



**H2020-RISE-2016  
Coordinators day**

**Reporting & Payment**

**Frederico MIRANDA**  
Project Officer LIFE  
*frederico.miranda@ec.europa.eu*

Research  
Executive  
Agency

2 March 2017

RISE Coordinator's Day - REPA

## Reporting Deadlines



- **Progress report:** Deliverable Month 12 & 36\*  
**By deadline** set in GA Annex I
- **Periodic report:** Month 24 & End of Project  
**60 days** from end of period
- **Final report:** End of Project  
**60 days** from end of project
- **Deliverables:** Continuous Reporting  
**By deadline** set in GA Annex I
- **Researcher Declarations:** Continuous Reporting  
**Within 20 days** from start of secondment



- There are several **reporting obligations** for the project (most are defined under articles 19 and 20 of the Grant Agreement).
- In addition to those, Evaluation and Follow-up **questionnaires** will also be integrated in the reporting module at some point in the future. They will have to be completed once available in the system.

## Continuous Reporting



### 7 tabs

- Summary for Publications
- Deliverables
- Milestones
- Publications
- Dissemination
- Patents (IPR)
- SME Impact
- Gender
- Researchers (Declarations)



Research  
Executive  
Agency

- The **Continuous Reporting** module can be accessed at any time between the start of the project and the submission of the final reports.
- It is divided in **7 tabs**, that must be completed by the coordinators. Some parts have to be submitted at specific deadlines (for example Deliverables of Researcher declarations) and others can be completed at any time until the end of the period (for example Publications).

# Continuous Reporting Access

European Commission

MY AREA HOME FUNDING OPPORTUNITIES

My Organisation(s)

My Project(s)

My Notifications(s)

My Formal Notification(s)

My Expert Area

Legend

AA Access Amendment GP Grant Preparation MP Manage Projects FR Financial Reporting

PR Periodic Reporting RD Reporting & Deliverables PC Project Consortium VP View Proposal

Show 10 entries Hide closed projects Search:

ACRONYM	CALL	PROGRAM	PROJECT	PHASE	ACTIONS
SAFE-Aqua	H2020-MSCA-RISE-2016	H2020	734486	Active	PC VP MP

Participant Portal - Grant Management Services

Frederico MIRANDA

MY PROJECT

HORIZON 2020

Call: H2020-MSCA-RISE-2016

Type of Action: MSCA-RISE

Acronym: SAFE-Aqua

Current Phases: Grant

Management:

Number: 734486

Duration: 48 months

Start Date: 01 Jan 2017

Estimated Project Cost: €900,000.00

Requested EU Contribution: €900,000.00

Contact: Frederico MIRANDA

Latest Legal Data

Continuous Reporting

734486 - SAFE-Aqua

Continuous reporting data

Process specific documents

Process specific communications

Proposal Management & Grant Preparation

734486 - SAFE-Aqua

28 Apr 2016

Submitted Informed Invited Prepared Signed Paid

Research Executive Agency

- The **Continuous reporting** module is accessed via the "Manage Projects" button in the "Projects" section of the Participant Portal.

# Publishable Summary



 Grant Management

 Project Continuous Report

 GoFund

 734486 (SAFE-Aqua)

 MSCA-RISE

 Summary for publication

 Deliverables

 Milestones

 Publications

 Dissemination

 Patents (IPR)

 SME Impact

 Gender

 Researchers

 HORIZON 2020

Call: H2020-MSCA-RISE-2016

Topic: MSCA-RISE-2016

Unit: REA/A/03



















## Summary for publication

The summary for publication should be written as a "stand-alone" text, in a language easily understandable by a broader public and must not contain any confidential data

Summary of the context and overall objectives of the project (For the final period, include the conclusions of the action)

[ No text provided ]

Work performed from the beginning of the project to the end of the period covered by the report and main results achieved so far (For the final period please include an overview of the results and their exploitation and dissemination)

[ No text provided ]

Progress beyond the state of the art and expected potential impact (including the socio-economic impact and the wider societal implications of the project so far)

[ No text provided ]

Address (URL) of the project's public website


[ No text provided ]

Images attached to the Summary for publication


Image Name	Image Description	Actions
		

- In the first tab, the consortium has to provide **publishable information**, such as a summary of the project and results, website and pictures.
- This information will in principle be published in a website of the Commission and should be **updated regularly**.

