

Grant Agreement Preparation

Description of the Action (DoA)

Lionel Boillot, Project Officer / Call coordinator



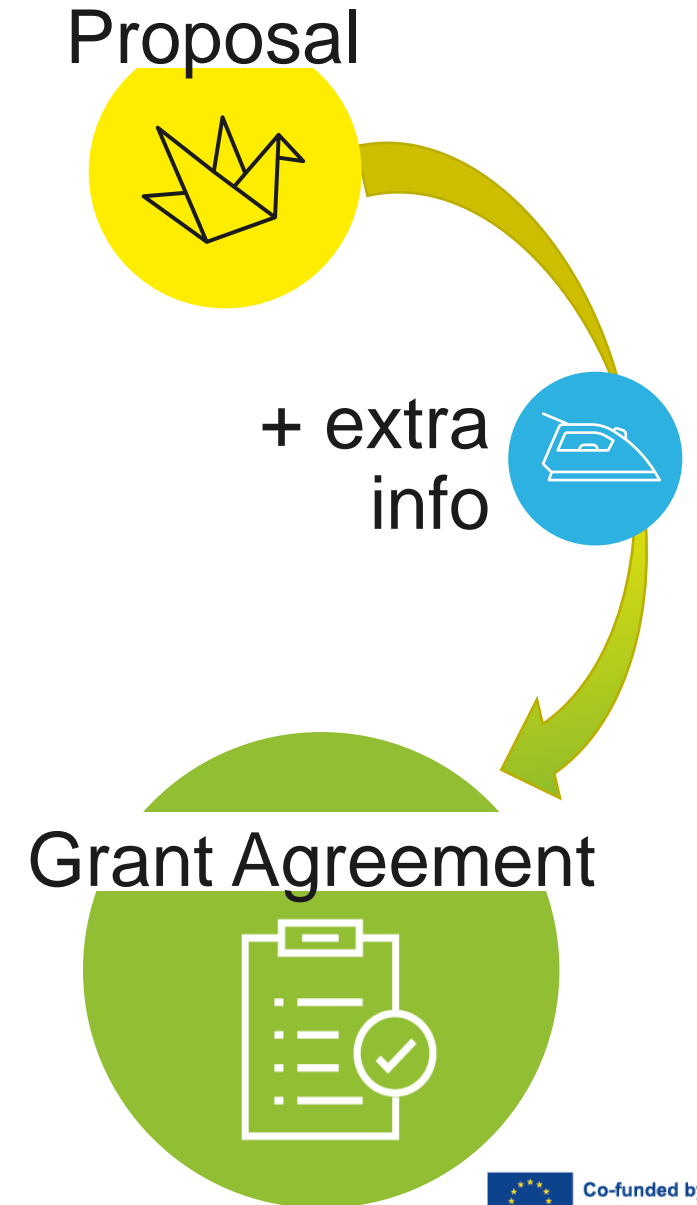
Objectives of the GAP

Transfer information from the proposal to the grant agreement

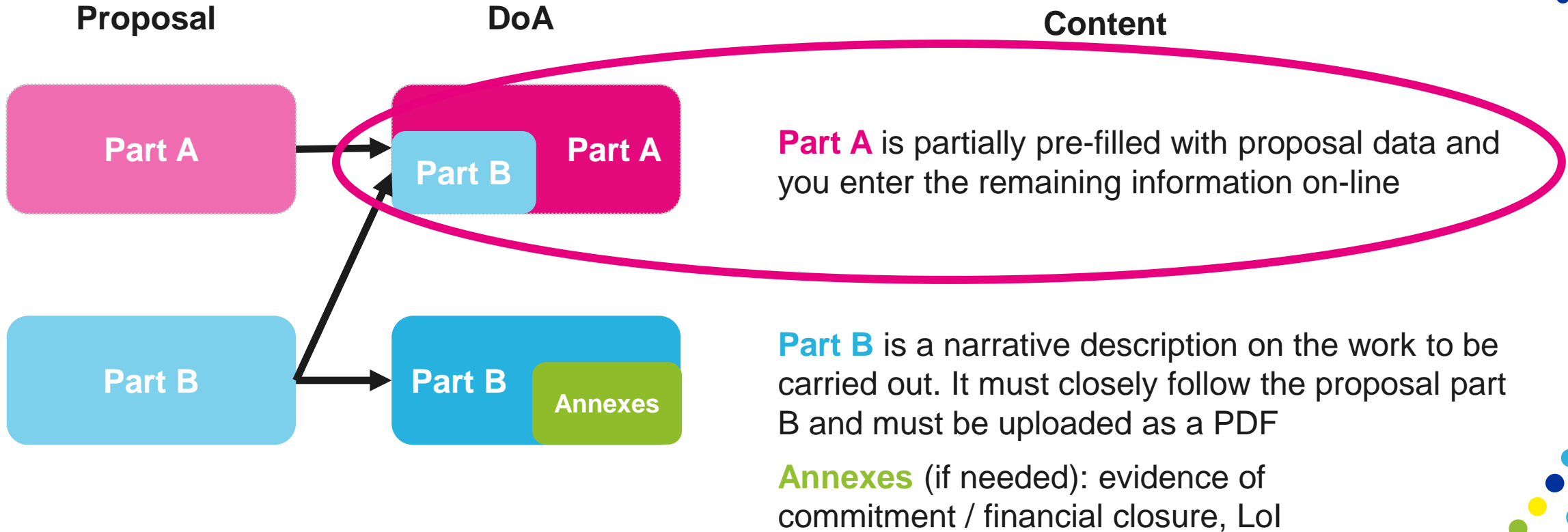
Collect additional information not present in the proposal (e.g. budget details, third parties)

if applicable, also:

- Implement any requirements from an ethics review or security scrutiny
- Removal or replacement of a participant (if agreed)
- Change of administrative aspects (e.g., the legal status of a participant can affect the budget)
- Obvious errors or inconsistencies may be removed
- You may correct shortcomings identified by the experts in the ESR



Description of the Action (DoA) = Annex I



Coordinator is able to download the DoA template (instructions) from the Portal at the time of grant preparation invitation.

Part A of the Description of the Action (DoA) must be completed directly on the Portal Grant Preparation screens.

It includes:

- COVER PAGE
- TABLE OF CONTENTS
- Project summary (automated – based on proposal abstract)
- List of participants (automated – based on proposal information)
- List of work packages (based on proposal table 3.1b)
- Staff effort (based on proposal table 3.1f)
- List of **deliverables** (based on proposal table 3.1c)
- List of milestones (based on proposal table 3.1d)
- List of critical risks (based on proposal table 3.1e)



All changes need to be discussed and agreed with the CleanH2 JU Project Officer. Substantial changes to the proposal are NOT allowed.



Proposals 2023 - Topic description (Innovation actions)

- *Proposals should provide a **preliminary draft** on ‘hydrogen safety planning and management’ at the project level, which will be further updated during project implementation.*

GAP Phase – Instructions

2 confidential deliverables must be included in WP of coordination/management

- Hydrogen Safety planning - **Draft plan**. Due month: M3 (tentative)
- Hydrogen Safety planning - **Final plan**. Due month: M12 (tentative)

Deliverables to be reviewed by the EHSP

Due months to be agreed with your PO

Reference documentation and guidance on the EHSP webpage (*)

- Safety Planning and Management Guidance document
- Simple template for a safety plan

https://www.clean-hydrogen.europa.eu/get-involved/european-hydrogen-safety-panel-0/reference-documents_en



- To be introduced in the **List of deliverables**
- Name: **'Annual data reporting'**
- Periodicity: **every year** (deadline months of **FEBRUARY / MARCH**) → several deliverables
 - On a specific template (depending on technology, TRL etc) – to be provided by the Clean Hydrogen JU in a dedicated on-line platform/tool (accessible to coordinators, password protected) ([indicative templates here](#))
 - Project Fiche for qualitative feedback ([indicative template here](#))

More details in the separate Knowledge Management Info-Day presentation and on the [relevant Clean Hydrogen JU webpage!](#)

