



Interreg IPA CBC FACTSHEE Italy–Albania–Montenegro Programme **PROGRAMME MANUAL**

4.2 eMS User Manual – Reporting procedures

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Introduction

This factsheet provides technical guidance to the partners on how to fill in partner progress reports and joint progress reports in the eMS platform. Please follow the activities as described below.

More information on eMS operative procedures can be found on YouTube, following tutorials developed by INTERACT:

https://www.youtube.com/watch?v=YXVFcEhbNp0&list=PLIeYZgDh1wiRGPp75QZKv0y_KdiDD-H8-&t=1224s&index=1 https://www.youtube.com/watch?v=rkQp05VDLpQ&list=PLIeYZgDh1wiRGPp75QZKv0y_KdiDD-H8-&index=1 https://www.youtube.com/watch?v=uFvJ2thGCI0&index=2&list=PLIeYZgDh1wiRGPp75QZKv0y_KdiDD-H8https://www.youtube.com/watch?v=QHfCmOCARwc&index=3&list=PLIeYZgDh1wiRGPp75QZKv0y_KdiDD-H8-

Please note that in the eMS platform as well as in several section of this factsheet:

- Partner report stands for progress partner's report (PR), which is the report by the Partner, passed on to the First level controllers for certification of expenditures and afterwards to the Lead Partner.
- Project report stands for joint progress report of the project (JPR), which is the report by the Lead Partner to the Managing Authority, which includes also the information on progress and certified expenditures by all project partners.



1.1 PARTNER REPORT

1.1.1 General Information & preliminary activities

Once a project is set to the status "contracted" in eMS, the reporting section becomes available only to Lead Partner (LP). When accessing the project, you are automatically directed to the reporting overview section. Partner reports cover activities and expenditure of individual project partners and need to be verified by the authorised national controllers. All partner reports need to be created for reporting periods as defined in the application form. A new partner report can be created once the previous one has been submitted.

It is currently not possible for the partner to open more than one report at the same time.



Please always remember to press "SAVE REPORT" before leaving a section!



1.1.2 Assigning new users account for reporting (for LP and PPs).

LP can decide to have only one user account for its reporting activities or to add more than one. For the LP, a user is assigned by default, who is the so-called Lead Partner user.

It is possible to assign additional users to the LP institution that will then have access to the reporting of the LP as well as to the joint progress report.

Before assigning a new user, the person in charge needs to be registered into the eMS platform (see procedures on "User manual_v.0.2" uploaded on eMS login page). After that, LP has to insert "username" used for registration, in the section "Supplementary information/User assignment" section. This procedure in valid also for Project Partner (PP) user assignment.

This user(s) will then have access rights to the partner report of the PP they are assigned to.

D Project		New User	(t) Ant	
 Supplementary Information 		Project partners		
(*) Ext		User For Partner	(†) Add	
() Help		User For Partner Ministry		
Generated Files		New User	(+) Add	
Enable Final Report	-			
Contacts		User For Partner Ministry		
(b) Logout		New User	AM	

IMPORTANT!!

<u>Please remember to fill-in all the information required in the "supplementary information" section,</u> <u>especially the tab "Bank account", (for LP it is a pre-requisite for preparation cost reimbursement).</u> <u>See section 1.1.5 – Lump Sum. Option</u>



1.1.3 Partner Report generation

After the log-in, select the project from the overview table and open it by clicking on "viewreporting".

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If a user has multiple roles in the project (e.g. LP = Lead Partner; PP = Project Partner), it is necessary to select the role from the dropdown menu at the top of the interface called "Select role".

Note:

- For filling in the partner report, make sure that the correct role is selected: "PP"
- Lead Partners must create their own partner reports as 'PP', not as 'LP'. The LP role is exclusively for creating 'Project reports'. (for more detail see section "Project reports")

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1 - Minist	ery ABC - ABC	-						_
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Report 1.1	01072018	31.02.014	Rept FL: Celled	10.0214	Ret Included		810.000.00	
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Parend 3 81.82	2847-31.12.2947							
Print 4 (1) (1)	2010-20.06.2010							
Print 2018	2010 -21 12 2018							
ALC: NO	20.06.019							
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Please note that only the periods for which the report can be generated are listed; <u>partners</u> <u>have to generate only 1 report per period</u>; eMs also gives the possibility to generate max 2 Partner Reports per Period (allowed only after authorization or formal request by the MA/JS).



Example of 2 partner reports per period:

Period 2 (01/07-2018 - 31/12/2018)

Once project partners have closed their PR 1 (period 1), they shall open the 1st report for Period 2, (i.e. PR 2.1) (<u>specifying the period relates to 01/07-31/10/2018</u>), upload their expenditures incurred and paid and submit it to the national controllers (FLC).

Afterwards, the Lead Partner shall generate the JPR 2.1 specifying that it relates to the interim period 01/07-31/10/2018 and collecting all partners' reports (PR) certified by FLCs.

The same procedure needs to be followed to open Partner Report 2.2 (**specifying the period** 01/11-31/12/2018) and the JPR 2.2 (By LP).



Each partner report (PR) is given a number that consists of a period number and a report number.

leport	Report Start
Period 1 29.04	2016 - 29.04.2017
Report 1.1	29.04.2016
Period 2 30.04	2017 - 29.04.2018
Report 2.1	30.04.2017
Period 3 30.04	2018 - 29.04.2019
leport 3.1	30.04.2018
Report 3.2	30.0 <mark>4.2</mark> 018
Period 4 30.04	2019 - 29.04.2020
Report 4.1	30.04.2019

It is possible to delete a partner progress report as long as it is not submitted to the FLC. In order to delete the report, please click on '**Delete report'** in the report menu to the left. All users assigned to the partner are able to create and to delete a partner report.



ems demo	acronym ITP410 See	ow Mann Partner Report 2P Period 1
	Partner Report 🌔 List O	#Expenditures 🦻 Contribution And Forecast 💚 Attachments
Parmer Enance Report	Partner Report	
Check Served Report	Period 1 - 30.07.2015 - 31.0	7722016
Delate Report	forest disense	Ead Barn
Application Folter	30.07.2018	31.07.000
Supprenentary Information		
# POIL Report	Summary of partner's work in	n this reporting period
	Press describe your progress in this repo	uning period and how this contributed to other partners' activities, outputs and deliverables delivered in this reporting period.
)ta	$\mathcal{X} \cong G_{1} (\mathcal{Y}, \mathcal{X}) = \mathcal{X} (\mathcal{Y}, \mathcal{Y})$	$\mathbf{x} : \mathbf{x} \in [0, \mathbb{R}] := \mathbf{x} \in [0, \mathbb{R}] = \mathbf{z} \in [\mathbf{X}]$
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Lead partners can view submitted/not submitted reports of all project partners, once they have been created by each partner.

