

Enter & submit grant data

ENTER LEGAL, ADMINISTRATIVE & FINANCIAL DATA

Tasks as a beneficiary (including coordinators)

1. Go to the Participant Portal and log in using your ECAS account

2. Go to the [My Projects](#) page under the My Area section

3. Select your project

Select the action (i.e. project) for which a grant agreement is being prepared.

4. Provide appropriate access rights to all partners

- Ask your coordinator to give you access to the project at the Participant Portal if it is not already displayed there. As a beneficiary, you need access so you can provide an electronic signature.
- The coordinator of a consortium can enter or edit information for other beneficiaries but cannot sign on their behalf.
- The contact persons of your organisation indicated in the proposal will automatically be assigned to specific roles and receive the corresponding access rights during grant preparation:

Contacts indicated in the proposal	Automatically assigned role during grant preparation
Contact person with full access rights	Coordinator Contact (CoCo, for the coordinating organisation); Participant Contact (PaCo, for other beneficiaries)
Contact person with read-only rights	Team Member

- The **minimum setup of roles** that you need to prepare and conclude the grant agreement at the Participant Portal is shown below:

For the coordinating organisation:

- Primary coordinator contact (PCoCo)
- Legal entity appointed representative (LEAR)
- Project Legal signatory (PLSIGN)

For other beneficiaries:

- Participant contact (PaCo)
- Legal entity appointed representative (LEAR)

- Project Legal Signatory (PLSIGN)

A single person can fulfil several or all of the above roles.

5. Select legal signatories

- Before a grant agreement can be signed, **each beneficiary's legal entity appointed representative (LEAR) must appoint one or more legal signatories (LSIGN)** to represent the beneficiary by providing electronic signatures during the grant preparation process.

As a LEAR, to add LSIGN role to your organisation, login to the Participant Portal and go to the **My Organisations** page and click on the blue **OR - Organisation Roles action button** where you can 'Edit Roles'.

- From among the legal signatories (LSIGN), **select one or more project legal signatories (PLSIGN) that can sign for your specific project**. The list of LSIGNs of your organisation will be available at the Participant Portal: as a Coordinator Contact or Participant Contact, go to the **My Projects** page and click on the yellow **PC - Project Consortium icon** where you can 'Edit Roles' of your organisation.
- Designate the one PLSIGN whose name is to appear in the preamble of the grant agreement or the accession form. See more details about nomination in the **Roles and access rights** section.
- Tip: If the internal rules of your organisation require more than one signature, this requirement must be implemented by establishing an internal process in the organisation ensuring that the electronic signature in our system is executed only after all the necessary authorisations were given. These authorisations (signatures) must be collected, stored and archived locally following the usual management practice of the organisation, for instance via an internal paper-based process.

6. Sign the Declaration of Honour

- A **project legal signatory (PLSIGN) must sign a 'Declaration of Honour'** at the Participant Portal on behalf of each beneficiary before the grant agreement can be signed. The coordinator cannot sign it on behalf of other beneficiaries.
- This declaration ensures that all beneficiaries comply with the rules and are not in a situation that would exclude them from receiving EU funding (e.g. bankruptcy).

7. Linked third parties: enter their PIC

Enter the Participant Identification Codes (PIC) of any linked third parties associated with you, if applicable.

- Beneficiaries with linked third parties must make sure that these parties are validated (see Grants Manual [guide on beneficiary registration, validation and financial viability check](#)).

8. Enter other information as prompted

Tasks as the coordinator or sole applicant

1. Set the project starting date

Set the date on which the project is to start (starting date of the action).

There are 2 options:

- the first day of the month after the Commission signs the grant agreement (default option).
- if needed, a fixed start date may be agreed - this is usually after the signing of the agreement, and it must be the first day of the month.

If you enter a fixed start date, you will be asked to justify your choice. We can accept a start date before the signing of the grant agreement if you show that your project requires this. The start date must not precede the date on which the grant application was submitted (Article 130, Financial Regulation).

If the date for signing the grant agreement falls after the agreed start date, you (as a consortium or sole applicant) will be liable for any risks associated with the possibility that the grant agreement may finally not be signed.

2. Check PIC-numbers for all beneficiaries

Check that all beneficiaries' **Participant Identification Codes (PICs)** are validated (see Grants Manual [guide on beneficiary registration, validation and financial viability check](#)).

3. Linked third parties: check if PICs are validated

Check that the Participant Identification Codes (PICs) of any linked third parties have been entered and are validated.