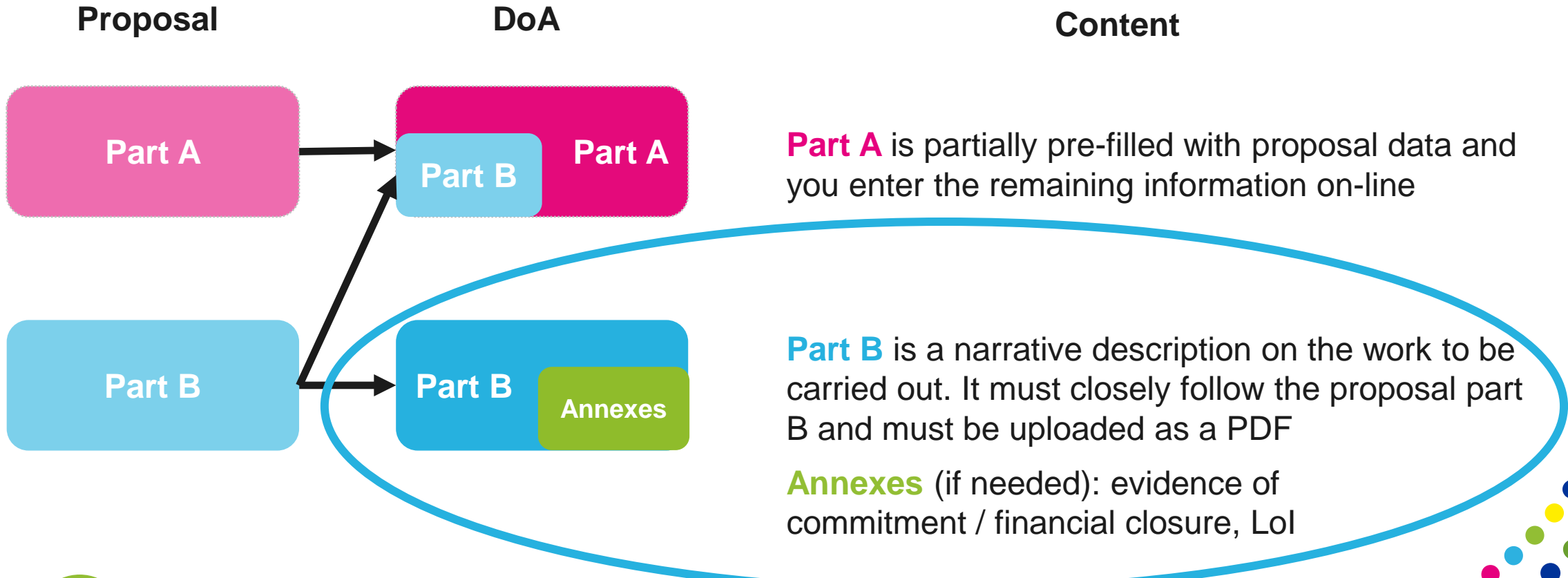
Deliverable « plan for dissemination and exploitation, including communication activities » - Horizon Europe



- The **draft plan was an admissibility condition** at the proposal stage
- Include in the list of deliverables:
 - **Month 6 (max.)** = More **detailed plan** for dissemination and exploitation, including communication activities
 - **Months X, Y, Z** = **Periodic update of the plan** in alignment with the project's progress

More details later on today and in the separate Communication, Dissemination and Exploitation Info-Day [presentation](#) !

Description of the Action (DoA) = Annex I



Coordinator is able to download the DoA template (instructions) from the Portal at the time of grant preparation invitation.

Instructions

- **START** from Part B of your proposal. Use the version that was submitted for evaluation.
- **REMOVE** the cover page, if any.
- **DELETE** the header, if any.
- **REPLACE** the footer with the following information '[Proposal number] [Proposal acronym] – Part B – [Page number (starting at 1 for Part B)]'.
- **REMOVE** the list of participants. This is included in Part A.
- **REMOVE** tables 3.1a (list of work packages), 3.1b (work packages descriptions), 3.1c (list of deliverables), 3.1d (list of milestones), 3.1e (critical risks for implementation) and 3.1f (summary of staff effort) from section 3.1 (they are encoded in the screens and included in Part A). Keep tables 3.1g, 3.1h, 3.1i and 3.1j (and any other table linked to specific types of actions).
- **CREATE** a section 4 'ethics self-assessment' and copy into this section the ethics self-assessment you included in the proposal Part A.
- **ADD** a table with the history of changes. Specify all changes compared to your proposal. Changes should be described concisely. You do not need to include minor changes that do not modify the substance of the DoA (e.g. correction of spelling and grammar, changes in formatting).
- **ADD** a table of contents with page numbers



Use the submitted version of the proposal. All changes need to be discussed and agreed with the CleanH2 JU Project Officer. Substantial changes to the proposal are NOT allowed.

Resulting structure – Part B

History of changes

Table of contents

1. Excellence

1.1 Objectives and ambition

1.2 Methodology

In this section you must record all changes implemented in comparison with the submitted proposal or previous DoA version – 3 columns table: When, What, Where

Generate a table of content with page number

Same heading,
Same numbering
as in the proposal

Avoid repetition of information

- E.g., no duplication between work plan tables (Part A) and free text (Part B)
- All information should appear in one, findable, place only

Ethics and security

Ethics and security processes are on-going

Ethics review and security scrutiny

- **If GAP has NO serious and complex ethics issues**
- **If GAP has NO security issues**



Copy-paste the self-assessment from your proposal

Extract from
Grant
Agreement




14.1 Ethics

The action must be carried out in line with the highest ethical standards and the applicable EU, international and national law on ethical principles.

Ethics review and security scrutiny

- The proposals are subject to an **ethics review** and may be subject to **security scrutiny**.
- The results of the ethics review and/or a security scrutiny must be implemented in the grant agreement
- Coordinator needs to update the ethics section in Part B (DoA) to ensure that any 'ethics requirements' are met
- Similarly for security scrutiny

SRIA - KPI Reporting - CleanH2 JU specific

 In order to allow the JU to monitor progress of the project KPIs the following is needed:

- Define the KPI**
 Identify topic/project and SRIA KPI's in the **DoA - Part B** section 2 "Impacts"
- Follow-up of the progress towards the KPI**
Add in DoA - part A a new task: "An assessment of the progress towards the achievement of the project KPIs should be provided in each of the reporting periods (as an Annex in part B of the periodic report)".

Where? In the relevant WP (e.g. Coordination, reporting, management)

Clean Hydrogen JU SRIA KPIs						
SRIA reference	SRIA KPIs (parameter)	Unit	SoA (2020)	Target 2024	Targets 2030	Project KPI (targets)
Pillar / KPI table	[From SRIA table]	[From SRIA table]	[From SRIA table]	[From SRIA table]	[From SRIA table]	[project specific]
¹ [e.g. Pillar Heat & Power/ table Solid Oxide Stationary Fuel Cells]	[e.g. CAPEX]	[e.g. €/kW]	[e.g. 10,000]	[e.g. 6,000]	[e.g. 3,500]	[project value]
Additional project KPIs						
SRIA reference (if relevant)	KPI (Parameter) [1]	Unit	SoA	Source (SoA)	Project Targets	
[create link to SRIA KPI as relevant]	[parameter name]	[...]	[...]	[...]	[project specific]	
^N [e.g. Pillar Heat & Power/ table Solid Oxide Stationary Fuel Cells/Efficiency]	[e.g. Power density of the stack per surface area]	[e.g. W/m ²]	[...]	[...]	[project value]	

Indicative



Hydrogen Valleys – 3 proposals invited for Grant Agreement preparation

3 Valleys selected for Grant Preparation Call 2023

- 1 large-scale and 2 small-scale

6 Valleys signed Call 2022 + 3 being prepared

2 Ongoing Valleys, H2020



Do not communicate about your project without consulting your Project Officer – Grant not signed yet!!

Large projects = sound monitoring

GAP Phase – Instructions

- **DoA - Part B** must have clear project **Gantt Chart and milestones**. Include **key phases** of the implementation of the project **and their duration** (i.e. preparation of the specifications of equipment, manufacturing, deployment and operation).




Your project will be part of a wider family of projects, exchanges and collaboration are expected



Synergies & Co-funding strategy

- CleanH2 JU specific for flagships, especially H2 Valleys

Proposals 2023 - Topic description (Hydrogen Valleys)

- 
 - Applicants should provide a **funding plan** to ensure implementation of the project in synergies with other sources of funding...
 - If additional sources of funding will be required, proposals should present a clear plan on which funding programmes at either EU or national levels will be targeted... In these cases, applicants should present a **credible planning that includes forecasted funding programmes and their expected time of commitment**

GAP Phase – Instructions

- 
 - Define the financing/funding linked with technical objectives
Structure and update funding/financing plan relative to proposal
 + Hydrogen Valleys Summary table in **DoA - Part B** as an Annex
- 
 - Follow-up of the financing/funding
Add in DoA - part A a new task: "Updated information on the synergies established with other EU/national/regional programmes including the financing structure and strategy of the project should be provided in each of the reporting periods (as an Annex in part B of the periodic report)"
Where? In the relevant WP (e.g. Coordination, reporting, management)



Elements of the Hydrogen Valley**	Technical			Financial				Comments
	Main technical parameters	Hydrogen produced / stored, distributed/ consumed (tonnes H2 per year)	Partner Incurring/deciding the costs	Cost related to each of the equipment/infrastructure items (MEUR)	Type of Cost (purchase/contract) In case of equipment purchase distinguish between depreciation, full capitalised costs, leasing, etc.	Costs declared in the JU grant (yes/no)	If yes, include the request of grant for the specific item (MEUR)	
Hydrogen production¹								
e.g. electrolyser	capacity e.g. 5 MW	e.g. 500	e.g. [DEM]	e.g. 6	Equipment, full capitalised costs	e.g. yes	2	e.g. National funding (secured)
e.g. electrolyser				e.g. 2	Sub-contracting	e.g. yes	1	e.g. Own funding (H2 pending)
Hydrogen distribution								
e.g. hydrogen pipeline	length and capacity of pipeline (km)							
Hydrogen storage								
e.g. abovegrd and belowgrd	Storage volume (m ³)							
End uses: transport								
e.g.	Number							

Summary of Call 2023 conditions and elements common across topics



- Manage my area
- My Organisation(s)
- GRANTS
- My Proposal(s)
- My Project(s)**
- My Formal Notification(s)

SEARCH FUNDING & TENDERS | HOW TO PARTICIPATE | PROJECTS & RESULTS | WORK AS AN EXPERT | SUPPORT

My Project(s)

Online manual "Grant management" | IT HOW TO "Grant management"

