



iPAAC JA

Technical Periodic Reports – Requirements

Luxembourg, 17 April 2018

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Health and Food Safety Unit

European Commission


Consumers, Health, Agriculture and Food Executive Agency (Chafea)

Overview


The **periodic reporting** process consists of several phases:

- 1. Logging in to the Participant Portal when you have received a notification.**
- 2. Completing the report.**
- 3. Submitting the report to the EU.**
- 4. The EU assess the report.**
- 5. The EU perform the Final Payment.**

Continuous reporting


SyGMA
System for Grant Management

Project Continuous Report




Call: HP-JA-2014
Topic: JA-05-2014


HP-PJ

Unit: CHAFAE/B


Summary for publication




Deliverables




Milestones



Critical Risks



HP_PX



Deliverables

WP No	Del Rel. No	Del No	Title	Lead Benefici	Nature	Dissemination Lev	Est. Del. Date (an)	Receipt Date	Approval Date	Status
WP1	D1.1	D1	Interim report (ATNA	Report	Public	30 Apr 2016			
WP1	D1.2	D2	Interim report (ATNA	Report	Public	30 Apr 2017			
WP1	D1.3	D3	Governance Ma	ATNA	Report	Confidential, or	31 Oct 2015			
WP1	D1.4	D4	Final report (D1	ATNA	Report	Public	30 Apr 2018			

Step 1 – Notification & Login

The coordinator receives a notification and log on to the Participant Portal to complete:

- **The Financial Statement**
- **The the Technical Part of the Periodic Report**



RESEARCH & INNOVATION

Participant Portal

European Commission > Research & Innovation > Participant Portal > My Projects

MY AREA HOME FUNDING OPPORTUNITIES HOW TO PARTICIPATE PROJECTS & RESULTS EXPERTS SUPPORT ▾

HRISTINA MILEVA

My Organisation(s)

My Proposal(s)

My Project(s)

My Notification(s) **494**

My Formal Notification(s)

My Expert Area

My projects

FP7 REF. DOCS

H2020 ONLINE MANUAL

HOW TO

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



Access Amendment



Grant Preparation



Manage Projects



Financial Reporting



Periodic Reporting



Reporting & Deliverables



Project Consortium



View Proposal

Show 10 entries



☐ Hide closed projects

Search:

ACRONYM	CALL	PROGRAM	PROJECT	PHASE	ACTIONS
	HP-ADHOC-2014-	3HP	724161	Active	



European
Commission

RESEARCH & INNOVATION

Help

Participant Portal - Grant Management Services

abc DEF

MY PROJECT



Call: H2020-SCC-2015

Type of Action: CSA

Acronym: 119261 TEST [ABAC:
ABACBUDL]

Current Phase: Grant
Management

Number: 119261

Duration: 36 months

Start Date: 17 Jan 2010

Estimated Project Cost:
€819.00

Requested EU Contribution:

€20.00

Contact: [Genevieve VALLIER](#)

Latest Legal Data

Process List

Document Library

Communication Center

H2020 ONLINE MANUAL



Launch new interaction with the EU +



Periodic Reporting
REP-119261-1 - period
17/01/2010 > 16/07/2011

14 Mar 2017



Draft

15 Sep 2011
(2068/60 days)



Submitted



Paid



Technical Part contribution

Lock for review



Financial Statement AST [PIC 973276467] drafting

Lock for review



Periodic Report composition

Submit to EU



Process specific documents



Process specific communications



Continuous Reporting
119261 - 119261 TEST [ABAC:
ABACBUDL]

14 Mar 2017



Started



Completed



Continuous reporting data



Process specific documents



Process specific communications



**Proposal Management & Grant
Preparation**
119261 - 119261 TEST [ABAC:
ABACBUDL]

01 Mar 2017



Submitted



Informed



Invited



Prepared



Signed




Paid

13 Apr 2017
(1/30 days)




GA Declaration - GAP-119261 - 973276467 signature by other
beneficiaries

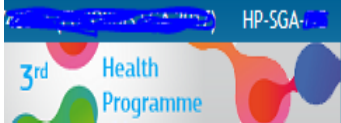
Technical report



Grant
Management

milevhr (EXTERN)








HP-SGA-...


