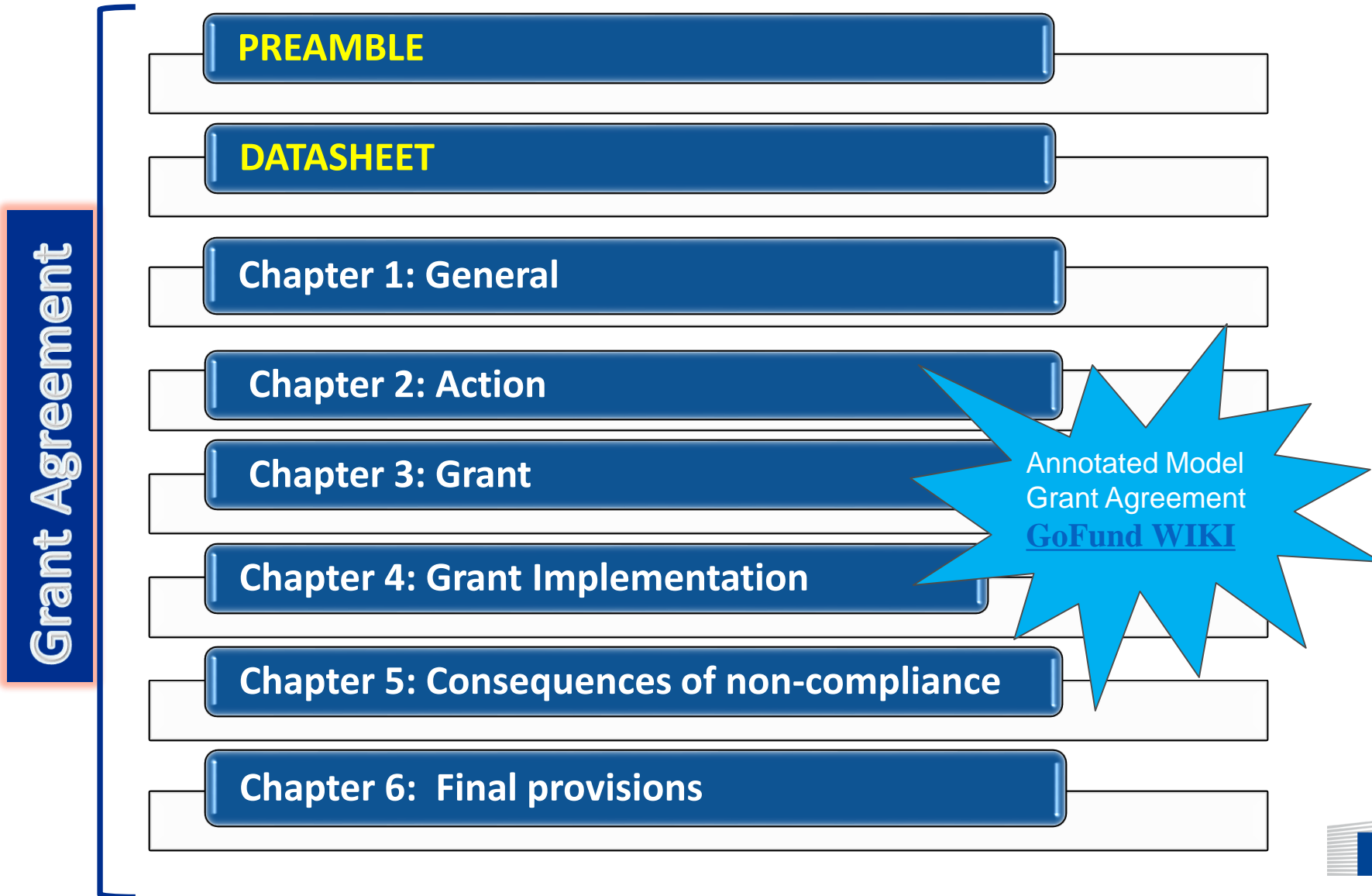




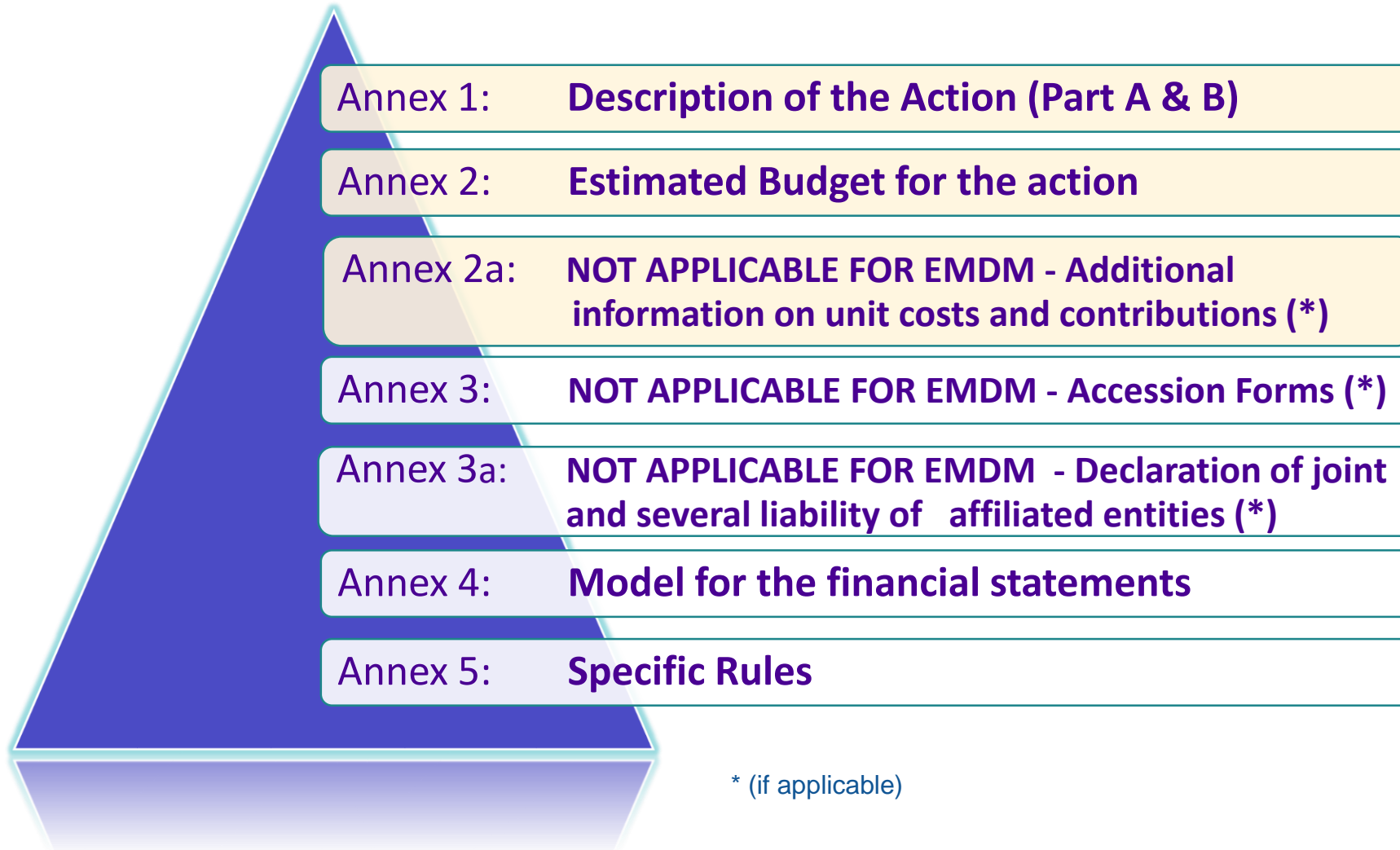
GRANT AGREEMENT Highlights

Kick off meeting 8 December 2022

Terms and Conditions of the Grant Agreement



Annexes To The Grant



* (if applicable)

SUPERIORITY – ART.37 INTERPRETATION OF THE AGREEMENT

- **Data Sheet** > over the rest of the Terms and Conditions
- **Annex 5** > over the Terms and Conditions
- **Terms and Conditions** > over the Annexes, other than Annex 5
- **Annex 2** > over Annex 1

DATA SHEET – KEY DATA

General Data

(e.g. Project number, name, type of action, start and end date and duration)

Participant

(e.g. Coordinator)

Grant

(e.g. Action grant, budget categories)
- Lump sum

Reporting, payment and recoveries
(e.g. Periodic reporting, payments/recoveries, bank account, etc.)