4. Check your proposal's details

Check that all organisations participating in the project (beneficiaries and, if applicable, linked third parties) match those specified in the proposal - only then can you sign the grant agreement.

- **Consortia can be altered under exceptional circumstances only**, and justification must be provided. A consortium can propose that a participant be taken

off the project or replaced.

Such change may be justified if, for instance, a participant goes bankrupt or is bought by another entity with a different strategy. A change in the consortium may also be accepted if a participant is losing a key member of staff that is needed to carry out the project (e.g. when a principal investigator is moving to another university).

When submitting your proposal, you declared that each participating organisation

- gave their explicit consent concerning their participation
- confirmed their financial and operational capacity to carry out the proposed work

Therefore, modifying a consortium can only be accepted for reasons that arose or became known after submission of the proposal.

- **To request a change in the consortium**, the coordinator must write to the project officer, on behalf of the consortium, to explain why a participant has been withdrawn or replaced, and put forward a solution. We will then assess (a) why the consortium is to be altered and (b) your proposed solution, which can be accepted only if it does not change the project in any substantial way.

If a participant is withdrawn, you must **clarify how you will reassign its tasks and budget within the consortium** or to a new participant. The redistribution of tasks must be in line with the competences of the participants concerned. If a new participant is added to the consortium you need to explain why it is a suitable replacement.

You need to **provide updated grant preparation data** that reflect the proposed changes in all sections that are affected. For example, you should update the operational capacity section. This enables us to assess the altered consortium's eligibility and operational capacity and to make sure that the change will not substantially alter the project.

If a change in the consortium is proposed and no acceptable solution is presented, grant preparation may be terminated and the proposal rejected. This may be the case if, for example, any substantial part of the work initially proposed cannot be carried out any more, or if the quality of the consortium is significantly decreased.

5. Define the budget

Make sure the budget details match the proposal and the invitation to prepare the grant agreement. In the proposal, the budget of any linked third parties is included in the budget of the participants concerned. At this stage, you need to separate the budget of participants and linked third parties and provide details for both.

6. Check the reporting periods

We will set the reporting periods for your project. To minimise administrative work, we will choose the smallest possible number of reporting periods. The standard duration of reporting periods is 18 months. The duration of your project determines the number of reporting periods. For example, for a project duration of between 18 and 36 months, there will be 2 reporting periods. We may deviate from this standard for reporting periods in order to meet the needs of specific actions or work programmes. For details see the [Annotated Model Grant Agreement, Article 20](#).

In case you have serious concerns about the reporting periods, please contact your project officer.

7. Provide banking details

As established in the Grant Agreement, the Coordinator has to select a bank account for EU payments, by choosing from a dropdown list of the organisation's validated bank accounts in the [My Projects](#) page, under the MP (Manage Projects) button. Once the appropriate bank account is assigned to the project, it will be used for the grant agreement.

If the preferred bank account is not listed, the LEAR of the organisation (or the self-registrant for non-validated PICs) should [update the organisation's data](#) on the Participant Portal by uploading the duly completed [Financial Identification](#) in the documents section.

Once this new bank account has been validated (this may take a few days), it will appear in the list of validated bank accounts and the Coordinator will be able to select it.

8. Financial capacity assessment

If applicable, implement the result of a financial capacity assessment.

We will verify the financial capacity of coordinators in projects with requested EU funding of equal or superior to EUR 500,000. Coordinators that are public bodies or financially guaranteed by a member state or an associated country will not be checked. Likewise, if there is only one participant in a project, this entity will not be checked. However, any participant will be checked if there are justified grounds to doubt its financial capacity.

Financial capacity to participate in a given project will be assessed based on the financial viability of the organisation concerned. The circumstances of the project and other relevant

information about the organisation may also be considered. You can determine the financial viability of your organisation by using the [financial self-check tool](#) available on the Participant Portal.

For further details, please see the [guide on beneficiary registration, validation and financial viability check](#).

The financial viability check has 4 possible outcomes: Good - Acceptable - Weak - Insufficient

'Good' or 'Acceptable'

If your financial viability is good or acceptable no further action is normally necessary.