Select Role Lp				•			
Projec	t Reports				1		
Report	Report Start	Report End	State	Date Of F	Project Submission	Total Expenditures	View
Period 1 09	06,2016 - 09,06,201	8					

09.06.2018 Report Submitted 09.06.2016

Report 1.1 09.06.2016

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Project Management 📎 Bank Information 📎 PL	Dotuments	Fartnership Agreement Procurements Above The	Thresholds
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1.1.4 Filling-in the partner report

Partner reports consist of several sections (i.e. 'Partner report', 'List of expenditure', Contribution and forecast' and 'Attachments'), each of which must be filled with information.



A. Partner report Tab

The 'Partner report' section focuses on activities implemented throughout the reporting period. It contains general descriptions of activities as well as reporting per Work Package.

This section asks you to describe activities during the reporting period ('Summary of partner's work in this reporting period').

To provide information on specific outputs, please select each applicable output from a dropdown which lists all outputs included in the AF. It is possible to upload documents for each output under 'Output evidence'.

artner Report			
Period 3 - 01.01.201	7 - 05.05.2017		
bilde Soly	dexeasure and a second		
Summary of partners	I work in this reporting period		
Report Securities your prograde	is this reporting period and how this series to addee partners attained	surplus and definedents between to this requiring particle	
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Provide information on the development of outputs by clicking on "Add output" and then selecting the relevant output from the drop-down menu (outputs as defined in the AF).

Project Main Outputs Delivered		
Please Select Outputs		
O Add Output		
Target Groups Reached		
O Add Targetgroup		



Insert information in the description text box; output evidence can be directly uploaded here.

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and the standard standard standard standard standards	\sim	-	ALC: 1		the second second	
	and the second second	rename	retipe	- 100	Calculated By	Camer
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Provide information on the target groups reached by clicking on "Add target group" and then selecting the relevant target group from the drop-down menu (target groups as defined in the AF). Quantify the reached target group (the target as defined in the AF is displayed) and insert explanations in the description text box.

and lines		Target price target selve	1014	
ne prin admity	()			
anthalise of large group marked in the series particle	\smile			100 Diseases
	8.00			

Below you can report on individual work packages. The list of work packages depends on the work packages included in the approved application form. The example report shown below has the work package management and one implementation work package. You will see all work packages, even if you have not been assigned to a work package in the AF.

Reports of individual work packages should contain descriptions of activities, problems (if any) and information on individual deliverables with evidence in the form of an attachment.

Deliverables are reported by clicking on 'Add deliverable' under the relevant work package. The drop-down shows all deliverables listed in the AF.



Reporting per Work Package

I Management (05.2015 - 05.2017)						
Nease describe year commonities to the activities carried out in this reporting period		If applicatile, please de presented in the applic	scribe and justify any ation farm and the u	Current Expenditure E 0.00 problems and deviation studiems found	Expen in including delays f	diture to Far 6 20 228.95 from the work plan
	ti Oo anto lanaining					2223223
Rease choose deliverables you have contributed to and describe your contribution.						
No records found.						
D Add Daliverable						
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1 My Implementation 1 (05.2015 - 05.2017) Rease Resolve your contribution to the activities carried and in this reporting pariest		If applicable, please de presenteel in the applic	scrike and justify any ation from and the s	Correct Expenditure C.0.0 protects and deviation plutions faund	Exper is including datage (ofture Se Far 6 0.30 Iron Che work plan
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"Thematic Result indicators" and "Communicative Result Indicators" need to be fulfilled according to the AF by each Project Partner (PP) for each reporting period. (see picture below).

Result Indicator	Measurement unit	Target (on project level)	Reached in the ourrent period	Explanations
Number of institutions adopting new and/or improved strategies and action plane	institutions	3.00		300 Outston Renation
Number of institutions applying new and/or ingroved tools and services	institutions	5,00		900 Characters Herbarer
Amount of funds leveraged based on project achievements	EUR	80.000.00	()	2000 Charistens Remainer
Number of jobs created (FTE) based on project achievements	FTE	1,00		2010 Characters Hervarder
Number of trained persons	Persons	30.00		2000 Charactern Hernando



Result Indicator	Measurement unit	level)	period	Explanations
Visita to the project website	Number of stakeholders roached	8-000.00		300 Characters Name
Parkispanta at pisgact 6-vente	Number of stakeholders reached	1,000,09		2001 Devotes Rener
uticles, TV/Radio News/Reportape, etc. on local and international resea	Number of publications, radio/video. productions	\$00.00		and Develop House
Doos-border events, jointly organized by project partners	Number of joint events	2,60		

Please always remember to save the report!

ems demo	IESI	Please describe the activities and the progress made within this w work packages, please explain how target groups (and other stake
SAVE REPORT	A+B	Deliverables (Please select the relevant deliverables on which the
Partner Finance Report	A+B F Perio	No records tound.
Check saved report	Terre	(B) Save Report

B. List of Expenditure Tab

Financial reporting is done through the List of expenditures (LoE) section.

SAVE	Partner Report List Of Expenditure Contribution And Forecast Documents Attachment	ts
	List Of Expenditure	
Partner Finance Report Check Saved Report	Options Report Number © Budget Line © Wp © Int Ref No © Inv No © Inv Date ©	Payr
Delete Report	No Match Found	
 Application Form 	(3) Export (11) Save Columns Columns +	
Supplementary Information		
 Print Report 	+ Add Real Cost + Add Lump Sum	
) Exit	Download all attactments	

Select "Add real cost" to add a new expenditure. (Please note that "Add lump sum" is only required for closure costs – see section 1.1.5).



