



# MSCA – ITN reporting for beneficiaries

MSCA online Audit Event - UKRO  
10<sup>th</sup> December 2020

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Research Executive Agency

# Outline

- ❖ **Monitoring Project implementation**
- ❖ **Project Timeline**
- ❖ **Continuous Reporting module**
- ❖ **Periodic Reporting**
- ❖ **Project Checks**
- ❖ **Ethics**
- ❖ **Communication with REA**

# 1. Monitoring Project Implementation

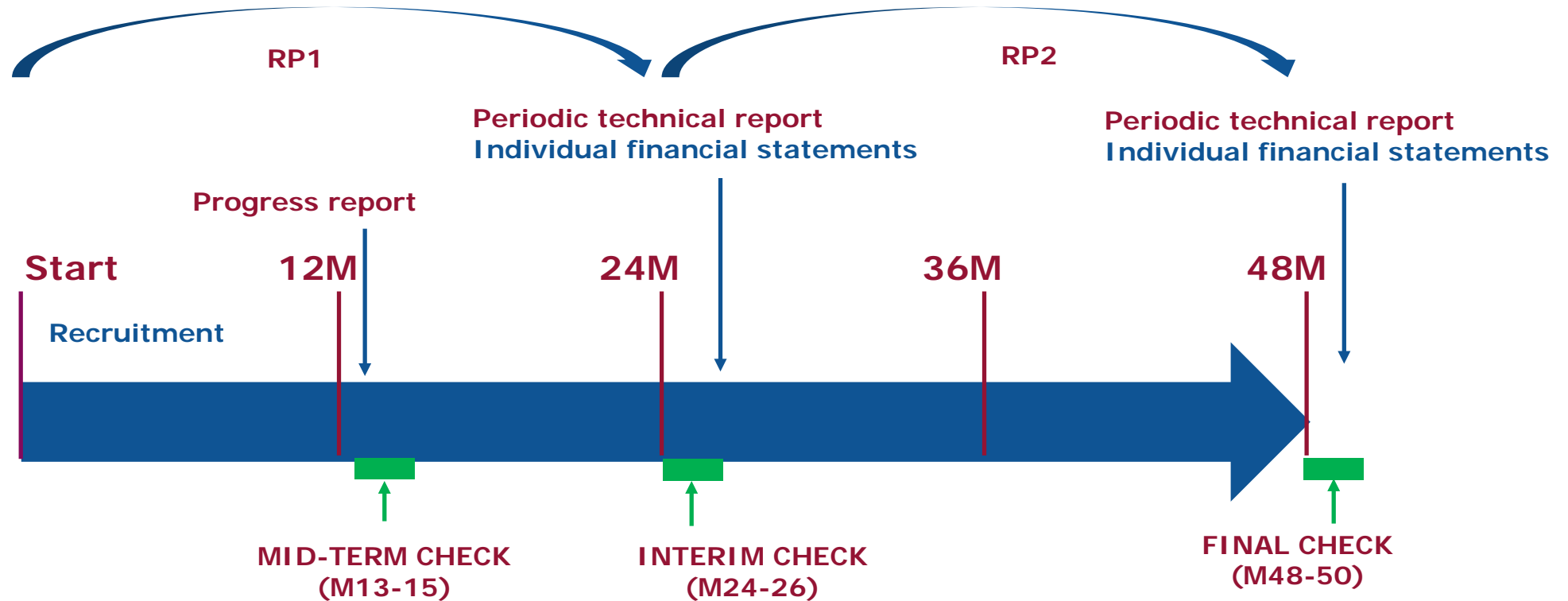
# Monitoring Project Implementation

- The Agency must monitor the activities of the projects in order to assess and verify:
  - ✓ That the **project is implemented as described in Annex 1** (Description of the action – DoA) of the Grant Agreement (GA) (technical implementation)
  - ✓ That the **project's activities comply with the obligations under the GA** (legal & administrative implementation)

In order for the Agency to verify that the project is implemented properly, the beneficiaries must submit any information requested, and in particular **the deliverables and reports specified in the GA.**

In addition, the Agency will also carry out **3 checks.**

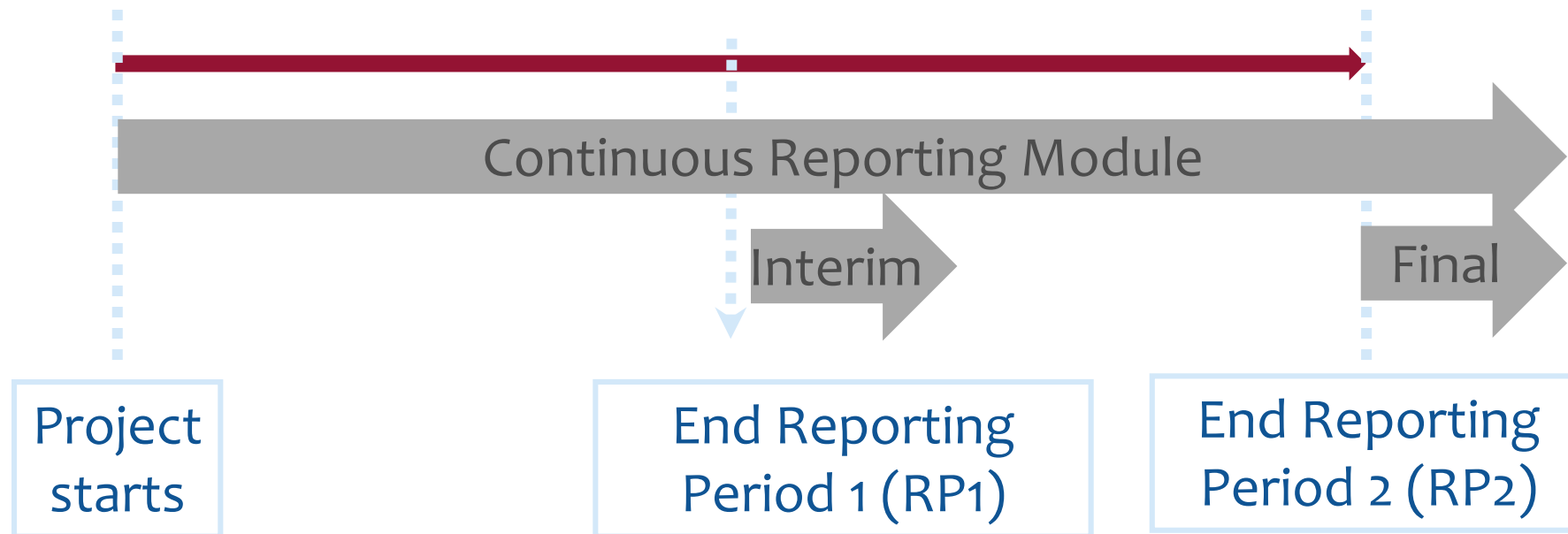
# Project timeline



**CONTINUOUS REPORTING**  
Publishable Summary, deliverables, milestones, critical risks, publications, patents, gender and Researcher Declarations

# How it works – IT tools

- ✓ Continuous reporting module
- ✓ Periodic reporting module



# Continuous Reporting

## **Continuous reporting module**

Information to be entered as soon as project starts

# Funding & Tender: My Project(s)



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

✓ Log in to Funding & Tender opportunities Portal

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

My Organisation(s)

GRANTS

**My Proposal(s)**

My Project(s)

My Formal Notification(s)

## My Project(s)

More info

Results: 3

Download excel list of those projects

Search..

