Grant Agreement Preparation

Presentation for the Beneficiaries

EACEA October 2021
Contents

• Overview of the process and context
• Before we start: useful resources for support
• The steps (end to end)
This presentation will focus on the ‘iterative process’ between you, as a Project Coordinator, and the Project Officer of the Agency.
Useful resources for support

More detailed information can be found on the Funding & Tender Portal under the Support tab by following this link.

Tjis presentation is based on the IT How to.
Useful resources for support

Manage Your Grant

Grant Preparation
How to access your project

1. Login
2. Access Projects
3. My Project(s)
4. Manage Projects
Grant Agreement Data Preparation and Submission

The Coordinator clicks on **Grant agreement data preparation** to edit and complete the necessary form. (1/3)
And the person in the organisation that has the role ‘PLSIGN’ signs the Declaration of Honour (DoH) electronically. (2/3)

Please note that if there are Affiliated Entities (Linked Third Parties) in the Consortium, the responsible Beneficiary will have a separate task for the DoH for each Affiliated Entity (you can find more information by following this link).
NB: for multi-beneficiaries Agreements, each one of them will have to sign. (3/3)
Grant Agreement Data Preparation and Submission Documents

Once the Coordinator has clicked the Grant Agreement Data preparation task, he or she can complete the necessary forms in the Grant Management Services tool, which opens with the **Project Summary screen**.
Grant Agreement Data Preparation and Submission Documents

The following *annexes* need to be uploaded under **Documents**:

Annex 1 - Description Of Action (part B) (mandatory)

Documents at this stage are ‘under construction’
Once the grant has been signed, the ‘entry into force date of the grant’ will also be displayed.
Grant Agreement Data Preparation and Submission Beneficiaries screens

The **Coordinator** and the **Beneficiaries** are automatically listed after receiving the invitation letter.

Please check all missing information and warnings.
You are invited to hover along the screens and check the data (could be outdated).

‘Read-only’ data is validated (or to be validated) by the EU Validation team.
The Project Coordinator will appear as the contact person.

**The legal signatory** is selected in the Portal, under Manage Consortium.
The **Project General Information** is automatically listed after receiving the invitation letter.

The **start date** needs to be completed.
In case it's a specific date, a justification needs to be provided.
Grant Agreement Data Preparation and Submission

Reporting Period

The **Project Reporting Periods** will be available.

The default reporting option is established in the call and will be displayed accordingly.

These reporting periods are linked to a payment.

This can be changed ONLY by the EU officer if necessary.
The **Project Grant Agreement Information** will be available and is read-only.

Any missing fields will be completed by the EU officer.
The **Project Grant Agreement Options** will be available and are read-only.

Any missing fields will be completed by the EU officer.

These options are those that will appear in the Agreement (see earlier slide on Documents).
For projects being funded through a **Budget Based mechanisms** the Project Financial Information is automatically listed after receiving the invitation letter:

Check whether the budget table is correct and whether all cost categories are present.
Grant Agreement Data Preparation and Submission

Project Financial Information (for Lump Sum funding)

For projects being funded through a **Lump Sum** mechanism, the Project Financial Information is ‘empty’.

You will have to **set up the Work Packages first** and associate the appropriate budget amount.

The system will build up the table automatically.
Grant Agreement Data Preparation and Submission

Project LF Overview

The Project LF Overview will be available and is read-only.

It gives the legal and financial situation of each beneficiary of the project.
The **Project Work Packages** are not automatically listed after receiving the invitation letter.

- Complete all necessary work packages.
- Please note that you can change the order of the work packages by dragging and dropping.
- Please reuse the naming and the order as declared in the application (easier to follow-up and cross-check).
The **Project Deliverables** are not automatically listed after receiving the invitation letter.

- Complete all necessary Deliverables.
- Please note that you can change the order by dragging and dropping.
- Please reuse the naming and the order as declared in the application.
The **Project Deliverables** are not automatically listed after receiving the invitation letter.

- Please edit the description
- Insert also the links of the deliverables once these have been set (see following slides).
Grant Agreement Data Preparation and Submission
Project Milestones and Critical Risks

Although not Mandatory, please insert both Milestones and Risks as per your Application.
Once all forms have been completed, the **Coordinator** clicks the **Submit to EU** button.
Some other support resources (1/2)

Support overview (europa.eu)
Some other support resources (2/2)

- Walk through all the steps to get your LEAR Approved
- How to manage the roles in your project