Project roles can be granted/revoked in the "Manage Consortium" section

Project actions can be accessed in the "Manage Project" section

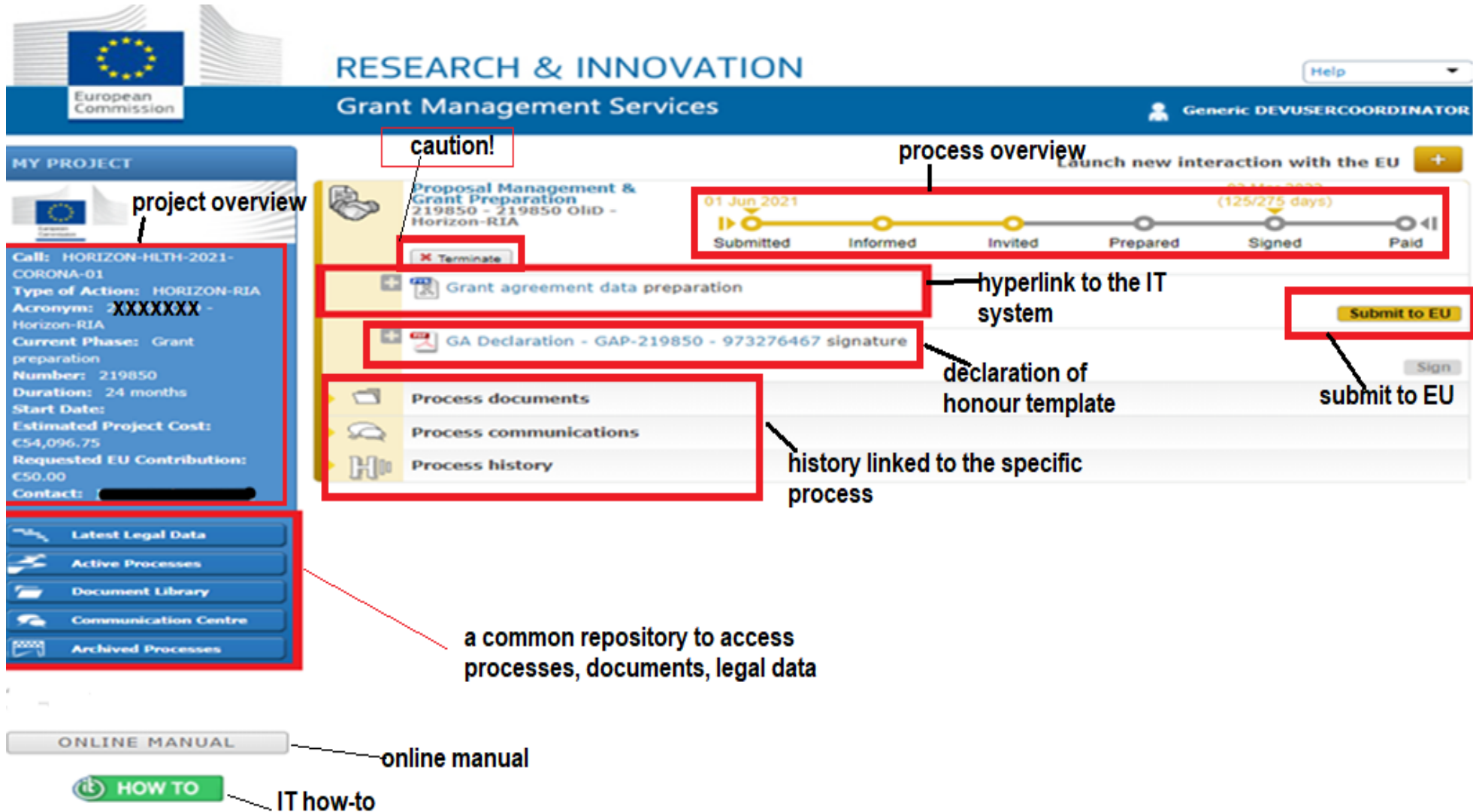
Results: 1

ACRONYM	CALL	PROGRAM	PROJECT	PHASE	ACTIONS
H2ME 2	H2020-JTI-FCH-2015-1	H2020	700350	Active	1 Actions

1 10

- 1
- Manage Consortium
- Manage Project
- View Proposal

Takes you back to your sealed proposal

RESEARCH & INNOVATION
European Commission
Grant Management Services
Generic DEVUSERCOORDINATOR

MY PROJECT
project overview

Call: HORIZON-HLTH-2021-CORONA-01
Type of Action: HORIZON-RIA
Acronym: XXXXXXXX - Horizon-RIA
Current Phase: Grant preparation
Number: 219850
Duration: 24 months
Start Date:
Estimated Project Cost: €54,096.75
Requested EU Contribution: €50.00
Contact:

caution!

process overview
01 Jun 2021
Submitted Informed Invited Prepared Signed Paid (125/275 days)

Grant agreement data preparation
hyperlink to the IT system

GA Declaration - GAP-219850 - 973276467 signature
declaration of honour template

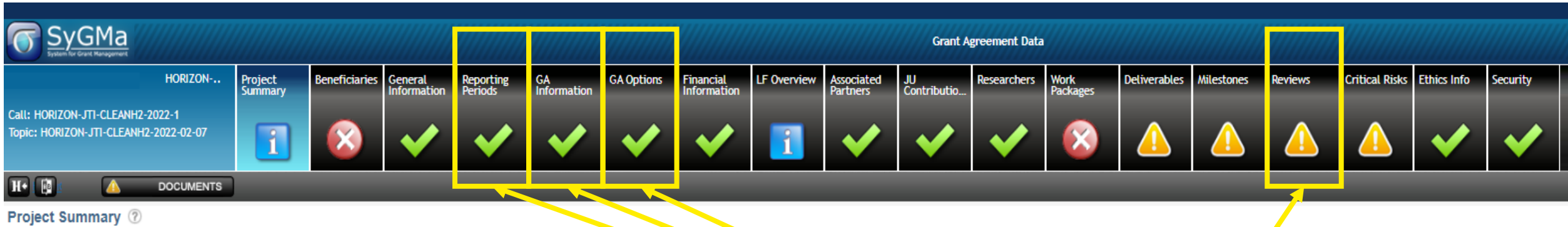
Process documents
Process communications
Process history
history linked to the specific process

Submit to EU
submit to EU

Latest Legal Data
Active Processes
Document Library
Communication Centre
Archived Processes
a common repository to access processes, documents, legal data

ONLINE MANUAL
online manual

HOW TO
IT how-to



SyGMA
System for Grant Management

HORIZON-...
Call: HORIZON-JTI-CLEANH2-2022-1
Topic: HORIZON-JTI-CLEANH2-2022-02-07

Project Summary

Beneficiaries

General Information

Reporting Periods

GA Information

GA Options

Financial Information

LF Overview

Associated Partners

JU Contributio...

Researchers

Work Packages

Deliverables

Milestones

Reviews

Critical Risks

Ethics Info

Security

DOCUMENTS

Project Summary ?



Information complete



Missing information: **blocking**



For information only



Missing information: not blocking at this point



This screen is only editable by EU Officers

Beneficiaries



Grant Management | Grant Agreement Data | ndevugen (EXTERNAL) ?

224 | Ca | Top

Project Summary | **Beneficiaries** | General Information | Reporting Periods | GA Information | GA Options | Financial Information | LF Overview | Associated Partners | Researchers | Work Packages | Deliverables | Milestones | Reviews | Critical Risks | Ethics Info | Security

DOCUMENTS

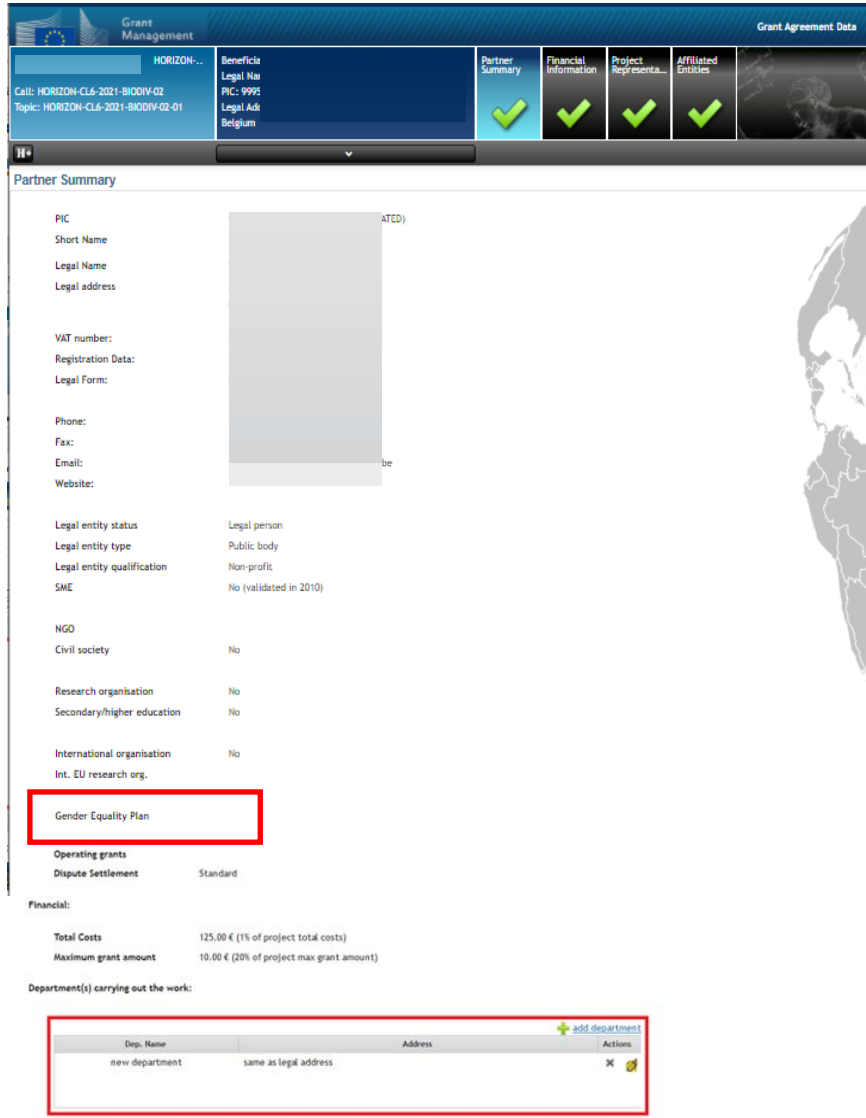
Beneficiaries

Change Coordinator | Add New Beneficiary

Number	Short Name	Legal Name	Role	Country	Start Date	End Date	Status
1	A	ACT ADVANCED POLICE TECHNICAL EQUIPMENT	CO		9	7	VALIDATED
2		CE	BEN		9	0	VALIDATED