Period No: 1 Duration (months): 12


Reporting Period : [01 Jan 2017 - 31 Dec 2017]


Summary for publication


Deliverables Ethics, DMP, Other Reports




Milestones


Critical Risks


Questionnaire (HP_SGA_OG)


Tech.Report (Part B)


Technical Report (Part B)

Number ▲	Attachment	Actions	Template
1	Explanation of the work - Overview of progress	No file selected  Upload	

1. Description of the activities carried out during the reporting period in line with Annex 1 to the Grant Agreement:

- Main activities carried out including methods and means
- Coordination with other projects or activities at European, National and International level
- Project Coordination
- Financial management

2 Overview of the project results compared with the objectives of the action in line with the structure of Annex 1 to the Grant Agreement including summary of deliverables and milestones.

3. Project Results and Visibility

- Target groups
- Dissemination activities during and after the project
- Project website
- Major problems and lessons learned
- Further use of the project results
- Recommendations

4. Overview of the dissemination activities

- Strength of the dissemination activities
- Weaknesses of the dissemination activities
- (if applicable) Update of the plan for dissemination of results

5. Overview of the evaluation activities and results

- Process evaluation
- Output evaluation
- Outcome evaluation

6. Objectives

- List the specific objectives for the project and describe the activities carried out during the reporting period towards the achievement of each listed objective.

7. Description of the activities carried per WP

- Work Package 1
- Work Package 2
- Work Package

Describe the activities carried out in all WPs during the reporting period giving details of the work carried out.




8.Deviations from Annex 1

Explanations for tasks not fully implemented, specific objectives not fully achieved and/or not being on schedule, deliverables and milestones. Explain the reasons for deviations from Annex 1, the consequences and implemented corrective actions.

MY PROJECT





Call: H2020-SCC-2015
Type of Action: CSA
Acronym: 119261 TEST [ABAC:
ABACBUDL]
Current Phase: Grant
Management
Number: 119261
Duration: 36 months
Start Date: 17 Jan 2010
Estimated Project Cost:
€819.00
Requested EU Contribution:
€20.00
Contact: [Genevieve VALLIER](#)

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

H2020 ONLINE MANUAL



Launch new interaction with the EU 

**Periodic Reporting**
REP-119261-1 - period
17/01/2010 > 16/07/2011



14 Mar 2017



15 Sep 2011
(2068/60 days)



Draft


Submitted


Paid


 Technical Part contribution


 Financial Statement AST [PIC 973276467] drafting


 Periodic Report composition


 Lock for review

 Lock for review

 Submit to EU

 Process specific documents



 Process specific communications


**Continuous Reporting**
119261 - 119261 TEST [ABAC:
ABACBUDL]


14 Mar 2017

Started

Completed

 Continuous reporting data

 Process specific documents

 Process specific communications

**Proposal Management & Grant
Preparation**
119261 - 119261 TEST [ABAC:
ABACBUDL]

01 Mar 2017

13 Apr 2017
(1/30 days)

Submitted

Informed

Invited

Prepared

Signed


Paid

 GA Declaration - GAP-119261 - 973276467 signature by other beneficiaries

 Process specific documents

 Process specific communications


Step 2. Completing the report – technical part



Periodic Reporting
REP-896821-1 - period 01/2014
> 07/2015


10 Jul 2015

Draft Submitted Reviewed Paid




Technical Part of Periodic Report contribution

Lock for review




Periodic Report 1 projectNo 896821 composition

Submit to EU




Process specific documents



Process specific communications


Step 2. Completing the report – technical part



Periodic Reporting
REP-896821-1 - period 01/2014
> 07/2015


10 Jul 2015

Draft Submitted Reviewed Paid



Technical Part of Periodic Report review

Unlock to draft Accept & Include



Periodic Report 1 projectNo 896821 composition

Submit to EU

Process specific documents

Process specific communications

Step 2. Completing the report – technical part

Who can complete the technical part of the periodic report?

Coordinator Contact; Task Manager; Project Financial Signatory

Who can lock the technical report for review and accept it?

Coordinator Contact



RESEARCH & INNOVATION

Participant Portal - Grant Management Services

Help

abc DEF

MY PROJECT



Call: H2020-SOC-2015
Type of Action: CSA
Acronym: 119261 TEST [ABAC: ABACBUDL]
Current Phase: Grant Management
Number: 119261
Duration: 36 months
Start Date: 17 Jan 2010
Estimated Project Cost: €819.00
Requested EU Contribution: €20.00
Contact: Genevieve VALLIER

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HOW TO

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Periodic Reporting
REP-119261-1 - period 17/01/2010 > 16/07/2011

