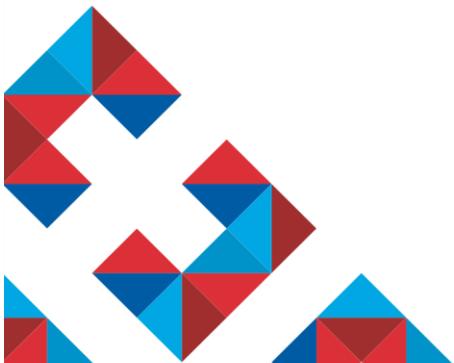


Information for New Coordinators

Version 1: 12 October 2016



Introduction

As a new coordinator, we hope you find this pack helpful but, if you do have any questions, please do not hesitate to contact us. **This does not replace the [Operational Handbook](#) but is merely a brief guide to help you in your new role.**

We have designed this New Coordinator pack with key project milestones in mind so that depending when you start in the year; the document provides information on what is happening at that time.

Contact Form

When a contact person on a project changes the UK National Agency (“UK NA”) must be informed as soon as possible. To do this, you will need to submit a [Change of Contact](#) form detailing all of the contact people you would like listed on the project. The UK NA will then be able to update your project records and add you to our mailing lists. You are able to include additional contacts on the form as well. Please ensure the main (or preferred contact) is always listed under **Preferred Erasmus+ Contact (main contact person for the project):**

Mailing List

There are two mailing lists; Erasmus Tempus Talk (“ETT”) and Erasmus Information (“EI”).

ETT is an open discussion forum where all subscribers can post messages. ETT is not only for Erasmus+ Higher Education coordinators but is open to anyone interested/involved with the programme, such as academic staff etc. We also post general information and traineeship offers to ETT.

EI is a closed mailing list only for Erasmus coordinators. Only British Council staff can post to EI and we only post important information, such as deadline reminders.

Basic Information about Erasmus+ for Higher Education

Erasmus+ started in 2014 and will run until the end of 2020. It is made up of what were once Lifelong Learning Programmes and a number of other programmes, including, for HE, Erasmus Mundus. Now the various programmes have merged and there are different Key Actions (“KA”). All the sectors are represented within the Key Actions.

Key Action 1 – *Mobility of individuals*

- Mobility for Higher Education Students and Staff
- Mobility for VET Learners and Staff
- Mobility for School Staff
- Mobility for Young People and Youth Workers
- Master’s Student Loan Guarantee*
- Joint Master Degrees*
- Large Scale European Voluntary Service Events*

Key Action 2 – Strategic Partnerships

- Strategic Partnerships for Higher Education
- Strategic Partnerships for VET
- Strategic Partnerships for Schools
- Strategic Partnerships for Adult Education
- Strategic Partnerships for Youth
- Strategic Partnerships in more than one field

Key Action 3 – Support for Policy Reform*

- Meetings between Young People and Decision Makers

Other Funding Opportunities:

Jean Monnet*

Sport*

*Centralised Actions – Managed by the Executive Agency. Please visit the [Commission's website](#) for further information.

You can also read more about Erasmus+ in the Commission's [2016 Programme Guide](#).

There are calls released for each Key Action and sector.

General information about applying for Erasmus+ funding

Erasmus Charter for Higher Education (“ECHE”)

All Higher Education Institutions (HEI) that wish to apply for funding under Erasmus+ are required to have an ECHE. The ECHE provides the quality framework for Erasmus+ funded activities carried out by an HEI and is a pre-requisite for all HEIs wishing to participate in Erasmus+.

The Call for proposals for the award of the ECHE is held annually and is awarded for the full remaining duration of the Erasmus+ Programme (i.e. until 2020), and therefore HEIs which already hold the ECHE do not need to re-apply. If you do wish to apply for the ECHE you need to register via the European Commission's Authentication Service (“ECAS”) (see the ECAS section below).

The 2016 Call for applications for the ECHE, which enables Erasmus+ participation in 2017/18, has now closed. We are expecting the next annual call to be released in March 2017 and this will allow participation in 2018/19. To see if your institution has an ECHE, please visit the Commission's [updated list](#) of those awarded the ECHE.

If you have been awarded the ECHE, you need to display it on your institution's website.

For more information on the ECHE, click [here](#).

European Commission Authentication Service (“ECAS”)

In order to apply for funding, or for the ECHE, you need to create an [ECAS account](#). This is the Commission's security system. You can find guidance on creating an ECAS account [here](#). You will need the same login to access various aspects of the Commission's online applications and reporting systems.