Validate

Partner summary



Grant Management

HORIZON-...
Call: HORIZON-CL6-2021-BIODIV-02
Topic: HORIZON-CL6-2021-BIODIV-02-01

Beneficia
Legal Nar
PIC: 9995
Legal Adk
Belgium

Partner Summary ✓
Financial Information ✓
Project Representa... ✓
Affiliated Entities ✓

Partner Summary

PIC: [REDACTED] (ATED)

Short Name: [REDACTED]

Legal Name: [REDACTED]

Legal address: [REDACTED]

VAT number: [REDACTED]

Registration Data:
Legal Form: [REDACTED]

Phone: [REDACTED]
Fax: [REDACTED]
Email: [REDACTED]
Website: [REDACTED]

Legal entity status: Legal person
Legal entity type: Public body
Legal entity qualification: Non-profit
SME: No (validated in 2010)

NGO:
Civil society: No

Research organisation: No
Secondary/higher education: No

International organisation: No
Int. EU research org.: No

Gender Equality Plan

Operating grants:
Dispute Settlement: Standard

Financial:
Total Costs: 125.00 € (1% of project total costs)
Maximum grant amount: 10.00 € (20% of project max grant amount)

Department(s) carrying out the work:

Dep. Name	Address	Actions
new department	same as legal address	X [add department]

- Coordinator/beneficiary Partner Summary is automatically listed after receiving the invitation letter.
- The **department** needs to be added (mandatory for all beneficiaries, except for Affiliated Entities)
- Having a **Gender Equality Plan** is mandatory (for public bodies, research organisations and higher education institutions) before signing the GA (existence of the plan has to be declared in the portal organisational data)

THIS IS AN ELIGIBILITY ASPECT

Grant Management
Grant Agreement Data

Call: HORIZON-CL6-2021-BIODIV-02
Topic: HORIZON-CL6-2021-BIODIV-02-01

BRUSSEL

Beneficial Legal N°: PIC: 999
Legal Ad: Belgium

Partner Summary

Financial Information

Project Representa...

Affiliated Entities

Financial Data

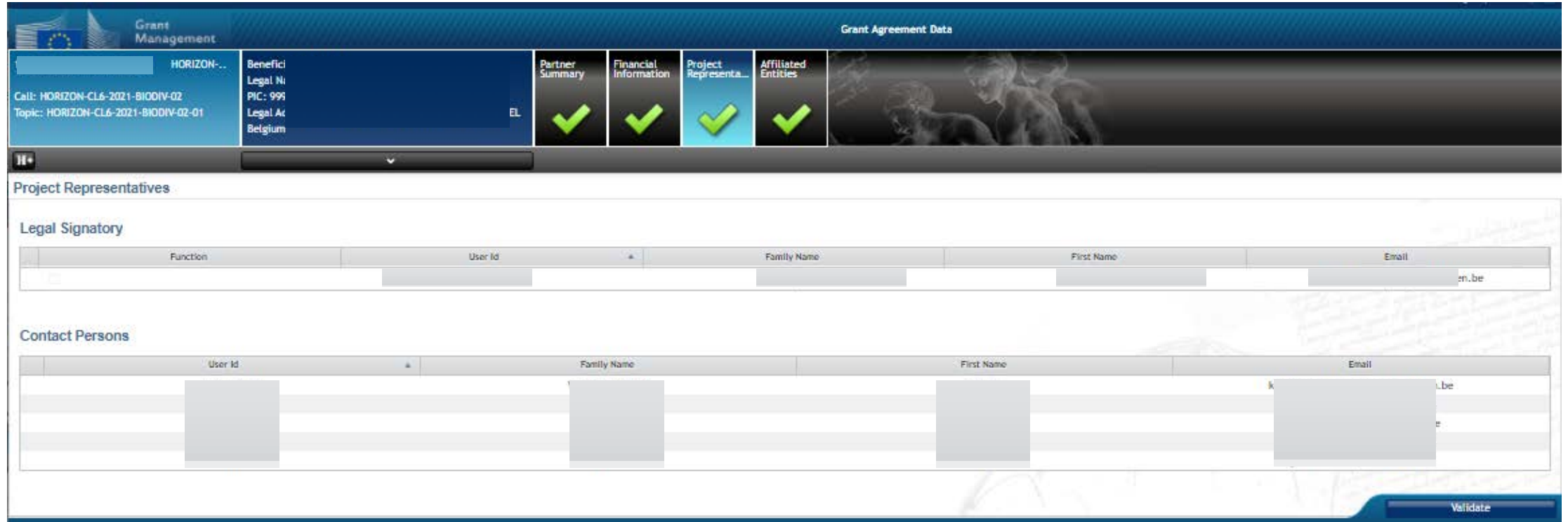
Partner is exempted from CFS Yes No

Individual costs table:

Category	Form of Funding	Total Amount
▼ Estimated eligible costs (per budget category)		
▼ Direct costs		
▼ A. Personnel costs		
(a1) A.1 Employees (or equivalent), A.2 Natural persons under direct contract, A.3 Seconded persons	actual	1,379,529.00 €
(a2) A.1 Employees (or equivalent), A.2 Natural persons under direct contract, A.3 Seconded persons	unit (usual accounting practices)	0.00 €
▼ B. Subcontracting costs		
(b) Subcontracting	actual	0.00 €
▼ C. Purchase costs		
(c1) C.1 Travel and subsistence	actual	25,963.00 €
(c2) C.2 Equipment	actual	18,545.00 €
(c3) C.3 Other goods, works and services	actual	24,727.00 €
▼ D. Other cost categories		
(d1) D.1 Financial support to third parties	actual	0.00 €
(d2) D.2 Internally invoiced goods and services	unit (usual accounting practices)	0.00 €
▼ Indirect costs		
▼ E. Indirect costs		
(e) E. Indirect costs (25% * (a1 + a2 + c1 + c2 + c3))	flat-rate	362,191.00 €
(f) Total costs (a1 + a2 + b + c1 + c2 + c3 + d1 + d2 + e)		1,810,955.00 €
▼ Estimated EU contribution		
▼ EU contribution to eligible costs		
(g) Maximum EU contribution (30% * f)		543,286.50 €
(h) Requested EU contribution		526,082.00 €
(m) Maximum grant amount (h)		526,082.00 €

