

Key Action 2- Strategic Partnerships – Final Reporting

Frequently Asked Questions

Change of Contact Person or Legal Representative

Q1) We need to change the Contact Person for this project. How do we do this?

Due to data protection reasons the National Agency is only able to discuss project details with the listed Contact Persons and Legal Representative of a project. For this reason it is important that you let us know as soon as possible if there is a change of Contact Person and their details. For us to update the contact person, we will need the listed Contact Person or Legal Representative of the project to email us at ukerasmuspluska2sp@ce.britishcouncil.org and request this update. Please provide the new contact's full name, their role or position title, email address, and telephone number. Please also supply their postal address if this differs from the organisation's address.

Q2) The Legal Representative has left the organisation, how do we update the project's Legal Representative?

It is important that we are informed if there is a change of Legal Representative for the project. The Legal Representative cannot be updated on Mobility Tool+ so you will need to notify us before reporting. Any documents that need to be signed by the Legal Representative will be rejected, unless the name and signature match the ones that we have in our systems. For us to update the Legal Representative, we will email you a Change of Legal Representative form which needs to be completed and returned to us with the following:

- An appointment letter, on headed paper, signed by a senior member of the organisation (i.e. board member, trustee, school governor, HR Manager, etc.) stating the new Legal Representative's full name, their role or position title, email address, and telephone number. Please also supply their postal address if this differs from the organisation's address.
- A new declaration form (which we will provide) signed by the new Legal Representative.

Q3) When should I submit the Final Beneficiary Report?

The Final Beneficiary Report must be completed within 60 days of the project end date. Beneficiaries are able to begin completing their narrative report prior to their mobility data being completed, as the Mobility Tool+ automatically updates the report with any changes to the mobility data.

Q4) How can I access Mobility Tool+?

Mobility Tool+ is the online management and reporting system developed by the European Commission for all Erasmus+ projects. It is a contractual requirement for all beneficiaries to report their project activities in the tool. It is highly recommended to complete information online as your project progresses. This will help you to manage your project budget and save time when the project final report is due for submission.

The official Contact and Legal Representative for your Erasmus+ project (as per the most up-to-date details on the UK National Agency database) would have received an automated email when your Erasmus+ project had been added to Mobility Tool+ Once logged in, the Contact person can add additional contacts to assist with the reporting of the Erasmus+ project. The Mobility Tool+ website can be accessed. [here](#)

Please note that the Legal Representative will automatically be given “View” access and will not be able to amend the information on Mobility Tool+ unless these rights are manually changed

If the contact person has changed and the new contact requires access to the Mobility Tool+ please read Q1 for information on how to change the contact person Once this has been changed on our system you should then be able to access the Mobility Tool.

To log in to Mobility Tool+ you need to have an ‘EU Login’ account EU Login is a service that allows users to access digital systems developed or used by the European Commission.

If you do not have an EU Login account, please follow the instructions below to register Open the link [here](#) to access the registration page to enter your details.

Please ensure that you:

- Complete all mandatory fields (marked with an asterisk *)
- Read and accept the privacy statement by checking the box; and
- Complete the security check by typing in the characters on screen. If the characters are not clear enough, click the icon to try a different image or click the icon for an audio version

After clicking ‘Create an account’ button, an automatic email will be sent through to the email address you used to register This email contains your username and a link to create your password. You must create a password within 90 minutes of receiving the email. If you are required to specify your Domain Name when completing the form, you should ensure that you choose ‘External’ Further guidance for registering with EU Login is available on the Erasmus+ website.

Once you have registered, you will be able to log in to Mobility Tool+ In order to do this, please click [here](#) or follow this URL address: <https://webgate.ec.europa.eu/eac/mobility>.

We recommend that you open Mobility Tool+ in Google Chrome or Firefox, as other browsers might not allow you full access to the tool. Please do keep in mind that some organisations’ networks block access to the Mobility Tool+, so you might need to refer to your organisation’s IT team, or access the website using another electronic device/network

Further information on how to access all the reporting tools can be found on the Erasmus+ website: www.erasmusplus.org.uk/

Final Reporting

Q5) What can Project Management and Implementation (PMI) funding be used for?

PMI is a unit cost contribution awarded to each partner to cover costs precisely linked to the implementation of the project activities, such as planning and meetings, finances, coordination and communication between partners. It is also the contribution towards the production of small-scale learning, teaching, or training materials, tools or approaches, as well as supporting virtual cooperation and local project activities such as classroom project work with learners, youth work activities, organisation and mentoring of embedded learning, teaching or training activities. It is also the contribution towards the production and distribution of project related information, promotion, and dissemination such as brochures, leaflets, web information.