Consequences of non-compliance, applicable law & dispute settlement forum

Others
(e.g. Annex 5, record-keeping, audits and reviews, ect.); 3 years (EMDM)

CHAPTER 1 to 6 – KEY ARTICLES (1)

- ARTICLE 2 — DEFINITIONS
- ARTICLE 6 — ELIGIBLE AND INELIGIBLE CONTRIBUTIONS
- ARTICLE 11 — PROPER IMPLEMENTATION OF THE ACTION
- ARTICLE 17 — COMMUNICATION, DISSEMINATION AND VISIBILITY
- ARTICLE 21 — REPORTING
- ARTICLE 22 — PAYMENTS AND RECOVERIES — CALCULATION OF AMOUNTS DUE

CHAPTER 1 to 6 – KEY ARTICLES (2)

- ARTICLE 35 — FORCE MAJEURE
- ARTICLE 36 — COMMUNICATION BETWEEN THE PARTIES
- ARTICLE 38 — CALCULATION OF PERIODS AND DEADLINES

AUDIT



WHY?

For reasons of accountability

WHO?

Agency/Commission staff,
external auditors, European
Court of Auditors

WHEN?

Up to 3Y after the end of project
implementation

WHERE?

In your premises

HOW?

Checking supporting
documentation

**ARTICLE 25 —
CHECKS,
REVIEWS, AUDITS
AND
INVESTIGATIONS
— EXTENSION OF
FINDINGS**

Amendments

Requested by CONSORTIUM



Amendments (1/2) - (Article 39)

- The party requesting an amendment must submit a request for amendment signed directly in the Portal Amendment tool.
- The coordinator submits and receives requests for amendment on behalf of the beneficiaries
- The request for amendment must include: - the reasons why and the appropriate supporting documents;
- The amendment (AMD) must be signed for 45 days from the receiving of the notification; the deadline may be extended or the AMD could be rejected;

Amendments (2/2) - (Article 39)

- Request to be submitted before the end of the action & sufficiently in advance
- Enters into force on the day of the signature of the receiving party

NOT NEEDED :

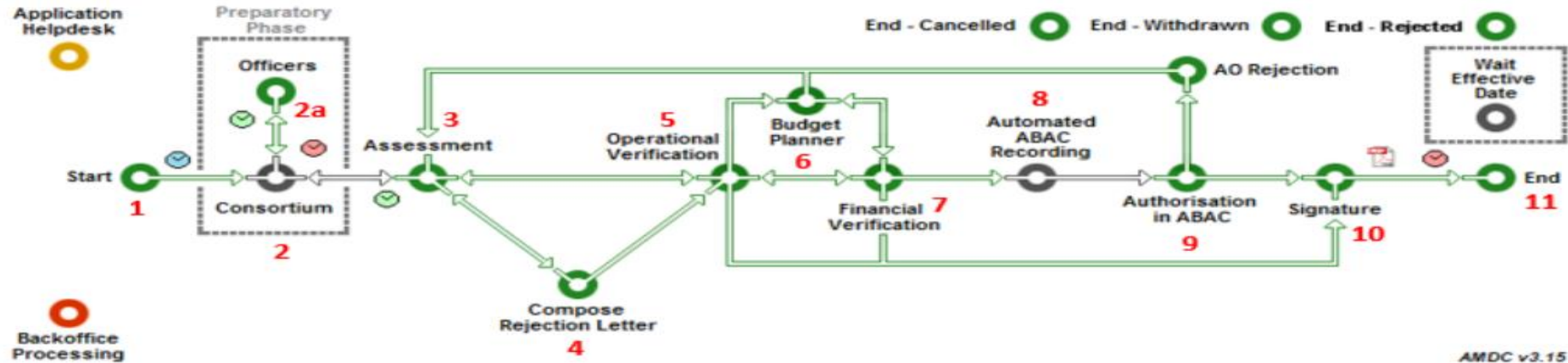
- Example: name & address of the organization, legal form, etc. but obligation to update information in the participant portal

NEEDED:

- extension of eligibility period, bank account, ..
- Significant changes in planned activities / deliverables.