Real cost items

After clicking on 'Add real cost' a pop-up appears, where the system asks you to give basic information on the cost item. It is necessary to allocate each expenditure item to one budget line and one work package. It is also obligatory to indicate 'Total Value of Item in Original Currency' and 'Declared amount in Original Currency'. It is possible to introduce expenditure in different currencies and the system converts it automatically into EUR using the currency conversion rate applicable at the moment of entering the information into the pop-up.

Budgetline	1111		Description1	
Workpackage		-		
Internal Reference Number	r		mic Cu Description2	auters Remaining
Invoice Number	-			
Invoice Date			200 04	nates Revision
Date Of Payment	-		Partner Comment	
Currency	EUR - EURO		: 1000 CH	inations Remaining
Conversion rate		(1)		
Total Value Of Item In Original Currency	1	-		
Vat	r			
Declared Amount In The Original Currency				
Declared amount in Eur				
Expenditure Outside (The Union Part Of) The Programme Area?				
Purchase Of Land				

Internal reference Number: Please enter this data based on your internal organization registration of costs system, e.g. you could add the number of the record/account office system.

Invoice Number: Enter the number of the concerned reported invoice/receipt/pay-slip or other document with probative value. In case the document does not foresee a specific number, e.g. travel claim, you could add the number of the record office system.

Invoice date: Enter date of issue of the invoice, or in case the document does not foresee a specific number, e.g. travel claim, you could add the date of the record office system or the date of delivery of the document for approval by the responsible for reimbursement.

Date of payment: Enter the date of payment, i.e. payment order date, where applicable, or the money transfer document date for the concerned expenditure.

Currency: Enter the amount of the reported expenditure as indicated in the invoice, i.e. document of expenditure (see "Paragraph Currencies other than Euro").

Total value of item in original currency: Enter the total value of the invoice including VAT as well. In case of currencies other than euro please see "Paragraph Currencies other than Euro".



VAT: Amount of VAT concerning the reported expenditure, if there is any, in national currency. In other cases, e.g. mission reimbursement, do not fill in this section.

Declared amount in original currency: Amount of cost declared for the project excluding VAT if VAT can be recovered by any mean or with VAT if that is definitely borne by the beneficiary. Amounts are declared in national currency.

Expenditures outside The Programme area: Flag this box if you are reporting an expenditure incurred outside the programme's eligible area *(see Programme manual).*

Description 1: Describe shortly the most relevant information related to the reported expenditure, (e.g. Description under Travel and accommodation costs: Type of the cost, name of the beneficiary staff, event, destination,).

Description 2: Describe other relevant information not descripted under Description 1 (Description under Travel and accommodation costs: duration of mission, details on mission reimbursement payment, etc.).

Partner comment: Optional: only in case of further relevant information not included in the other previous paragraphs (e.g. in cases of expenditures connected to public selection procedures – staff costs hired for the project - it is advisable to upload the documents of the selection procedure only in the report of the first pay-slip costs. When reporting following monthly payment only the concerning pay-slip, and other supporting documents of payment can be uploaded, so the exact No of Report and reference of expenditure where public selection documents have been uploaded could be described in this section in order).

Example: How to fill in "list of expenditures" for Equipment Costs.

(Clarification concerning "<u>Total value of item in original currency</u>" and "<u>Declared amount in</u> <u>original currency</u>").

EQUIPEMENT COSTS EXAMPLE

- Total value of the equipment: 12.100 euro (VAT included not recoverable)
- of which VAT (e.g. 20%): 2.100 euro (not recoverable)
- depreciation rate accordingly to the national law: e.g. 20%, this mean that the total value is divided in 5 year
- period 1 (duration: months of the project period: e.g. 6 month):

In EMS:

Total value of item in original currency : 12.100 euro (vat included) VAT: 2.100 euro Declared amount in original currency : 1.210 euro ((12.100 € * 20%)/2). This is the value that will be certified by FLC.

The above procedure shall be carried out also in the next project periods (2, 3, etc...)



It is possible to upload one or multiple attachments to each of the expenditure items by clicking the 'Upload' button. Once a button is clicked, a dialogue box is shown where it is possible to upload different files. It is also possible to download all the attachments related to one expenditure item at once, using 'download all attachments' option. To save all information please click "add" button.

+ Upload	
Other	
	Uploaded
	σμοσοσο
No records found	

O Add

Flat Rates

If you have Staff cost and/or Office and administration flat rates approved in the application form, the system will automatically calculate flat rates based on relevant inputs into the List of Expenditures.

Attention!

Please note, it is not possible to add real cost invoices to budget lines covered by flat rates. It is also not possible to modify the amount claimed based on flat rates (neither by project partner nor by any of the authorities verifying the report).

1.1.5 Lump Sum option (only for LP)

This functionality is available only for Lead Partner and concern only "Preparation & Closure" costs. Preparation Costs and Closure costs are claimed by Lead partner in different ways.

Preparation Costs

After the project has been contracted, the **Lead Partner** could claim only the preparation cost lump sum (10.000 EUR). (remember to select "LP" in the textbox "Select Role").



ip +	
Project Reports	
Report Start Report East State Date Of Project Report Submission Total Expenditors Submitted To Ja View R	apport
Period 8 26 12 2010 - 30 12 2018	
Period 1.25.12.2010 - 19.00.2017	
Period 2 2608-2817 - 19.12 2017	
Period 3 36.12.2917 - 19.86.2018	
Period 4 20-20-2018 - 10.12-2018	
Period 8.36.12.2018 . 31.52.2018	
(3) Counte Region Prov. Particl 1 (+ 2010 - 20 12 2010)	(B) Dawr preparator cant
Partner Reports	

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If LP clicks on the button "Claim preparation cost" the system will ask for confirmation of the action. If confirmed the following will happen automatically:

1. The system will generate partner reports (only for LP). The reports will contain no text, just the List of Expenditure. All values will be taken from the Application Form and all items will be marked as lump sums.