Validate

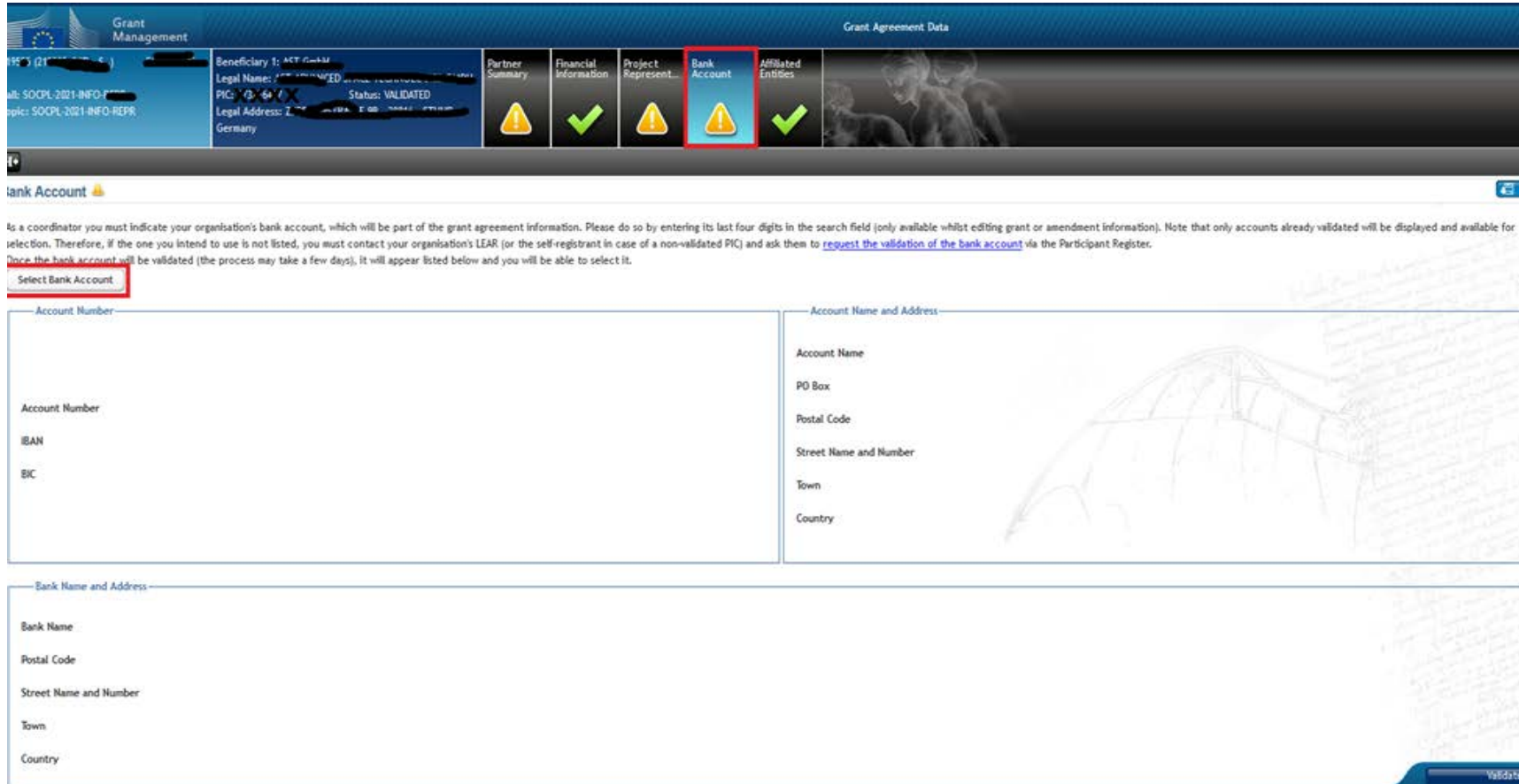
- Coordinator/beneficiary financial Information is automatically listed after receiving the invitation letter (from proposal).



The screenshot shows the 'Grant Management' interface. At the top, there's a header with the European Union flag and 'Grant Management' on the left, and 'Grant Agreement Data' on the right. Below the header, there's a navigation bar with several tabs: 'Partner Summary', 'Financial Information', 'Project Representa...', and 'Affiliated Entities'. Each tab has a green checkmark, indicating that the information is complete. The 'Project Representa...' tab is currently selected. Below the navigation bar, there's a section titled 'Project Representatives'. Under this section, there are two tables. The first table is titled 'Legal Signatory' and has columns for 'Function', 'User Id', 'Family Name', 'First Name', and 'Email'. The second table is titled 'Contact Persons' and has columns for 'User Id', 'Family Name', 'First Name', and 'Email'. Both tables have several rows, but the data is mostly obscured by grey boxes. At the bottom right of the interface, there is a 'Validate' button.

- If no Project Representatives are listed, please complete in the **roles management section of the F&T Portal**.
- Check all information and update, if necessary, in the **roles management section of the F&T Portal**.
- Nominate in the Funding & Tenders Portal, the Legal Entity Appointed Representative (LEAR) and Project Legal Signatory (PLSIGN). Once this has been done, **the PLSIGN who will appear in the Grant Agreement has to be selected in this screen**. Please note that all other PLSIGNs can sign the Grant Agreement.

Bank account (coordinator only)



The screenshot shows the 'Grant Management' interface with a navigation bar containing 'Partner Summary', 'Financial Information', 'Project Represent...', 'Bank Account', and 'Affiliated Entities'. The 'Bank Account' tab is highlighted with a red box. Below the navigation bar, a 'Bank Account' section is visible, containing a 'Select Bank Account' button (also highlighted with a red box) and a form with the following fields:

- Account Number:** Account Number, IBAN, BIC
- Account Name and Address:** Account Name, PO Box, Postal Code, Street Name and Number, Town, Country
- Bank Name and Address:** Bank Name, Postal Code, Street Name and Number, Town, Country

A 'Validate' button is located at the bottom right of the form.

- Select your bank account from the list of accounts already registered in the Participant Register. For more info about how to register a bank account in the Participant Register, please click [here](#).

Affiliated entities



Grant Management | Grant Agreement Data

Benefic Legal N: [redacted] | PIC: 97 | Legal A: German

Partner Summary: [Warning] | Financial Information: [Green] | Project Represent: [Warning] | Bank Account: [Warning] | **Affiliated Entities: [Green]**

Affiliated Entities [SAVE] [Add new Affiliated Entity]

Short Name	Legal Name	Country	PIC	PIC Status	Joint Several Liability	Actions
[Green]		DE		VALIDATED	<input type="checkbox"/>	[X]

Grant Management | Grant Agreement Data

Beneficiary 1: [redacted] | Affiliated Entity 1: I.O.N. [redacted] | DUSSELDORF Germany

Legal Name: [redacted] | Legal Name: [redacted] | DUSSELDORF Germany

PIC: 97 | Status: VALIDATED | PIC: 99 | Status: VALIDATED

Legal Address: [redacted] | Legal Address: [redacted]

Germany | DUSSELDORF Germany

Partner Summary: [Green] | **Financial Information: [Green]**

Financial Data

Amount | Guarantee Required | Guarantee Amount

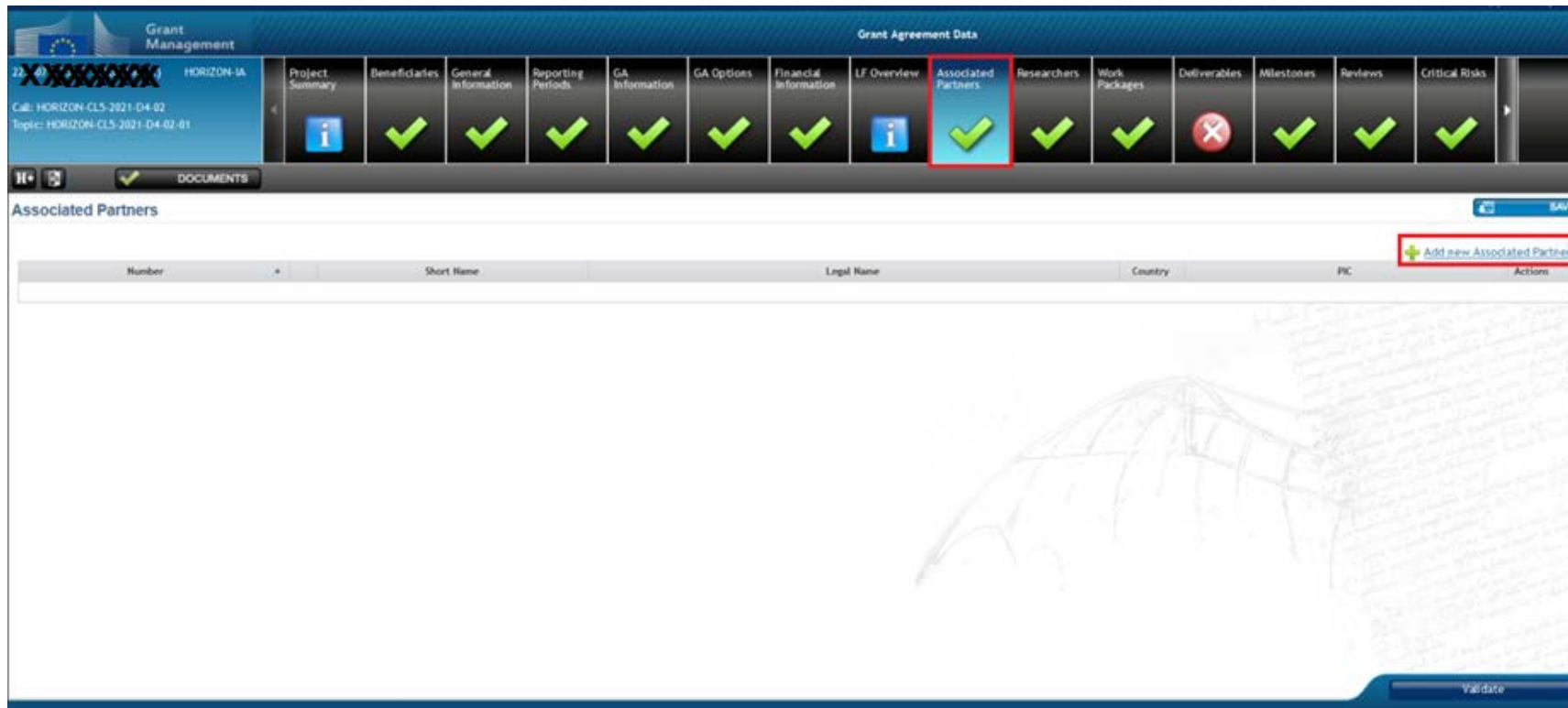
Partner is exempted from CFS: Yes No

Individual costs table:

Category	Form of Funding	Total Amount
▼ Estimated eligible costs (per budget category)		
▼ Direct costs		
▼ A. Personnel costs		
(a1) A.1 Employees (or equivalent), A.2 Natural persons under direct contract, A.3 Seconded persons	actual	0.00 €
(a4) A.5 Volunteers	unit	0.00 €
▼ B. Subcontracting costs		
(b) Subcontracting	actual	0.00 €
▼ C. Purchase costs		
▼ C.1 Travel and subsistence		
(c1a) Travel	unit or actual	0.00 €
(c1b) Accommodation	unit or actual	0.00 €
(c1c) Subsistence	unit or actual	0.00 €
(c2) C.2 Equipment	actual	0.00 €
(c3) C.3 Other goods, works and services	actual	0.00 €
▼ D. Other cost categories		