Amendments Main Steps

Amendment - Consortium Request



Step 1. Launch the Amendment preparation in the F&T Portal

- The Coordinator logs in to the F&T Portal

[How to launch an amendment - IT How To - Funding Tenders Opportunities \(europa.eu\)](#)

[Amendments - Online Manual - Funding Tenders Opportunities \(europa.eu\)](#)

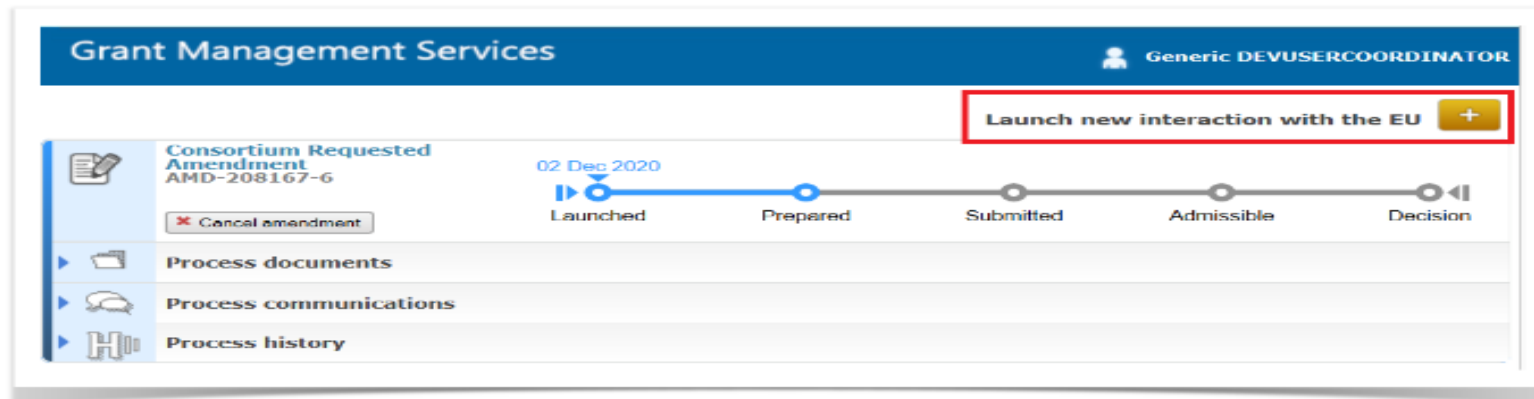
- Good practice if you have doubts: prior to the launch of your Amendment, contact your PO via a PNS (Participant Notification System)

Amendments Main Steps

• Step 2: The Coordinator launches the amendment request, prepares all data and sends to the EU for review

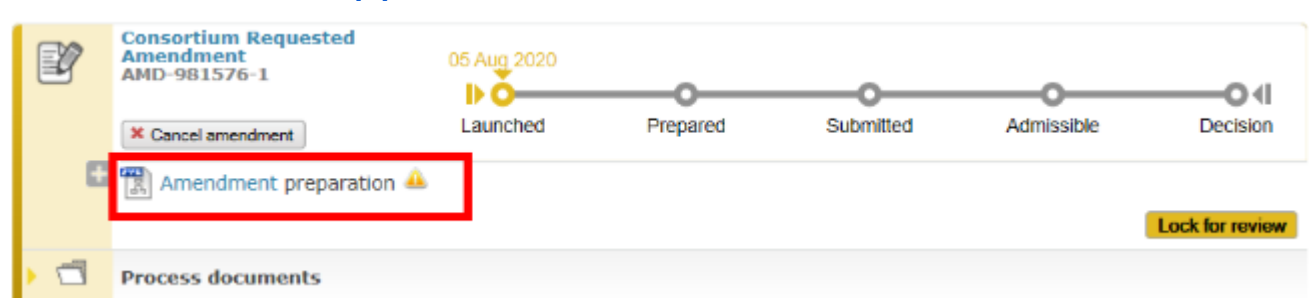
- a. Launching a new interaction with the Service.

❗ Only the Coordinator Contact Person can perform this action.