Partner	Reports								
1		_							_
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www.uke	4.0105-10.00.0117								
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Pamor 5 387	a ann fo reamanna								
PROFESSION	COTO PENDATE:								
Partiel 528.7	3,3010-31,70,0010								
(2) Partners i	ang Tuken								

- 2. The report will be automatically marked as 'Report FLC Certified' but no FLC certificate will be available. The report will skip the FLC.
- 3. The system will automatically generate project progress report and mark it as 'Report submitted to JS" and attach all certificates of all automatically generated partner reports.
- 4. The project report will automatically be submitted to the JS.
- 5. The 'Claim preparation cost' button will be deactivated and cannot be pressed again.



Project Reports

vehou	Report Start	Report End	State	Date Of Project Report Submission	Total Expenditure Submitted To Ja	View Report
Period 8 29.1	12.2016 - 20.12.20	16				
Report 0.1	20 12 2016	28 12 2016	Report in Progress	20.12.2016	€ 58 000.00	Ð
Period 1 20.1	12.2015 - 19.06.20	17				
Period 2 20.0	06.2917 - 19.12.20	17				
Period 3 20.1	12.2017 - 15.06.20	18				
Period 4 20.0	05.2018 - 19.12.20	18				
Period 5 20.1	12.2018 - 31.12.20	58				

Partner Reports

Caution!

It is not possible to repeat this reporting process! The system does not allow for submission of any additional preparation costs reports.

Closure Costs

The remaining 5000 EUR, automatically allocated in WP M (Management) - budget line "External expertise and services" will be claimed, by the LP in the last period, within the final report.

This expenditure item will be claimed by LP following the same procedure for real costs (see sub-section "List of Expenditure Tab"), but marked as lump sum (clicking on "lump sum button" in the relevant pop-up); in this case the expenditure still goes through FLC.

SAVE	Partn	er Report 🔪 L	ist Of Expenditure	Contrib	oution And Forecast	Docume	nts Attachme	ents
	List Of	Expenditure						
Check Saved Report	Options	Report Number 0	Budget Line 0	Wp 0	Int Ref No o	Inv No 0	Inv Date 0	Payr
Delete Report Application Form Supplementary Information Print Report	No Match B	Found Sever Columns ael Cost	Columns +					
) Esit	Download all	attactments						



Scrolling the List of Expenditures (LoE) from left to right

The LoE can be scrolled by pressing the middle-mouse-button (press it and move around in the table). This was already possible previously but feature is hard to detect.

Dartnar Rang	d List Of Exper	diture Attack	mante Forecar	•7			
st Of Exper	diture		\triangleleft				
Seq No 0	Budget Line ¢	Wp o	Int Ref No 0	Inv No O	Inv Date 0	Paym Date ¢	
31	Staff costs	M Management	08042	3		30.10.2014	N

Currencies other than Euro

Amounts introduced into the eMS in currencies different than EUR will automatically be recalculated into EUR based on available exchange rates of the European Commission (http://ec.europa.eu/budget/contracts_grants/info_contracts/inforeuro/index_en.cf m).

The system recalculates the amounts several times – first time when the expenditure item is created and each time it is modified before submission. The value is updated when clicking on 'check saved report' and once more at the moment of submission of the report to the FLC. It is not modified ever again, even if the report is reverted to the partner and re-submitted the exchange rate from the moment of submission is the valid one.

A. Contribution and Forecast

Partner Report	List Of Expenditures	Contribution And Forecast	Attachments

In the Contribution and Forecast section, you are asked to forecast spending for the next partner report and you need to provide information on the financial contribution.

Report Forecast	
Estimated Expenditure	
	€ 0.00
Description	



In this section you need to specify the source(s) of partner contribution matching the IPA funds. The eMS gives the partner target amount (i.e. the total contribution calculated by deducting the fund co-financing from total eligible expenditure introduced in the List of Expenditures). The system proposes the same sources of contribution as specified in the application form.

The total value of contribution from all sources needs to match the target value. The exact information on sources of partner contribution is necessary to calculate the total public expenditure at CA level.

000.00							
Name Of Corenibution 9	Legal Status #	Total Amount indicated in The Application Form #	Ni Of Total According To A Fi &	Presentity Reported 8	Current Report	Total Reported So Far	Percentage Of Total Reported
U ⁴	public	C5.00		100	2010	£000	
uic Total Public Canomazon un Total Preside Canomazon		<100 C100		80.08 20.06	< 0.00 C 0.00	6.0.00 6.0.00	
and Contribution		(E10)		83.56	20.00	6.0.00	

B. Report Attachments

		Partner Report	List Of Expenditures	\geq	Contribution And Forecast	Attachments
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Partners are also allowed to upload additional attachments related to the entire report. A list of all attachments uploaded in this section is shown here, including information on who uploaded which document and when.

In order to upload a document, please click on the button 'Upload', the upload pop up will appear.

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Partner Finance Report

Under the 'Partner finance report' menu item (left-side menu) you will find various financial tables summing up the declared expenditure. The tables are updated live with every new expenditure item.

Please note that 'Currently reported' column changes over time. Initially (when you are preparing the report), it is 'amount to be declared to FLC'. After submission to FLC it becomes 'amount declared to FLC'. It changes into 'amount certified by FLC' after the FLC certificate is issued and finally changes into 'amount included in project finance report' once the Lead Partner submits the project progress report with the relevant certificate to the JS.

R Patier Denne Rent	Partier Japon	Lie Of Koent	turer Contribution And	loncast Atachinants						
	Partner Report E	spenditure Su	Institutely	Control (Reported Laborated	Total	and a	forward a	Take Amount Deciment for	Total Arriver Cathlant	has toront taken in Frant
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system.										

Submitting a Partner Report

Before submitting a partner report, the saved report needs to be checked (analogically to checking the saved application form prior to submission) by clicking 'Check Saved Report' in the left-side menu.



When clicking on 'Check saved report' a validation plugin is called, where programmes can set different validation rules to make sure that the report follows the programme rules. In case some of the rules are not fulfilled, an error message will appear and the partner needs to correct information.



