programme on growth and Please add updated information on turnover of the company and number of employees (or SME Name	only for SME participants)
AST ADVANCED SPACE TECHNOLOGIES GMBH	 Note: The SME Impact questionnaire is only available for projects having a SME beneficiary. The questionnaire manages the: Evolution of the SMEs during the project implementation regarding turnover and employment data. Forecast of the impact after project completion regarding turnover and employment data.





Deliverables

- > Art. 19 of the GA
- To be uploaded directly on the PP by the Coordinator
- Scientific deliverables and other deliverables as defined in the GA Annex 1
- In case of an update of a deliverable, the PO needs to be notified and re-opens the session







Deliverables

Please download here the template for the Progress Report: 😤 Download template

benterub	100															
Please down	load here the	template fo	or the Progress Repor	t: 🕈 <u>Download t</u>	template											Â
WP No	Del Rel. No	Del No	Title	Lead Beneficiar	Nature	Dissemination Level	Est. Del. Date (annex	Receipt Date	Approval Date	Status						
WP1	D1.1	D2	D.1.1 - Report on t	SOTON	Report	Public	30 Jun 2018			Pending				\square		
WP2	D2.1	D3	D.2.1 - Report on I	SOTON	Report	Public	30 Jun 2018			Pending				\bigcirc		
WP3	D3.1	D4	D3.1 - Report desc	SOTON	Report	Public	30 Jun 2018			Pending				\bigcirc		
WP4	D4.1	D5	D4.1 - Novel CFC e	SOTON	Report	Public	30 Jun 2018			Pending				\bigcirc		
WP5	D5.1	D6	D5.1 - Novel mode	GLPS	Other	Confidential, only f	30 Jun 2018			Pending				\bigcirc		
WP6	D6.1	D7	D6.1 - Novel lightn	GLPS	Other	Confidential, only f	30 Jun 2018			Pending				\bigcirc		-
WP7	D7.1	D8	D.T.1 - Taught scie	SOTON	Other	Public	30 Jun 2015	15 Sep 2016 🤽		Submi	۵	- *	8	I) 💭		=
WP7	D7.2	D9	D.T.2 - Transferab	SOTON	Other	Public	30 Jun 2015	25 Aug 2016 🔒	15 Sep 2016	Approved	0		3	\bigcirc		
WP7	D7.3	D10	D.T.3 - Conference	SOTON	Other	Public	30 Jun 2015	25 Aug 2016 🔒	15 Sep 2016	Approved	۵		3	\square		
WP8	D8.1	D1	Consortium Agreen	GLPS	Report	Confidential, only f	28 Feb 2015	25 Jan 2016 🔒	04 Aug 2016	Approved	۵		3	\bigcirc		
WP8	D8.2	D15	Supervisory Board (GLPS	Other	Public	28 Feb 2015	30 Mar 2016 🦲	04 Aug 2016	Approved	۵		3	\square		
WP8	D8.3	D16	Progress report	GLPS	Report	Confidential, only f	31 Jan 2016	14 Oct 2016 🔒		Submi	0	× ×	8	\bigcirc		
WP8	D8.4	D17	Draft Periodic Repo	GLPS	Report	Confidential, only f	31 Dec 2016	18 Oct 2016		Submi	0	× ×	8	\square		
WP8	D8.5	D18	Mid term review m	GLPS	Report	Confidential, only f	28 Feb 2017			Pending				\bigcirc		
WP9	D9.1	D11	D.ED.1 - Project w	GLPS	Other	Public	30 Jun 2015	30 Mar 2016 🖲	04 Aug 2016	Approved	۵		3	\sim		
WP9	D9.2	D12	D.ED.2 - Overall Ex	GLPS	Report	Confidential, only f	30 Jun 2015	30 Mar 2016 🕰	04 Aug 2016	Approved	0		3	\bigcirc		
WP9	D9.3	D13	D.ED.3 - Business p	GLPS	Other	Confidential, only f	30 Jun 2015	15 Sep 2016 🔔		Submi	۵	- *	8		Validate	





CONTINUOUS REPORTING

During whole project life cycle, whenever needed

MSCA ITN specific:

- Researchers
- Network-wide training events
- > Fellows' individual projects
- MSCA questionnaires (not yet developed)
- EID-hosting of fellow (for EID projects only)
- EJD-enrolment in PhD (for EJD projects only)





Researchers Declaration (RD):

- Art. 19 of the GA (within 20 days of start date of recruitment)
- > To be submitted **by each beneficiary** for all recruited researchers

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 recruitment, hosting institution, etc.