The screenshot shows the 'Grant Management Services' interface for a user named 'Generic DEVUSERCOORDINATOR'. A red box highlights a yellow button labeled 'Launch new interaction with the EU' with a plus sign. Below this, a card for 'Consortium Requested Amendment AMD-208167-6' is shown with a progress bar. The progress bar has five stages: 'Launched' (active, dated 02 Dec 2020), 'Prepared', 'Submitted', 'Admissible', and 'Decision'. A 'Cancel amendment' button is visible. On the left, there are menu items: 'Process documents', 'Process communications', and 'Process history'.

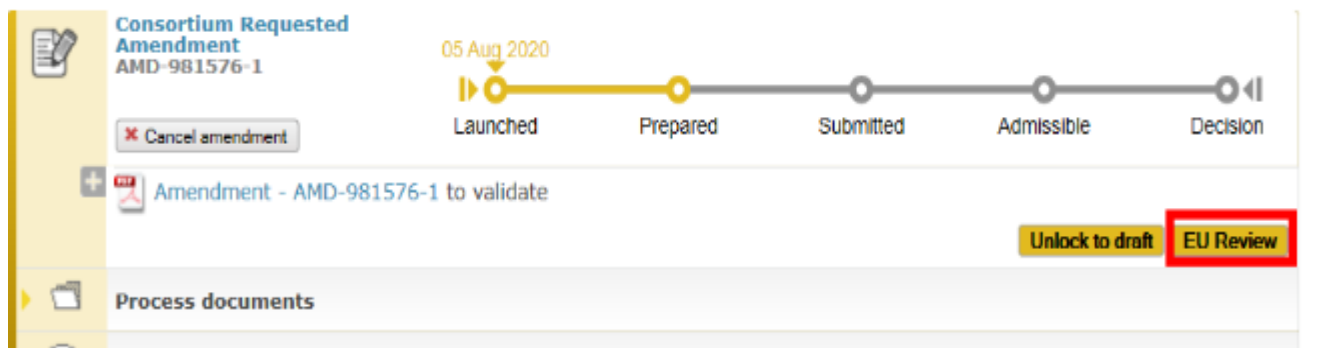
- b. Preparing the amendment data. – the task will be available, as soon as the button Lock for Review appears.



The screenshot shows the 'Grant Management Services' interface for a user named 'Generic DEVUSERCOORDINATOR'. A red box highlights a yellow button labeled 'Amendment preparation' with a warning icon. Below this, a card for 'Consortium Requested Amendment AMD-981576-1' is shown with a progress bar. The progress bar has five stages: 'Launched' (active, dated 05 Aug 2020), 'Prepared', 'Submitted', 'Admissible', and 'Decision'. A 'Cancel amendment' button is visible. At the bottom right, there is a yellow button labeled 'Lock for review'. On the left, there is a menu item: 'Process documents'.

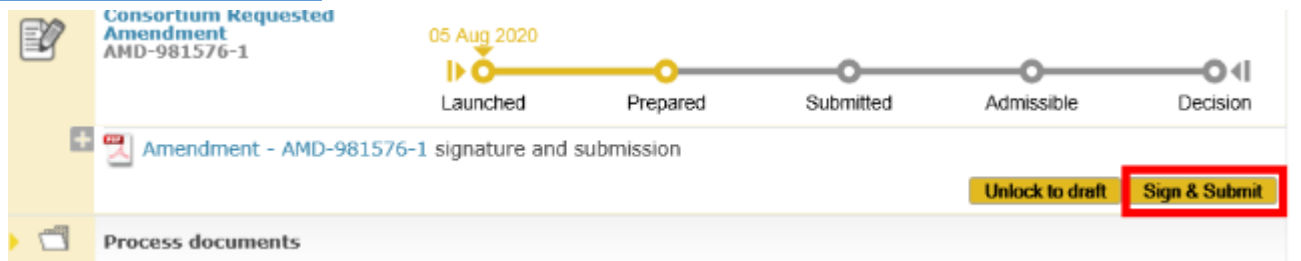
Amendments Main Steps

- [c. Locking the amendment request for review](#)
- [d. Sending the amendment request for review by the EU](#)
 - [Option: cancel amendment](#)



• [Step 2: The EU Services review the amendment request \(mandatory\)](#)

• [Step 3: The Project Legal Signatory signs and submits the amendment request to the EU Services after the EU review](#)



Amendments Main Steps

- Step 4: The EU Services assess the amendment.