# Deliverables



European Commission



MSCA-RISE  
Call: H2020-MSCA-RISE-2016  
Topic: MSCA-RISE-2016  
Unit: REA/A/B3

Grant Management
**Deliverables**
Milestones
Publications
Dissemination
Patents (IPR)
SME Impact
Gender
Researchers

Project Continuous Report

Summary for publication


### Deliverables

For each Deliverable, a single file (max 52MB) can be uploaded  
Please download here the template for the Progress Report: [Download template](#)

← Template for Progress Report


WP No	Del Ref. No	Del No	Title	Lead Benefic	Nature	Dissemination Lev	Est. Del. Date (an)	Receipt Date	Approval Date	Status
WP1	D1.1	D1	Shrimp organ si		Report	Confidential, oi	31 Dec 2019			Pending
WP1	D1.2	D2	Effects of feed		Report	Confidential, oi	31 Dec 2018			Pending
WP1	D1.3	D3	Formulation of		Report	Confidential, oi	31 Dec 2019			Pending
WP1	D1.4	D4	Effects of verte		Report	Public	31 Dec 2019			Pending
WP2	D2.1	D5	A workshop on		Other	Public	30 Jun 2018			Pending
WP2	D2.2	D6	Shrimp genome		Report	Confidential, oi	30 Apr 2020			Pending
WP3	D3.1	D7	Established pro		Report	Confidential, oi	31 Dec 2018			Pending
WP3	D3.2	D8	List of ecosanc		Report	Confidential, oi	30 Jun 2019			Pending
WP3	D3.3	D9	Establishment c		Demonstrator	Confidential, oi	31 Dec 2019			Pending
WP3	D3.4	D10	A workshop on		Report	Public	31 Dec 2017			Pending
WP3	D3.5	D11	First sequencin		Report	Confidential, oi	31 Dec 2019			Pending
WP3	D3.6	D12	Validation and		Report	Confidential, oi	30 Apr 2020			Pending
WP4	D4.1	D13	Molecular meth		Report	Confidential, oi	31 Dec 2017			Pending
WP4	D4.2	D14	Establishment c		Report	Public	31 Dec 2018			Pending
WP4	D4.3	D15	Feed additives		Report	Confidential, oi	31 Dec 2019			Pending
WP5	D5.1	D16	Establishment c		Report	Confidential, oi	31 Dec 2018			Pending
WP5	D5.2	D17	A workshop on		Other	Public	29 Feb 2020			Pending
WP5	D5.3	D18	Methods for me		Report	Public	31 Dec 2020			Pending
WP6	D6.1	D19	Model of qualit		Report	Public	31 Oct 2020			Pending
WP7	D7.1	D20	A kick-off meet		Report	Confidential, oi	31 Jan 2017			Pending
WP7	D7.2	D21	A public projec		Websites, paten	Public	30 Jun 2017			Pending


←




- **Deliverables** must be uploaded on the relevant tab of the Continuous Reporting module.
- They have to be **submitted by the deadline** set in the Grant Agreement. If the deadline is late its status becomes **red**.
- Once submitted, the **Project officer approves** them or reopens them for correction.
- The **Progress Reports** to be provided at months 12 and 36 (if applicable) have to be uploaded in the relevant deliverable. The **template** is available on top of the page.
- Note that you can only upload **1 file per deliverable** so you need to merge PDF files if you have several or upload a zip file.
- If you are part of the **open research data pilot**, don't forget that you need to submit your data management plan by month 6 of the project.
- Deliverables will the Dissemination Level "Public" will be automatically published on the commission **Cordis** website upon submission.


# Milestones




Grant Management

Project Continuous Report





MSCA-RISE  
THE FRAMEWORK PROGRAMME FOR RESEARCH AND INNOVATION  
HORIZON 2020  
Call: H2020-MSCA-RISE-2014  
Topic: MSCA-RISE-2014  
Unit: REA/A/03

Summary for publication

Deliverables

Milestones

Publications

Dissemination

Patents (IPR)