Researchers Declaration – step 1:

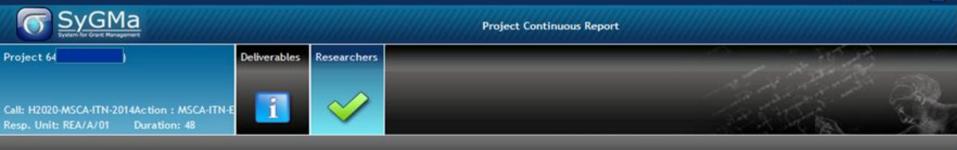
Project researcher library:

- Each beneficiary can add a 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 EID, EJD)





Researcher Declaration

ellow Id 🔺	First Name	Last Name	Gender	Birthday	Nationality	Submitted Declaration A	ctions
2	lac	Lc	M	29-06-1989	IT - Italy	0 of 1	
3	Ka	N ₁	M	23-08-1990	DK - Denmark	0 of 0	
4	Pa	Rc	м	13-10-1984	ES - Spain	0 of 0	
5	Co	Q	F	29-05-1991	US - United States	0 of 0	
6	Jo	Lc	м	12-07-1989	DE - Germany	0 of 0	
7	Da	Sn	м	30-05-1990	PL - Poland	0 of 0	
8	Fla	Re	F	07-08-1986	UG - Uganda	0 of 1	
9	Mi	N	м	20-11-1987	SN - Senegal	1 of 1	+
10	Ch	Pa	м	01-03-1982	DE - Germany	0 of 0	
11	Mi	Hi	M	14-03-1991	DE - Germany	0 of 0	

Researcher Declaration

Nc A	Fellow I	First Name	Last Name	Sending Organisation	Recruitment Organisation	Start Date	End Date	Working Time Comm	Status	Actions
1	9	A	Nc		Te	01-10-201	30-09-201	FULL_TIME	SUBMI	
2	8	F	Re		Fr	19-10-201	18-10-201	FULL_TIME	DRAFT	
3	2	a.	Lo		U,	15-09-201	15-09-201	FULL_TIME	DRAFT	



Researchers Declaration – step 2:

Create RD

- According to GA to be submitted within 20 days after recruitment
- For researchers that already exist in the project library (all personal data are automatically prefilled)
- In case of a change (maternity/parental ...) in the employment contract, the researchers declaration should be updated
- Any new employment contract for the existing researcher requires a new RD



	Ma			Project Continuous Report		
Project 64	•	Deliverables	Researchers		1 Harley	
Call: H2020-MSCA-ITN- Resp. Unit: REA/A/01	-2014Action : MSCA-ITN-E Duration: 48	1	\checkmark		Carlos .	Contraction of the

Researcher Declaration

Project's Researcher Library

ellow Id 🔺	First Name	Last Name	Gender	Birthday	Nationality	Submitted Declaration Act	ions
2	la	Lc	M	29-06-1989	IT - Italy	0 of 1	
3	Ki	N1	M	23-08-1990	DK - Denmark	0 of 0	
4	Pi	Rc	M	13-10-1984	ES - Spain	0 of 0	
5	Ci	Q	F	29-05-1991	US - United States	0 of 0	
6	Jc	Lc	M	12-07-1989	DE - Germany	0 of 0	
7	Di	Sin	M	30-05-1990	PL - Poland	0 of 0	
8	FL	Re	F	07-08-1986	UG - Uganda	0 of 1	
9	M	Ne	M	20-11-1987	SN - Senegal	1 of 1	+
10	a	Pa	M	01-03-1982	DE - Germany	0 of 0	
11	M	Hi	м	14-03-1991	DE - Germany	0 of 0	

Researcher Declaration

Actions	Status	Working Time Comm	End Date	Start Date	Recruitment Organisation	Sending Organisation	Last Name	First Name	Fellow I	Nc A
2	SUBMIT	FULL_TIME	30-09-201	01-10-201	Te		Nc	^	9	1
	DRAFT	FULL_TIME	18-10-201	19-10-201	Fr		Re	F	8	2
	DRAFT	FULL_TIME	15-09-201	15-09-201	Uc		Lo	l.	2	3



Questionnaires

≻ WHAT

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

- WHO Each recruited researcher
- ➤ HOW Via PP→ MP





Progress reports (Art 19 of GA)

WHEN
 Within **30 days** after year 1
 NO financial reports required

> WHAT

Template defined on the Participant Portal (single pdf to upload as a deliverable)

➢ HOW Via PP→ MP





Periodic reporting





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

> Part A is generated by the IT system.