- The EU Services have 45 days to assess the request.

- Once the request has been assessed, the process goes to the status **Admissible**



- Step 5: The EU Services accept (countersign the amendment) or reject (make available a rejection letter).

- On completion of the assessment, the amendment is accepted or rejected and countersigned by the EU. The metro line moves to the status decision

SYGMA SCREEN

The screenshot displays the SYGMA interface for project 667980 (CARAT). The top navigation bar includes 'Grant Management' and 'Amendments of Grant Agreement Data'. A row of tabs is visible, with 'Project Summary' highlighted in red. Below the tabs, the 'Project Summary' section shows project details: 'Project 667980 (CARAT) - SIGNED (IN FORCE)', 'Responsible Unit: RTD/E/05', 'Call: H2020-PHC-2014-2015 submitted for H2020-PHC-2015-two-stage / 21 Apr 2015', 'Topic: PHC-16-2015 - Tools and technologies for advanced therapies', 'Type of Action: RIA', and 'Duration: 48'. The 'Important Dates' section lists 'Entry into force of the Grant: 08/12/2015', 'Project Start Date: 01/01/2016', and 'Project End Date: 31/12/2019'. The 'Amendment Information' section, also highlighted in red, shows 'Number: (number will be automatically assigned as soon as the amendment is signed by both parties)', 'Reference: AMD-667980-8', and 'Type: CR (Consortium Requested)'. The 'Budget Information' section shows 'Proposal overall costs: 5,989,158.75 €', 'Maximum grant amount after evaluation: 5,989,158.75 €', 'Total costs (including non-EU funded): 5,989,158.75 €', 'Total Costs: 5,989,158.75 €', and 'Maximum Grant Amount: 5,989,158.75 €' with a progress bar at 100.00% of total costs. The 'Officers' section is partially visible at the bottom. A 'Validate' button is located at the bottom right of the screen.

667980 (CARAT) RIA
Reference: AMD-667980-8
Type: CR (Consortium Requested)

Project Summary Amendment Information Beneficiaries General Information Reporting Periods GA Information GA Options Financial Information

DOCUMENTS

Project Summary

Project 667980 (CARAT) - SIGNED (IN FORCE)

Responsible Unit: RTD/E/05
Call: H2020-PHC-2014-2015 submitted for H2020-PHC-2015-two-stage / 21 Apr 2015
Topic: PHC-16-2015 - Tools and technologies for advanced therapies
Type of Action: RIA
Duration: 48

Important Dates:
Entry into force of the Grant: 08/12/2015
Project Start Date: 01/01/2016
Project End Date: 31/12/2019

Amendment Information:
Number: (number will be automatically assigned as soon as the amendment is signed by both parties)
Reference: AMD-667980-8
Type: CR (Consortium Requested)

Budget Information:
Proposal overall costs : 5,989,158.75 €
Maximum grant amount after evaluation : 5,989,158.75 €
Total costs (including non-EU funded) : 5,989,158.75 €
Total Costs: 5,989,158.75 €
Maximum Grant Amount: 5,989,158.75 € 100.00 % of total costs

Officers:

Validate

Consortium makes all the **needed changes:** (e.g.. change Start date, duration,) in the related tabs

At least one modification has to be done

THE MOST COMMON AMENDMENTS

- Change of the bank account for payments
- Change of Contact person - PCoCo change by the PO
- The following changes of project data will automatically trigger the setting of the "Change of annex 1" type:
 - Any change to Work Package
 - Any change to Deliverable – example changes in the dissemination level or content
 - Any change to Milestones
 - Change of the project name, project acronym
 - Change of the project duration
 - Change of reporting period

CHANGES WITHOUT AMENDMENT

Certain data changes which do not require a formal amendment:

- **AMD Information Procedures** – examples:
 - change of legal entity data (name, address, VAT);
 - change of bank account info (bank name, branch address or bank account holder),

[AMD Information Procedures - GoFund - Confluence \(europa.eu\)](#)

- Change of the deliverable due date;

Thank you



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