SME Impact

Gender

Researchers

☒
☐
☒
☒
☒
☒
☒
☒
☒

## Milestones

Nurr A	Name	Lead Beneficiary	Delivery Date (Annex I)	Achieved	Delivery Date (actual)	Comments
1	Set system specific	IM	01 Jan 2016	<input type="checkbox"/>		
2	Microarray producti	L	01 Jul 2016	<input type="checkbox"/>		
3	DataBase developm	PC	01 Mar 2017	<input type="checkbox"/>		
4	Validation of protei	L	01 Jul 2017	<input type="checkbox"/>		
5	Epidemiological stu	UH	01 Jan 2017	<input type="checkbox"/>		
6	Analysis of immune	UH	01 Jul 2018	<input type="checkbox"/>		

Research Executive Agency

- The **Milestones Tab** is the only one that is in the Continuous Reporting Module but not in the in the Periodic Reporting Module.
- The Milestones can be validated in the Continuous Reporting Module, but additional **details** have to be given in the **Periodic Technical Report Part B**.

# Publications




Grant Management

Project Continuous Report



MSCA-RISE	Summary for publication	Deliverables	Milestones	Publications	Dissemination	Patents (IPR)	SME Impact	Gender	Researchers
 <p>THE RESEARCH PROGRAMME FOR INNOVATION AND GROWTH</p> <p><b>HORIZON 2020</b></p> <p>Call: H2020-MSCA-RISE-2014 Topic: MSCA-RISE-2014 Unit: REA/A/03</p>									

## Publications

☒ This project does not currently have any scientific publication

All publications must mention the EU funding  
(sentence in GA [Art. 29.4](#))

OpenAIRE: <https://www.openaire.eu/>



- The **Publications** should be related to the RISE project. Of course the list should NOT contain publications dated **before the starting date** of the project.
- Don't forget that there is an obligation for all your publications and dissemination to **mention the EU funding** using the sentence indicated in Article 29.4 or your grant agreement.
- There is also an **obligation for ensure open access** to all peer-reviewed scientific publications relating to their results (Article 29.2). Participants and deposit publications using OpenAIRE if they want to.
- When publications are deposited with **OpenAIRE** the reporting system will automatically look for the project publications in OpenAIRE and will propose the consortium a list of pre-filled publications in this module. The consortium then just has to confirm if the publications are indeed related to the project or not. Publications that are not pre-filled from OpenAIRE have to be added **manually**.



# Dissemination



European Commission



Grant Management

Project Continuous Report



<p>MSCA RISE</p> <p><b>HORIZON 2020</b></p> <p>Call: H2020-MSCA-RISE-2014</p> <p>Topic: MSCA-RISE-2014 Unit: REA/A/03</p>	Summary for publication	Deliverables	Milestones	Publications	Dissemination	Patents (IPR)	SME Impact	Gender	Researchers
	✓			✓	✓	✓	✓	✓	✓

### Dissemination & Communication Activities

Specify the total funding amount used for Dissemination and Communication activities linked to the project

Total Funding Amount: 40.50 €

Specify the number of Dissemination and Communication activities linked to the project 1 for each of the following categories

Organisation of a Conference	0
Organisation of a Workshop	0
Press release	0
Non-scientific and non-peer-reviewed publication (popularised publication)	0

Specify the estimated number of persons reached, in the context of all dissemination and communication activities, in each of the following categories

Communications must mention the EU funding

(sentence in GA [Art. 38.1.2](#))



Research Executive Agency

- In this section you need to indicate the different **dissemination and communication activities** done by the project. These will include for example organisation of a workshop, participation in conferences, creation of a website or development of social media related activities.
- All communication activities must **mention the EU funding** using the sentence indicated in Article 38.1.2 of the grant agreement.

# Patents



Grant Management

Project Continuous Report



MSCA-RISE

THE FRAMEWORK PROGRAMME FOR RESEARCH AND INNOVATION

HORIZON 2020

Call: H2020-MSCA-RISE-2014

Topic: MSCA-RISE-2014 Unit: REA/A/03

Summary for publication	Deliverables	Milestones	Publications	Dissemination	Patents (IPR)	SME Impact	Gender	Researchers
✓	i	i	✓	✓	✓	✓	✓	✓

## Patents (IPR)


☒ This project does not have any Registered Intellectual Property Right yet

All patents must mention the EU funding  
(sentence in GA [Art. 27.3](#))



- All **applications for protection of results** (including patent applications) must **mention the EU funding** using the sentence indicated in Article 27.3 of the grant agreement.