Commission

- It is based on the information entered by the participants through the <u>periodic report and continuous reporting</u> <u>modules</u>
- Part B is the narrative part.
- It includes explanations of the work carried out by the beneficiaries during the reporting period.
- Part B needs to be uploaded as a PDF document following the template of Part B Periodic Technical report.
- Periodic Financial Report
 - Individual financial statements (IFS) for each beneficiary
 - Explanation of the use of resources
 - A periodic summary financial statement including the request for interim payment.





Part A (General items)

generated automatically by IT system based on inputs from Continuous reporting

- Summary for publication
- Deliverables
- Milestones
- Critical risks
- Publications
- Patents (IPR)
- Dissemination & communication activities





Part A (MSCA ITN specific items)

generated automatically by IT system based on inputs from Continuous reporting

- Researchers
- Network-wide training events
- Fellows' individual projects
- EID-hosting of fellow (for EID projects only)
- EJD-enrolment in PhD (for EJD projects only)





Part B (MSCA template to be followed)

- Report Core
 - It is the narrative part that includes explanations of the work carried out by the beneficiaries during the reporting period
 - It is mandatory
 - Part B must be uploaded as a PDF document following the MSCA template of Part B Periodic Technical Report





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 (IFS), signed electronically (FSIGN) and submit to Coordinator
- Coordinator "marks for submission" all reports to be submitted to REA
- Coordinator submits all parts in one package Single Submission.

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





Periodic report is located in different tabs in SyGMa

	Grant Management	<i>\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\</i>							Project Pe	riodic Report	
642025 (NCPs CaRE)	CSA		Report Core	Deliverables	Milestones	Critical Risks	Publications		Patents (IPR)	Innovation	Gender
	DN2020	publication		_	_			Communicati	_		
	n (months): 18	\sim	1	1	1	\checkmark	\checkmark	\checkmark	1	\checkmark	
Summary for public	ation										
The summary for publication should be written as a "stand-alone" text, in a language easily understandable by a broader public and must not contain any confidential data											
Summary of the contex	xt and overall obje	ectives of the	project (For t	he final perio	d, include the	e conclusions	of the action))			





Periodic report could be downloaded as one ZIP-file with all corresponding PDF files

Name	Size	Packed Size	Modified
PR_FINANCIAL_STATEMENT_PARTNER_961026337_1.pdf	521 061	208 455	2016-11-24 10:39
PR_FINANCIAL_STATEMENT_PARTNER_948589870_1.pdf	524 429	208 648	2016-11-24 10:39
PR_FINANCIAL_STATEMENT_PARTNER_996151686_1.pdf	523 820	209 324	2016-11-24 10:39
PR_FINANCIAL_STATEMENT_PARTNER_934333974_1.pdf	521 186	207 901	2016-11-24 10:39
PR_UOR_SUMMARY_1.pdf	122 916	110 588	2016-11-24 10:39
PR_FINANCIAL_STATEMENT_PARTNER_941040942_1.pdf	521 700	208 430	2016-11-24 10:39
PR_FINANCIAL_STATEMENT_PARTNER_918730457_1.pdf	314 717	150 888	2016-11-24 10:39
PR_CRITICAL_RISKS_1.pdf	15 697	10 639	2016-11-24 10:39
PR_FINANCIAL_STATEMENT_PARTNER_936044472_1.pdf	522 702	208 321	2016-11-24 10:39
PR_FINANCIAL_SUMMARY_1.pdf	69 609	63 641	2016-11-24 10:39
PR_MILESTONES_1.pdf	61 185	55 318	2016-11-24 10:39
PR_CORE_1.pdf	958 965	795 162	2016-11-24 10:39
PR_DELIVERABLES_1.pdf	78 107	71 563	2016-11-24 10:39
PR_FINANCIAL_STATEMENT_PARTNER_998802502_1.pdf	525 817	210 328	2016-11-24 10:39
PR_FINANCIAL_STATEMENT_PARTNER_996695953_1.pdf	520 706	207 756	2016-11-24 10:39
PR_FINANCIAL_STATEMENT_PARTNER_946763554_1.pdf	523 810	209 156	2016-11-24 10:39
PR_FINANCIAL_STATEMENT_PARTNER_999464624_1.pdf	764 301	296 926	2016-11-24 10:39
PR_FINANCIAL_STATEMENT_PARTNER_984449606_1.pdf	521 739	208 520	2016-11-24 10:39
PR_FINANCIAL_STATEMENT_PARTNER_951035919_1.pdf	521 700	208 525	2016-11-24 10:39
PR_QUESTIONNAIRE_1.pdf	14 778	10 054	2016-11-24 10:39
PR_PUBLISHABLE_SUMMARY_1.pdf	68 062	61 902	2016-11-24 10:39
PR_FINANCIAL_STATEMENT_PARTNER_926001480_1.pdf	524 563	208 946	2016-11-24 10:39
COVER_LETTER_1.pdf	40 712	35 173	2016-11-24 10:39
PR_FINANCIAL_STATEMENT_PARTNER_938294969_1.pdf	521 478	208 466	2016-11-24 10:39



