MT+ How to complete and submit the final beneficiary report

- 1. Open the project and check that it is up to date2. "Generate" the Beneficiary Report
- 3. General functionality
- 4. Fill in the Beneficiary Report
- 5. Submit the report

This page describes the steps to be taken to complete and submit the final beneficiary report for Erasmus+ projects. The steps described follow the example of using a project for action type KA105.

There may be differences between the beneficiary reports for different key actions but the basic functionality remains the same for each key action.

Relevant for...

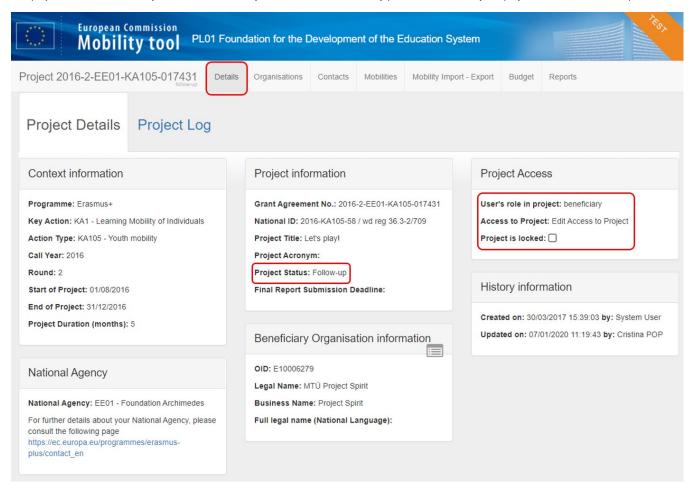
Call Year	Key Action	Action
2014 onward	KA1 - Mobility of individuals	All
	KA3 - Support for policy reform	

Steps

1. Open the project and check that it is up to date

1.1. Check the "Details" tab

The project must be in follow-up status, unlocked and you must have the necessary permissions to modify the project data, in order to complete the Beneficiary Report.

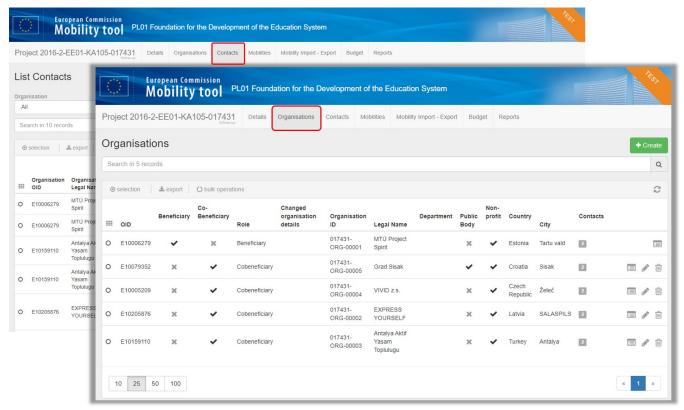


1.2. Click the "Organisations" and "Contacts" tabs

Check the organisation details and associated contact persons for all organisations.

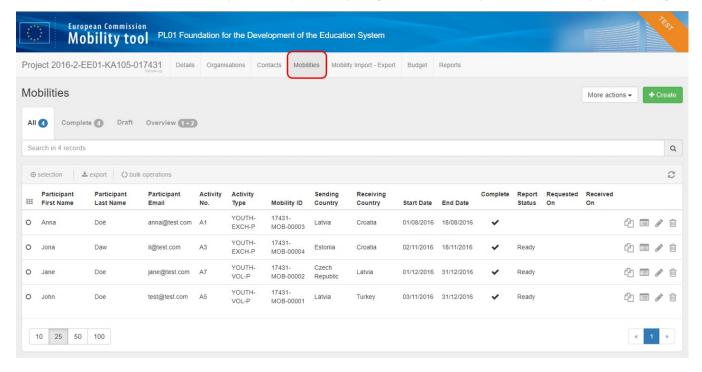
If any organisation details need to be updated, the National Agency should first be notified and the details should be updated in the Organisation Registration system. O nce the changes are made in the National Agency's project management system, they will be reflected in Mobility Tool+.

