FAQ on Beneficiary Register, organisation data management and SME-self-assessment

- **What does the Beneficiary registration tool of the Participant Portal provide?**

  The Beneficiary Register, hosted by the Participant Portal (PP), allows participants to **register and submit their legal and financial data** electronically to the Commission. LEARs/Account Administrators, as well as self-registrants, will be able to **update the legal- and financial data** of their organisation. Once data is validated, only LEARs/Account Administrator will be able to request updates. For more information about these PP roles, see the H2020 Online Manual.
- **Where can I find the Beneficiary registration tool?**

  It is hosted on the Participant Portal.

  If your organisation is already registered and you want to **update its data** or you want to **continue a registration** that you started but did not finalise, go to My Organisations.
- **I have created my ECAS account, how could I access the Beneficiary Register?**

  You should login to the Participant Portal.

  To register your organisation or find out if it is already registered, go to How to Participate> Beneficiary Register.

  If your organisation is already registered and you want to **update its data** or you want to **continue a registration** that you started but did not finalise, go to My Organisations.
- **I would like to become a contact point for the European Commission, how should I proceed?**

  The only contact point for the organisation will be the LEAR. Please consult the frequently asked questions on the LEAR in the **Roles section** and the H2020 Online Manual for more detailed info.
- **What happens if my organisation registered twice in Participant Portal?**

  If there is a duplicate registration (the same organisation has been registered twice), the new (or 2nd) PIC will be replaced by the PIC obtained with the first registration. The participant will be informed about any PIC related updates should the submitted proposal reach the grant preparation stage.
- **How can I contact the helpdesk in case of technical difficulties during the registration?**

  By sending your request to the IT Helpdesk. . If you have questions concerning the content of the information to be provided you can always contact the Research Enquiry Service.
- **I have registered my organisation but when I tried to log in to the Participant Portal, the data could only be viewed in read-only mode?**

  As from September 2013, the self-registered data remains always editable and updates and/or corrections can be introduced by the self-registrant till the LEAR has been nominated and activated. As from that point, only the LEAR will be able to manage that data. To find out how to appoint a LEAR, please consult the H2020 Online Manual.
- **Does the Beneficiary registration tool exist in any language other than English?**

  It is only available in English at this moment for the participants reaching it from the Participant Portal. For those participating in the educational programmes handled by DG EAC and EACEA, the organisation registration tool becomes progressively multilingual as from September 2013.
- **How can I modify my organisation's data?**

  For all validated organisations who wish to change their data, only the appointed LEAR can request modifications in the database (using the PIC code of the validated organisation).

  Once the relevant supporting documents have been uploaded by the LEAR in the system, then the VS

evaluates the accuracy of the request and, if possible, changes the information in the database.
If something else needs to be clarified or provided, the VS will contact the LEAR via the Beneficiary registration tool itself.
For organisations whose data is not yet validated, the self-registrant will be able to updated/correct the information provided and the VS will perform the assessment on the basis of the latest request.

- **Who is the VS or Validation Services?**
  The Validation Services (VS) is a specialised service within the Research Executive Agency which acts under powers delegated by the European Commission on behalf of the research DGs (DG RTD, ,DG MOVE, DG ENER, DG CNECT, DG ENTR), DG EAC and Executive Agencies (REA, ERCEA, EASME, EACEA, CHAFEA).
  The VS is entrusted to carry out the verification of the legal existence and legal status of f participants (the 'validation') as follows:
    - For Horizon 2020 participants, the verification of the legal existence and legal status (public or private bodies, non-profit, secondary and higher education, international organisation, etc.) is done against the H2020 rules for participation and the provisions of the H2020 Grant Manual.
    - For participants in other programmes, the VS verifies the legal existence and status based on the Financial Regulation (applicable to the general budget of the Union).

Each participant has to be validated and obtain a PIC (Participant identification Code) before being able to sign grant agreements under FP7, H2020 and other programmes managed by the DGs and Agencies listed before.