14 Mar 2017 15 Sep 2011 (2068/60 days)

Draft Submitted Paid

- Technical Part contribution Lock for review
- Financial Statement AST [PIC 973276467] drafting** Lock for review
- Periodic Report composition Submit to EU

Process specific documents

Process specific communications

Continuous Reporting
119261 - 119261 TEST [ABAC: ABACBUDL]

14 Mar 2017

Started Completed

- Continuous reporting data

Process specific documents

Process specific communications

Proposal Management & Grant Preparation
119261 - 119261 TEST [ABAC: ABACBUDL]

01 Mar 2017 13 Apr 2017 (1/30 days)

Submitted Informed Invited Prepared Signed Paid

- GA Declaration - GAP-119261 - 973276467 signature by other beneficiaries

Process specific documents

Process specific communications

Grant
Management

Project Periodic Report

Project 666098 (666098 REPA Testing REA 7)

HORIZON 2020

Period No: 1 Duration (months): 18

Reporting Period : [10/06/2012 - 09/12/2013]

Beneficiary 1: shortname for 999997930

Legal Name: CENTRE NATIONAL DE LA RECHERCHE SCIENTIFIQUE

PIC: 999997930

Status: VALIDATED

Legal Address: Rue Michel -Ange 3 , 75794 , PARIS France

Financial
Statement

Financial Statement

SAVE

Financial information from contact

No contribution requested?

☐ Yes ☒ No

Financial Statements

Period	Adjustment	Requested Contribution
10/06/2012 - 09/12/2013 (Period No '1')	No	0.00 €

Financial Statement for period '1' (10/06/2012 - 09/12/2013)

Eligible costs:

Cost Category	Total	Actions
a) Direct personnel costs declared as actual costs	0.00 €	
b) Direct personnel costs declared as unit costs (average costs)	0.00 €	
d) Direct costs of subcontracting	0.00 €	
e) Direct costs of providing financial support to third parties	0.00 €	
f) Other direct costs	0.00 €	
h) Indirect costs (= 0.25 * (a + b + f - o))	0.00 €	
j) Total costs (= a + b + d + e + f + h)	0.00 €	
m) Maximum EU contribution (100%)	0.00 €	
n) Requested EU contribution	0.00 €	
z) Requested EU contribution eligible for CFS	0.00 €	

Detailed financial statement under "breakdown of direct costs" – template can be downloaded

Upload supporting documents for equipment, subcontracting and contributions received from 3rd parties

Eligible costs:

Cost Category
a) Direct personnel costs declared as actual costs
b) Direct costs of subcontracting
c) Other direct costs
d) Indirect costs (= $0.07 * (a + b + c)$)
e) Total costs (= $a + b + c + d$)
f) Income generated by the action
g) Financial contributions given by third parties to the beneficiary
h) Receipts (= $f + g$)
j) Requested EU contribution (project-level reimbursement rate:50%)

Breakdown of direct costs:

 [View document](#)

 [Download template](#)

Invoices related to these Financial Statements:

 [View document](#)

Periodic Reporting
REP-~~000130~~-1 - period 10/2013
> 03/2015

BETA Version

06/10/2014

Draft Submitted Reviewed Paid

Financial Statement ~~00041340~~ drafting

Lock for review

Technical Report contribution

Lock for review

Periodic Report 1 projectNo ~~000330~~ composition

Submit to EU

Documents

Messages

Periodic Reporting
REP-~~000130~~-1 - period 10/2013
> 03/2015

BETA Version

06/10/2014

Draft Submitted Reviewed Paid

Financial Statement ~~ADN-IT[PC 00041340]~~ signature and submission to coordinator

Unlock to draft Sign & Submit

Technical Report contribution

Lock for review

Periodic Report 1 projectNo ~~000330~~ composition

i

Documents

Messages

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

The screenshot shows the 'EU Login Signature' page of the European Commission Authentication Service. The header includes the European Commission logo and the text 'EUROPEAN COMMISSION AUTHENTICATION SERVICE (EU LOGIN)'. Below the header, there is a navigation bar with links for 'Change password', 'My Account', 'Help', and 'Logout'. The main content area is titled 'EU Login Signature' and features a globe icon. A message states: 'Welcome [user] to the EU Login Signature page. This page allows you to digitally sign a transaction using your EU Login password.' The transaction details are as follows:

- Sign a transaction for SyGma-PPGMS**
- Description:** Signature of the financial statement for 500603-500603 PROJECT 2016/10/28-5 [ABAC: ABACBUOL] as authorised representative of the legal entity .SERVICES BV
- Reason:** For signature

There are two input fields: 'Comment' and 'Password'. The 'Password' field is highlighted with a red border. Below the 'Password' field is a blue 'SIGN' button, also highlighted with a red border.

