

# Key Action 229 - School Exchange 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 or 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 [Erasmus.schools@ce.britishcouncil.org](mailto:Erasmus.schools@ce.britishcouncil.org) and request this update. We will then email a Change of Contact form to you which needs to be completed and returned to us.

#### Q2) The Legal Representative has left the school. 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+ and, therefore, 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 school (i.e., governors or HR Manager) stating the new Legal Representative's position in the school.
- 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. KA229 projects require co-ordination by all partners to complete the submission process (If all partners are ready then the lead co-ordinator can submit early). Please make sure that your organisation undertakes the necessary steps as outlined in the Mobility Tool+. The lead co-ordinating school will be responsible for creating mobilities undertaken by the project (these should be created as a priority in order to allow partners to complete their financial spend) prior to the partnership submission and for submitting results onto the Project Results Platform (PRP) see below for further explanation.

#### 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+ on Google Chrome or Firefox, as other browsers might not allow you full access to the tool. Please do keep in mind that some school networks block the access to Mobility Tool+ and, therefore, you might need to access the website using your own electronic device/network.

## Final Reporting

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

Costs directly linked to the implementation of a transnational school exchange partnership activity, including financial planning, co-ordination and communication, local project activities and class-room project work, training materials, tools, promotion, evaluation and dissemination activities e.g., brochures, leaflets, web information.

### Q6) Do I need to provide evidence for PMI?

You don't 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) How do I create/add a transnational Learning Teaching and Training activity? Lead Only.

The **lead** is responsible for the creation of all Project mobilities which must include accurate dates, type of activity (whether this is a student or staff mobility) and a narrative of what actually took place.

- Within the Learning/Teaching/Training tab Click "+Create" complete details and "Save"
- It is important to get this detail right as once partners start to add costs, editing will not be possible, unless partners delete their record first.

### Q8) How do I add costs for attending mobilities? All partners.

When saved this information will also be visible to all partners who will each be able to add their financial costs into their **own** project record in Mobility Tool+. Each partner is only responsible for reporting their own individual costs for their participation in the project.

- Click "View" at activity level. Click "+Create" fill in details and Click "Save".

There are two costs you can apply for here which are fixed rate.

Travel – where you input the total amount of participants travelling from your School. Use the distance calculator available on the tool between cities you travelled to calculate the rate.

Individual Support (hotel/food costs) input number of participants attending from your School and the number of days of the event.

- Please note number of participants requiring Individual Support cannot exceed the number of participants that have travelled.

Expensive travel can only be reported if this has been approved as part of your Grant Award - this is not an additional cost and would take the place of standard travel.

## **Q9) We took more pupils/staff on mobilities than awarded, can I claim these costs?**

The overall funding awarded to your organisation cannot be increased. However, where an underspend has occurred either as a result of cancelled and/or COVID-19 affected mobilities, then the UKNA can consider costs associated for additional participants and/or the number of days where activities have taken place.

- A full explanation of why participants/duration has been increased must be provided. The UKNA will remove any ineligible/unjustified costs.

## **Q10) How do I claim costs for virtual mobility?**

Virtual costs are only eligible if a transnational mobility has been 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.

## **Q11 Can attendance at external conference/training be funded?**

No. All mobilities carried out must be in-line with activities awarded within your original application and must be carried out by the partnership on a transnational school to school basis.

## **Q12) What are Exceptional Costs/ Special Needs Costs for?**

If you have been approved these costs as part of your application and have purchased said items/services, then you can submit these costs as part of your final report. Invoices should be uploaded to Mobility Tool+ prior to submission and costs converted into Euros within the tool.

- Any conversion into Euro of costs incurred in other currencies must be made by the beneficiary at the monthly exchange rate established by the Commission and published on its website ([available here](#)) – applicable on the day when the bank account of the beneficiary is credited (pre-finance payment at the start of the project)

Where virtual activity has been undertaken due to COVID-19, beneficiaries are allowed to transfer up to 10% funds from any budget category in order to cover costs related to buying and/or renting of equipment and/or services necessary for the implementation of virtual mobilities. A pre-approved application to the UK NA is required.

## **Q13) What is classed as force majeure? How do I claim force majeure and what evidence do I need to submit?**

If a mobility has been affected by force majeure and had to be cancelled, the first step to take is to try to recover the costs through your insurance provider or other refund method from the airlines and accommodation providers. However, if this is not possible you may be able to claim force majeure.

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

For mobilities impacted by force majeure we require evidence that you tried to recoup the costs via your insurance provider. To consider claims we require:

- The relevant extract from the insurance policy or policy provider to confirm the insurance policy doesn't pay out for COVID-19.
- Cancellation **emails/invoices** for the flights/hotels and for any claims being sought.

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

Actual costs incurred can be recorded under the relevant mobility within the LTTA category in the tool. By clicking the Force Majeure box, this will allow a free text field over the budget areas (travel and IS) where you can input these costs. Please ensure that you provide a full explanation of how this was affected by COVID-19.

#### **Q14) 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 because of this, they are eligible for funding under the Exceptional Costs for Services and Equipment section and as part of the exceptional rules applying under the COVID-19 framework. The reimbursement rate is set at 100% of the eligible costs incurred. Please ensure you click the 'covid-19 test' box to claim.

As part of the COVID-19 framework, the European Commission has approved the transfer of up to 10% of funds from any budget category to exceptional costs. The circumstances where this applies, and the rules relating to the transfer have been set out either in the Addendum issued to you by the UK National Agency (NA) or for all Call 2020 KA229 projects within **Annex III Financial and Contractual Rules** that 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. Invoices to support these costs should be uploaded onto the tool prior to submission.

#### **Q15) The overall costs of the project are higher than the funding awarded. Am I able to claim more funding?**

No. The Erasmus+ grant is approved on a co-finance approach and it is not meant to entirely fund all elements of the programme.

## Q16) 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. The following scenarios' apply:

### Lead Co-ordinator

**Termination no grant** – As lead you have responsibility to ensure that all learning Teaching Training Activities have firstly been created in order for your partners to submit any eligible/force majeure costs to their respective National Agency.

If no mobilities have been carried out by the **Project** and no costs have been incurred for the project **by your organisation**, 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.

### Partner

**Termination no grant** - If no mobilities have been carried out and no costs have been incurred for your organisation, 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 pre-finance payment** issued to your organisation will follow once the final reporting process is completed.

**Termination with eligible costs (Lead and Partner organisation)** – 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 can verify the level of PMI costs that would be eligible i.e., time in project (start and end date).

**Premature Finalisation (Lead and Partner organisations)** – If you have withdrawn from the project early and have undertaken some project activities then you must report as normal. The **Lead** organisation 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.

## Q17) What supporting Documents are required?

Your final report submission within Mobility Tool must be supported with a Declaration of Honour signed by your current Legal Representative - please sense check this document to make sure all fields are completed (such as place of signature). Exceptional/Special Costs must be supported with a relevant Invoice. Force Majeure costs must be supported with both an Invoice and relevant communication/policy documents as specified previously.

## Q18) What is the Project Results Platform?

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 KA229 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.

## **Q19) How can I access the Project Results Platform? (Lead Organisation only)**

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 [Erasmus.schools@ce.britishcouncil.org](mailto:Erasmus.schools@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 the school 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'.

## **Q20) 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 [Erasmus.schools@ce.britishcouncil.org](mailto:Erasmus.schools@ce.britishcouncil.org)

## **Primary and System Check questions**

### **Q21 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.

### **Q22) 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.

## **Q23 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.

## **Q24) 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.