Q6) Do I need to provide evidence for PMI?

You do not need to evidence PMI costs along with your final report submission. You do need to keep evidence on file in case of an audit (see information provided on Primary Check)

Please provide a summary of project management undertaken during your project. Itemised costs are not required.

Q7) When developing our Intellectual Outputs (IOs) can we transfer funding from one category of staff to another category of staff, which we did not apply or receive funding for?

Any changes to the delivery of your project must be discussed and approved in writing by the UK National Agency **before** the expenditure was incurred. For example, if 100 days of Technician time was applied for and approved for the development of an Intellectual Output but the final report claims 50 days of Technician time and 50 days of Researcher time, the Researcher time will be ineligible if not already discussed with and approved by the UKNA.

It is also important to note that only **staff** of the partnership are eligible to be funded for the development of Intellectual Outputs.

Q8) Can Multiplier Events take place prior to the completion of an Intellectual Output?

No, the funding rules for Multiplier Events (MEs) state that: in order to be eligible to receive funding an ME must be held **after** the date on which the related IOs were fully developed and wholly completed. Please note that the funding rules make no exceptions for beta versions of IOs, and the use of a Multiplier Event as a pilot or testing event would also make the event ineligible. If you put the project end date as the completion date for your IOs then this automatically makes all MEs ineligible to be funded.

Staff, students and representatives of the project's partner organisations are not eligible to receive this funding. Participants linked to associated partners that are hosting a Multiplier event are not eligible for funding under Multiplier Events.

Q9) We intend to use a 3rd party conference/education fair as the platform to deliver our Multiplier Event. Can we claim costs?

No, a third party is not the organiser of the event. Please keep in mind that the eligible costs are contributions to the organisation of an event by an eligible entity of the partnership, and if there is no organisation being done by members of the partnership then there is nothing to contribute to.

Q10) We took more participants on a project mobility than originally requested/awarded, can we claim these costs?

The total overall funding awarded to your organisation cannot be increased. However, under the terms and conditions of your grant agreement, it may be possible for the UKNA to increase amounts awarded in some budget categories using underspends reported in other budget categories. Please note that such transfers are limited and you should refer to your grant agreement (including the virtual activity addendum for activities cancelled or impacted by COVID-19) for full details.

The narrative of your final report must include a full explanation of why the numbers of participants and/or the activity duration has been increased, and what impact or added value these changes brought to the project. The UKNA will remove any ineligible or unjustified costs.

Q11) Due to partnership difficulties we were unable to schedule our last event before the end date of the project. Can we claim these costs?

No, to be eligible to receive funding all Erasmus+ project activities must take place between your project start and end dates.

Q12) The partnership decided to hold a Transnational Project Meeting at the same time as one of our Learning, Teaching, or Training Activities, can we claim costs for both activities?

A learning, teaching, or training activity (LTTA) and a Transnational Project Meeting (TPM) each have their own funding eligibility rules which must all be adhered to in full, and care must be taken to ensure that there is no overlap in funding claims made in these situations. As it is only possible for people to travel and stay once at the venue, claims made for the same participants attending both the LTTA and the TPM would be considered double funding, and the UKNA must reduce the budget accordingly.

Q13) How do I claim costs for virtual mobility?

Under the terms of the Virtual Activity Addendum, virtual activity costs are only eligible if a transnational mobility was affected by COVID 19.

In order for virtual rates to be available the mobility created by the **lead** must be selected as virtual or blended (if physical and virtual activities occurred). Virtual mobilities should replicate the original physical mobility intended.

- The report should include an explanation of why the participants attended virtually. Any increase in numbers attending must be further supported with a comprehensive explanation of the rationale and benefits for doing so. The UKNA will remove any ineligible/unjustified costs.

Q14) How do I report Exceptional Costs/ Special Needs Support?

If you requested and were awarded these costs as part of your application and have purchased the approved items/services, then you can submit these costs as part of your final report.

Please note that while the grant agreement allows some scope to increase the Special Needs Support budget category, there is no such agreement to increase Exceptional Costs (except in relation to COVID 19, see below)

Invoices/Receipts should be uploaded to Mobility Tool+ prior to final report submission. All supporting evidence should be in the English language, or accompanied by a full translation (from a reputable source) into English.

Any costs claimed in currencies other than the Euro must be converted into Euros when entering into Mobility Tool. Please refer to your grant agreement for the only approved website to use when performing currency conversions; the UKNA will check all conversions using the same website, and will correct any found to be incorrect.

