



MSCA - COFUND reporting for beneficiaries

MSCA online Audit Event - UKRO
10th December 2020

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Research Executive Agency

Outline:



Reporting:

1. Continuous Reporting
 - Researcher Declaration
 - Other Deliverables
2. Periodic Reporting
3. Mid-term visits
4. How to – IT tools

1. Continuous Reporting

Continuous Reporting

-RESEARCHER DECLARATION

-DELIVERABLES

Deliverables

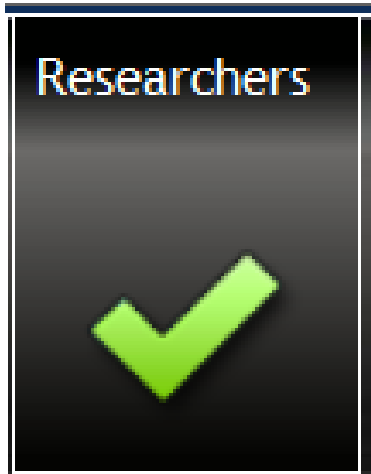
Deliverables are uploaded in the IT-tool through the **continuous reporting** module

Researcher Declaration within 20 days of the start of the research training activities, one for each researcher;

Other Deliverables identified in Annex 1, at the time set out in it.

The deliverables are
submitted via the Funding & Tender Portal

Researcher Declaration



Within 20 days of the start of the research training activities, one for each researcher:

- Start date – end date of the fellowship
- Name and Surname
- Gender
- Birth date
- Nationality
- E-mail...

Deliverables Foreseen

1.- *Progress Report (after the first 12 months)*

2.- *Report on evaluation and selection for each call*

- Deviations from the Evaluation Procedure described in Annex I?
- Number of applications/How many eligible/ineligible?
- Dates when the evaluation & selection took place
- Call opening – Call closing
- Names and Affiliations of experts involved (From which countries? Gender? Sectors?)
- Was the evaluation done remotely or onsite?
- Was there a briefing of the experts?
- Number of experts evaluating each proposal?
- Number of proposals passing/failing evaluation
- Number of fellows finally selected under the specific Call (and in the reserve list, if relevant).



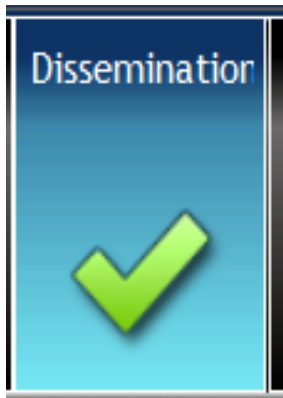
Deliverables

Deliverables Foreseen

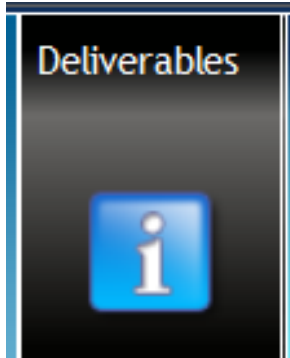
3.- *Report on dissemination activities for each call*



- Dates of Call Publication and places where it was published (Supporting documents required)
- Flyers, brochures, or other information produced
- Presentations conferences and meetings or other events
- Published articles in the press
- Any other means of advertising the programme,
- Quantitative information, for instance. Number of: Conferences, Number of press releases, Flyers.

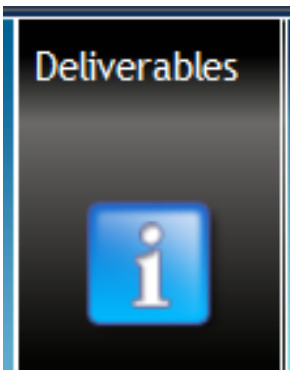


Deliverables Foreseen



4.- Call Publication

- Inform the Project Officer by sending the link to the **Euraxess** website where the Call has been published



5.- Report on training & career development

- Report on the trainings and career development activities after the end of each reporting period

Deliverables Foreseen

6.- Report on ethical issues

the ethics issues will be cleared during the implementation of the project, based on the Ethics reports (deliverables) which will be submitted by the coordinator

Deliverables



Continuous Reporting Module

SyGMA System for Grant Management

Project Continuous Report

MSCA-COFUND

THE FRAMEWORK PROGRAMME FOR RESEARCH AND INNOVATION
HORIZON 2020

Call: H2020-MSCA-COFUND-2014
Topic: MSCA-COFUND-2014-FP Unit: REA/A/04

| Deliverables | Publications | Dissemination | Patents (IPR) | Gender | Researchers |
|--------------|--------------|---------------|---------------|--------|-------------|
| | | | | | |

- Submit deliverables when they are due
- Publications
- Dissemination
- Patents
- Gender
- Researchers (researcher declarations)

Information to be entered in the IT tool at any time during the life of the project.