Final report (Art 20 of GA)

> 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





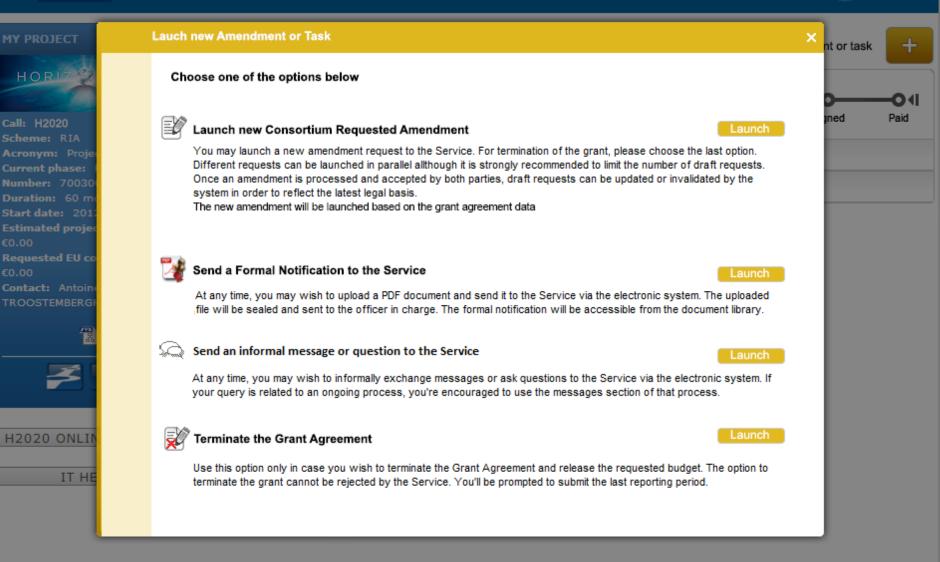
Communication with REA





Participant Portal - Grant Management Services







Amendments

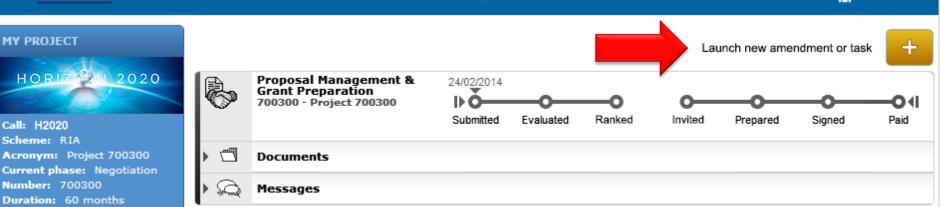
≻ WHAT

- Changes in the Grant agreement (e.g. change in consortium, modification of Annex I, etc.)
- H2020 online manual (Amendments)
- With prior consultation of the project officer
- ➢ HOW Via PP→MP





Participant Portal - Grant Management Services



After the grant agreement is signed by Coordinator and by REA

2

Ppgms COCO

H2020 ONLINE MANUAL

See all data ...