Exceptional Costs and COVID-19: Where virtual activity has been undertaken due to COVID-19, beneficiaries are allowed to transfer up to 10% funds from any budget category into the Exceptional Costs budget category as a contribution towards costs related to buying and/or renting of equipment and/or services necessary for the implementation of virtual mobilities. However a pre-approved application to the UKNA would have been expected, and full justification for the transfer within the narrative of the final report is required.

Q15) What is classed as *force majeure*? How do I claim *force majeure* and what evidence do I need to submit?

Force majeure is defined on page 327 of the 2020 Erasmus+ Programme Guide v3 as 'an unforeseeable exceptional situation or event beyond the participant's control and not attributable to error or negligence on his/her part'

If a mobility has been affected by *force majeure*, the first step to take is to try to recover the travel and accommodation costs from the travel and accommodation providers, keeping copies of this correspondence.

If the travel and accommodation companies decline or otherwise refuse your refund request you should then make a claim from your insurance provider, again keeping copies of this correspondence. Remember it is an obligation of all participating organisations to ensure suitable insurance is in place for all project activities.

If your insurance provider also declines your claim, then you may be able to claim *force majeure* within the final report.

When claiming *force majeure* in the final report the UKNA requires evidence that you tried to recoup the costs as outlined above. To consider claims we require:

- Cancellation **emails/invoices** for the flights/hotels and for any claims being sought

- Correspondence from your insurance company declining your claim, and the relevant extract from the insurance policy or policy provider to confirm the insurance policy doesn't pay out for COVID-19

Please upload this evidence to the Mobility Tool+ prior to submission, and include any correspondence you had with the travel and accommodation providers, and insurance providers.

Actual costs incurred can be recorded under the relevant activity within the Mobility Tool. By clicking the Force Majeure box, this will allow you to enter into a free text field over the budget areas where you can input these costs. Please ensure that you provide a full explanation of how the activity was affected by COVID-19, and what steps to recoup losses from other sources have been attempted.

Q16) Can I claim costs for COVID tests?

The European Commission acknowledges that COVID-19 testing has become more and more a pre-requisite for physical mobility abroad, and in response have made COVID tests eligible for funding under the Exceptional Costs budget category. The reimbursement rate is set at 100% of the eligible costs incurred. Please ensure you click the 'covid-19 test' box in the Mobility Tool to claim.

As part of its response to the COVID-19 pandemic, the European Commission has approved the transfer of up to 10% of funds from any budget category to the Exceptional Costs budget category. The circumstances where this transfer rule applies, and the rules relating to the transfer have been set out in the Virtual Activity Addendum issued to you by the UK National Agency, or as part of the Annex III Financial and Contractual Rules which was issued with your contract. In all cases, it is not possible to request additional funding over and above the last budget approved by the NA.

All costs will be subject to approval by the NA on submission of the final report form and must be recorded within Mobility Tool+ under the Special Costs tab, and supported by appropriate supporting documentation. Invoices to support these costs should be uploaded onto the Mobility Tool prior to submission.

Q17) The overall costs of the project are higher than the funding awarded. Am I able to claim more funding?

No. Article 1.3 of your grant agreement sets the maximum amount of grant that the UKNA can pay, and this sum cannot be increased. All Erasmus+ grants are awarded on a co-financed approach and a grant is not meant to entirely fund all elements of a project, and other sources of funding from the partnership's own resources will need to make good any shortfall.

Q18) We have been unable to participate and/or have withdrawn from the Project early?

You are still contractually obliged to submit a final report and you may have eligible costs to report on behalf of the partnership. The following scenarios' apply:

Termination no grant If no mobilities have been carried out by the **Project** and no costs have been incurred for the project **by the partnership**, then you can go to the Reports section of the project on [Mobility Tool+](#) and click on the 'Generate a termination report with no grant'. A request to **recover the full pre-finance payment** issued to your organisation will follow once the final reporting process is completed and you will need to repay to the UKNA any and all monies paid to you for this project

Termination with eligible costs If you have withdrawn from the project early and have not undertaken any project activities, your report should outline any work and costs that have been incurred (including *force majeure* claims) following the guidance previously outlined. You must include a withdrawal date from the project in order for the UKNA to verify the level of PMI costs that would be eligible i.e., time in project (start and end date). On receipt and processing of an acceptable final report the UKNA will pay you eligible costs, however please remember that if your calculated eligible costs are lower than any pre-financing or interim payments made to you, then the balance may need to be repaid to the UKNA

Premature Finalisation If you have withdrawn from the project early and have undertaken some project activities then you must report as normal. You will still be required to upload any Project Results on to the Project Results Platform for evaluation by external expert (see below) and as outlined above a date when you withdrew must be provided. As above, on receipt and processing of an acceptable final report the UKNA will pay you eligible costs, however, please remember that if your calculated eligible costs are lower than any pre-financing or interim payments made to you, then the balance may need to be repaid to the UKNA

Q19) What supporting Documents are required?