# SME Impact & Gender



European Commission

---

**Grant Management**

MSCA-RISE  
HORIZON 2020  
Call: H2020-MSCA-RISE-2014  
Topic: MSCA-RISE-2014  
Unit: REA/A/03

**Project Continuous Report**

Summary for publication
Deliverables
Milestones
Publications
Dissemination
Patents (IPR)
SME Impact
Gender
Researchers

✓
i
i
✓
✓
✓
✓
✓
✓

### Impact on SMEs

Questionnaire to measure the impact of H2020 Programme on growth and job creation in participating SMEs  
Please add updated information on turnover of the company and number of employees (only for SME participants)

SME Name	Financial year accounts	Type of data entry	Turnover	N of Employees
G	31/12/2014	Beginning of Project		

MSCA-RISE  
HORIZON 2020  
Call: H2020-MSCA-RISE-2014  
Topic: MSCA-RISE-2014  
Unit: REA/A/03

Summary for publication
Deliverables
Milestones
Publications
Dissemination
Patents (IPR)
SME Impact
Gender
Researchers

✓
i
i
✓
✓
✓
✓
✓
✓

### Gender

**Gender Dimension in the Project** ⓘ  
• Does the project include a gender dimension in research? ☐ Yes ☒ No

**Gender of R&D participants involved in the project** ⓘ  
Please include in the count the participants working for Third Parties (if appropriate)

Organisation	Number of Female partic	Number of Male participa	Total Number of partici
1 - IMI	3	4	7

Research Executive Agency

- The "SME Impact" and "Gender Impact" tabs provide information to our services regarding **specific policy objectives**.
- The **SME Impact** tab asks information on the SMEs in the project such as the Number of Employees and Turnover.
- The Gender tab is used to identify if the **Gender Dimension** in the project. The coordinator has to indicate if there is a gender dimension in the research (for example, if when collecting humans samples, the balance of genders is considered in the recruitment of participants) and to indicate the number of staff seconded in each gender from each sending organisation.

**Researcher Declarations**

European Commission

Grant Management Project Continuous Report

MSCA-RISE  
HORIZON 2020  
Call: H2020-MSCA-RISE-2014  
Topic: MSCA-RISE-2014 Unit: REA/A/03

Summary for publication Deliverables Milestones Publications Dissemination Patents (IPR) SME Impact Gender **Researchers**

**Researcher Declaration**  
Project's Researcher Library

← **Library of RDs: shows duplicate entries**

Fellow Id	First Name	Last Name	Gender	Birthday	Nationality	Submitted Declarations
1	Domen	Domen	M	19-12-1989	SI - Slovenia	1 of 1
2	Valentina	Valentina	F	31-01-1980	IT - Italy	1 of 1
3	Greta	Greta	F	19-03-1975	IT - Italy	1 of 1
4	Jure	Jure	M	23-04-1989	SI - Slovenia	1 of 1

← **Researcher Declarations**


Nc	Fellow Id	First Name	Last Name	Status	Sending Organisation	Secondment Organisation	Start Date	End Date	Working Time Commitr	Duration
1	1	Domen	Domen	SUBMIT	G		04-05-201	02-07-201	Full Time	6.93
							04-10-201	02-11-201	Full Time	
							08-04-201	06-06-201	Full Time	
							06-10-201	04-12-201	Full Time	
2	2	Valentina	Valentina	SUBMIT	U		30-06-201	13-08-201	Full Time	1.5
3	3	Greta	Greta	SUBMIT	P		13-07-201	12-01-201	Full Time	12
							13-07-201	18-11-201	Full Time	
							08-02-201	31-03-201	Full Time	
4	4	Jure	Jure	SUBMIT	G	G	01-03-201	29-08-201	Full Time	8.83
							30-08-201	25-11-201	Full Time	

**Splits correctly encoded** →

Research Executive Agency



- Each time a new secondment takes place, **the sending Beneficiary** has to submit the respective Researcher Declaration **within 20 days** from the start of the secondment.
- If the sending organisation is a **third country partner organisations** the Researcher Declarations have to be submitted by the **Coordinator** (Third Country Partner Organisations do not have access to the participant portal, so they can't add Researcher Declarations). **All the secondments have to be reported** even if the sending organisation is a Third Country Partner Organisation not eligible to receive EU funding.
- If the same staff member is sent from the same organisation to the same host, this is considered as the same secondment, even if this travel is repeated several times, each different period is considered as a **split period of the same secondment**. Splits correctly encoded appear in the same Researcher Declaration. New Researcher Declaration must NOT be created to encode splits of the same secondment, otherwise the IT system will not calculate the eligible costs correctly.
- Each time a new researcher is added, he or she can be found in the **library** which shows duplicate entries for the same person.
- However, if the same staff member is sent to a **different destination organisation**, this is considered as a different secondment, and therefore a new Research Declaration has to be created.