'Weak'

If your financial viability is weak

- we will normally ask you to step down as coordinator
A coordinator with 'weak' financial viability must normally step down as coordinator but can participate in the project in any other role. In this case the consortium must put forward a solution, including the appointment of a new coordinator and reassignment of coordination tasks.
- and you have third parties linked to you that account for 50% or more of the EU contribution you requested, we may ask the third parties to sign a declaration of joint and several liability
If requested, a declaration of joint and several liability must be submitted after the grant agreement has been signed, together with the beneficiary's accession form (see [Grant Signature](#) section). For further details see the [Annotated Model Grant Agreement, Article 14](#).
- you may be subject to additional monitoring (e.g. through additional reviews or on-the-spot checks)

'Insufficient'

If your financial viability is insufficient, you will normally not be allowed to participate in the project.

We will inform you immediately if you are barred from participating in a project due to 'insufficient' financial capacity, together with the means to appeal.

In this case the consortium must put forward a solution, following the steps for removing or replacing a participant (see above). If no acceptable solution is presented, grant preparation may be terminated and the proposal rejected.

9. Prepare and sign a consortium agreement

Consortium agreements are **mandatory for all collaborative projects** unless otherwise specified in the applicable work programme or call for proposals. They cover issues that will or may arise during the project (e.g. how to take decisions, resolve conflicts or safeguard intellectual property rights). The consortium agreement should be signed before the grant agreement. For details, see [Annotated Model Grant Agreement, Article 41.3](#) and the [guidance on establishing a consortium agreement](#).

PRE-FINANCING

When the legal, administrative and financial data are complete, we will establish how much pre-financing is to be paid to you at the start of the project. There is no standard amount or percentage for the pre-financing payment. For actions with at least two reporting periods, it will normally be up to the average EU funding per period (i.e. maximum grant amount / number of periods). For details, see the [Annotated Model Grant Agreement, Article 21.2](#).

PREPARE THE DESCRIPTION OF THE ACTION (DOA), ANNEX 1

The DoA is structured in the same way as the proposal, comprising Parts A and B:

Part A: is based mostly on structured information, while

Part B (the narrative part): is based on Part B of the proposal and must be uploaded as a PDF.

Creating Part B of the DoA is straightforward, as it can be derived directly from Part B of the proposal. (You can also check the [template of the Description of the Action](#).)

Enter the structured information for Part A and upload Part B. The IT system will then merge the 2 parts, generating a single PDF with the full Description of the Action.

Task of the coordinator or sole applicant

- **Workplan tables:** Complete the workplan tables in Part A, (e.g. **work package descriptions, deliverables** and **milestones**)
- **Check that DoA and the proposal match:**

If the content of the DoA differs in any way from the proposal, this must be in compliance with your invitation letter to start grant preparation. In addition, you may correct shortcomings identified by the experts in the evaluation summary report.

The information presented in the DoA can be made more consistent if necessary. Obvious errors

should be corrected (e.g. where data displayed in a table or figure are at odds with the description).

- **Legal and administrative information:** Make sure the DoA matches the legal and administrative information on the project.

For example, it must describe the role of and the tasks performed by each

- beneficiary
- third party linked to a beneficiary
- third party providing in-kind contributions

defined in the administrative section.

- **Avoid any overlaps between Parts A & B:**

For example, Part B should not contain any workplan tables. These are set out in Part A, following a standard format.

- **Structure:** Make sure the structure (e.g. sections, titles) and formatting of Part B match the template provided
- **Ethics review:** If applicable, implement the results of an [ethics review](#)
- **Security scrutiny:** If applicable, implement the results of a [security scrutiny](#)

STANDARD DEADLINES

The **grant agreement must be signed no later than 3 months** after you receive your evaluation results (Article 20(2) Rules for Participation). To make this happen, there is a strict deadline for each stage in preparing the agreement.

First version: You will have **3 weeks** to submit the first version of the grant agreement data, including **Annex 1 (DoA)** and **Annex 2 (estimated budget)**. The Project Officer will assess the first version and tell you about any requirements you still need to meet.

Finalisation: You will then have **up to 2 weeks** to submit a final version of the data.

Signing Declaration of Honour: As a beneficiary, you must sign a 'Declaration of Honour' as soon as possible and **no later than 6 weeks** after the date on which you were invited to help prepare the grant agreement. The grant agreement cannot be signed until all beneficiaries have signed their Declarations of Honour.

Deadlines: The invitation to prepare the grant agreement will specify the deadlines you must meet. They may differ slightly from the standard ones detailed above, provided that the grant agreement can be completed **within 3 months**.

Deadlines can be extended under exceptional circumstances. You can ask your project officer for an extension of a specific deadline if you can prove you need it for your project.

- If you have **not been granted an extension**, and you fail to meet the established deadlines, preparation of your grant agreement may be terminated and your proposal rejected.