[Validate]

Associated partners



Grant Management

Grant Agreement Data

HORIZON-IA

Call: HORIZON-CL5-2021-D4-02
Topic: HORIZON-CL5-2021-D4-02-01

Project Summary | Beneficiaries | General Information | Reporting Periods | GA Information | GA Options | Financial Information | LF Overview | **Associated Partners** | Researchers | Work Packages | Deliverables | Milestones | Reviews | Critical Risks

DOCUMENTS

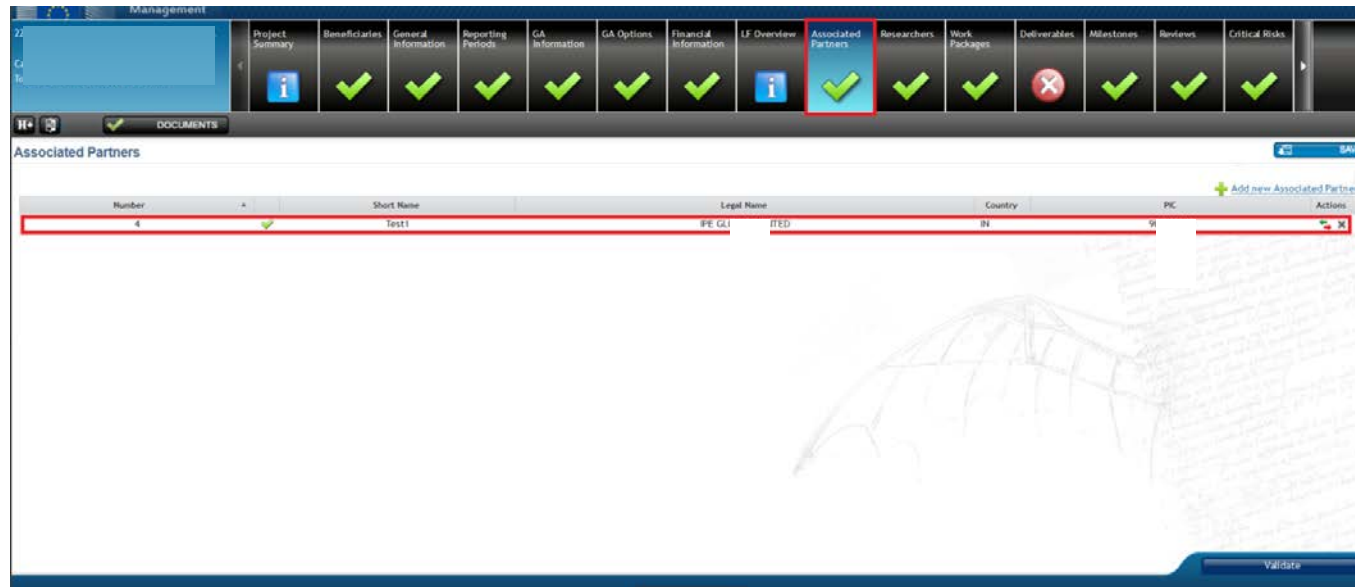
Associated Partners

Number	Short Name	Legal Name	Country	PIC	Actions
					Add new Associated Partner

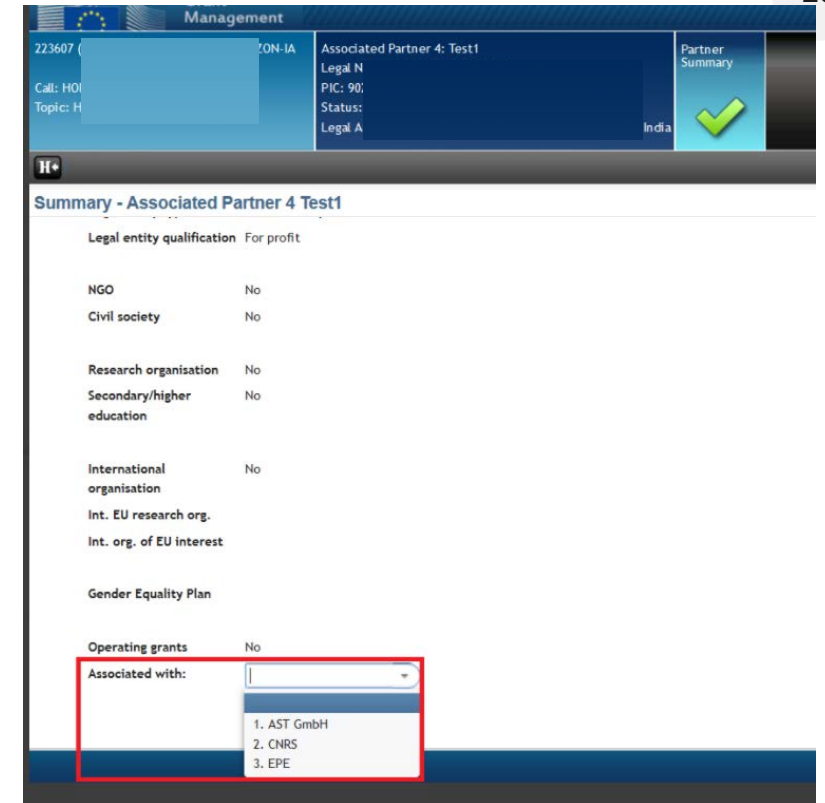
Validate

- Data prefilled with proposal information
- Associated partners do not sign the grant agreement and cannot declare costs
- They are allowed to be WP leaders
- Budget table in GA (Annex 2) will not include any information of the budget of AP. Information is included in the proposal and if needed, some information can also be included in DoA - part B
- Coordinator will be able to enter researchers in the researcher table for AP

Associated partners



Number	Short Name	Legal Name	Country	PIC	Actions
4	Test1	IFE GLI	IND	90	



Summary - Associated Partner 4 Test1

Legal entity qualification For profit

NGO No

Civil society No

Research organisation No

Secondary/higher education No

International organisation No

Int. EU research org. No

Int. org. of EU interest No

Gender Equality Plan No

Operating grants No

Associated with:

1. AST GmbH
2. CNRS
3. EPE

In the Grant Agreement, Article 9.1 specifies to which entity the Associated Partner is linked to:

- if the associated partner is linked to one beneficiary, this beneficiary will be named under Article 9.1
- if the associated partner is linked to the whole consortium (i.e. not linked to a specific beneficiary), Article 9.1 will display only the name of the AP.

ASSOCIATED with:

- whole consortium
- or a beneficiary

JU Contribution – IKAA and IKOP



SyGMA System for Grant Management

Grant Agreement Data

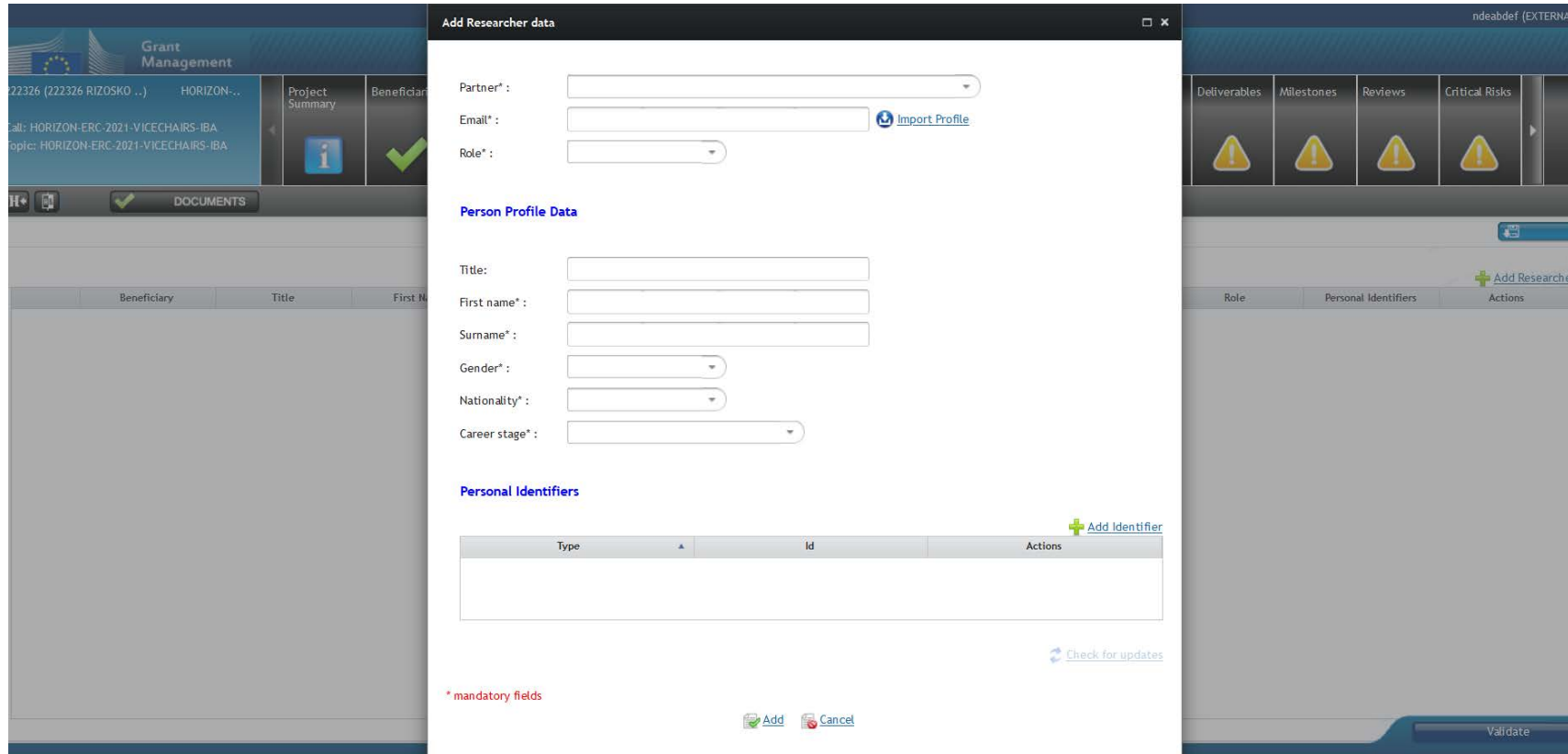
Project Summary Beneficiaries General Information Reporting Periods GA Information GA Options Financial Information LF Overview Associated Partners **JU Contribution** Researchers Work Packages Deliverables Milestones Reviews Critical Risks Ethics Info Security