This does not apply to certain contact details, such as those of the project co-beneficiaries and partners, which can be updated directly in Mobility Tool+.



1.3. Click the "Mobilities" tab

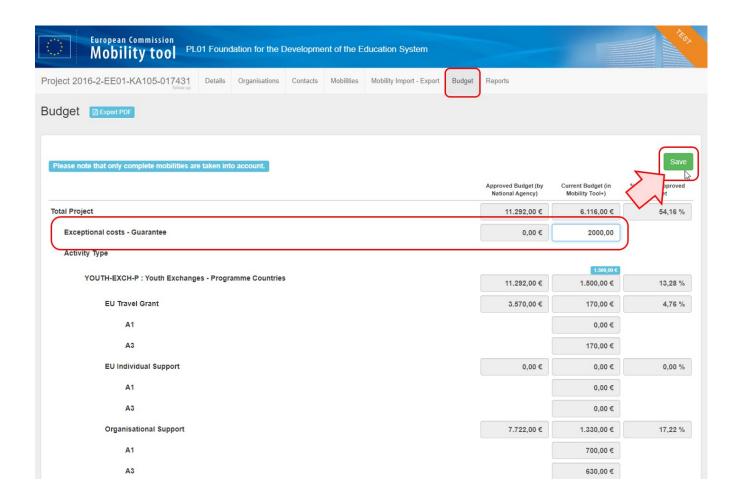
Click the Mobilities tab to check that the mobility details are up to date. Any changes made to the mobility details will automatically update the budget summary.



1.4. Click the "Budget" tab

Check the **Budget** tab to view the summary of the project budget as entered under each mobility.

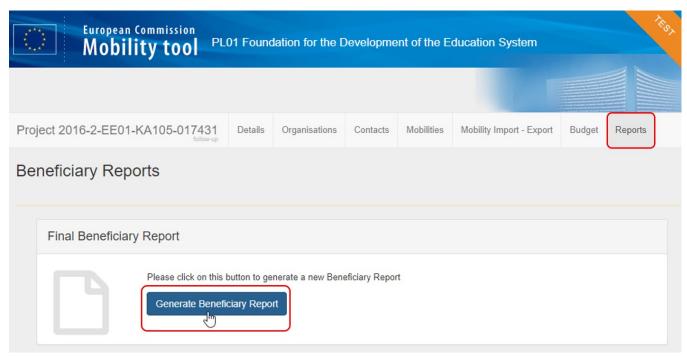
Additional project costs may be entered in the budget tab depending on the action type. In the following example the **Exceptional costs - Guarantee** field can be edited. If you record additional costs in the **Budget** tab save the changes by clicking the **Save** button.



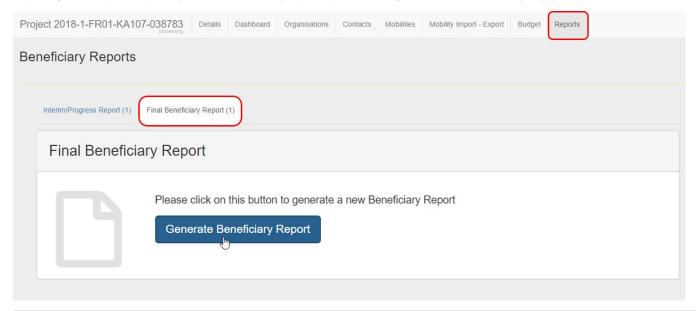
2. "Generate" the Beneficiary Report

2.1. Click the "Reports" tab

When all the project data is up to date, click the Reports tab and create the draft beneficiary report by clicking the Generate Beneficiary Report button.