# Researcher Information



Researcher Declaration


Researcher Information	Secondment Information	Secondment Period
Researcher	1 - Mr. D	
Category	Technical staff	
Gender	<input checked="" type="radio"/> Male <input type="radio"/> Female	
Birth Date	19-12-1989	
Nationality	SI - Slovenia	
Last Countries of Activity (up to five)	SI - Slovenia	
Email	d@s.com	
Is the researcher enrolled in a PhD programme?	<input type="radio"/> Yes <input checked="" type="radio"/> No	



Research Executive Agency

- The first part of the Researcher declaration includes **personal information** about the researcher (name, category, gender, date of birth, etc).

## Secondments Information


  
 European Commission

Researcher Information
Secondment Information
Secondment Period

**Sending Organisation**

Legal Name 6. G

**Destination Organisation**

Legal Name 4. Ut i

**Other Information**

**Work Packages**

Number	Title	Lead Beneficiary	End Month
3	Validate assay protocol and performa	U	18

Researcher Information
Secondment Information
Secondment Period

Add Period

**Secondment Period 1**

Start Date 04-05-2015

End Date 02-07-2015

Working Time Commitment Full Time

**Secondment Period 2**

Start Date 04-10-2015

End Date 02-11-2015

Working Time Commitment Full Time

Research Executive Agency

- The Researcher Declaration also includes **information about the secondment** (such as the destination institution and the duration of the secondment).
- For each secondment the main **Work Package** linked to the secondment also has to be indicated.
- **Important:** To encode secondments **splits**, the relevant secondment Researcher Declaration has to be reopened and **a new period** created by using the "Add Period" button (click on a Researcher Declaration already submitted to reopen it).
- Note that for the RISE action the working commitment during the secondment must always be **Full Time**.

## Periodic Reporting



Same tabs as Continuous Reporting Module +3 extra

- Critical Risks
- Technical Report Part B  
(Word Template)
- Financial Statements



Research  
Executive  
Agency

- The **Periodic Reporting module** includes the same tabs (except Milestones) as the Continuous Reporting Module (which can be updated from the Periodic Reporting) and some additional tabs that have to be completed before the Periodic Report is submitted: **Critical Risks**, **Technical Report Part B** and **Financial Statements**.
- All the tabs must be updated before submitting the Periodic Report as the **"Part A" of the technical report** is generated automatically from the information inserted in the different tabs of the Periodic Reporting Module.
- It's important to submit all the Deliverables and Researcher Declarations before the submission of the Periodic Report.
- If a due **Deliverable is still missing** at the moment of submission of the periodic report, the **delay must be explained and a new target date must be given** in the Technical Report Part B. **Same for the milestones**. All the **delays or deviations** must be convincingly explained in the report and the consortium should demonstrate that it has done everything in its power to reach the planned milestones or deliverables.

# Periodic Report Access



RESEARCH & INNOVATION

Participant Portal - Grant Management Services


Frederico MIRANDA



Periodic Reporting

REP-645754-1 - period

01/01/2015 > 31/12/2016

Technical Part contribution

Periodic Report composition

Process specific documents

Process specific communications

14 Feb 2017

Draft

02 Mar 2017  
(44/60 days)

Submitted

Paid

Access all report

Access separate parts of the report

Submit to EU

Launch new interaction with the EU


+

Research Executive Agency


- As the Continuous Reporting, the Periodic Reporting Module is accessed via the participant portal. The module **appears automatically** when the reporting period ends.