Each time a report is saved, it needs to be checked again before submission. Only after the check is successful, the system will allow for the report to be submitted. The 'Checked saved report' button will be replaced with the 'Submit report' button.



A submitted report is locked and the partner cannot modify it anymore. After submission, the partner report is forwarded to the FLC of the partner in question. The partner can see the status of the report on the reporting overview dashboard.

1 - AT coo	peration agen	cy - ATCoop					
Report	Report Start	Report End	Share	Time Of Partner Submission	included in Project R	sport	Total Partner Esperatiture Declared ERDF
Period 1 09.04	2016-09.86.2018						
Report 1.1	09.06.2294	09.06.2018	Report FLC Certifies	09.06.2016	Period 1 Project Report 1	Fieport automitted	FLC civiliad and included in submitted project report
Report 1.2	09.06.2016	09.06.2018	Report SubWidel	27.06.2016	No Centiles	Report submitted	but not yet FLC certified
Period 2 08.04	2018-0526.2018						
Report 21	08.06.2018	09.06.2018	Report Rut Certifier	09:06.2016	Net toclobel Rep	out submitted and Pl	CC cartified last not yet included in automated project report
Period 3 09.04	2018-09-04-2018						
Report.31	08.00.2018	09.06.2018	Apport Submitted	09:06.2016	NULCESTER		
Period 4 55 26	2010-00.06.2010						
Report 4.1	06.06.2018	09.06.2018	Report Substitled	13.96.2016	Nati Certified		
Person \$ 55.06	2018-20.06.2018						
Reporting	06.06.2018	99.06.2018	Report In Progress	in Progress	Not Centred	Report not yet	autorethed to FLC
Permer M	ng Tables						

A new partner report can be opened once the previous one has been submitted. It is currently not possible for the partner to open more than one report at the same time.

Submission of partner reports to Lead Partner (in case of no expenditure)

It is possible to generate a zero partner report, which will be submitted to the LP and not to the FLC. The partner generates a report in the same way as any other partner report and as long as the List of Expenditure remains empty he/she can see a button 'Submit to lead partner'



ems demo	ITP192 Applicati	on form version 1 (Shan	Mone Partner Report 1	Period 2
SAVE REPORT	Partnet Report	List Of Expenditures	Contribution And Forecast	Attachments
Bartrar Eleance Based	Partner Report			
Check Saved Report	Period 2 - 04.01.20	18 - 03,07,2018		
O: Submit to lead partner	China thinks		Find Date	
Delete Report	04.01.2018		03.07.2018	
Supplementary Information Print Report	Summary of partner	r's work in this reporting s in this reporting period and how thi	period	and deliverables deliver
() Exit	· · · · · · · · · · · · · · · · · · ·	1 I U aix X, X' 🐓 🧮	≘)∈ e:⊨≡≡ ≋ X	
Help				
Generated Files				
(a) Contacts				
0 Logout				
EN/				

Partner can fill out all the content fields of the report as well as forecast and submit to LP.

Submission to Lead Partner means that the report is not validated by the FLC and no certificate has been issued. Lead Partner has access to partner content information and forecast and can use it when preparing the project report, even if it cannot attach any FLC certificate linked to that report.

Submitted partner report is not editable but can be reverted by LP if needed (in case of Mistake). See section 1.2.7 "Reverting Procedure"

1.1.6 Partner living tables

In the partner report overview section click on "Partner living tables" to access the different financial overview tables. Partner living tables are financial tables at the partner level that summarise partner expenditure processed through all partner reports.

Like other living tables (e.g. at project level), partner living tables grow over time as expenditure is declared by the project partner and processed by the various authorities. You can use living tables to keep an overview on expenditure declared in the partner reports. To access partner living tables, click on the button under the partner report overview table.



Partner Reports

-	Personal Street	Statut Int		Title Of Partner Substantion -	Sectories in Present Report	Total Partner Expenditure Decise to DRDP		-
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	martann.	0.042014	Partfictettid	18.063898	Parist 3 Project Report 1		418010	1.8
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ninal 3 Pr (b) prival 2 Pr (b) prival 2 Pr (b)	ANT - 24 AN 2011 ANT - 24 AL 2017 ANT - 24 AL 2018 ANT - 24 AL 2018 ANT - 24 AL 2018							

Partner expend	ature summary								
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	and the trade of the								
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1.2 JOINT PROGRESS REPORT

1.2.1 General Information

Once a project is set to the status "contracted" in eMS, the reporting section becomes available and the lead partner (LP) has access to the joint progress report. When accessing the project you are automatically directed to the reporting overview section. Joint progress reports cover activities and expenditure on project level in the respective period. Joint progress reports are created by the lead partner based on partner reports including expenditure previously certified by their national controller. It is not possible to have two joint progress reports open at the same time. A new joint progress report can only be created once the previous has been submitted to the JS.

Please always remember to press "SAVE REPORT" before leaving a section!



1.2.2 Assigning users to a joint progress report

Attention!

Currently only one user has the lead partner role in eMS and thus access to the joint progress report. This is the user accepted as LP by the JS in the handover procedure. Even if more users are assigned to the LP institution in the section 'Supplementary information/User assignment', they do not have the right to create, edit and/or submit joint progress reports. Such users can only work on the partner reports of the LP institution. It is always possible to see which user is the LP for the project by clicking the 'Show more' button at the top of the project/reporting view.



1.2.3 Generating the Project report (joint progress report)

Project reports are created by the Lead Partner based on partner reports previously certified by FLC.

Only Lead partners can generate and submit project reports.

After the project has been contracted, the 'Reports overview' is the default view when accessing the project.

In order to generate a project report, the Lead Partner needs to select the role 'LP' from the role dropdown. Each Lead Partner has two roles to select from 'PP' for creating own partner reports and 'LP'. The LP role allows to see reports of all project partners and to create and submit the project report.

elect Role						
.p				-		
Projec	t Reports					
Report	Report Start	Report End	State	Date Of Project Submission	Total Expenditures	View Report
Period 1 09	.06.2016 - 09.06.20	18				
Report 1.1	09.06.2016	09.06.2018	Report Submitted	09.06.2016	€ 2 150.00	P
Period 2 09	.06.2018 - 09.06.20	18				
Period 3 09 Period 4 09	.06.2018 - 09.06.20 .06.2018 - 09.06.20	18 18				
	06 2019 00 06 20	19				

If the Lead Partner user is not assigned to other partners as a user in the supplementary information, he/she can only see reports of other partners and cannot create, modify, delete or submit them.