ACRONYM	CALL	PROGRAM	PROJECT	PHASE	ACTIONS
ESIT	H2020-MSCA-ITN-2016	H2020	722046	Active	Actions
MARSoluT	H2020-MSCA-ITN-2018	H2020	814066		Project Consortium Manage Project View Proposal
MICROCOMB	H2020-MSCA-ITN-2018	H2020	812818	Active	

1 | 10

Click on Actions/Manage Project to access the Grants Management Services







# RESEARCH & INNOVATION

Help ▾

## Participant Portal - Grant Management System

**Continuous reporting module**

### MY PROJECT



Call: H2020-ICT-2016-2  
Type of Action: RIA  
Acronym: IoRL  
Current Phase: Grant Management  
Number: 761992  
Duration: 36 months  
Start Date: 01 Jun 2017  
Estimated Project Cost: €8,604,923.75  
Requested EU Contribution: €7,685,423.75  
Contact: [Manuel CARVALHOSA](#)

- Latest Legal Data
- Process List
- Document Library
- Communication Centre

H2020 ONLINE MANUAL

HOW TO

Launch new interaction with the EU +

**Continuous Reporting** 14 Jun 2017

Started Completed

+ Continuous reporting data

Process documents

Process communications New messages (0)

Process history

EU launched the process on 14 Jun 2017 16:30

**Proposal Management & Grant Preparation** 08 Nov 2016














Submitted Informed Invited Prepared Signed Paid

Process documents


Process communications New messages (0)

Process history

# Continuous Reporting: *Summary for publications*

 MSCA-ITN.. THE FRAMEWORK PROGRAMME FOR RESEARCH AND INNOVATION <b>HORIZON 2020</b> Call: H2020-MSCA-ITN-2018 Topic: MSCA-ITN-2018 Unit: REA/A/01	Summary for publication 	Deliverables Ethics, DMP, Other Reports 	Milestones 	Publications 	Disseminati... 	Patents (IPR) 	SME Impact 	Open Data 	Gender 	Researchers 	Training Activities 	ABS Regulation 
---	--	--	---	---	---	--	---	--	---	--	--	---

## Summary for publication

 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 context and overall objectives of the project (For the final period, include the conclusions of the action)

[ No text provided ]

Work performed from the beginning of the project to the end of the period covered by the report and main results achieved so far (For the final period please include an overview of the results and their exploitation and dissemination)

[ No text provided ]

Progress beyond the state of the art and expected potential impact (including the socio-economic impact and the wider societal implication of the project so far)

[ No text provided ]

Address (URL) of the project's public website

- All fields are mandatory.
- Strongly recommended to upload at least one image under "Publishable Summary's associated images".

# Continuous Reporting: *Deliverables*

MSCA-ITN..

Summary for publication

Deliverables Ethics, DMP, Other Reports

Milestones

Publications

Disseminati...

Patents (IPR)

SME Impact

Open Data

Gender

Researchers

Training Activities

ABS Regulation

THE FRAMEWORK PROGRAMME FOR RESEARCH AND INNOVATION  
**HORIZON 2020**

Call: H2020-MSCA-ITN-2018  
Topic: MSCA-ITN-2018 Unit: REA/A/01

## Deliverables

Please download here the template for the Progress Report: [Download template](#)

WP No	Del Rel. ▲	Del No	Title	Description	Lead Be	Nature	Disseminati	Est. Del. Date (	Receipt Date	Approval Date	Status
WP1							Public	28 Feb 2017			Pending

### *Obligation to submit deliverables identified in Annex 1 (Art. 19.1 of the GA)*

- The status of the deliverable is 'Pending' when a deliverable hasn't been uploaded yet and the delivery date has passed.
- Before submission a comment can be added.
- All beneficiaries can upload deliverables, but only the coordinator can submit them.
- Each time a deliverable has been submitted, the EU Officer will be notified.
- Each time the EU Officer rejects the deliverable, the Coordinator Contacts and the Participant Contacts are notified through the Participant Portal Notification System.
- Deliverables with a 'PUBLIC' dissemination level will be published as soon as they are approved by the EU officer; to change the dissemination level to 'CONFIDENTIAL', contact your Project Officer.

# Continuous Reporting: *Milestones*

MSCA-ITN..  
THE FRAMEWORK PROGRAMME FOR RESEARCH AND INNOVATION  
**HORIZON 2020**  
Call: H2020-MSCA-ITN-2018  
Topic: MSCA-ITN-2018 Unit: REA/A/01

Summary for publication	Deliverables Ethics, DMP, Other Reports	Milestones	Publications	Disseminati...	Patents (IPR)	SME Impact	Open Data	Gender	Researchers	Training Activities	ABS Regulation













## Milestones

Number ▲	Name	Lead Beneficiary	Delivery Date (Annex I)	Achieved	Delivery Date (actual)	Comments
1	Kick-off meeting		01 Aug 2017	<input type="checkbox"/>	11 Jul 2017	

- *The milestones entered during the Grant Preparation are displayed here.*
- *It has to be indicated whether the milestone has been achieved or not and select the delivery date.*

# Continuous Reporting: *Publications*

MSCA-ITN..  
THE FRAMEWORK PROGRAMME FOR RESEARCH AND INNOVATION  
**HORIZON 2020**  
Call: H2020-MSCA-ITN-2018  
Topic: MSCA-ITN-2018 Unit: REA/A/01

Summary for publication  Deliverables Ethics, DMP, Other Reports  Milestones  Publications  Disseminati...  Patents (IPR)  SME Impact  Open Data  Gender  Researchers  Training Activities  ABS Regulation 

## Publications

This project does not currently have any scientific publication

### Project publications (5 publications)

No. <sup>A</sup>	Type	Title	Authors	Title of the Journal/Proc./Book	Number, date or freq. of the Journal/Proc./Book	DOI	Repository Link
1	Publication in C		Bart Pannebakker	2016 International Congress of Entomology			

- Only the publications linked to the project should be included.
- The EU funding should be acknowledged.
- It is expected to see ESRs as co-authors of the publications.
- Joint publications are encouraged.
- Each beneficiary must ensure open access (free of charge, online access for any user) to all peer-reviewed scientific publications relating to its results (Art. 29,2 of the GA). Non-compliance can result in a grant reduction (Art. 29,6).

# Continuous Reporting: *Publications*

SyGMa - System for Grant Management - Mozilla Firefox  
https://ec.europa.eu/research/participants/grants-app/reporting/DLV-642068

Grant Management  
MSCA-ITN-ETN  
HORIZON 2020  
Call: H2020-MSCA-ITN-2014  
Topic: MSCA-ITN-2014-ETN Unit: REA/A/01

**New publication**  
Please provide a DOI for the publication (recommended) or fill-in manually the required information

DOI  *Digital Object identifier: this is a unique a unique string of characters allocated to a website, file, or other piece of digital information*

Type of publication

Repository Link  *The link leading to the Open Access repository*

Link to the publication

Title

Authors

Title of the Journal/Proceedings/Books series/Book (for book chapters)

Number, date or frequency of the Journal/Proceedings/Book

Relevant Pages

ISBN

Publisher

Place of publication

Year of publication

Is this publication available in Open-Access, or will it be made available?  
 Yes - available i  
 Yes - available i  
 No

Is this a peer-reviewed publication?  Yes  No

Is this a joint public/private publication?  Yes  No

\* mandatory fields

SAVE

Validate

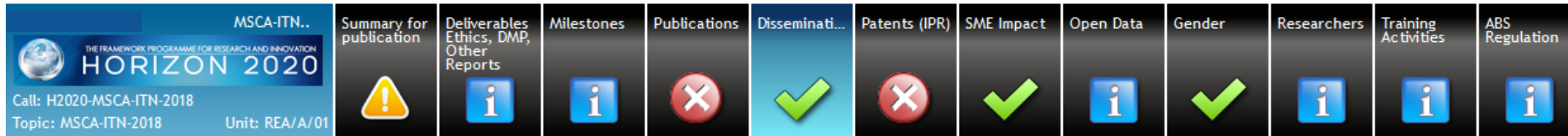
*We need this information to answer one of the H2020 KPI. 'Both the joint publications coming from public and private project participants as well as from private/public project participants with public/private organisations outside the consortium (as long as they are related to the funded project) should be reported.'*

*The beneficiaries must answer YES to this question in the following cases:*

- Joint publication coming from public and private project participants (for instances two participants, one from public sector and another from private sector are authors of the publication)
- Publication in which one or more participants from the public sector are authors, and the publication contains also author(s) from private sector who are not beneficiaries of the project
- Publication in which one or more participants from the private sector are authors, and the publication contains also author(s) from public sector who are not beneficiaries of the project

*In summary the answer should be YES always that the publication has a mix of authors from public and private sectors.*

# Continuous Reporting: *Dissemination*



## Dissemination & Communication Activities

Specify the total funding amount used for Dissemination and Communication activities linked to the project












Total Funding Amount 33,000.00 €

Specify the number of Dissemination and Communication activities linked to the project  for each of the following categories

Organisation of a Conference	0
Organisation of a Workshop	2
Press release	4
Non-scientific and non-peer-reviewed publication (popularised publication)	0
Exhibition	0
Flyer	0
Training	2
Social Media	0
Website	1
Communication Campaign (e.g. Radio, TV)	0
Participation to a Conference	0
Participation to a Workshop	0
Participation to an Event other than a Conference or a Workshop	0
Video/Film	0
Brokerage Event	0
Pitch Event	0

In total funding amount, an estimation of the EU budget dedicated to the communication and dissemination activities should be indicated for statistical reasons.