Start date: 2012-11-01 Estimated project cost:

Contact: Antoine DE

TROOSTEMBERGH

Requested EU contribution:

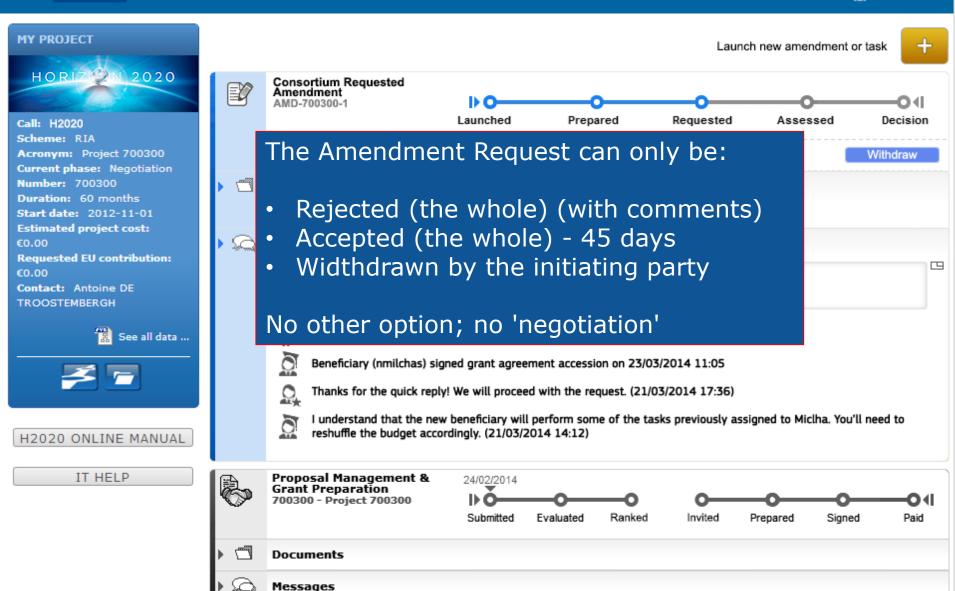
€0.00

€0.00

IT HELP



Participant Portal - Grant Management Services





Participant Portal - Grant Management Services

Ppgms COCO

Assessed

Involve PO

Prepared

Signed

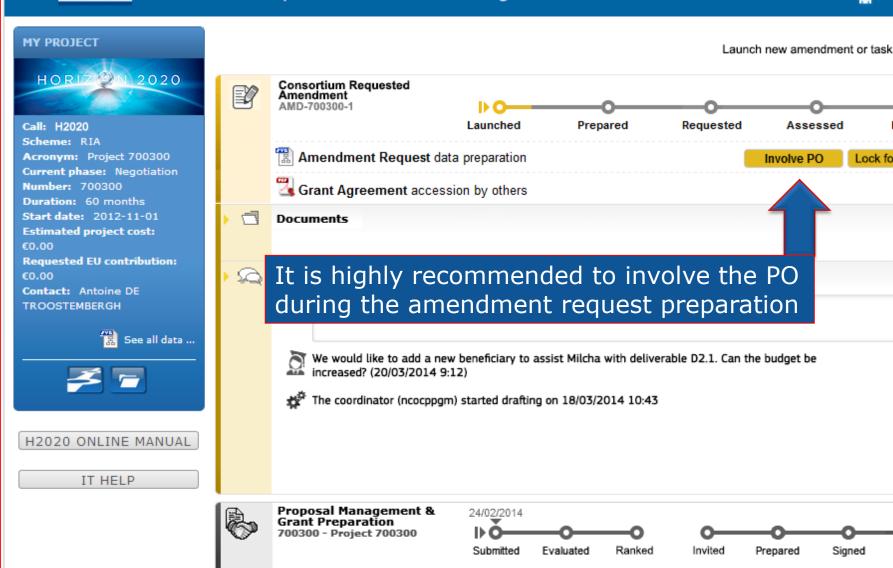
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O∢I

Paid

Decision

Lock for Review



Documents



Formal Notifications

➢ WHAT

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

➤ HOW

Via PP→My Area→My Organization





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





Thank you for your attention!

http://ec.europa.eu/mariecurieactions