All partner reports have statuses from which users can find out if the report was already certified by the FLC and if yes, whether it was included in the project report. Lead Partner can access the reports and the certificates of all partners (*See Chapter Partner Report'*)



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Sec.	Report Dart	Report land	-	Bate Of Auction Substances	Instantial in Propert Report	Total Partner Expenditure Declaned Mill		No.	Cartifican
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Argunt & V	10.04.2017	2014-20-0	Report Not Serviced	1648,816	Prevent & Propert August 1.		0.58116	8	0
Period 1 St.24	JUTE DEAL METE								
Approx, 8.7	(8:54.2018	1104219	9104173232-0804	04.06.2010) Period d Project Reside (C		1633030	8	8
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Ferry + 30.84	1015-10-04 (0.28)								
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Witness Links	and Balance								

For creating a new project report, you need to click "Create Report For" and select a period for which you wish to create a report. The system redirects you to the project report corresponding to the selected reporting period.

Each project report is given a number which consists of the period number and the report number (*see example below*).

Select Role		
Lp		
Project	t Reports	
Report	Report Start	Report End
Period 1 30.	09.2015 - 30.09.201	8
Report 1.1	30.09.2015	30.09.2018
Period 201.	10.2018 - 30.09.201	9
Report 2.1	01.10.2018	30.09.2019

Caution!

It is currently not possible to have two open project reports at the same time. You can open another report only once the previous one has been submitted to the JS.

It is possible to delete the report only as long as it has not been submitted to the JS. In order to do this, the Lead Partner needs to click on the 'Delete Report' button in the left-side menu.

Check Saved Report
Delete Report
Application Form
 Supplementary Information
Print Project Report



1.2.4 Filling-in a joint progress report

Project reports consist of a financial part and a content part. The financial part is compiled automatically by the system based on available FLC certificates included in the project report by the Lead Partner. The content part of the report needs to be filled out manually by the Lead Partner. It is also possible to upload attachments to a project report.

Some parts of the joint progress report depend on the contents of the approved application form (e.g. defined work packages etc.).

Report 💦 🗸	Workpackages	\geq	Certificates	\geq	Project Report Tables	Attachments

A. Report tab

The 'Report' section focuses on activities implemented throughout the reporting period. It contains general descriptions of activities as well as reporting per Work Package.

This section first asks you to describe activities during the reporting period ('Highlights of main achievements') in this reporting period and to include FLC certificates of project partners.

An overview of project main indicators ('project main outputs achievement') is also provided (see framed in green below). This table is automatically generated from information provided in the 'Workpackages' section of the report.

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Period 2 - 01 85 2010 - 01.0	16-20110								
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You are then asked to provide information on the target groups reached as well as problems encountered and solutions found.

And Analysis Analysis	
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At the bottom you will find an interface to provide information on horizontal principles and a tick box which can be used to indicate that the project has been fully implemented. The section 'reporting per workpackages overview' can be used to access individual work packages.

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Please always remember to save the report!



B. Work Package tab

Reporting per work package is the second part of the project report.

Report sections of individual work packages can be accessed either from the navigation bar 'Work packages' or from the table at the bottom of the page under the section 'Report'.

Report	Workpackages	Certificates Project Report Tables Attachments
Reporting	 Preparation 	aration
Min Nin	 Management 	We The
Р	∘ Workpackage T1	Preparation
Partners Invo	∘ Workpackage I1	
No Partner S	 Communication 	
Summary Desc		Dut And Contribution Of Eache Partner

Reporting Per Workpackage Overview			
Id	Start	End	Туре
2461	wrz.2015	wrz.2019	management
2462	wrz.2015	wrz.2019	implementation
2463	wrz.2015	wrz.2019	investment
2464	wrz.2015	wrz.2019	communication

Save

In this section you can describe the implementation of each work package in detail, incl. information on activities carried out and contributions by the project partners as well as information on any problems or deviations from the initial plan.



Here you also provide information on project output indicators and activities and deliveries. Reporting on deliverables, incl. upload of evidence of achievement is also part of reporting on work packages.

Select a work package from the drop-down menu

No. Title		Management	date	Station		Expenditure - c
M Maraj	dament .	Dist implementation	2019	nut stated	15	61.00
involved partners	5	Prior imprementation				
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KLM Naces describe the pr or thematic and com repplicable, please d	rogress in 1 munication feacible and rogress of a	uses NLME the current reporting period and exploits how partners, were involved in the activities i work packages, please explain how target groups (and other stakeholders) were ner partity any problems and deviations including delays from the work plan as present chrittes and deliverables achieved in the current reporting period.	who did what), often did the activities are ed in the application for	E development of the project outputs.		
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Information on the work package, activities and deliverables indexes and titles, as well as work package start and end dates are automatically displayed based on the information in the AF. The status of the work package and progress of activities and deliverables has to be selected from the respective drop-down menus.

A description on the work package progress and eventual problems and deviations is required. For deliverables explanations on their progress have to be provided and related documentation can be uploaded (obligatory for finalised deliverables).



A - Joint progress report	B - Reporting per work peckage 🔊 🤇	- Certificates of expenditure	D + Joint progress report financial tel	bles E - Annexes
Assagement work package			\sim	
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				- See

Within thematic work packages specifications, if foreseen within the AF, reporting on the foreseen outputs is required (quantification, current status, upload of documentation).

Project adjust	Dalpet description	Programme subject indication	Parred debury math	Oxford suartification therpet	Active-set on the (five-reporting partial rul institution)	Advantation Becaused period	Level of addressment inclinations for the online project including current	Uphad solpd Dourrentation (solpd Sail about or investment report)
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For the communication work package information on the level of achievement of the communication objectives (as defined in the AF) and related explanations are required.