# Continuous Reporting: *Patents (IPR)*

 MSCA-ITN.. THE FRAMEWORK PROGRAMME FOR RESEARCH AND INNOVATION <b>HORIZON 2020</b> Call: H2020-MSCA-ITN-2018 Topic: MSCA-ITN-2018 Unit: REA/A/01	Summary for publication 	Deliverables Ethics, DMP, Other Reports 	Milestones 	Publications 	Disseminati... 	<b>Patents (IPR)</b> 	SME Impact 	Open Data 	Gender 	Researchers 	Training Activities 	ABS Regulation 
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## Patents (IPR)

This project does not have any Registered Intellectual Property Right yet

 Important! If a filed application is rejected by the IPR authority during the course of the EU funded action (the project's duration) then you must remove the concerned item from the IPR list














There are no Intellectual Property Right registered.

*This tab lists the Registered Intellectual Property Rights which have been generated by the project.*

*Patents should be reported as soon as an application for patent has been filed.*



# Continuous Reporting: *SME Impact*














 <p>MSCA-ITN.. THE FRAMEWORK PROGRAMME FOR RESEARCH AND INNOVATION <b>HORIZON 2020</b> Call: H2020-MSCA-ITN-2018 Topic: MSCA-ITN-2018 Unit: REA/A/01</p>	Summary for publication 	Deliverables Ethics, DMP, Other Reports 	Milestones 	Publications 	Disseminati... 	Patents (IPR) 	<b>SME Impact</b> 	Open Data 	Gender 	Researchers 	Training Activities 	ABS Regulation 
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## Impact on SMEs

**Questionnaire to measure the impact of H2020 Programme on growth and job creation in participating SMEs**

Please add updated information on turnover of the company and number of employees (only for SME participants)

# Continuous Reporting: *Open Data*

 MSCA-ITN.. THE FRAMEWORK PROGRAMME FOR RESEARCH AND INNOVATION <b>HORIZON 2020</b> Call: H2020-MSCA-ITN-2018 Topic: MSCA-ITN-2018 Unit: REA/A/01	Summary for publication 	Deliverables Ethics, DMP, Other Reports 	Milestones 	Publications 	Disseminati... 	Patents (IPR) 	SME Impact 	Open Data 	Gender 	Researchers 	Training Activities 	ABS Regulation 
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**Open Data**

This project does not currently have any Open Dataset

Open Datasets suggested by OpenAIRE (0 datasets pending)

There are no Datasets

Project Open Datasets (0 datasets pending)

There are no Datasets

[Manually Add Data Set](#)

# Continuous Reporting: *Open Data*

The screenshot displays the 'New Open Dataset' form within the Horizon 2020 reporting system. The top navigation bar includes tabs for 'Summary for publication', 'Deliverables Ethics, DMP, Other Reports', 'Milestones', 'Publications', 'Disseminati...', 'Patents (IPR)', 'SME Impact', 'Open Data', 'Gender', 'Researchers', 'Training Activities', and 'ABS Regulation'. The 'Open Data' tab is currently selected. The form itself contains the following fields and options:

- D.O.I.**: A text input field.
- Repository Link**: A text input field.
- Non-Repository Link**: A text input field.
- Title**: A large text area with a scroll bar.
- Is Dataset accessible?**: Radio buttons for 'Yes' and 'No'.
- Is Dataset reusable?**: Radio buttons for 'Yes' and 'No'.
- D.O.I. linked Publication**: A text input field.
- Buttons**: 'Add Open Dataset' and 'Cancel'.

On the right side of the interface, a red circle highlights a link labeled 'Add Data Se'.

# Continuous Reporting: *Gender*

MSCA-ITN.. THE FRAMEWORK PROGRAMME FOR RESEARCH AND INNOVATION  
**HORIZON 2020**  
Call: H2020-MSCA-ITN-2018  
Topic: MSCA-ITN-2018 Unit: REA/A/01

Summary for publication	Deliverables Ethics, DMP, Other Reports	Milestones	Publications	Disseminati...	Patents (IPR)	SME Impact	Open Data	<b>Gender</b>	Researchers	Training Activities	ABS Regulation

**Gender**

**Gender of researchers and other workforce involved in the project**

Please note that:

- The 'researchers' count must include researchers at all levels, incl. postdocs and PhD students
- Figures must be provided in Head Count
- The count for a beneficiary should include the staff working for its Third Parties (if appropriate)

Beneficiaries	Number of female researchers	Number of male researchers	Number of females in the workforce other than researchers	Number of males in the workforce other than researchers	Total number of females in the workforce	Total number of males in the workforce
1 - WAGENINGEN UNIVERSITY	N/A	N/A	N/A	N/A	3	1

## Gender dimension in the project

Does the project include a gender dimension in research content?  Yes  No

*Gender dimension in research analyses the various elements concerning biological characteristics and social/cultural factors of both women and men into the development of research policies and projects.*

[\*See explanatory video.\*](#)

# Continuous Reporting: *Researchers*

MSCA-ITN.. THE FRAMEWORK PROGRAMME FOR RESEARCH AND INNOVATION  
**HORIZON 2020**  
 Call: H2020-MSCA-ITN-2018 Topic: MSCA-ITN-2018 Unit: REA/A/01

Summary for publication Deliverables Ethics, DMP, Other Reports Milestones Publications Disseminati... Patents (IPR) SME Impact Open Data Gender **Researchers** Training Activities ABS Regulation

## Researcher Declaration

### Project's Researcher Library

Fellow Id	First Name	Last Name	Gender	Birthdate	Nationality	Submitted Declarations	Actions
1	[REDACTED]	[REDACTED]	Female	22-09-1991	NL	1 of 1	

### Researcher Declaration

No	Fellow Id	First Name	Last Name	Status	Recruitment Organisation	Start Date	End Date	Working Time Commitment	Duration	Actions
1	1	[REDACTED]	[REDACTED]	SUBMITTED	Universitaet Bremen	16-10-2015	31-12-2016	Full Time	14.53	

### Project Secondment Periods

Nc	Fellow Id	First Name	Last Name	Sending Organisation	Sector of Sending Org.	Sending Country	Secondment Organisation	Sector of Sec. Org.	Secondment Country	Start Date	End Date	Working Time Commitr	Working Time Perc.	Duration	Actions
1	13	[REDACTED]	[REDACTED]	[REDACTED]	Academic	[REDACTED]	[REDACTED]	[REDACTED]	Ireland	25-04-2016	29-04-2016	Full Time	100 %	0.17	

*Each beneficiary must submit a 'researcher declaration' within 20 days after the recruitment of each researcher (Art. 19.1 of the GA).*

# Continuous Reporting: *Researchers*

- **First step – Project Researcher's library:** researchers personal details can be encoded in the library serving as a database from which researcher's declarations (RDs) can be automatically created and prefilled with the data from the library.
- **Second step - Creation of (RDs) by each beneficiary**  
The GA specifies the assigned researchers in the action. The assignment is identified by a duration and the profile of the researcher, but without identifying exactly the person that will be assigned to the job. **The RD is the document that links a specific researcher to one of the assignments.**
- **The RDs contain :**
  - **Researcher information** (name, birth date, nationality, gender, family charges, email of researcher, last countries of activity, contract type, enrolment in PhD).
  - **Recruitment information:** recruitment organisation, country and sector.
  - **Recruitment period:** start date and end date of contract, working time commitment (full time, part-time, etc.).