Participant Identification Code (“PIC”)

Every organisation that wishes to participate in a European Commission (“EC”) programme needs to register their organisation via the Commission's [URF / Participant Portal](#) prior to the submission of an application. This is the EC's database for all organisations participating with EC programmes. Organisations are only required to register for this PIC once and each organisation should only have one PIC.

There is a possibility that your institution already has a PIC so please check before registering your organisation for a PIC. To check if your organisation has a PIC, click on the URF/Participant Portal link above and select 'Register Organisation'. Insert your institution's name and country. Select 'No' to the next 3 questions (this will broaden the search of the EC's database). If your institution has a PIC, it should appear. If no PIC is registered, you will be taken to the next page to register. You can follow the guidance on registering for a PIC [here](#).

Application, Grant Management and Reporting

The image below shows the project lifecycle for Erasmus+ grants. You can find details of specific elements of the Erasmus+ project lifecycle in more detail below the image:



Applications for next year's funding (*Oct-March*)

Each Key Action and Sector has a 'Call' released for applicants to apply for funding. We notify all coordinators whenever any relevant 'Calls' are released via the EI mailing list. For KA1 Higher Education, the call is released in October with a deadline usually in February of the following year.

You must apply online via the Electronic Form that is released for the relevant call. You should be informed of the results of your application within four months of the application deadline. All 'indicative' deadlines can be found in the [2016 Programme Guide](#).

Grant Agreement (*June*)

If funding is approved, the UK NA will issue a Grant Agreement which includes the terms under which the grant is made between your organisation and by the UK NA. The UK NA will send the Grant Agreement by email to the preferred contact listed in your institution's application form.

Upon receipt of the Grant Agreement, two copies must be printed and both copies must be signed and dated by the Legal Representative as detailed in your organisation's application form. Your organisation must then return the two signed copies to the UK NA to countersign. When returning the Grant Agreement, you do not need to send the entire Grant Agreement back to us, only the part from the first page up to the signature page.

Once we have received the Grant Agreements they are then countersigned by the NA. If there is a problem with your Grant Agreement, we will be in contact to rectify the issue. Depending on the grant amount, the agreement will be signed in our Cardiff office or our London office. After we have countersigned, we will return one copy for you to keep for your records.

Initial Allocation Payment (*June – July*)

Once the UK NA has countersigned the Grant Agreement, your project's Initial Allocation Payment will be raised and released within 30 days of countersignature. The payment will be 70% of the contracted total in your organisation's Grant Agreement.

Interim Report (*March*)

Half way through the year your organisation must report how much you have spent and expect to spend for the entire project by recording all mobilities that have taken place or will be taking place over that Erasmus+ year. The student interim report deadline is February and the staff interim report deadline is in March. You may not know all of the specific data required, such as a Traineeship provider's name, especially for those mobilities that have not yet been finalised.

You can enter 'dummy' information if you are not certain of specific information but the financial reporting needs to be as accurate as possible. You do not need to click a 'submit' button on the interim report as your report data is exported directly from your project on Mobility Tool+ (MT+). After the Interim Report you cannot increase the amount of funding reported. You cannot exceed your contracted amount in your Grant Agreement.

Amended Grant Agreement *(May)*

Once we have exported and validated your institution's Interim Report, we will generate an Amended Grant Agreement which will confirm the amount your institution is expected to spend for that current year and this will be based on the data validated in the Interim Report.

You will need to follow the same procedure with your Amended Grant Agreement (see Grant Agreement section) as with your Grant Agreement at the beginning of the Erasmus+ Mobility Year.

Second Allocation Payment / Request for Repayment *(June)*

After the Amended Grant Agreement has been countersigned by the UK NA, depending on your expenditure (the interim report must show that at least 70% of the initial allocation has been allocated to mobilities), your institution may receive a second allocation payment which is the remainder of your contracted grant amount. If your organisation has spent less than your Initial Allocation Payment, your organisation will receive a Request for Repayment.

Final Report – Mobility Data (Sept for 16 month project / May for 24 month project)

The Final Report is used to represent the mobilities which have taken place and how much your institution has spent over the Erasmus+ year. It updates corrects and finalises the Interim Report data that is already stored on MT+.

As with the Interim Report, it is not necessary to click a 'submit' button as we export the information directly from MT+. The UK NA will validate the data, looking at dates recorded and the destination country. Once the UK NA has exported and validated your project data, the UK NA will issue a Closure Letter. After the Final Report deadline you are not able to continue allocating funds, even if the total amount used is less than your contracted amount, as stated in your Amended Grant Agreement.

