FACTSHEET

Interreg IPA CBC

Italy–Albania–Montenegro Programme

PROGRAMME MANUAL

3.2   eMS User Manual – Contracting Procedure

Index

Introduction

This factsheet is a technical guidance for Lead Partners on Application Form Modification in eMS, after the project was approved by the Joint Monitoring Committee. Please follow the steps as described below.
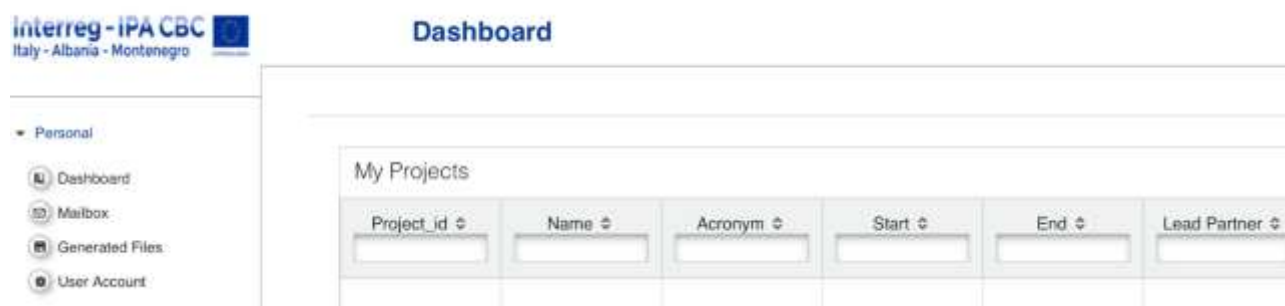

1.1   APPLICATION FORM (AF) MODIFICATION PROCEDURES

After the "Quality Assessment" Procedure has been concluded, the Joint Secretary (JS) will inform the Lead Applicant (LA) on the status of the project. From this moment on, the platform is open for modifications and different options will be possible:

A. **Project Approved**: The project is approved as it is, no modification needed;

B. **Project Approved under condition**: JS required more detail or changes into the AF;

C. **Project Rejected**: The Project does not respect minimum conditions for approval.

1.1.1   Access the application form

The Lead Applicant logs in to eMS and can see in the dashboard the list of projects submitted.


The Project status is changed in "Cr in Process". See table below as example.

By clicking on "View" button, Lead Applicant enters the project section and can see the "modification request overview" section:

- Decision state: "Accepted" means that the request for modification of the application form has been accepted by the JS (automatically set for projects approved "under condition") and that the AF is open for modifications.
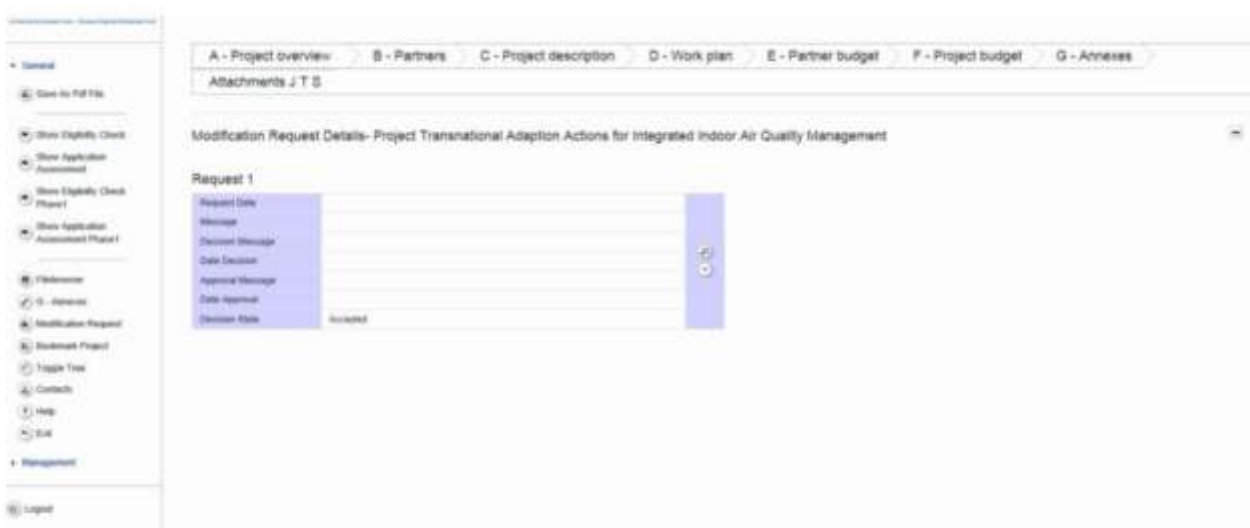
By clicking on the magnifying glass:

- more detailed information is shown

- alternatively, this section can be accessed via the button on the left. "Modification request" in the menu on the left.