# Continuous Reporting: *Researchers*

- If something was wrongly encoded, a researcher's declaration can be re-opened by the EU officer and corrected by the beneficiary. ⚠️ Once a Researcher Declaration has been submitted, the only data that is still editable are the periods.
- There is an automatic calculation of the costs in the **Financial Statement** based on the duration (in person months) in the Researcher Declarations. The costs are not editable.

**Thus RDs are the basis for IFS (Individual financial Statement) and need to be updated in case of change (particularly before submission of periodic reports).**

## **Secondments**

- **Secondments** are additional periods of research training with another beneficiary or partner organisation.
- All beneficiaries need to report **all implemented secondments**.

# Continuous Reporting: *Researchers*

**New Researcher Declaration**

Researcher Information Recruitment Information Recruitment Period

Researcher 2 - [REDACTED]

Category Early stage researcher

Gender  Male  Female

Birth Date [REDACTED]

Nationality BE - Belgium

Last Countries of Activity (up to five) ID - Indonesia

Email [REDACTED]

Family Charges  Yes  No

Contract Type [REDACTED]

Is the researcher enrolled in a PhD programme?  Yes  No

List all countries of residence in the last 3 years, starting from the more recent



# Continuous Reporting: *Researchers*

**New Researcher Declaration**

Researcher Information **Recruitment Information** Recruitment Period

Import Recruitment from GAP

**Destination Organisation**

✖ Legal Name

✖ Country

✖ Sector  Academic  Non-Academic

# Continuous Reporting: *Researchers*

New Researcher Declaration

Researcher Information Recruitment Information **Recruitment Period**

+ Add Period

Recruitment Period 1

Start Date

End Date

**Working Time Commitment**

Full time (100%)  
Suspension (0%)  
Part time (1-99%)  
Maternity leave (0%)  
Parental leave (0%)

**Sick leave:** periods for which the researcher was absent for more than 30 days cannot be charged to the action. They should be reported as a suspension.

Ok Cancel

# Continuous Reporting: *Researchers*

- If something was wrongly encoded, a researcher's declaration can be re-opened by the EU officer and corrected by the beneficiary.

## **IMPORTANT!**













- There is an automatic calculation of the costs in the **Financial Statement** based on the duration (in person months) in the Researcher Declarations.  
The costs are not editable.

**Thus RDs are the basis for IFS (Individual financial Statement) and need to be updated in case of change (particularly before submission of periodic reports).**



# Continuous Reporting: *Training Activities*

MSCA-ITN...  
 THE FRAMEWORK PROGRAMME FOR RESEARCH AND INNOVATION  
**HORIZON 2020**  
 Call: H2020-MSCA-ITN-2018  
 Topic: MSCA-ITN-2018 Unit: REA/A/01














Summary for publication  Deliverables Ethics, DMP, Other Reports  Milestones  Publications  Disseminati...  Patents (IPR)  SME Impact  Open Data  Gender  Researchers  **Training Activities**  ABS Regulation 

## Network-wide Training Activities

	Organiser Name	Organiser Sector	Training Module Title	Skills/Knowledge Acquired	Duration (days)	ETCS Points (if applicable)	Number of Early Stage Researchers	Number of External Trainees
1		Non-Academic		Skills, Other	5.00	3	13	1

*This tab needs to list the network-wide training activities which were foreseen in the DoA and which took place.*

# Continuous Reporting: *ABS Regulation*

 MSCA-ITN.. THE FRAMEWORK PROGRAMME FOR RESEARCH AND INNOVATION <b>HORIZON 2020</b> Call: H2020-MSCA-ITN-2018 Topic: MSCA-ITN-2018 Unit: REA/A/01	Summary for publication 	Deliverables Ethics, DMP, Other Reports 	Milestones 	Publications 	Disseminati... 	Patents (IPR) 	SME Impact 	Open Data 	Gender 	Researchers 	Training Activities 	ABS Regulation 
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## EU Access and Benefit Sharing Regulation (NAGOYA Protocol)

 Important! Before answering the question below, please read the relevant information and complete the decision tree provided in the [Participant Portal Online Manual](#)

Does this project fall within the scope of the EU Access and Benefit Sharing (ABS) Regulation?

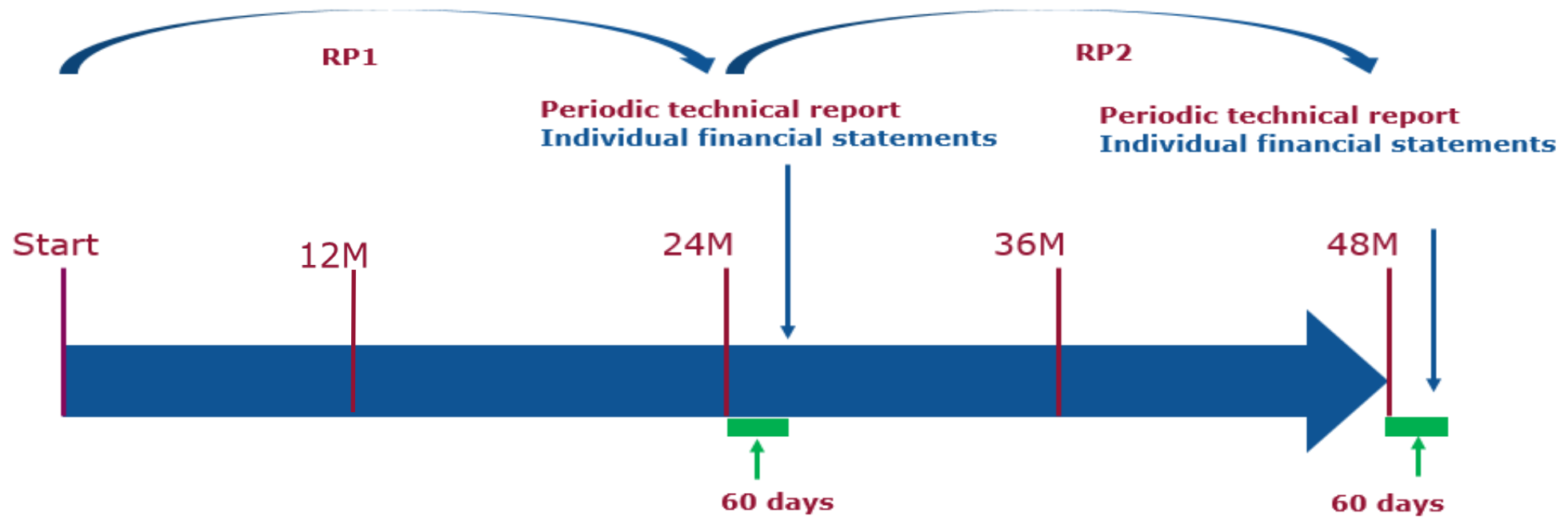
Yes

*Necessity to inform about 'possible obligations under the ABS Regulation' for projects utilising genetic resources .*

*If a project uses genetic resources and if it falls within the scope of the ABS regulation, this needs to be declared in SyGMa by the beneficiary. If this is the case, a declaration of due diligence needs to be submitted. This needs to be done before the end of the project.*

# Periodic Reporting

(Art. 20 of the GA)



# Periodic Reporting

Electronic submission via Funding & Tender opportunities Portal & Electronic signature

## ✓ *Periodic report – Payment request*

### ➤ The periodic report contains:

#### (1) A Periodic technical report (part A & B):

- Part A: generated by the IT system, based on information retrieved from continuous reporting
- Part B: narrative part with explanations of the work carried out (to be uploaded as pdf)

#### (2) A Periodic financial report containing:

- An individual financial statement from each beneficiary.
- A periodic summary financial statement, created automatically by the electronic exchange system, consolidating the individual financial statements for the reporting period.