DOCUMENTS

JU Contributions

Number	Participate In Projects	PIC	Legal Name	Membership	Financial contributions	IKAA	IKOP
1	Yes			Unknown	0.00 €	0.00 €	0.00 €
2	Yes			Unknown	0.00 €	0.00 €	0.00 €
3	Yes			Unknown	0.00 €	0.00 €	0.00 €
4	Yes			Unknown	0.00 €	0.00 €	0.00 €
5	Yes			Unknown	0.00 €	0.00 €	0.00 €
6	Yes			Unknown	0.00 €	0.00 €	0.00 €
7	Yes			Unknown	0.00 €	0.00 €	0.00 €
8	Yes			Unknown	0.00 €	0.00 €	0.00 €
9	Yes			Unknown	0.00 €	0.00 €	0.00 €
10	Yes			Unknown	0.00 €	0.00 €	0.00 €
11	Yes			Unknown	0.00 €	0.00 €	0.00 €
Total					0 €	0 €	0 €

For Financial contributions, IKAA and IKOP
= put « 0 » zero

The screenshot shows the 'Add Researcher data' form in the Grant Management system. The form is divided into several sections:

- Partner:** A dropdown menu.
- Email*:** A text input field with an 'Import Profile' button.
- Role*:** A dropdown menu.
- Person Profile Data:**
 - Title:** A text input field.
 - First name*:** A text input field.
 - Surname*:** A text input field.
 - Gender*:** A dropdown menu.
 - Nationality*:** A dropdown menu.
 - Career stage*:** A dropdown menu.
- Personal Identifiers:**
 - A table with columns: Type, Id, Actions.
 - An 'Add Identifier' button.
 - A 'Check for updates' button.

At the bottom, there is a legend: '* mandatory fields'. There are 'Add' and 'Cancel' buttons at the bottom center, and a 'Validate' button at the bottom right.

- Listing the researchers funded by the action is obligatory under HE; each beneficiary enters their own
- Option A: Complete manually all the mandatory data fields
- Option B: Retrieve the researcher's personal data (the ones made public, using the information provided by the researcher in the My Person Profile section of the F&T Portal)
- Removal of researchers listed in proposal only conditional (subject to CleanH2 JU agreement)



Grant Management | Grant Agreement Data

Call: HORIZON-CL6-2021-BIODIV-02
Topic: HORIZON-CL6-2021-BIODIV-02-01

Project Summary | Beneficiari... | General information | Reporting Periods | GA Information | GA Options | Financial information | LF Overview | Associated Partners | Researchers | Work Packages | Deliverables | Milestones | Reviews | Critical Risks | Ethics Info | Security

DOCUMENTS

Work Packages

Number	*	Name	Lead Beneficiary	Total Effort	Start Month	End Month	Deliverables No.
1	✓			61.25	1	84	1, 2, 3 ...
2	✓			1186.07	1	84	10, 11 ...
3	✓			30.25	1	84	17, 18 ...
4	✓			28.5	1	84	24, 25 ...
5	✓			26.25	1	84	30, 31 ...
6	✓			15.5	1	84	36, 37 ...
7	⚠			0	1	84	42, 43 ...
8	✓			10.5	1	84	49, 50 ...
9	✓	Coordination and Management		190.6	1	84	56, 57 ...
Total:				1548.92			

Validate

- The Project Work Packages are not automatically listed after receiving the invitation letter.
- Complete all necessary work packages
- You can change the order of the work packages by **dragging and dropping**.



Grant Management

Grant Agreement Data

HORIZON-...
Call: HORIZON-CL6-2021-BIODIV-02
Topic: HORIZON-CL6-2021-BIODIV-02-01

Project Summary Beneficiary General Information Reporting Periods GA Information GA Options Financial Information LF Overview Associated Partners Researchers Work Packages Deliverables Milestones Reviews Critical Risks Ethics Info Security

DOCUMENTS

Deliverables

Number	Relative Number in WP		Name	Lead Beneficiary	Type	Dissemination Level	Due Date (in months)
D1	D1.1	✓			R	SEN	1
D2	D1.2	✓			R	SEN	12
D3	D1.3	✓			R	SEN	16
D4	D1.4	✓			R	PU	21
D5	D1.5	✓			R	SEN	21
D6	D1.6	✓			R	PU	21
D7	D1.7	✓			R	SEN	19
D8	D1.8	✓			R	SEN	22
D9	D1.9	✓			R	SEN	28
D10	D2.1	✓			R	SEN	6

Validate

- Deliverables are not automatically listed
- All deliverables in proposal need to be included with the same details
- Select appropriate Dissemination status (Public, Sensitive (limited under conditions in GA), **EU classified (EU-restricted/EU-confidential/EU-secret)**).



Grant Management Grant Agreement Data

Project Summary | Beneficiari... | General Information | Reporting Periods | GA Information | GA Options | Financial Information | LF Overview | Associated Partners | Researchers | Work Packages | Deliverables | **Milestones** | Reviews | Critical Risks | Ethics Info | Security

Call: HORIZON-CL6-2021-BIODIV-02
Topic: HORIZON-CL6-2021-BIODIV-02-01

DOCUMENTS

Milestones

Number	Name	Lead Beneficiary	Due Date (in months)	Means of Verification	Work Package No.
M1			1		1
M2			1		1
M3			1		1
M4			1		1
M5			1		1
M6			2		1
M7			3		1
M8			4		1
M9			4		1
M10			5		1
M11			5		1
M12			7		1

Validate

- Milestones are not automatically listed
- All milestones in proposal need to be included with the same details



Grant Management | Grant Agreement Data

Call: HORIZON-CL6-2021-BIODIV-02
Topic: HORIZON-CL6-2021-BIODIV-02-01

Project Summary | Beneficiary | General Information | Reporting Periods | GA Information | GA Options | Financial Information | LF Overview | Associated Partners | Researchers | Work Packages | Deliverables | Milestones | Reviews | **Critical Risks** | Ethics Info | Security