Step 2. Completing the report – Financial statement

**Who can draft the financial statement of the
periodic report?**

Coordinator Contact

**Who can sign and submit the financial
statement?**

Project Financial Signatory



RESEARCH & INNOVATION

Participant Portal - Grant Management Services

Help

abc DEF

MY PROJECT



Call: H2020-SOC-2015
Type of Action: CSA
Acronym: 119261 TEST [ABAC: ABACBUDL]
Current Phases: Grant Management
Number: 119261
Duration: 36 months
Start Date: 17 Jan 2010
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Requested EU Contributions: €20,00
Contact: Genevieve VALLIER

Latest Legal Data

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H2020 ONLINE MANUAL



HOW TO

Launch new interaction with the EU +

Periodic Reporting
REP-119261-1 - period
17/01/2010 > 16/07/2011

14 Mar 2017 15 Sep 2011 (2068/60 days)

Draft Submitted Paid

- Technical Part contribution Lock for review
- Financial Statement AST [PIC 973276467] drafting Lock for review
- Periodic Report composition** Submit to EU

Process specific documents

Process specific communications

Continuous Reporting
119261 - 119261 TEST [ABAC: ABACBUDL]

14 Mar 2017

Started Completed

- Continuous reporting data

Process specific documents

Process specific communications

Proposal Management & Grant Preparation
119261 - 119261 TEST [ABAC: ABACBUDL]

01 Mar 2017 13 Apr 2017 (1/30 days)

Submitted Informed Invited Prepared Signed Paid

- GA Declaration - GAP-119261 - 973276467 signature by other beneficiaries

Process specific documents

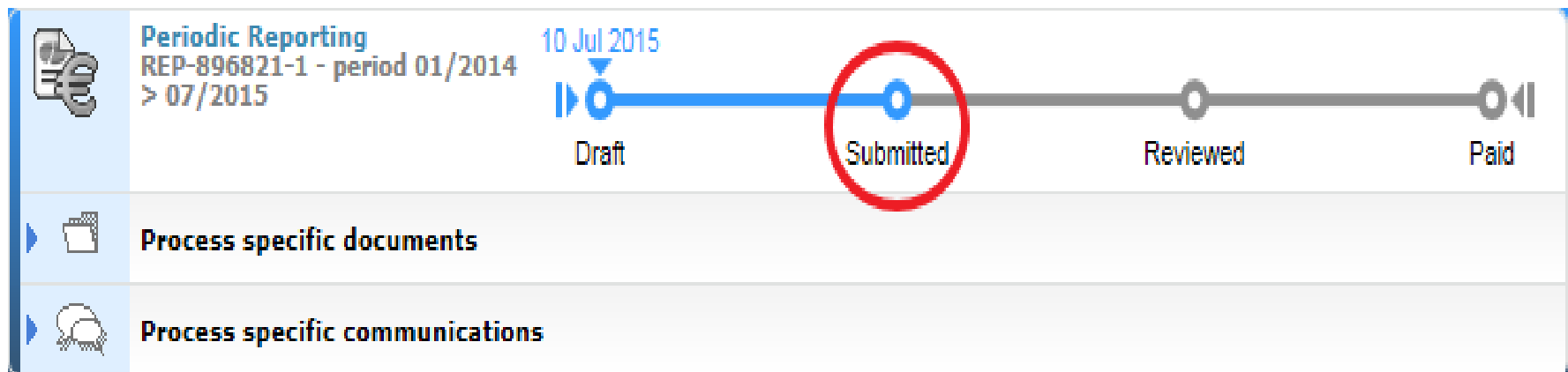
Process specific communications

Step 3: Submitting the report to the EU

The Coordinator approves the elements of the Periodic Report & submits to the EU

- The Coordinator reviews and approve the elements of the Periodic Report (Redo or Include)
- Validation of completeness and submission

Successfully submitted



Step 4: The EU assess the report

- The EU reviews the submitted Periodic Report and accepts, requests additional information or rejects it (60 days).
- The EU can request additional information in order to accept the Periodic Report. The Coordinator will be notified via the Participant Notification System. She/he should read the request letter and provide the requested information/documents.
- Rejection – the process described above starts again