# Critical Risks





European Commission



Grant Management

Project Periodic Report





MSCA-RISE  
HORIZON 2020  
Period No: 1 Duration (months): 24  
Reporting Period : [01 Jan 2015 - 31 Dec 2016]

Summary for publication  
✓

Deliverables  
i

Critical Risks  
⚠

Publications  
✓

Dissemination Communication  
✓

Patents (IPR)  
i

SME Impact  
✓

Gender  
✓

Tech. Report (Part B)  
i

Financial Statements  
i

**Critical Risks** ⚠

**Foreseen Risks (Annex-I)** ← **Annex I Risks**

Number	Description	Work Package No.	Risk Mitigation Measures	State of the Play Reference Reporting Period	State of the Play Mitigation Measures Applied	State of the Play Risk Materialized	State of the Play Comments
1	Technology	3, 4	Assay reagents: Vaccine reagents will be sourced from				
2	Market The commercial opportunities arising from the	2, 3, 4 ...	Societal conservatism: Perhaps the single most serious				

**Unforeseen Risks** ← **Add new Risks**

There are no unforeseen critical risks.

Research Executive Agency

- The Critical Risks already identified in the Annex I will automatically appear. The consortium needs to indicate for each of them if the **risk mitigation measures were implemented** and if the **risk materialised** (the risk is opened by clicking on the "Actions" button).
- New ones can be added at the moment of the periodic report if identified in the meantime.

# Technical Report Part B




Grant Management

Project Periodic Report



645754 (Vaccinesurvey)
MSCA-RISE

Summary for publication
Deliverables
Critical Risks
Publications
Dissemination Communicati
Patents (IPR)
SME Impact
Gender
Tech.Report (Part B)
Financial Statements
Researchers


HORIZON 2020

Period No: 1
Duration (months): 24
Reporting Period : [01 Jan 2015 - 31 Dec 2016]













## Technical Report (Part B)

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

### Part B Sections

1. Explanation of the work carried out by the beneficiaries and Overview of the progress
2. Update of the plan for exploitation and dissemination of results (if applicable)
3. Update of the data management plan (if applicable)
4. Follow-up of recommendations and comments from previous review(s) (if applicable)
5. Deviations from Annex 1 and Annex 2 (if applicable)



**Template for Technical Report Part B**



- The "Tech. Report (Part B)" tab contains a **word template** that must be used to complete the **descriptive part of the Technical Report** (Part B). The coordinator needs to upload it in PDF format when completed.
- The Part B is composed of **5 sections**.
- **Section 3** only concerns projects that are part of the Open Research Data Pilot.

## Tech Report Part B Not Applicable



Not applicable to you RISE project (**do not complete**):

**1.4. Access provisions to Research Infrastructures**  
(Research Infrastructures programme only)

**5.2 Use of resources** (not applicable to MSCA projects)

**5.2.1 Unforeseen subcontracting**  
(not applicable to MSCA projects)

**5.2.2 Unforeseen use of in kind contribution from  
third party against payment or free of charges** (not  
applicable to MSCA projects)



- The following sub-sections of the Technical Report Part B **do not apply** to the RISE projects and are not to be completed:
  - 1.4
  - 5.2
  - 5.2.1
  - 5.2.2

# Financial Statements




Grant Management

Project Periodic Report





MSCA-RISE

THE HORIZON PROGRAMME FOR RESEARCH AND INNOVATION

**HORIZON 2020**

Period No: 1    Duration (months): 24

Reporting Period : [01 Jan 2015 - 31 Dec 2016]

Summary for publication

Deliverables

Critical Risks

Publications

Dissemination Communicati

Patents (IPR)

SME Impact

Gender

Tech. Report (Part B)

Financial Statements

Researchers













## Partners Financial Report

Number	Role	Short Name	Legal Name	Country	PIC	Status
1	CO	IMP	IMP	UK		Draft
2	BEN	POL	POL	IT		Draft
3	BEN	UNI	UNI	IT		Draft
4	BEN	UI	UI	IT		Draft
5	BEN	A	A	UK		Draft
6	BEN	Ge	Ge	SI		Draft



- **Each Beneficiary** will have to sign and submit its financial statement to the coordinator. The Coordinator then submits the **full package** (technical reports + financial statements) at once to the REA.
- The statement is accessed by **clicking on** it.