Participant Identification Code (PIC)

- **What is the PIC or Participant Identification Code of my organisation?**
  The Participant Identification Code (PIC) is a 9-digit unique identifier for every validated organisation. Participants will not have to submit their legal and financial information (and supporting documents) each time they submit a proposal or negotiate a grant agreement, but just their PIC.
- **Is it mandatory to have an ECAS account in order to get a PIC?**
  Yes. An ECAS account is required for every individual in order to log into the Participant Portal where the organisation registration tool is hosted. Through the organisation registration tool you can register your organisation and will then receive a PIC.
- **How can I find out whether my organisation already has a PIC?**
  First, use the Search PIC tool under How to Participate> Organisation Registration. If you still cannot find the PIC of your organisation, find out within your organisation who is the person nominated as LEAR; he/she will be able to tell you the PIC.
- **I have a PIC on the Research Portal, how can I update this PIC for participation in the Education, Audio-visual, Culture, Citizenship and Volunteering (EAC) programme?**
  Please go to the Organisation Register page of the EAC portal and log in with your ECAS account.
  In the menu bar, select Organisations from the drop down menu. You will subsequently be offered 3 options: Register, My Organisations and Search. Select **My Organisations** and the relevant PICs will appear. Continue by clicking on either **VO** to view the content or **MO** to modify, update or complete your information. Once the organisation data screen appears, select the corresponding EAC programme from the drop down menu on the bottom left-hand corner of the page. Click on **Update your Data** to save any changes you may have made.

- **I have a PIC on the portal of the Education, Audio-visual, Culture, Citizenship and Volunteering (EAC) programme, how can I update this PIC for the Research and Innovation programme?**
  Please go to the Research and Innovation Participant Portal and log in with your ECAS account.
  Select **My Organisations** from the My Area drop-down menu and your organisation registered on the EAC portal and its PIC will appear. Continue by clicking on either VO to view the content or MO to modify, update or complete your information. Once the organisation data screen appears, select the Research and Innovation (R&I) Programme from the drop down menu on the bottom left-hand corner of the page. Click on Update your Data to save any changes you may have made.
- **What are the advantages for participants using a PIC?**
  - Participants will not have to submit their legal and financial information (and supporting documents) each time they prepare a new proposal or grant agreement with the research DGs (DG RTD, DG EAC, DG MOVE, DG ENER, DG CNECT, DG ENTR) or Agencies, but just their PIC;
  - Participants (through their Legal Entity Appointed Representatives - LEARs) will be able to check the legal and financial data the Commission has on their organisation; they will be able to propose changes if their records are not correct or up-to-date; any new transactions will automatically take the changes into account and this will reduce the administrative workload;
  - The Validation Services will establish a privileged relationship with the LEAR, which will alleviate administrative and scientific personnel from the task of following-up on administrative data submitted, providing legal and financial information and related supporting documents.
- **I know that my organisation does not have a PIC. How can I get one?**
  If your organisation does not have any FP7 grant agreement or submitted proposal, then you should create an account in the Participant Portal in order to be able to register your organisation in the organisation registration tool of the Participant Portal. A PIC is provided at the end of the registration process and can be then used for proposal submission after 10 minutes.
- **How can I use the PIC in general?**
  In the tools used for the submission of proposal and for negotiation of projects there are fields available where you will be able to enter the PIC, thus avoiding entering all the legal and financial data of your organisation every time.
- **Our organisation is made up of different departments, should I get more PICs?**
  No, different departments from one organisation (legal entity) are not taken into account. Hence, all departments should make use of the same PIC for the organisation. As for the LEAR, currently only one person should be appointed for the entire organisation, but this person can delegate further his/her functions to the so-called Account Administrators.
- **I have received two PICs for my organisation, what should I do?**
  You might have received two PICs, if your organisation has been registered twice, and thus one registration is a duplicate. Duplicate registrations (and the respective temporary PICs) will be identified by the Validation Services (VS) if the proposal is successful and the participants enter negotiation. Your organisation would then be notified about the PIC which has been validated as permanent, and it is that permanent PIC that you would use in any applications. Until a PIC is validated as permanent, you can use any of the received temporary PICs when submitting your proposal.
- **How long should I wait before I can start using the PIC once I registered in the organisation registration tool?**
  New participants register their organisation in the Participant Portal. After the registration, they will receive a

PIC. Although the legal data is directly saved in the participant database, there will be a delay of 10 minutes before the data will be visible in the proposal forms. However the PIC can be used immediately if it is to be used in the tool used for negotiation of grants.