# Periodic Reporting

## REA Assessment of reports and payment (Art. 21.5 of the GA)

EU Officers' assessment can be either:

- ✓ Report acceptance OR
- ✓ Report rejection - 2 options :
  - 1) Ask for revisions → Suspension of payment deadline letter → Modify Reports
  - 2) Ask for additional information → Suspension of payment deadline letter → send notification with requested information

Once accepted by EU → Payment



# Periodic reporting

## Periodic reporting module

Information to be entered after the end of each reporting period

# Periodic reporting module

RESEARCH & INNOVATION  
Participant Portal - Grant Management Services

European Commission

Help

abc DEF

MY PROJECT

HORIZON 2020

Call: H2020-MSCA-NIGHT-2014  
Type of Action: CSA  
Acronym:

Current Phase: Grant Management  
Number:  
Duration: 18 months  
Start Date: 2014-02-19  
Estimated Project Cost: €422,375.00  
Requested EU Contribution: €2.00  
Contact:

Latest Legal Data  
Process List  
Document Library  
Communication Center

H2020 ONLINE MANUAL

HOW TO

Periodic Reporting period 02/2015 18 Aug 2015

Draft Submitted Reviewed Paid

Technical Part of Periodic Report contribution Lock for review

Financial Statement drafting Lock for Review

Periodic Report 1 projectNo composition Submit to EU

Process specific documents

Process specific communications

Proposal Management & Grant Preparation 17 Aug 2015

Submitted Informed Invited Prepared Signed Completed

GA Declaration - signature Sign

Process specific documents

Process specific communications

Continuous Reporting 01 Feb 2014

Started Completed

Continuous reporting data

Process specific documents

Process specific communications

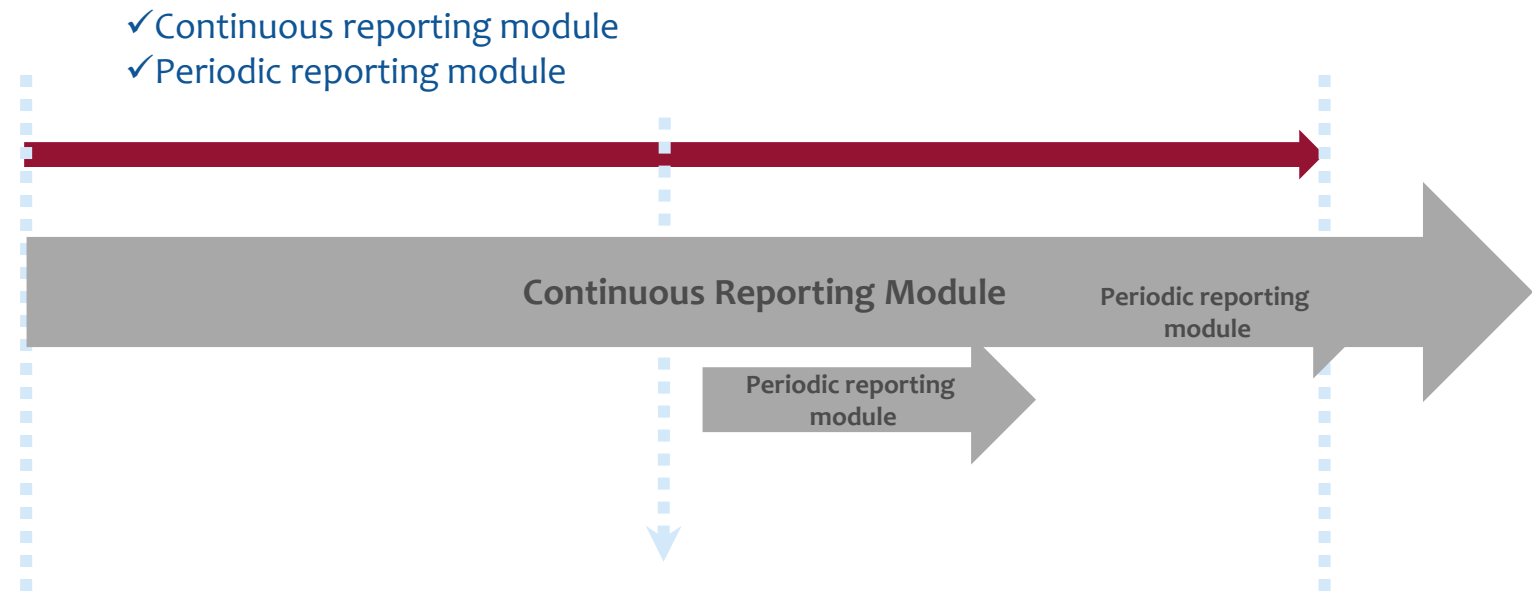
# Periodic reporting module: *Summary of steps*

1. **Notification**: All beneficiaries receive a notification at the end of each Reporting Period → Log on to the Funding & Tender opportunities Portal.
2. **Beneficiaries contribute to Periodic Report :**
  - All beneficiaries contribute to the Technical Part of the Periodic Report.
  - All beneficiaries check and e-sign their own Financial Statement and submit to Coordinator → If corrections are needed, beneficiaries must update Researcher Declarations in Continuous reporting module.
3. **The Coordinator approves & submits the elements of the Periodic Report.** Coordinator submits all reports ((**Technical Part and Financial Statements**)) in one package – **Single Submission**.
4. **The REA reviews** the submitted reports -> Accepts or rejects them.
5. **The REA issues the interim payment / payment of the balance.**

# Periodic reporting module

- ✓ While the periodic reporting module is active beneficiaries can also update information in the continuous reporting.
- ✓ There is synchronization between the two modules until the coordinator '**locks for review**' the periodic reporting.
- ✓ 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.

## Synchronisation between the 2 modules



# Periodic reporting module: *Technical report*

The screenshot displays the 'RESEARCH & INNOVATION Participant Portal - Grant Management Services' interface. The top navigation bar includes the European Commission logo and a 'Help' dropdown. The main content area is titled 'MY PROJECT HORIZON 2020' and features a 'Launch new interaction with the EU' button. A progress timeline shows stages: Draft (10 Aug 2017), Submitted (30 Sep 2017, 21/60 days), and Paid. A callout box explains that '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.' A red arrow points from the 'Technical Part contribution' link in the left sidebar to the 'Summary for publication' section of the report form. The form includes a progress bar with icons for various report components: Summary for publication (red X), Deliverables (i), Milestones (i), Critical Risks (warning), Publications (check), Dissemination/Communications (check), Patents (IPR) (i), Innovation (check), SAE Impact (check), Gender (check), and Tech. Report (Part B) (i). The 'Summary for publication' section contains instructions and a text area for the user to input the summary.

All beneficiaries are asked to contribute to the Technical Part of the Periodic Report.