## Eligible Costs





- **Minimum 1 Month / secondment**
- **Maximum 12 Months / staff member**
- **1 M = day x of Month Y to day x-1 of Month Y+1**
- **Less than 1 month = pro-rata of 30 days**
- **Examples:**
  - 1 January – 31 January = **1 month**
  - 12 February – 11 March = **1 month**
  - 12 February – 10 March = **27 days (not eligible)**
  - 15 June – 17 August = **2 months + 3 days**



- The secondments are only eligible if the **minimum duration** of the secondment is **1 month** (or 30 days in case of an incomplete months). If the secondment has several split stays, the duration of the **secondment is the sum of all the splits**.
- If the same researcher is **seconded to a different participants**, this is considered as a different secondment. **Important:** the minimum duration of 1 month (30 days) has to be reached **for each different secondment** for the respective secondment to be eligible (but not for each split of the same secondment). If the same staff member is seconded to a participant 1 for a total of 2 months and seconded to participant 4 for a total of 2 weeks: the first secondment is eligible for reimbursement but the second one is NOT. Ineligible secondments are deducted from the total in the final period.
- In addition the **total duration** of secondment for the same staff member over the entire project cannot be more than **12 month** (sum of the duration of all secondments for that staff member).
- Full months (from **day x of Month Y to day x-1 of Month Y+1**) are considered as 1 month , while incomplete months are considered as a **pro-rata of 30 days**.

# Calculation of costs

European Commission

Grant Management | Project Periodic Report

MSCA-RISE  
HORIZON 2020  
Period No: 1 Duration (months): 24  
Reporting Period: [15 Jan 2013 - 14 Jan 2015]

Beneficiary 1: JSI  
Legal Name: INSTITUT JOZEF STEFAN  
PIC: 99971817 Status: VALIDATED  
Legal Address: Jamova 39 3000 - 1000 - LJUBLJANA Slovenia

Financial Statement

Financial information from contact  
No contribution requested? ☐ Yes ☒ No

Financial Statements

Period	adjustment	Requested Contribution
15/01/2013 - 14/01/2015 (Period No '1')		36.09 €

Financial Statement for period '1' - (15 Jan 2013 - 14 Jan 2015)

☒ Detail of the recruitments

Eligible costs:

Cost Category	Unit Cost	Number of Units	Subtotal	Total
▼ A) Costs of seconded staff members				
A1) Staff member top-up allowance	1.00 €	x 12.033333	= 12.03 €	12.03 €
▼ B) Institutional costs				
B1) Research, training and networking costs	1.00 €	x 12.033333	= 12.03 €	12.03 €
B1) Management and indirect costs	1.00 €	x 12.033333	= 12.03 €	12.03 €
C) Total costs (= A + B)				36.09 €
D) Maximum EU contribution (= 100% * C)				36.09 €
E) Requested EU contribution				36.09 €

Did you receive any EU/Euratom operating grants during this reporting period? ☐ Yes ☒ No


Please indicate how many of the total person-months were incurred DURING the period covered by the operating grant