- **After the registration of my organisation, I did not receive any email with the PIC.**
  - Contact your IT department to check if the email from the Authentication Service <fp7-urf-no-reply@ec.europa.eu> subject: Your registration request in the organisation registration tool is not "queuing" in the mail server.
  - The problem could occur if the email is treated as a spam. Ask your IT administrator to remove fp7-urf-no-reply@ec.europa.eu or the domain ec.europa.eu from the spam filter.
  - If it does not solve the problem, please contact EC-RESEARCH-IT-HELPDESK@ec.europa.eu and give them the details of your first name, last name, email address, username (if created) and the legal name of your organisation.
- **I was already using a PIC for my proposal. Then I received a new PIC from the Validation Services (VS). What happens to my old data?**

  Your data will not be lost. This is not a problem, since duplicate registrations (through temporary PICs) will be identified by the VS if the proposal is successful and the participant phase. From that moment on, you should only use the PIC validated by the VS.
- **When I entered the PIC in the proposal forms, I received an error message "No data is associated with this PIC". What shall I do?**

  If you have just registered your organisation in the organisation registration tool, the data will be recognized by the tool only 10 minutes after the registration.
- **Does my organisation's financial viability need to be checked?**

  The Commission always checks the financial viability of a project coordinator requesting an EU contribution **exceeding EUR 500,000** unless the coordinator is:
  - a public body
  - a higher or secondary education establishment
  - an international organisation or body whose participation is guaranteed by the government of an EU country or associated country, in accordance with the Guide of beneficiary registration,validation and financial viability check.
  - a private individual in receipt of a scholarship

  When an organisation **does not have legal personality** , his/her representatives must prove they have the viability to undertake legal obligations on behalf of the organisation and that the organisation has financial and operational viability equivalent to that of legal persons. In H2020 not only legal entities with legal personality can participate in projects.

- **How can I check the financial viability of my organisation?**

  If your organisation's financial viability has to be assessed, you will be informed in due time of the exact process and the official contact persons. If you wish to run a self-check for your own information, you can use the tool provided in the Participant Portal.

SME-self-assessment

- **I am an SME, do I have to fill in the SME self-assessment?**
  Yes. If you consider yourself SME and you have selected the Research and Innovation Programme, you can proceed with the SME self-assessment.
- **I am not an SME, do I have to fill in the SME self-assessment?**
  No.
- **My SME is registered and already has a temporary PIC. Do I still need to fill in the SME self-assessment in the beneficiary register for H2020?**
  Yes. Although you might have registered in the Beneficiary Register, you need to make sure that you have completed the SME self-assessment part under the Research and Innovation Programme Section, if you intend to submit a proposal to the SME instrument.
- **How do I initiate the SME self-assessment process?**
  Once you have completed the first part of your PIC registration process, you will be given the option to choose a specific programme. Proceed by selecting Research and Innovation Programme from the drop down list. You will subsequently be asked whether you want to declare your organisation as SME. The SME self-declaration wizard will then run you through the rest of the process.
  Note: Please make sure you have all required financial accounts readily available when you start the SME self-assessment.
- **I have completed the first part of the registration but did not proceed to the SME self-assessment. How can I pick up where I left off?**
  Enter the Participant Portal and click on the My Area tab. Then select My Organisation(s). Proceed by clicking on the **MO** icon under My Registered Organisations. You will then be redirected to the Starting Page. Select Research and Innovation Programme from the drop down list at the **bottom left corner of the screen** . In the Enterprise Data screen, select the Financial Year (either 2012 or 2013) from the drop down list. Once you have entered the relevant Financial Year, the SME self-declaration wizard will run you through the rest of the process.
- **I have filled in the SME self-assessment and do not agree with the result. What can I do?**
  You can redo the self-assessment making sure all the encoded info is correct. Alternatively, you can contact the business support offered in the wizard and request to check your result.
- **The Validation Services have already validated my SME status in the past. Do I need to fill in the SME self-assessment again?**
  This depends on the financial year data the SME validation was based upon. The financial year data cannot be older than 2 years. For instance, if for 2014 the financial year was either 2012 or 2013 then there is no need for a new self-assessment. If the SME validation was based on financial information dating back to 2011 or older, you are required to fill in the SME self-assessment again.