Lead Applicant can see all the project information as during the application stage. (**All sections of the Application Form are open for modification**). Following the JS instructions indicated into the decision message, the Lead Applicant can do the necessary modification.

ATTENTION

- **Please remember to regularly press the "SAVE" button, especially before leaving a section, in order to avoid losing data.**

- **Be careful when changing the project start and end dates. Budget is inserted per period and if - by changing the dates - a period is eliminated, the related budget is deleted as well!**
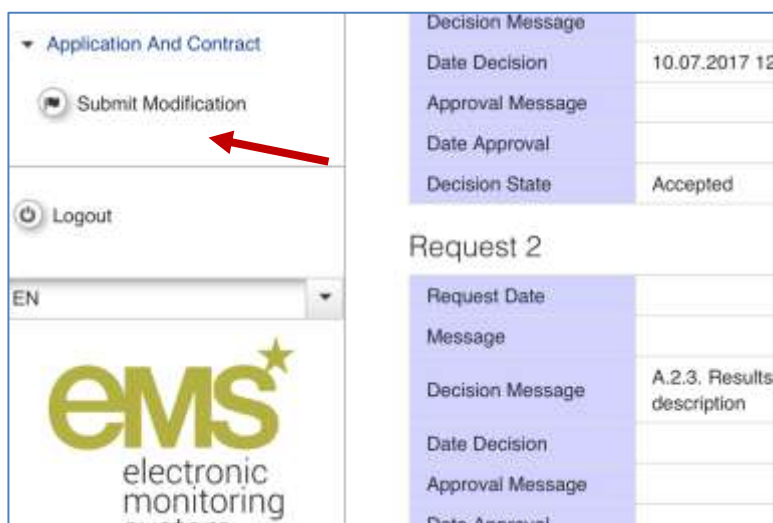

1.1.2 Check the revised application form

After all the changes have been made by Lead Applicant, the "Check modification" button must be pressed in order to finalize the procedure . These automatic checks work similar to the checks upon first submission of the application form.

- Eventual Warning and Error messages are displayed, giving instructions on which further amendments of the application form are necessary.

After the Lead Applicant has checked modification, the "submit modification" button will appear and clicking on it the Lead Applicant will submit the project modification. (see table below)

1.1.3 Submit the revised application form

Once all automatic checks have been passed successfully, the LP can submit the revised application form to the JS.

After the submission the project status changes to "Cr_done".

The JS will check the revised application form, and either accept the application form or hand it back to the LP for further amendments, if required. If this happens, the LP has to follow the same procedure (in order to add new modifications required by JS) and re-submit the project.

1.2 HAND OVER THE PROJECT TO THE FUTURE LEAD PARTNER

After the AF Modification Procedure, Lead Applicant needs to **modify definitively its status from "Lead applicant" to "Lead Partner"**. He can choose two options:

- OPTION 1 - Creating a new user account associated to a new email address. (this option is used if Lead Partner is different from "Lead Applicant" – *For creating a new user account associated to a new email address, user has to follow the same steps for the registration procedure). The eMS system can be accessed on the following link: https://www.italy-albania-montenegro.eu clicking on "Ems Platform login section"*

- OPTION 2 - Using the same user account. - *if the Lead Partner is the same user used for the Lead Applicant - login with the same user and password.*

The Lead Applicant logs in to eMS and can see in the dashboard the project approved (see below).