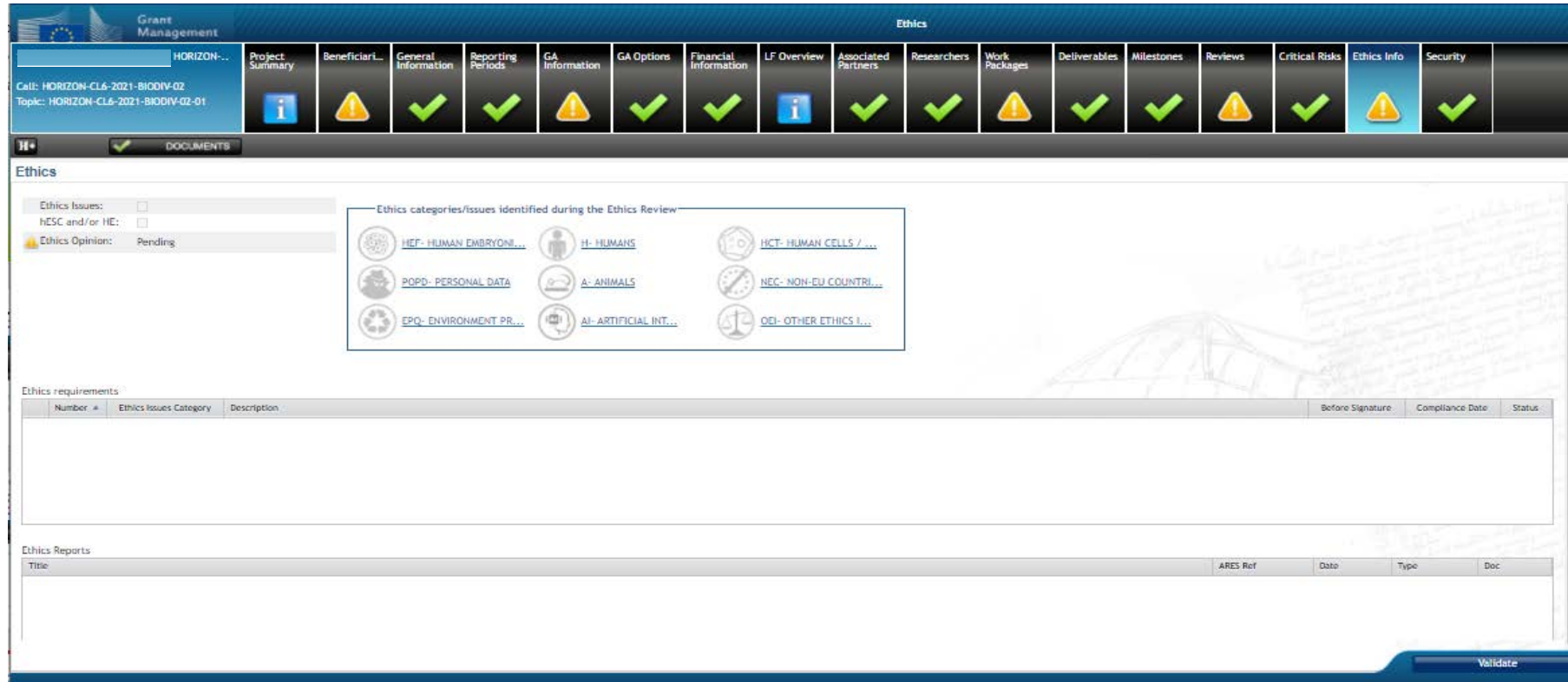
DOCUMENTS

Critical Risks For Implementation

Number	Description	Risk Mitigation Measures	Work Package No.
1	Risk	gree A lar the p f m m part	ides, ether ill to all also 1, 2, 3 ...
2	Pi	im reason and W due ti activi	a i Team work in of the rk, or 1, 2, 3 ...
3	Ris	od: Any B	ional e sir 1, 2, 3 ...
4		New pot cons	h the and in as 1, 2, 3 ...
5	Ris	ers. It wil par detai	vera- res (ERsA) 1, 2, 3 ...

Validate

- Critical risks are not automatically listed
- All critical risks in proposal need to be included with the same details

The screenshot shows the 'Ethics' section of the Grant Management system. At the top, there is a navigation bar with various tabs: Project Summary, Beneficiaries, General Information, Reporting Periods, GA Information, GA Options, Financial Information, LF Overview, Associated Partners, Researchers, Work Packages, Deliverables, Milestones, Reviews, Critical Risks, Ethics Info, and Security. Below this, a row of icons indicates the status of each section: Project Summary (info), Beneficiaries (warning), General Information (green), Reporting Periods (green), GA Information (warning), GA Options (green), Financial Information (green), LF Overview (info), Associated Partners (green), Researchers (green), Work Packages (warning), Deliverables (green), Milestones (green), Reviews (warning), Critical Risks (green), Ethics Info (warning), and Security (green).

The main content area is titled 'Ethics' and includes a section for 'Ethics Issues' with checkboxes for 'hESC and/or HE' and 'Ethics Opinion: Pending'. Below this is a box titled 'Ethics categories/issues identified during the Ethics Review' containing several categories with icons: HEF- HUMAN EMBRYON..., H- HUMANS, HCT- HUMAN CELLS /..., POPD- PERSONAL DATA, A- ANIMALS, NEC- NON-EU COUNTRI..., EPQ- ENVIRONMENT PR..., AI- ARTIFICIAL INT..., and OEL- OTHER ETHICS I....

There are also two empty tables: 'Ethics requirements' with columns for Number, Ethics Issues Category, Description, Before Signature, Compliance Date, and Status; and 'Ethics Reports' with columns for Title, ARES Ref, Date, Type, and Doc. A 'Validate' button is located at the bottom right of the screen.

- Ethics screen is available as read only
- Before a final Opinion is encoded by Ethics experts in the Ethics evaluation process, at times, additional information may be requested from the applicant.
- The Consortium or its representative has to upload the requested information in Grant Management application in the Funding & Tenders Portal, under section 'Additional Information request'

Security



Grant Management
Grant Agreement Data

HORIZON-... Call: HORIZON-CL6-2021-BIODIV-02 Topic: HORIZON-CL6-2021-BIODIV-02-01	Project Summary	Beneficiari...	General Information	Reporting Periods	GA Information	GA Options	Financial Information	LF Overview	Associated Partners	Researchers	Work Packages	Deliverables	Milestones	Reviews	Critical Risks	Ethics Info	Security	

DOCUMENTS

Security

Security Issues:

Security Classification:

- NSC No security concern
- REC Security recommendations
- R-UE/EU-R RESTREINT UE/EU RESTRICTED
- C-UE/EU-C CONFIDENTIEL UE/EU CONFIDENTIAL
- S-UE/EU-S SECRET UE/EU SECRET
- NOF Proposal too security-sensitive to be funded

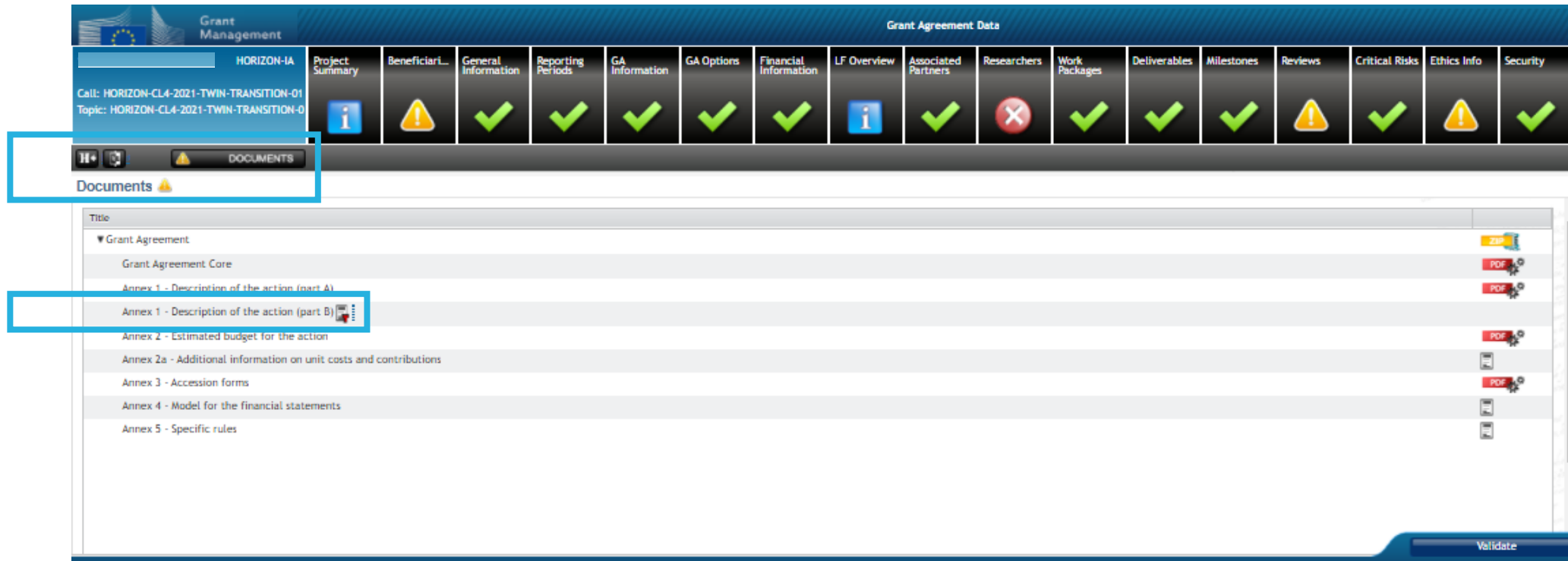
Security Classification Reason:

The Security Appraisal is not foreseen. The proposal was automatically cleared by the system.

Security Recommendations:

Number	Recommendations	Before Signature	Compliance Month	Status

Validate

The screenshot shows the 'Grant Management' interface with the 'Grant Agreement Data' section. The 'Documents' section is highlighted with a blue box, and the 'Annex 1 - Description of the action (part B)' document is also highlighted with a blue box.

Category	Project Summary	Beneficiary	General Information	Reporting Periods	GA Information	GA Options	Financial Information	LF Overview	Associated Partners	Researchers	Work Packages	Deliverables	Milestones	Reviews	Critical Risks	Ethics Info	Security
Icons	Information	Warning	Checkmark	Checkmark	Checkmark	Checkmark	Checkmark	Information	Checkmark	Warning	Checkmark	Checkmark	Checkmark	Warning	Checkmark	Warning	Checkmark

Documents

Title	Actions
▼ Grant Agreement	ZIP
Grant Agreement Core	PDF
Annex 1 - Description of the action (part A)	PDF
Annex 1 - Description of the action (part B)	PDF
Annex 2 - Estimated budget for the action	PDF
Annex 2a - Additional information on unit costs and contributions	PDF
Annex 3 - Accession forms	PDF
Annex 4 - Model for the financial statements	PDF
Annex 5 - Specific rules	PDF

Validate

Check instructions on slide 9 of this presentation

- Before uploading the part B, please remove the cover pages, the list of participants and add a history of changes. Changes need to be described concisely. Please add also a table of contents and page numbers.
- Please remove also, deliverables, milestones, risks and work packages as these are included in part A
- After creating the PDF, you may upload in the documents section
- Avoid repetition of information

Keep in touch

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