# Periodic reporting module: *Technical report*

642996 (BRAINVIEW) MSCA-ITN-ETN  
THE FRAMEWORK PROGRAMME FOR RESEARCH AND INNOVATION  
HORIZON 2020  
Period No: 1 Duration (months): 24  
Reporting Period : [01 Jan 2015 - 31 Dec 2016]

Summary for publication ✓ Deliverables Milestones Critical Risks Publications Dissemination Patents (IPR) SME Impact Gender Tech. Report (Part B) Financial Statements Researchers Training Activities Documents

Technical Report (Part B)

Number	Attachment	Actions
1	Explanation of the work - Overview of progress	View File Template

- The template for Part B of the Periodic Report will be available in this page.
- Template also available in the Funding & Tender opportunities Portal : [Template Periodic Report](#)

# Periodic reporting module: *Technical report*

Coordinator

RESEARCH & INNOVATION  
Participant Portal - Grant Management Services

European Commission

Help

abc DEF

MY PROJECT

HORIZON 2020

Call: H2020-MSCA-NIGHT-2014  
Type of Action: CSA  
Acronym:  
Current Phase: Grant Management  
Number:  
Duration: 18 months  
Start Date: 2014-02-19  
Estimated Project Cost: €422,375.00

Launch new interaction with the EU +

Periodic Reporting  
> 08/2015 period 02/2014 19 Aug 2015

Draft Submitted Reviewed Paid

Technical Part of Periodic Report contribution Lock for review

Financial Statement drafting Lock for Review

Periodic Report 1 projectNo composition Submit to EU

Process specific documents

Process specific communications

- Once all information for the *Technical Part* has been filled in, the *coordinator\** clicks on "Lock for Review".
- This action freezes the data and generates a PDF document.

\*Only users with the role *Primary Coordinator Contact* and *Coordinator Contact* can perform this action.

# Periodic reporting module: *Technical report*

## **Beneficiary / Coordinator Interaction**

- The Technical Part of the Periodic Report can be reviewed by the beneficiaries by clicking on the PDF icon.
- Once reviewed, the Technical Part of the Periodic Report can either be unlocked for further editing or accepted for submission to the EU Services by the coordinator\* (click the button Accept & Include).

*\*Only users with the role Primary and Coordinator Contact can perform this action.*

The screenshot displays the 'Periodic Reporting' interface. At the top, it shows 'Periodic Reporting REP-00000001 - period 10/2013 > 03/2015' with a date '06/10/2014'. Below this is a progress bar with stages: Draft, Submitted, Reviewed, and Paid. The 'Draft' stage is active, indicated by a yellow circle. Below the progress bar, there are two main sections. The first section is titled 'Technical Part of Periodic Report review' and contains two buttons: 'Unlock to draft' and 'Accept & Include'. The 'Accept & Include' button is highlighted with a red box. The second section is titled 'Periodic Report 1 projectNo 00000001 composition' and contains a 'Submit to EU' button. On the left side, there are 'Documents' and 'Messages' sections. A callout box with a light blue background and a white border is positioned over the 'Accept & Include' button, containing the text: 'Each beneficiary to review. Coordinator to accept and submit.'



# Periodic reporting module: *Technical report*

**Beneficiary**

**Beneficiaries** are asked to complete their own Financial Statement.

Task to be performed by each beneficiary.

RESEARCH & INNOVATION  
Participant Portal - Grant Management Services

MY PROJECT  
HORIZON 2020  
Call: H2020-MSCA-NIGHT-2014  
Type of Action: CSA  
Acronym:  
Current Phase: Grant Management  
Number:  
Duration: 18 months  
Start Date: 2014-02-19  
Estimated Project Cost: €422,375.00

Periodic Reporting  
period 02/2014  
19 Aug 2015  
> 08/2015

Draft Submitted Reviewed Paid

Technical Part of Periodic Report contribution Lock for review

Financial Statement drafting Lock for Review

Periodic Report 1 projectNo... composition Submit to EU

Process specific documents

Process specific communications

Automatically filled in from Researcher's declarations

## Individual financial statements

Automatically retrieved from Researcher's declarations

Automatically filled in based on unit costs

print form A4

MODEL ANNEX 4 FOR H2020 MSC-ITN — MULTI

FINANCIAL STATEMENT FOR BENEFICIARY [name] FOR REPORTING PERIOD [reporting period]

Eligible <sup>1</sup> costs (per budget category)											EU contribution				
A. Costs for recruited researchers						B. Institutional costs					Total costs	Reimbursement rate %	Maximum EU contribution	Requested EU contribution	
A.1 Living allowance		A.2 Mobility allowance		A.3 Family allowance		B.1. Research, training and networking costs			B.2. Management and indirect <sup>2</sup> costs						
Form of costs <sup>3</sup>		Unit		Unit		Unit		Unit		Unit					
		Costs per unit <sup>4</sup>	Total <sup>5</sup>	Costs per unit <sup>4</sup>	Total <sup>5</sup>	Costs per unit <sup>4</sup>	Total <sup>5</sup>	Costs per unit <sup>4</sup>	Total <sup>5</sup>	Costs per unit <sup>4</sup>	Total <sup>5</sup>	f = a+b+c+d+e	g	h	i
<b>Total beneficiary</b>															

Name of the fellows <sup>6</sup>	Number of units (person months)
<b>Total beneficiary</b>	

**Checkbox 1:** 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 that any underpayments in Reporting Period 1 will be corrected by the end of the action.

**Checkbox 2:** Did you receive any EU/Euratom operating grant during this reporting period? YES  NO

If yes, pls indicate how many of the total person-months (see 'total beneficiary' above) were incurred DURING the period covered by the operating grant?

Number of person-months	
-------------------------	--

# Periodic reporting module: *Beneficiary*

Automatically generated



THE EUROPEAN PROGRAMME FOR RESEARCH AND INNOVATION  
**HORIZON 2020**

Period No: 1    Duration (months): 24  
Reporting Period : [01 Jan 2015 - 31 Dec 2016]

Beneficiary 1: SKU  
Legal Name: STICHTING KATHOLIEKE UNIVERSITEIT  
PIC: 999992110    Status: VALIDATED  
Legal Address: GEERT GROOTEPLEIN NOORD 9 000 , 6525  
EZ , NIJMEGEN Netherlands

Financial Statement



## Financial Statement

Financial information from contract

No contribution requested?     Yes     No

Financial Statements

Period	Adjustment	Requested Contribution
01 Jan 2015 - 31 Dec 2016 (Period No. 1)	No	239,530.55 €

Financial Statement for period '1' - (01 Jan 2015 - 31 Dec 2016)

[Detail of the recruitments](#)

Eligible costs:

Cost Category	Unit Cost	Number of Units	Subtotal	Total
▼A) Costs of recruited researchers				134,530.55 €
Living allowance - F.Id 13 - Emma Ward (Country NL, Contract A)	3,243.73 € x	17.00 =	55,143.41 €	
Living allowance - F.Id 16 - Giorgia Bussu (Country NL, Contract A)	3,243.73 € x	18.00 =	58,387.14 €	
Mobility allowance - F.Id 13 - Emma Ward (Country NL, Contract A)	600.00 € x	17.00 =	10,200.00 €	
Mobility allowance - F.Id 16 - Giorgia Bussu (Country NL, Contract A)	600.00 € x	18.00 =	10,800.00 €	
Family allowance - F.Id 13 - Emma Ward (Country NL, Contract A)	0.00 € x	17.00 =	0.00 €	
Family allowance - F.Id 16 - Giorgia Bussu (Country NL, Contract A)	0.00 € x	18.00 =	0.00 €	
▼B) Institutional costs				105,000.00 €
B1) Research, training and networking costs	1,800.00 € x	35.00 =	63,000.00 €	
B1) Management and indirect costs	1,200.00 € x	35.00 =	42,000.00 €	
C) Total costs (= A + B)				239,530.55 €
D) Maximum EU contribution (= 100% * C)				239,530.55 €
E) Requested EU contribution				239,530.55 €

Did you receive any EU/Euratom operating grants during this reporting period?

Yes     No

Please indicate how many of the total person-months were incurred DURING the period covered by the operating grant

# Periodic reporting module: *Financial statement*

- Once all information has been filled in and saved, click on Lock for Review.
- The generation of the PDF might take a few minutes.