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C. Adding FLC Certificates to the Project Report

Financial reporting is done based on FLC certificates. All available FLC certificates could be included in the current project report.

ATTENTION!

You can decide which of the available FLC certificates to include in the project report under 'Include in project finance report'.

Only the selected FLC certificates will be taken into account for project report.

FLC certificates, which are not included in one project report, can be included in another project report.

The eMS does not check whether all the FLC certificates included in a project report by the LP refer to the same reporting period. This means that FLC certificates could originate from different reporting periods. It is possible for programmes, however, to add error checks in the validation plugin.

A Project report can be closed also without any FLC certificates.

Partner Abbreviation	Number Of FLIC Certificate	Date OFFL C Certificate	Total Expenditure Certified By FL C	Include In Project Finance Report	Total Partner Expenditure industed	Co-fmancing Source	Co-Strationg Rate(N)	Total Partner E R D Fincluded
1.1	10231	13.05.30%	\$ 126.638.96		4 (26-63) 78	BIDF	85.00 W	£187642.11
	1.1	1305,2016	\$15679	2	\$18573	90F	25,00 %	¢ (\$7.87

Once the FLC certificates are selected to be added to the project report, they can be accessed from two places in the project report: navigation toolbar tab 'Certificates' or table 'List of Partner FLC Certificates' under 'Reports' tab. Under 'Certificates' only those selected will be visible.



All the certificates of expenditure as selected in section A are listed in section "Certificates" and accessible for checks by the LP. By selecting a certificate of expenditure the related list of expenditures (LoE) is shown and single expenditures can be accessed by clicking on the item in the overview table.



A - Joint ;	progr	ess report 🔿 8 - Rep	orting per work package C - Certificates of e	spenditure I) - Joint progress	report financial ta	ibles E - Ann	exes	
list of exp	pend	fiture	V ADD Defailedate 1.1						
Seq No 1		Budget line 1	WP d	Intref No \$	Inv. No 0	Inv. date 2	Paym date 0	Description1 #	Desc
	1	BL1 Staff costs	M Varagement	54	654	06092018	1369/2016	staff 3 Per period 1	
	1	BL2 Office and admin.	M Management		FR	NAFR	NAFR		
	1	BL3 Travel and accom.	M Management	45	45	07460214	01/09/2016	Travel to Rick off	
	1	BL4 Estensil exp. and services	TI Stategy and Action plan development and implementation	554	862	01082016	13092016	analysis, Nr. dift, 3 days	
	1	8.5Epipment	12 Pild independent	654	66465	04092018	13092016	IT Equipment for Pilot action	

Comment LP	mount approved by LP 0	Difference LP 0	Comment controller \$	amount verified by controller \$	Difference controller 0
-	€ 21.000,00	€ 0,00		€ 21.000.00	€ 0,00
	€ 3.150,00	€0,0		€ 3.150,00	€ 0,00
-	€ 500,00	€ 0,00		€ 500,00	€ 0,00
-	€ 2.700.00	€ 0,00	VAT not deducted	€ 2.700,00	€ 300,00
	€ 6.000,00	€ 0,00		€ 6.000.00	€ 0,00

In well justified cases, the LP can decrease (but not increase!) in the list of expenditure amounts certified by the controller and provide an explanation.

Expenditures can be edited by a LP directly in the item overview table or in the expenditure item form by setting the difference in the corresponding field. The values previously inserted by a partner and by the national controller (Budget line, work package, Internal reference number, Invoice number, Invoice date, Date of payment, currency, VAT) cannot be modified anymore.

Please remember to always save the changes!



	Invoice number	552 01.08.2016	Partner comment	201 Distanting Revenues	^
	Date of payment	13.08.2018	- He was a second second		· · · · · · · · · · · · · · · · · · ·
SEE	Currency	EUR - EURO -		THE PARTY NEW YORK	proballer 0
narts.	Total value of item in original currency	3.000.00			121.000.00
ments	VAT	0.00			# 3.150.00
Nerts	Declared amount in original	3.000.00			6 505,00
ments	Expenditure outside (the Union part of) the programme area?	11			€ 8.008.00
	In Kind	101			
Contr	Verified by controller	8	Comment controller		
	Difference controller	€ 300,00	VAT not deducted		
	Amount verified by controller	€ 2 700.00	-	Di Dramina Revelina	
	Difference LP	€0.00	Comment LP		
9	Amount approved by LP	6.2.700.00		SHI Daning any	
	-	-	_	-	10

Expenditures can be edited by a Lead Partner directly in the item view form by setting the difference in the corresponding field (see Figure 9).

The values previously inserted by a partner and by FLC (Budget Line, Work package, Internal Reference Number, Invoice Number, Invoice Date, Date of Payment, Currency, VAT) cannot be modified anymore.

Attention!

The Lead Partner can only decrease items certified by FLC and cannot increase them.



D. Project report tables

This section provides various summary tables of the expenditure included in the joint progress report. Please note that the tables are updated before the report is submitted. All the cuts done by the LP should be immediately visible in the tables. Joint progress report tables follow the same logic as those in the partner report but take into account all certificates included in the joint progress report. Please note that the 'Currently reported' column changes its values (and name) each time a joint progress report changes the status.

Before the report is submitted it is 'amount to be declared to the JS' and once it is submitted it changes into 'amount declared to the JS'. Likewise, the column 'Previously reported (certified by CA) also changes if new CA confirmations become available. After submission of the report to the JS, the values do not change anymore. Tables can be exported to xls-files.