By clicking on "View" Lead Applicant can access the project and see at the top "Please hand over the project to the future Lead partner" (see picture below).
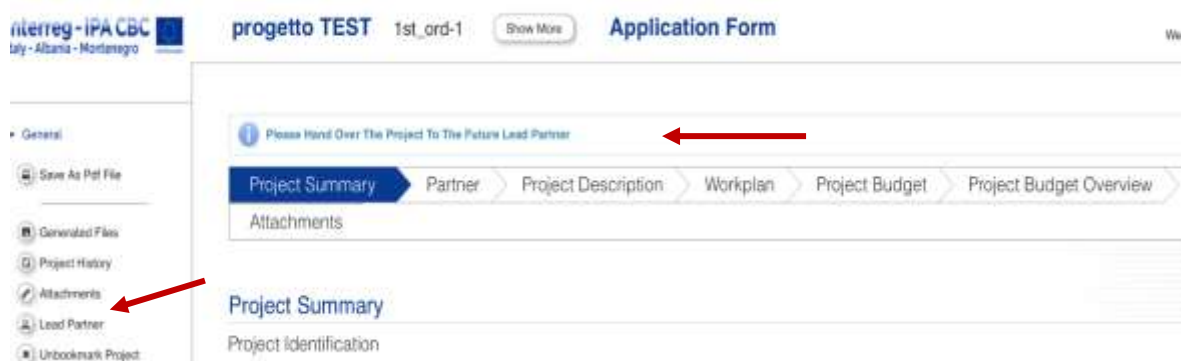
In order to modify the status, in the left Menu, Lead Applicant has to:

- click on "Lead Partner" section;

- enter a new "username" (OPTION 1) or replace the same user used as Lead Applicant (OPTION 2) into the box "Prospective Lead Partner. (This username will be associated to the "Lead Partner).

- click on the button "declare as Lead partner".
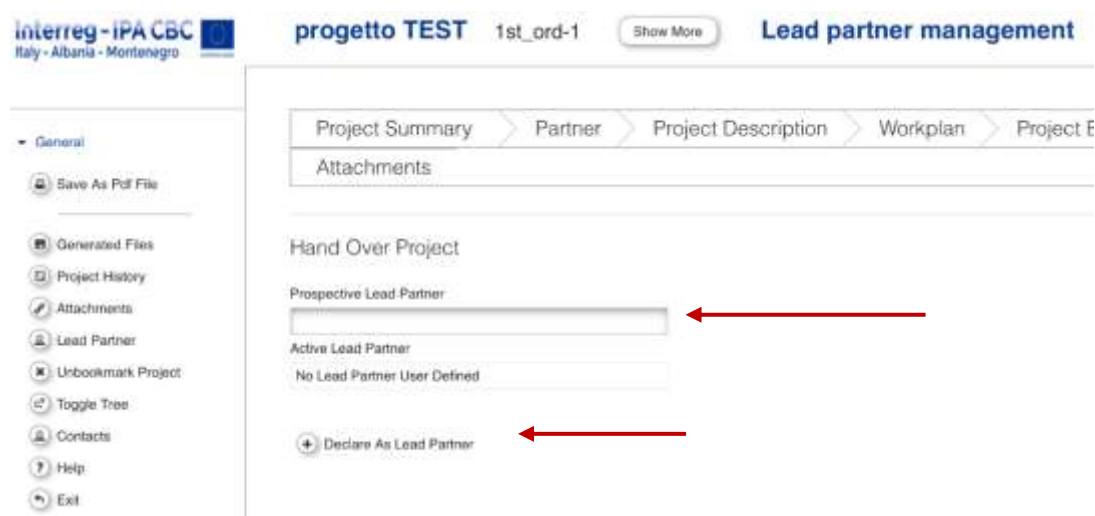
After that, the new Lead Partner User will be saved and has to be confirmed by JS. The JS can approve or reject the procedure.
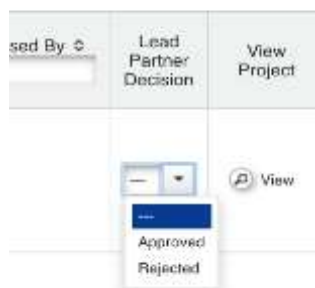
1.3 SUBSIDY CONTRACT AND SUPPLEMENTARY INFORMATION IN EMS

JS creates the draft of subsidy contract in word format and sends it to Lead Partner. After that, LP collects all the information from all Project Partners, fills the subsidy contract draft and collects PP signatures.

LP sends the signed subsidy contract to JS that uploads signed subsidy contract into the "attachment" section of the contracting procedure.

N.B: Within 3 months after the entry into force of the subsidy contract, the LP has to complete the section "Supplementary information" in the eMS which is a pre-condition for the reimbursement of funds.