Research Executive Agency

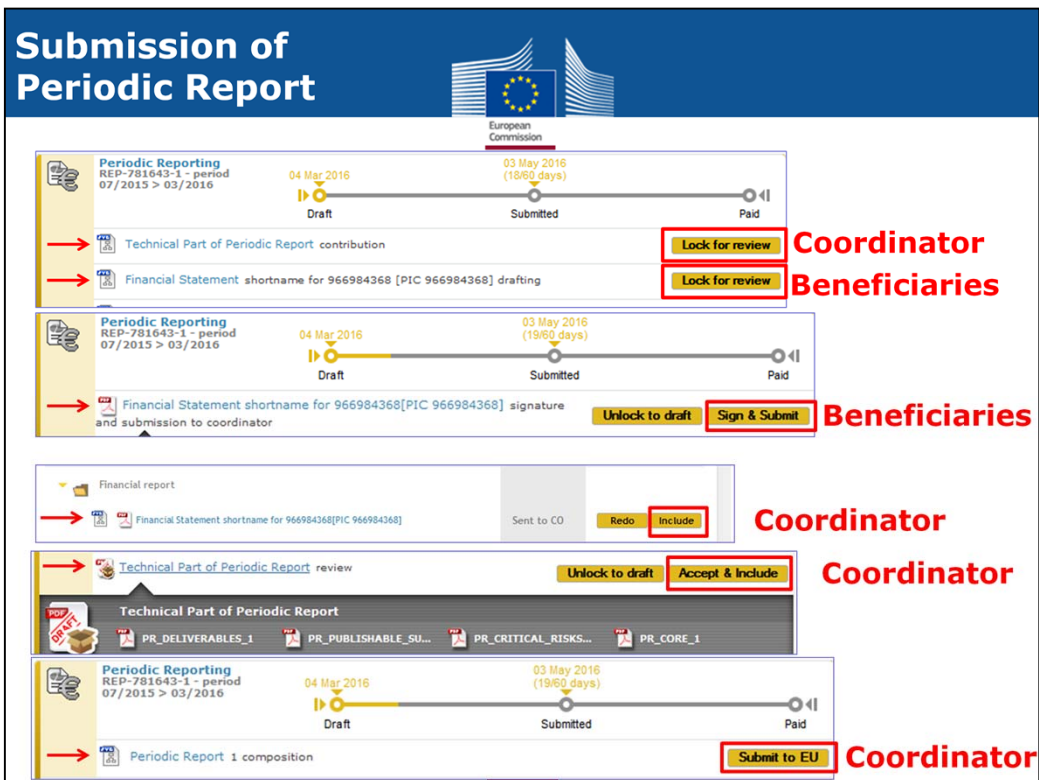
← EU/Euratom Operating grants

- The financial statements are pre-filled by the IT system. The **correct amounts are automatically calculated** by the system based on the duration of the secondments declared in the Researcher Declarations. As there is no need to change the amounts, all fields are read-only.
- The only editable section is about **Operating Grants**. If the Beneficiary has an EU or Euratom operating grants during the reporting period; it should indicate so, and complete how many of the person-months were incurred during the period covered by the Operating Grant.
- It is **extremely important** to **encode all the Researcher Declarations and splits** stays **before the submission** the Periodic Report, as it will not be possible anymore to include Researcher Declarations for that period after the report is submitted. It is **imperative that all Beneficiaries are informed** of this. Don't forget that the **Coordinator**, has to encode the secondments from the Third Country Partner Organisations.

## Submission of Periodic Report



European Commission




The screenshot illustrates the submission process for a periodic report, showing a timeline from Draft (04 Mar 2016) to Submitted (03 May 2016) to Paid. The process involves multiple steps:

- Lock for review** (Coordinator/Beneficiaries)
- Sign & Submit** (Beneficiaries)
- Include** (Coordinator)
- Accept & Include** (Coordinator)
- Submit to EU** (Coordinator)

- Several steps are needed to submit the periodic report. First all the beneficiaries have to submit their financial statements to the coordinator by clicking:
  - **Lock for Review** (Beneficiary Contact)
  - **Sign & Submit** (Beneficiary PFSIGN)
- Then the coordinator has to
  - **Include** all the financial statements in the Periodic Report Package (Coordinator Contact)
  - **Lock for Review** the Technical Periodic Report (Coordinator Contact)
  - **Accept & Include** the Technical Periodic in the Periodic Report Package (Coordinator Contact)
  - **Submit to EU** (Coordinator contact)
- Only after the "Submit to EU" is the periodic report submitted.



Additional Information  
Participant Portal




*Completion of Technical Report*  
<https://webgate.ec.europa.eu/fpfis/wikis/pages/viewpage.action?pageId=107942610>

*How to complete financial statement for RISE projects*  
<https://webgate.ec.europa.eu/fpfis/wikis/display/ECResearchGMS/How+to+complete+your+financial+statement+-+MSCA-RISE>

*The reporting process in general*  
<https://webgate.ec.europa.eu/fpfis/wikis/display/ECResearchGMS/Reporting+process+-+general>

*Calculation of secondments duration for RDs*  
<https://webgate.ec.europa.eu/fpfis/wikis/display/ECResearchGMS/Completing+the+Researcher+Declaration+Tab+for+MSCA-RISE>



#### Completion of Technical Report

<https://webgate.ec.europa.eu/fpfis/wikis/pages/viewpage.action?pageId=107942610>

#### How to complete financial statement for RISE projects

<https://webgate.ec.europa.eu/fpfis/wikis/display/ECResearchGMS/How+to+complete+your+financial+statement+-+MSCA-RISE>

#### The reporting process in general

<https://webgate.ec.europa.eu/fpfis/wikis/display/ECResearchGMS/Reporting+process+-+general>

#### Calculation of duration for RDs

<https://webgate.ec.europa.eu/fpfis/wikis/display/ECResearchGMS/Completing+the+Researcher+Declaration+Tab+for+MSCA-RISE>



- Periodic report of the last period
- Additional documents are generated upon submission:
  - Final summary financial statement
  - Request for payment of the balance

- The periodic report of the last period, will be the **Final Report**.



# Thank you



Research  
Executive  
Agency