Programme Like Beaming	Project total builget	Previously reported (cardined By CA)	Clarierity reported cannari miniand to 201	Total reported	Surbur Swiget	Parturing Swight	Total around declared by platform	Total arrows validated by Lonitoler	Total amount included a frames report
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Preferent BRCP	440724630	#1.200.00	4.00.001.00	4.27 MG/8	8.01%	< <p>4.434.300.00</p>	4.00.000.00	639,000,00	
farmer on financing	6 102 200.00	4.00.00	4487530	4336.0	7005	4 44.305.00	4878.0	61475.00	
trial shadow	1 10 10 10 10	43,000.00	4 10 10 10	12120	- 6.00 %	110.00.0	4 12 19 10 10	10.064	
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Troject experidat forget ins	Vie per budge Prest Mar Salpt 4 (24-97.0)	fileso Personally reported inertified By CA) ELLIS	Carrently reported (pressure Backend to JS) #21108-20	Tatal reported €21.00.00	Staf bild Indipit	Remaining Indiget C201.007.01	Total around declared by pathwes	Total armost solitated by controlor C2:00:00	Tatal amount included i Bases sport
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E. Attachment



It is possible to upload additional attachments relevant for the entire project report. In order to do so, please use the 'Attachments' tab.

Optood				
Attachments				
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1.2.5 Submitting a joint progress report

From the menu at the left side, the joint progress report needs to be checked before it is submitted to the JS. Only after the check has been successful, the system will allow for the report to be submitted and the 'Checked saved report' button is replaced by the 'Submit report' item in the left menu.



By pressing this button, the joint progress report is automatically submitted to the JS.



A submitted joint progress report is locked and the LP cannot modify it anymore unless the JS re-opens it for amendments during the clarification process. The report state is changed from "Report in progress" into "Report Submitted" and the submission date is displayed in the overview table.

Project	t Reports						
Report	Report Start	Report End	State	Date Of Project Submission		Total Expenditures	View Report
Period 1 05.	05.2015 - 05.05.201	6					
Report 1.1	05.05.2015	05.05.2016	Report Submitted	25.02.2016		€ 10 261.85	P
Period 206.	05.2016 - 31.12.201	6					
Period 3 01.	01.2017 - 05.05.201	7					

As long as the report is not submitted it can be deleted.

The left menu gives direct access to the AF and the supplementary information section.

The joint progress report can be printed as pdf-document. The pdf file is then available in the "Filebrowser" in the project general menu.



In order to leave the joint progress report and go back to the report overview tables please click on "Exit".

After submission, the Lead Partner can see the report but can't modify it anymore.

A new project report can be opened once the previous one has been submitted to JS. More than one project report can be submitted per period.

1.2.6 Project living tables

From the menu in the report overview section the project living budget overview tables can be accessed. Project living tables are financial tables at the project level that summarise project expenditure processed through all joint progress reports. Like other living tables (e.g. at partner level), project living tables grow over time as expenditure is declared by the project and processed by the various authorities.

You can use living tables to keep an overview on expenditure declared in the joint progress reports. To access the project living tables, click on the button "Project living tables" in the left menu.

Tripert Loarg Tables	Sensi Rus Le	
Supprentary Information	Joint progress report	
La Contra C	Report Report Net Report End State Period 2 0107 2015 - 0126 2016	Vee Report
	Pepart 0.1 01.07.2015 01.06.2019 Tepart 3ubmitted 18.08.2010 6.1 000,00	8
wg	Period 1 81 87 2816 - 21 12 2816	
untants	Report 1.1 01 07 2018 31.12.2019 Report In Progress In Progress €0.00	0.00
	Period 2 01.01.2017 - 30.06.3017	
rga (d	Period 101.07 2017 - 31.12 2017	
	Personal 4 01 01 2010-20 06 2010	
	Partial 6 01 01 3015 - 30 06 3019	

Interreg	TEST PROJEC	TREPORT	CE74 (instan) First	ance Report	Ing					Manager Para Tage
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	Nor other one	A ANT DALLAR.	4100.0	44.00	412000	185	6 400 (MAL 14	#10408C	#1000.00	a1.00.0
	Charlest States	4.447.546.84	#1383.00	6.1.00	412000	0.01%	4 400 200 10	4134.00	410808	41000
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	6.1 Bell yours	4.224.001.01	4100	+1.01	81.00	4.81%	8.02447141	918	110	110
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CIVIO	\$127 Section acces.	81040179	810	81.0	6100	1815.	4.0.43170	81.0	8.08	418
munito ing	St.4 Sources and their sectors	10100	1.00.0	*10	41000	185	1100	818828	1.00.0	1.004



1.2.7 Reverting Procedure

The Lead Partner can revert partner reports back to the First level Control (FLC) or to the Project Partner (PP).

This might be necessary in case he/she notices a mistake, which is not in his/her authority to correct.

This procedure is done through the table "List of Partner FLC Certificates" (see below) that is in the Joint Progress Report.

Total Partner E R D F Included	Total Partner I P A I I Included	Total Partner E N I Included	Flc Report	Revert	
€ 212.00			Show Report	🕤 Revert From Lp To Flc	🕤 Revert From Lp To Pp
	€ 10 050.00		Show Report	🕤 Revert From Lp To Flc	🕤 Revert From Lp To Pp

Typology of Mistakes & related procedures to correct them

Mistakes concerning descriptive sections (es: summary of report, deliverable/activity description, etc)

In case of Mistakes concerning descriptive section, LP can revert partner reports back to PP clicking the button "**Revert From LP To PP**" in the table "List of Partner FLC Certificates" section "Revert".

In this case the PP will only have the possibility to edit descriptive sections in that report. List of expenditure (budget lines verified by FLC) cannot be modified.

Mistakes concerning budget lines verified by FLC

In case of Mistakes concerning expenditures verified by FLC (es: amount of budget; budget lines; etc.) LP have to revert partner reports back to FLC clicking the button "**Revert From LP To FLC**".

Then FLC needs to untick the "verified by FLC" flag of the expenditures in which the mistake occurred. Then, FLC have to revert the report back to the partner. Only then, PP can modify the budget.

In this option PP can also modify Descriptive section.

In this option, Reverting the report to a project partner means that the project partner needs to correct and re-submit the report to the FLC and then the FLC needs to certify the report again.



Mistakes strictly related to FLC activities

In case of Mistakes strictly related to FLC activities (document missing, expenditure verified for error, ...), LP have to revert partner reports back to FLC clicking the button "**Revert From LP To FLC**". Then FLC can correct mistake or add data/document missing.

In this option, reverting the report to FLC means that the FLC needs to certify the report again but no corrections from the Partner are necessary.