The following guidance provides the main steps to be followed for filling in the required data.

- Supplementary information may be filled in by a lead partner after LP is confirmed by JS. For inserting supplementary information, you need to navigate to the section "Application and Contract" "Supplementary Information" in the left-side Menu.

- Supplementary information enables inserting data concerning Project Management, Bank Information, FLC, User Assignment and Documents.
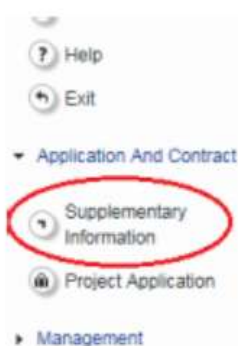
The supplementary information section is not locked. The lead partner is free to change the information at any time.

The supplementary information comprises the following sections to be filled in:

- Project management

- Bank information

- Controllers

- User assignment

- Location of documents

- Partnership agreement

As soon as all the required information is completed, please inform your JS project and finance managers accordingly. If at a later stage the supplementary information needs to be changed/updated, please be sure to inform the JS.

1.3.1 Project Management

Project Management includes information concerning Project Manager, Financial Manager of the Project and Communication Manager of the Project. Details on partner institution and accredited person responsible for the particular position are to be provided in these sections.

1.3.2 Bank Information

In this section details on the bank account of the lead partner are required for the reimbursement of the IPA amount. In case of changes of bank data during project implementation, please inform immediately the JS.

Please provide information on the bank as well as the bank account data. In case the lead partner institution requires an internal reference number for an easier identification of the transferred amounts, please include the respective information.

Confirmation documents can be uploaded.

1.3.3   FLC

Supplementary information contains details on the contact person of the FLC institution as well as the name and full address of the FLC.
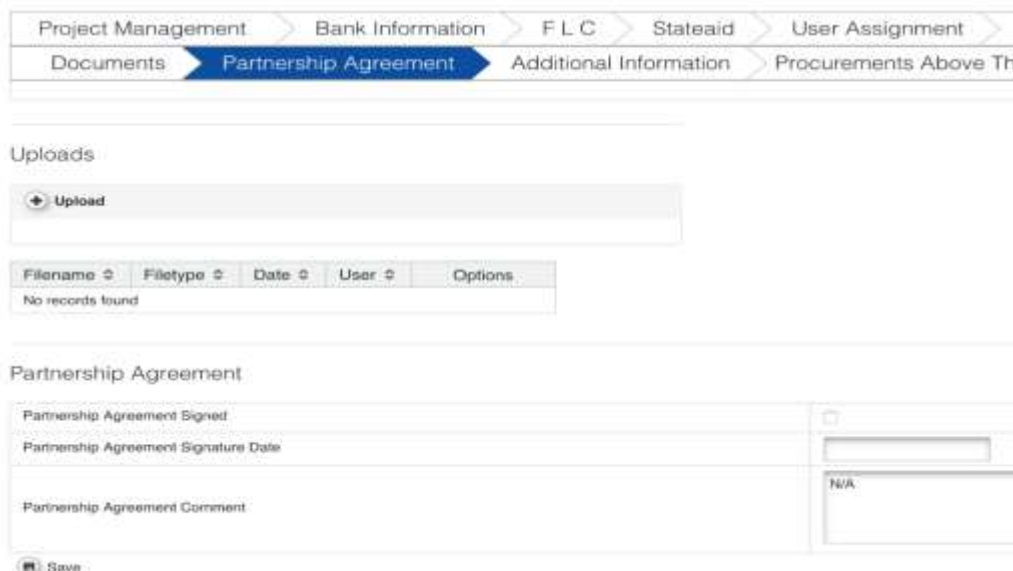
1.3.4   User Assignment

In this section the Lead Partner can assign one or more users per project partner by inserting the user name in the field "new user" and then clicking on "+ Add". These users will then have read access to the application form and write access to their partner report. Please note that each user has to first register in the eMS and then provide the lead partner with the user name in order to be assigned. Not valid users can be removed by the lead partner at any time.

1.3.5   Documents

In this section information on the location of documents has to be provided for all project partners. The information on the location of documents for associated partners does not need to be provided and should be left blank.

1.3.6   Partnership Agreement

In this section information on signature of the partnership agreement by all project partners has to be provided. The partnership agreement and its annex 3 (bank account information of all partners) should also be uploaded.