2. Periodic Reporting

Periodic Reporting

Periodic Report (within 60 days following the end of each reporting period)

- **Periodic technical report**
- **Periodic financial report**

Final Report (in addition to the periodic report for the last reporting period)

- **Final technical report**
- **Final financial report**

The periodic and final reports are submitted via the Funding & Tender Portal

Periodic Reports

Part A

- **Information imported from the continuous reporting module.**

Information entered in the
IT tool

Part B – narrative part

- **Explanation of the work carried out and overview of progress**

Objectives

Explanation of the work carried per Work Package

Impact

Explanations on **deviations** from DoA

Periodic Financial Report

Financial statement (Annex 4 to the GA)

A periodic summary financial statement including the request for payment

Information entered in the
IT tool

3. Mid-term Visits

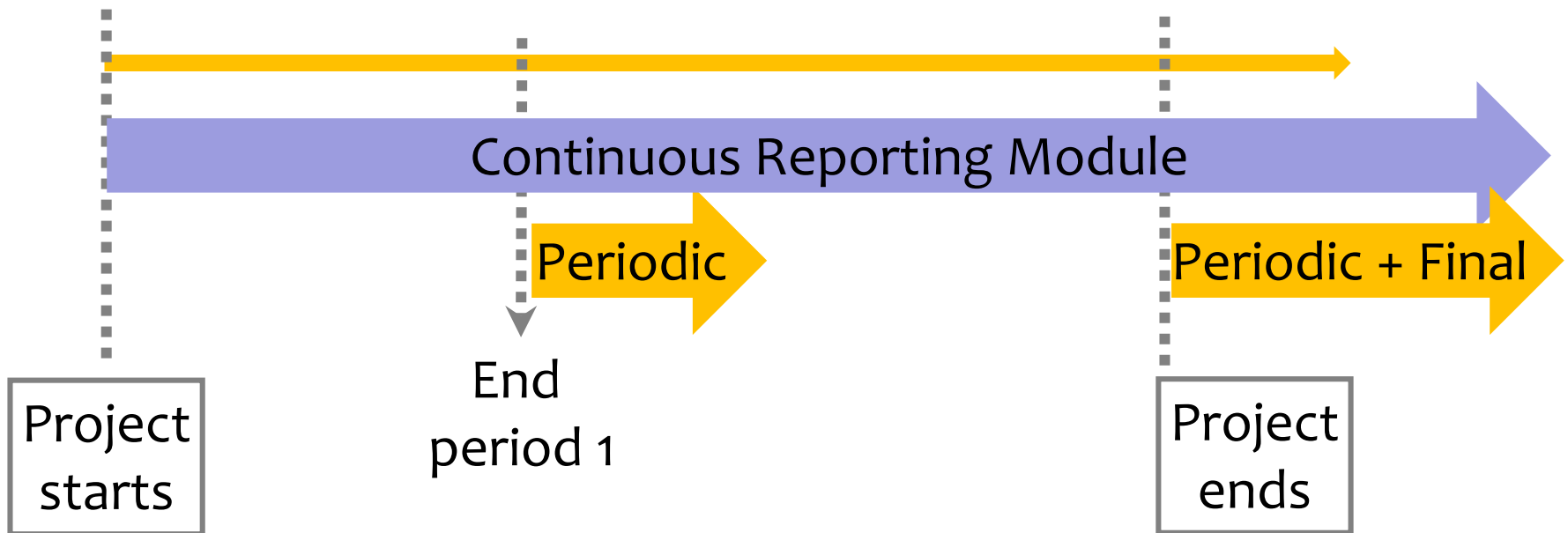
Mid-term Visits

- Expected between M20-M24
- Three levels of follow up:
 - a) **Scientific**
 - the objectives of the programme;
 - scientific highlights of the work so far
 - b) **Training**
 - follow up on the training programme
 - mobility patterns;
 - complementary skills
 - c) **Management**
 - recruitment status
 - financial aspects
 - any other issues/concerns
- Meeting between fellows and the project officer

4. IT Tools

How to – IT Tools

- Continuous reporting module
- Periodic reporting module



Funding & tender Portal



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

English

Register

Login



SEARCH FUNDING & TENDERS

HOW TO PARTICIPATE

PROJECTS & RESULTS

WORK AS AN EXPERT

SUPPORT

select programme

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

Find calls for proposals and tenders

Search calls for proposals and tenders by keywords, programmes...

Search

EU Programmes

3rd Health Programme (3HP)

Asylum, Migration and Integration Fund (AMIF)

Consumer Programme (CP)

Creative Europe (CREA)

European Defence Industrial Development Programme (EDIDP)

EU Aid Volunteers Programme (EUAID)

Erasmus+ Programme (EPLUS)



Funding & tender Portal



Funding & tender opportunities

Single Electronic Data Interchange Area (SEDIA)

Manage my area

My Organisation(s)

GRANTS

My Project(s)

My Formal Notification(s)

SEARCH FUNDING & TENDERS

HOW TO PARTICIPATE

PROJ...