Final Report – Narrative Report (Nov for 16 month project / July for 24 month project)

HEIs need to write a narrative report (through MT+) on their project after the project finishes. The narrative report must be submitted within 60 days of the project end date. There is a 'ready for submission' button that must be pressed in order to submit the report to the UK NA.

In the narrative report, some fields are automatically populated with the mobility information you have recorded on MT+ and the feedback reports that have been completed by project participants. There are text fields for you to complete. Please provide detailed answers in relation to the questions as the report will be assessed by an external assessor.

Closure Letter

We will issue a Closure Letter, providing a breakdown of each mobility type, confirming the figures calculated from your Final Report. We will also include the feedback from the external assessors and the scores for your narrative report with your closure letter. You will then receive a Request for Repayment for any unspent funds.

Documentation, Tools and Support

Participant documentation (Found in the 'Agreements' section of our [website](#))

- Student Grant Agreement
- Learning Agreement for Studies/Traineeship
- Staff Grant Agreement
- Mobility Agreement for Teaching/Training

Mobility Tool+ (MT+)

MT+ is the EC's reporting system for institutions to report the activity and funding spent on their project over the project lifetime. To access the Mobility Tool go to <https://webgate.ec.europa.eu/eac/mobility/> and you will come to an ECAS login screen.

You will need to log in with your ECAS account (which you will need to create using the email address that has been added to the MT+) if you haven't done so already. Information on how to do this is in the previous section **European Commission Authentication Service (ECAS)** and MT+ will then take you to your institution's project.

Sometimes there can be a problem with logging in and you will see an error message. Two frequent error messages and ways of solving the problems:

FREQUENT LOGIN ERROR MESSAGES:

- **My role has not been defined.**

This means the email address that was used in the creation of the ECAS account is not listed as a contact for your institution with the MT+ or access hasn't been granted. The NA, or another contact at your institution with access, can add or amend your details on MT+ so it links with your ECAS account.

- **Incorrect username or password supplied, please try again.**

You may have selected a different domain than that on which your account is registered. Sometimes it switches the domain over to European Commission, for instance. You should always log in using the EXTERNAL domain. When logging into the ECAS screen, ensure it says 'External domain' above the login boxes.

You can find guidance on using the Mobility Tool [here](#).

Before adding mobilities, you will need to add partner institutions and organisations (traineeships don't require an Inter-Institutional Agreement but for the purpose of reporting on the Mobility Tool, traineeship providers are classed as partners).

Online Linguistic Support ("OLS") - <http://erasmusplusols.eu/>

Any student undertaking their mobility in a language that is not their 'native' language (for example a UK student completing their mobility in French) must undertake an assessment via the OLS (if the

language is on the OLS system – see below). There is a second assessment to be completed after the mobility has finished which is linked to the first assessment licence.

The OLS languages available are: English, French, Spanish, German, Italian, Dutch, Czech, Danish, Polish, Portuguese and Swedish.

There is also an online course for the language of the assessment but the course is not mandatory. In order to participate in the course, the student must complete the assessment first. If the student receives a result between CEFR (Common European Framework Reference) levels A1 and B1 in their first language assessment they are automatically allocated a language course licence.

If a student achieves a result between CEFR levels B2 and C2 in their first language assessment, a course licence can be manually allocated to the student. You can see students who have achieved a result between B2 and C2 in the (Licence Allocation to Participants – Course) and course licences can be allocated to the student under that tab.

If a student is undertaking a mobility that is in their native language they are not required to complete the assessment.

Further guidance on the OLS system is available the [homepage](#). Any technical problems should be reported to the service provider via the '[report a problem](#)' link at the top of the screen.

Further assistance

We provide application guidance for each call year. When this is made available for the 2017/18 programme year, it will be published on our website as below under the 'Guidance' section of the right hand side of the screen:

[Application guidance for Key Action 103](#)

[Application guidance for Key Action 107](#)

[Application guidance for Key Action 203](#)

We also have a FAQs document for Higher Education staff and students available [here](#).

The UK NA has a helpdesk through which you can submit questions which are not answered in the Operational Handbook or in guidance documents. The details of the HE helpdesk are as follows:

Email: Erasmus@britishcouncil.org

Phone: 0292 092 4311

Opening hours: Monday – Friday
10:00 – 16:00

We aim to respond to emails within three working days.