Task to be performed by each beneficiary

RESEARCH & INNOVATION  
Participant Portal - Grant Management Services

MY PROJECT  
HORIZON 2020  
Call: H2020-MSCA-NIGHT-2014  
Type of Action: CSA  
Acronym:  
Current Phase: Grant Management  
Number:  
Duration: 18 months  
Start Date: 2014-02-19  
Estimated Project Cost: €422,375.00

Periodic Reporting  
> 08/2015 period 02/2014 19 Aug 2015  
Draft Submitted Reviewed Paid

Technical Part of Periodic Report contribution Lock for review

Financial Statement drafting Lock for Review

Periodic Report 1 projectNo composition Submit to EU

Process specific documents  
Process specific communications

# Periodic reporting module: *Financial statement*

- The Financial Statement can be reviewed by clicking on the PDF icon.
- Only users with the roles Participant Contacts, Project Financial Signatories and Task Managers can perform this action.
- To electronically sign & submit the Financial Statement click the button Sign & Submit.
- Only users with the role **Project Financial Signatory (PFSIGN)** can perform this action.

Task to be performed by each beneficiary

RESEARCH & INNOVATION  
Participant Portal - Grant Management Services

MY PROJECT  
HORIZON 2020  
Call: H2020-MSCA-NIGHT-2014  
Type of Action: CSA  
Acronym: H2020\_MSCA\_NIGHT  
Current Phase: Grant Management  
Number:  
Duration: 18 months  
Start Date: 2014-04-01  
Estimated Project Cost: €422,375.00  
Requested EU Contribution: €200,000.00

Periodic Reporting - period 04/2014  
05 Oct 2015  
Draft Submitted Reviewed Paid

Technical Part of Periodic Report contribution  
Financial Statement signature  
Unlock to draft Sign & Submit

Please confirm

The beneficiary hereby confirms that:

- The information provided is complete, reliable and true.
- The costs declared are eligible (see Article 6).
- The costs can be substantiated by adequate records and supporting documentation that will be produced upon request or in the context of checks, reviews, audits and investigations (see Articles 17, 18 and 22).
- For the last reporting period: that all the receipts have been declared (see Article 5.3.3).

Ok Cancel

# Periodic reporting module: *Submission*

- The Coordinator approves the elements of the Periodic Report by explicitly including them in the Periodic Report & submits all reports to the EU Services (click on the task Periodic Report composition).

Periodic Report 1 project No 907 235

Filter All Draft Available Included

Report Element	Status	Action
Technical report		
Technical Part of Periodic Report	Included	Redo
Financial report		
Financial Statement 999999999	Draft	
Financial Statement 999999999	Draft	
Financial Statement 999999999	Sent to CO	Redo Include
Financial Statement 999999999	Draft	
Financial Statement 999999999	Draft	
Financial Statement 999999999	Draft	
Financial Statement 999999999	Draft	

Each beneficiary to review.  
Coordinator to accept and submit

# Periodic reporting module: *Submission*

- 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.

Each beneficiary to review.  
Coordinator to accept and submit

The screenshot displays the 'RESEARCH & INNOVATION Participant Portal - Grant Management Services' interface. On the left, a sidebar titled 'MY PROJECT' shows details for a 'HORIZON 2020' project, including call number 'H2020-MSCA-NIGHT-2014', type of action 'CSA', and start date '2014-04-05'. The main content area features a progress bar for 'Periodic Reporting' with stages: Draft (05 Oct 2015), Submitted, Reviewed, and Paid. Below the progress bar, there are sections for 'Periodic Report 1 projectNo composition' with a 'Submit to EU' button, 'Process specific documents', 'Process specific communications', and 'Proposal Management Preparation'. A 'GA Declaration' section includes a checked box for 'I agree with the conditions' and another 'Submit to EU' button. A 'Launch new interaction with the EU' button is also visible in the top right of the main area.

# Periodic reporting module: *Status Submitted*

The screenshot displays the 'RESEARCH & INNOVATION Participant Portal - Grant Management Services' interface. The main content area shows a progress bar for 'Periodic Reporting' with three stages: 'Draft', 'Submitted', and 'Paid'. The 'Submitted' stage is currently active and is circled in red. A red circle also highlights the 'Submitted' label below the progress bar. The progress bar indicates a deadline of '24 Oct 2017 (40/90 days)'. Below the progress bar, there are sections for 'Process documents' (showing 'Periodic Report (1)' with a PDF icon), 'Process communications' (showing 'New messages (0)'), and 'Process history' (showing a list of events: 'submitted the report on 26 Jul 2017 10:30', 'available to the Coordinator on 01 Jun 2017 00:34', and 'EU launched the periodic reporting on 01 Jun 2017 00:34').

EU Officers' assessment can be either:

- ✓ Report acceptance OR
- ✓ Report rejection - 2 options :
  - 1) Ask for revisions → Suspension of payment deadline letter → Modify Reports
  - 2) Ask for additional information → Suspension of payment deadline letter → send notification with requested information



# Periodic reporting module: *If reports rejected by REA*

RESEARCH & INNOVATION  
Participant Portal - Grant Management Services

Help

European Commission

MY PROJECT  
HORIZON 2020

Launch new interaction with the EU +

Periodic Reporting  
01 Jun 2017 26 Oct 2017 (38/90 days)  
Draft Submitted Paid

- Technical Part contribution
- Periodic Report staging Financial signature and submission to coordinator by other beneficiaries
- Periodic Report composition

Process documents [Expand All](#) [Collapse All](#)

- Suspension Payment Deadline (1)
  - Suspension Payment Deadline - 1 - 0

Process communications **New messages (1)**

Process history

- EU sent the Periodic Report back to the Coordinator on 04 Sep 2017 15:20
- submitted the report on 28 Jul 2017 18:21
- EU made the Periodic Report available to the Coordinator on 01 Jun 2017 00:47
- EU launched the periodic reporting on 01 Jun 2017 00:47

Latest Legal Data  
Process List  
Document Library  
Communication Centre

H2020 ONLINE MANUAL

# If reports rejected by REA

Coordinator receives a notification with more details on the additional information requested

RESEARCH & INNOVATION  
Participant Portal - Grant Management Services

MY PROJECT  
HORIZON 2020

Launch new interaction with the EU +

Periodic Reporting  
01/01/2016 > 30/06/2017  
31 Jul 2017  
Draft Submitted Paid  
02 Dec 2017 (1/90 days)

Suspension Payment Deadline - Request for Additional Info - REP-  
to read and upload additional supporting documents

Process documents Expand All Collapse All

- Periodic Report (1)
- Suspension Payment Deadline - Additional info (1)
  - Suspension Payment Deadline - Request for Additional Info - REP-

Process communications New messages (0)

Process history

- EU requested additional supporting documents on 01 Sep 2017 15:47
- [redacted] submitted the report on 31 Aug 2017 11:55
- EU made the Periodic Report available to the Coordinator on 01 Jul 2017 00:50
- EU launched the periodic reporting on 01 Jul 2017 00:49

The Coordinator will **upload** a document with the requested information

# If Reports accepted by REA Payment / Process closed

The screenshot displays the REA Participant Portal interface. At the top, the European Commission logo and the text "RESEARCH & INNOVATION Participant Portal - Grant Management Services" are visible. A "Help" dropdown menu is located in the top right corner. Below the header, a "MY PROJECT" sidebar on the left shows "HORIZON 2020" and navigation buttons for "Latest Legal Data", "Process List", "Document Library", and "Communication Centre". The main content area features a "Launch new interaction with the EU" button and a "Periodic Reporting" section with a progress timeline. The timeline shows stages: Draft (01 Jul 2017), Submitted, and Paid. Below the timeline, the "Process documents" section lists "Interim Payment (1)" and "Periodic Report (1)". The "Process communications" section shows "New messages (0)". The "Process history" section contains a list of events: "EU closed the process on 18 Jul 2017 15:00", "EU paid completely the accepted periodic report to the Coordinator on 18 Jul 2017 15:00", "[redacted] submitted the report on 03 Jul 2017 09:53", "EU made the Periodic Report available to the Coordinator on 01 Jul 2017 02:49", and "EU launched the periodic reporting on 01 Jul 2017 02:48".