The Proposals Submission system is currently experiencing technical issues.

Funding & tender opportunities (the Single Electronic Data Interchange Area (SEDIA)) is available for all participants and experts in funding programmes of the European Commission and other EU bodies.

Funding & tender Portal

The screenshot displays a project record with the following details: NaMeS, H2020-MSCA-COFUND-2015, H2020, 711859, and Active. Below the record is a pagination control showing page 1 of 10. An 'Actions' dropdown menu is open, listing 'Project Consortium', 'Manage Project', and 'View Proposal'. The 'Actions' button and the dropdown menu are highlighted with a red box.

NaMeS H2020-MSCA-COFUND-2015 H2020 711859 Active

Project Consortium
Manage Project
View Proposal

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- Click on



- Choose Manage Project

Funding & tender Portal

Activated at the time project starts

RESEARCH & INNOVATION

Help

European Commission

Participant Portal - Grant Management Services

Marianne PAREZ

MY PROJECT

HORIZON 2020

Call: H2020-ICT-2014-1
Type of Action: RIA
Acronym: SNIFFPHONE
Current Phase: Grant Management
Number: 644031
Duration: 42 months
Start Date: 15 Feb 2015
Estimated Project Cost: €5,806,455.00
Requested EU Contribution: €5,806,455.00
Contact: [Henri RAJBENBACH](#)

Latest Legal Data

Process List

Document Library

Communication Center

H2020 ONLINE MANUAL

HOW TO

Launch new interaction with the EU +



Continuous Reporting
644031 - SNIFFPHONE

01 Feb 2015



Started



Completed



Continuous reporting data



Process specific documents



Process specific communications



Proposal Management & Grant Preparation
644031 - SNIFFPHONE

23 Apr 2014



Submitted



Informed



Invited



Prepared



Signed



Paid



Process specific documents



Process specific communications

Funding & tender Portal

Activated at the end reporting period

RESEARCH & INNOVATION
Participant Portal - Grant Management Services

Help

Paolo RUGGERI

MY PROJECT

HORIZON 2020

Call: H2020-Adhoc-2014-20
Type of Action: CSA
Acronym: SMEINNOAUSTRIA
Current Phase: Grant Management
Number: 643298
Duration: 6 months
Start Date: 2014-07-01
Estimated Project Cost: €113,007.50
Requested EU Contribution: €90,406.00
Contact: Erwan LE GUEN

Latest Legal Data
Process List
Document Library
Communication Center

H2020 ONLINE MANUAL

HOW TO

Launch new interaction with the Service +

Periodic Reporting
REP-643298-1 - period 07/2014 > 12/2014
01/01/2015
Draft Submitted Reviewed Paid

Periodic Report 1 projectNo 643298 composition

Process specific documents
Process specific communications

Continuous Reporting
643298 - SMEINNOAUSTRIA
01/07/2014
Started Completed

Continuous reporting data

Process specific documents
Process specific communications

Proposal Management & Grant Preparation
643298 - SMEINNOAUSTRIA
10/04/2014
Submitted Informed Invited Prepared Signed Paid

Process specific documents
Process specific communications

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European Commission

Periodic Reporting Module

- Beneficiaries complete on-line the financial statements
- The coordinator will be able to upload the Part B of the periodic technical report (narrative part)

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 Periodic report.

The periodic technical report will be 'locked for review' by the coordinator before its submission. Make sure the information in the continuous reporting module is up-to-date before the periodic report is 'locked for review'. Updates entered after this step will be included in the periodic report of the following period.



Periodic Reporting Module - Steps

1. The beneficiary receives a notification and logs on to the Funding & Tender Portal.
2. The beneficiary completes the Financial Statement and the Technical Part of the Periodic Report. Then e-signs and submits the Financial Statements to the Coordinator.
3. The Coordinator approves the elements of the Periodic Report & submits to the EU Services.
4. The EU Services review the submitted Periodic Report and accept or reject it.
5. Interim Payment

Summary of the process (submission Periodic Reports)

Beneficiaries (including the coordinator)

Financial statement: Type



Technical Report: Type

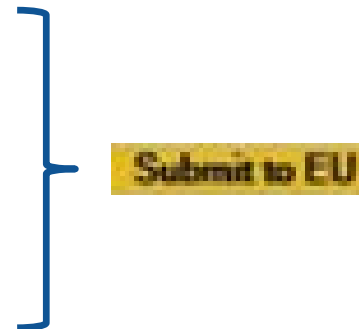


Coordinator

Financial statements: Check



Technical Report: Check



Thank you