MY PROJECT



Call: H2020-SCC-2014
 Type of Action: CSA
 Acronym: 114819 teaTEST
 [ABAC: ABACBUDL]
 Current Phase: Grant
 Management
 Number: 114819
 Duration: 36 months
 Start Date: 22 May 2015
 Estimated Project Cost:
 €819,00
 Requested EU Contribution:
 €20,00
 Contact: [Mario DIONISIO](#)

- [Latest Legal Data](#)
- [Process List](#)
- [Document Library](#)
- [Communication Center](#)

[H2020 ONLINE MANUAL](#)



Launch new interaction with the EU +



 Suspension Payment Deadline - REP-114819-1 - 1 to read and upload additional supporting documents

Upload


Complete

Process specific documents


Process specific communications




Write a message...

 EU requested additional supporting documents on 24 Nov 2016 12:03

 AST (POPESCU, Tiberiu) submitted the report on 23 Nov 2016 15:20

 EU made the periodic report available to the Coordinator on 23 Nov 2016 15:06

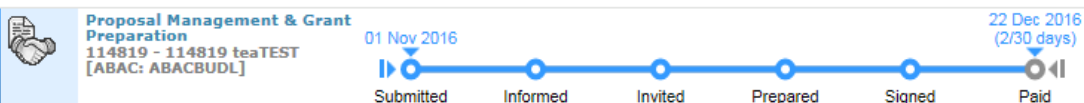
 EU launched the periodic reporting on 23 Nov 2016 15:05



 Continuous reporting data

Process specific documents

Process specific communications



Process specific documents

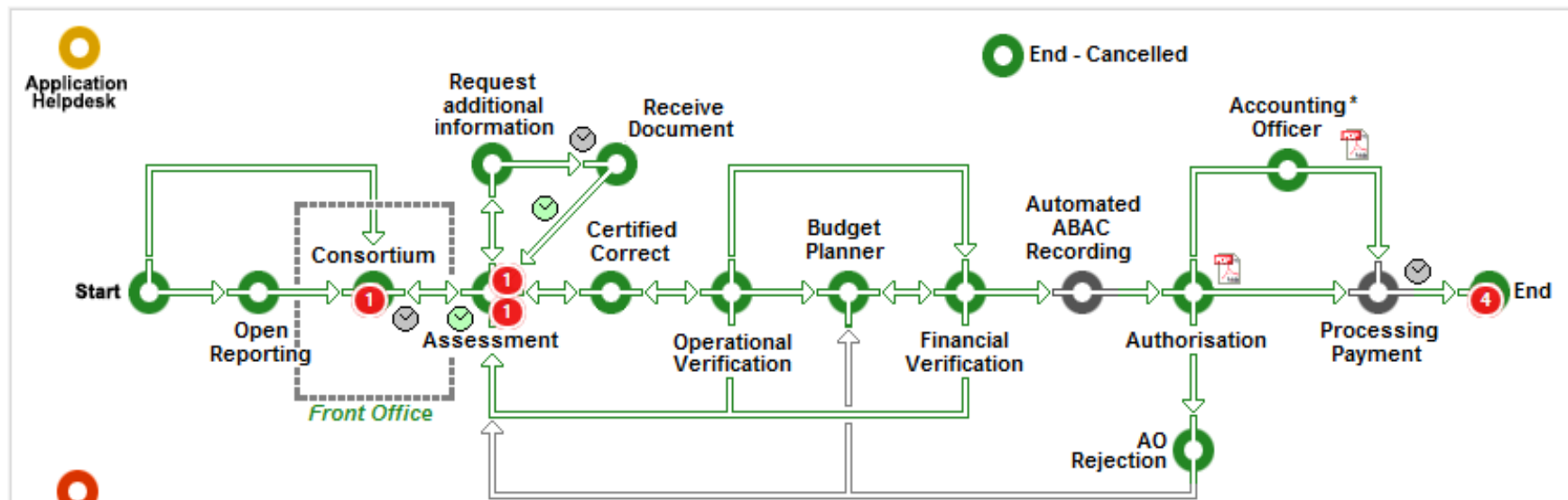
Process specific communications

Step 5: Notification, Payment, Finalisation

- After approval of the periodic report, EU pays to the coordinator and informs about the calculation (and rejections, if applicable) in the Participant Portal
- Rejection of ineligible costs:
 - ***The coordinator may within 30 days of receiving notification formally notify the Agency of his/her disagreement and the reasons why.***

Reporting and payment metroline

Reporting and Payment



Thank you for your attention!