RESEARCH & INNOVATION  
Participant Portal - Grant Management Services

Help

MY PROJECT  
HORIZON 2020

Launch new interaction with the EU +

Periodic Reporting  
01 Jul 2017  
Draft Submitted Paid

Process documents [Expand All](#) [Collapse All](#)

- Interim Payment (1)
  - Interim Payment Letter - 1
- Periodic Report (1)
  - Periodic Report - 1 - 0

Process communications **New messages (0)**  
No topics

Process history

- EU closed the process on 18 Jul 2017 15:00
- EU paid completely the accepted periodic report to the Coordinator on 18 Jul 2017 15:00
- [redacted] submitted the report on 03 Jul 2017 09:53
- EU made the Periodic Report available to the Coordinator on 01 Jul 2017 02:49
- EU launched the periodic reporting on 01 Jul 2017 02:48

# QUESTIONNAIRES: Art. 32.1(h)

## ➤ WHAT

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

## ➤ WHO

- Each recruited researcher

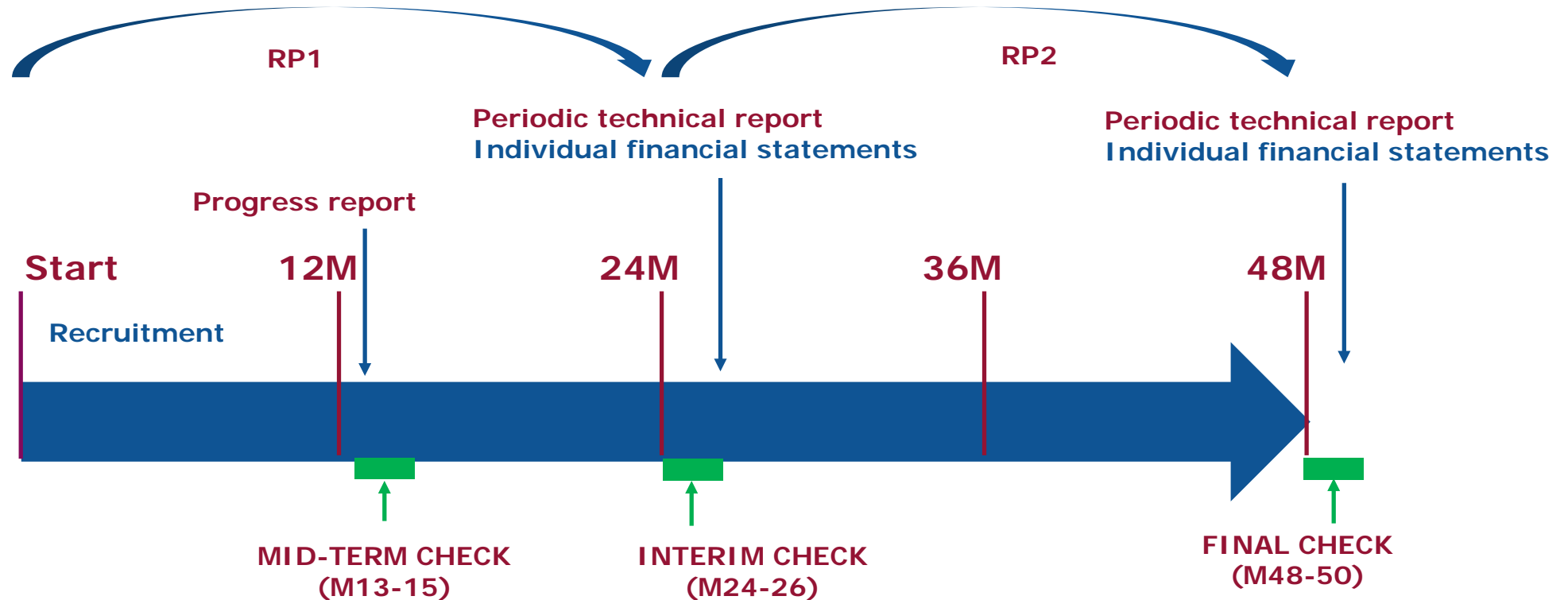
## ➤ HOW

- [https://ec.europa.eu/eusurvey/runner/Evaluation\\_for\\_MSC\\_fellows](https://ec.europa.eu/eusurvey/runner/Evaluation_for_MSC_fellows)
- [https://ec.europa.eu/eusurvey/runner/MSCA\\_Follow-up\\_Questionnaire\\_2\\_years\\_after\\_end\\_of\\_fellowship](https://ec.europa.eu/eusurvey/runner/MSCA_Follow-up_Questionnaire_2_years_after_end_of_fellowship)



# PROJECT CHECKS

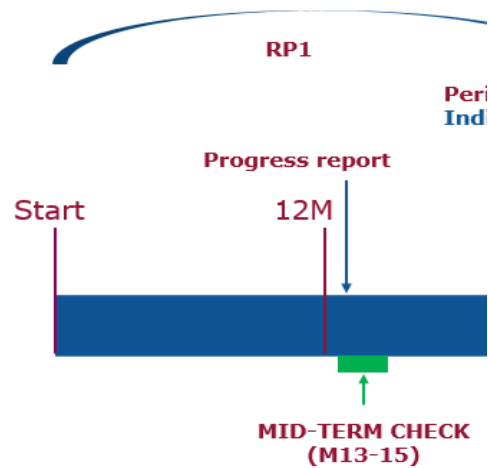
# Project timeline



**CONTINUOUS REPORTING**  
Publishable Summary, deliverables, milestones, critical risks, publications,  
patents, gender and Researcher Declarations

# PROJECT CHECK

## Mid-Term check (Article 19.1 of the GA)



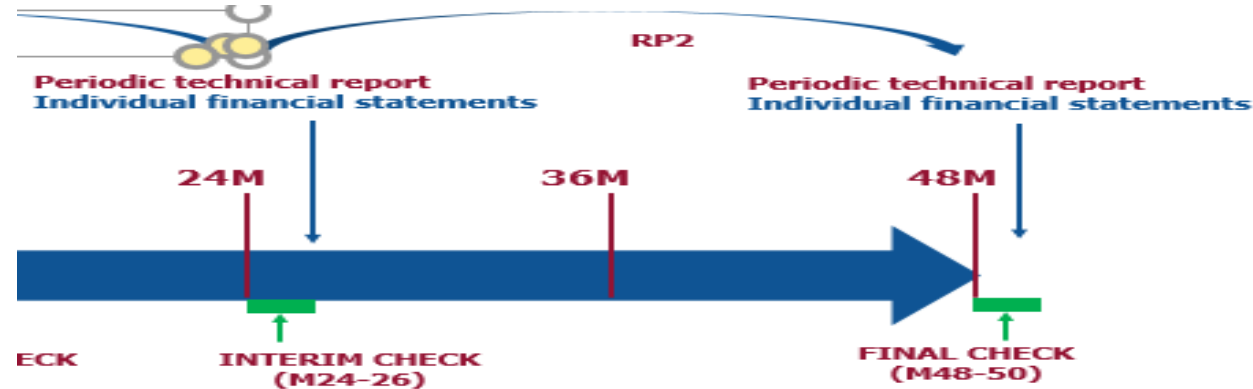
- The coordinator must organize a **mid-term meeting at M13-15 (unless otherwise agreed with the PO).**
- A Progress report needs to be submitted beforehand as deliverable via the continuous reporting module,
- Brings together EU officer, consortium members and recruited researchers.

The objective of the meeting will be to:

- ✓ Assess the recruitment progress and procedure.
- ✓ Clarify the eligibility rules for fellows.
- ✓ Raise awareness on the rights and obligations of fellows and beneficiaries.
- ✓ Assess any deviation of the original training programme.
- ✓ Define contingency plans if necessary.

# PROJECT CHECK

## Interim / final checks (Art. 22 of GA)



- In order to assess the project's progress, including **the assessment of the reports and deliverables of each reporting period**, the REA will organize an interim / final check.
- When? At the end of each reporting period.
- The checks will be done **remotely** unless otherwise agreed with the PO.
- They could be carried out with the help of an **external expert**.



# Thank you