Your final report submission within Mobility Tool must be supported with a Declaration of Honour and a Virtual Addendum signed by your current Legal Representative. Please check these documents to make sure all fields are completed (such as place of signature, e.g. Glasgow). Exceptional or Special Needs Support Costs must be supported with a relevant invoices or receipts. *Force Majeure* costs must be supported with both invoices or receipts and copies of the relevant communications with providers and policy documents as specified previously

If relevant, Timesheets to evidence work undertaken for Intellectual Outputs. These should be easy to read and presented in a well organised manner: i.e. one folder per partner, timesheets are in the English Language; each timesheet is appropriately named i.e. Spanish Partner IO2; Time claimed is displayed as full days (fractions of days cannot be awarded), and represents time spent on developing IO only. The UKNA will reject your report back to you to improve the quality of the submission if your timesheets do not conform to the above standard. Inaccurate, missing or poorly organised timesheets will result in delays in processing your final report and budget reductions to the expenditure reported

For Transnational Project Meetings and Learning, Teaching, and Training Activities: please supply legible scanned copies of the attendance registers (signing-in sheets) which must conform to the requirements set out in Annex III of your grant agreement. These sheets

must clearly show the date and location of the activity, the project reference number, with relevant details in the English language (or with a translation).

Q20) What is the Project Results Platform (PRP)?

This is a [separate platform](#) that is owned by the European Commission. It is an open access platform where all projects benefitting from an Erasmus+ grant must report both the results and outcomes of their projects for wider impact and dissemination to the public.

The **lead** co-ordinator of a KA2 Strategic Partnership project is responsible for uploading the results of the project *on behalf of the partnership*, such as handbooks, lesson plans, PowerPoints etc. Partners should ensure that they submit their resources to the lead co-ordinator prior to the final report submission.

Q21) How can I access the Project Results Platform?

The official Contact for the lead organisation for your project would have received an automated email when your Erasmus+ project was made available in the E+PRP. Only this person has access to the Beneficiary Dashboard, via their registered email address, unlike Mobility Tool. If this person is no longer with your organisation and you have not been provided with access then please contact our customer services ukerasmuspluska2sp@ce.britishcouncil.org to assist.

- Remember the project specific logo should be in JPEG form
- Provide a link to the project, this can be a *page* dedicated to the project on your website if no dedicated website is available
- Ensure the file size is within limits and the format is correct (this information is provided when adding attachments on the platform).
- Don't forget to scroll down and click 'Submit for Review'

Q22) How do I get in touch?

We are always happy to hear from you and to support you through your project's duration. For more support or if you have any questions regarding your project or final report, please quote your Erasmus+ **project number** and email the Customer Service team at ukerasmuspluska2sp@ce.britishcouncil.org

Primary and System Check questions

Q23) What is a Primary Check?

The UK National Agency is required by the European Commission to carry out detailed checks on a proportion of the organisations awarded Erasmus+ funding each year.

Primary Checks are separate from the Final Report process and are carried out by an independent Compliance team within the UK National Agency.

Q24) How should I submit documents requested for a Primary Check?

All documents submitted should have a short description and have identifiable and relevant names and be grouped in appropriate folders e.g , Relevant activity type If documents are received and are not easily identifiable the NA may reject the submission.

If you are asked to send documents that include personal data or sensitive information, please ensure that you use a secure file transfer mechanism.

Q25) Where can I find information on which documents I should retain in case of checks or audits?

You are required to retain all supporting documents for a period of 3 years from the date of final payment if your grant is less than €60,000, or 5 years for grants over €60,000. This requirement is outlined in Article II 20.2 of your grant agreement Annex III of the Grant Agreement clearly outlines the supporting documents which must be retained by each partner for each relevant budget heading

Q26) Are Primary Checks mandatory?

Yes. All Primary Checks are mandatory, and compliance is stated within your Grant Agreement (Article II.27.3). Failure to comply with a request to conduct a check could result in part or all of your grant being made ineligible, and a recovery being issued for the grant