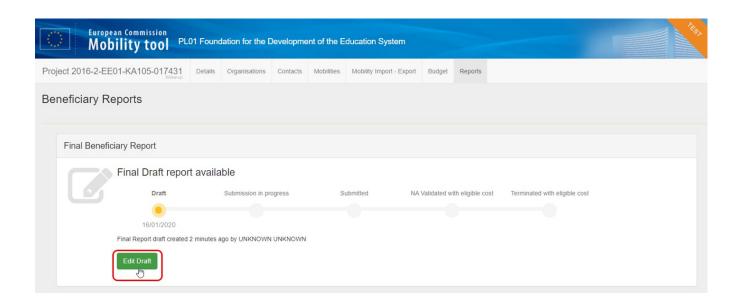


Depending on the key action, you may see this button directly or you may need to navigate to the Final Beneficiary Report sub-tab to find the button.



2.2. Click on "Edit Draft"

Once you have generated the report, click on **Edit Draft** to access it. You will be directed tot the report screen. Note that the project status has now changed to **process** inq.



3. General functionality

3.1. Report options and information

In the top left corner of the report screen you will see:

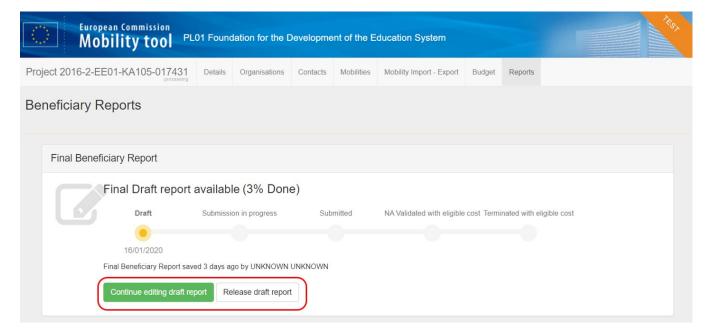
- 1. The time the draft report was last saved.
- 2. A progress bar indicating the percentage of the report that has been completed to date.
- 3. When the report is complete, the submission button will also be available in this section.
- 4. The options to:
 - a. Return to report page this will save the current draft report and redirect you to the Reports main page.
 - b. Print draft report this will allow you to print the report on paper.
 - c. Preview draft report this will save the current draft of the report to a PDF file.



3.2. "Continue editing" or "Release" the draft report for other users

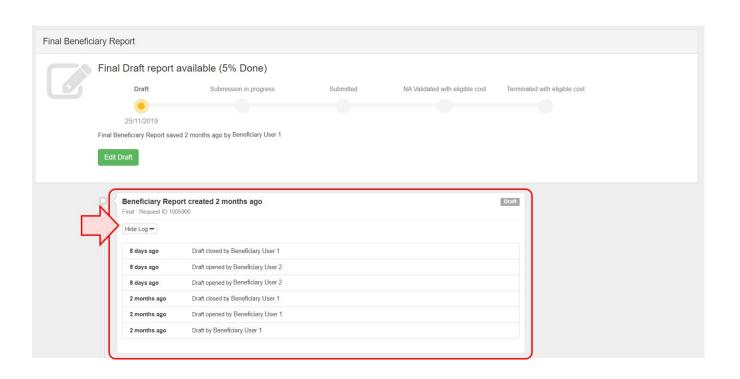
Once you have started to fill in the report, if you leave the report screen you can return to it at any time by clicking on the Reports tab. You will have two options:

- 1. Continue editing draft report click this button if you wish to continue filling in the report yourself.
- 2. Release draft report click this button if you wish to allow other beneficiary contact users to edit the draft report. Please note that two or more users are not allowed to edit the report at the same time, therefore when you release the report, you will not be able to edit it again unless the person editing it releases it at their turn.



3.3. Show log

Click on the **Show log + button** on the **Reports** page to see the main actions performed on the report, and the person who performed each action. Click the **Hide Log**-button to close the log.



4. Fill in the Beneficiary Report

4.1. Check the "Context" section

You will notice that the Context section is already filled in and marked with a green check.

The Context section contains the same information that is displayed under the project details (Details tab) and it cannot be modified in Mobility Tool+.

If project dates or titles require modifications this should be done by making a formal amendment request to the National Agency. Once this request is processed, the data will be updated in Mobility Tool+.

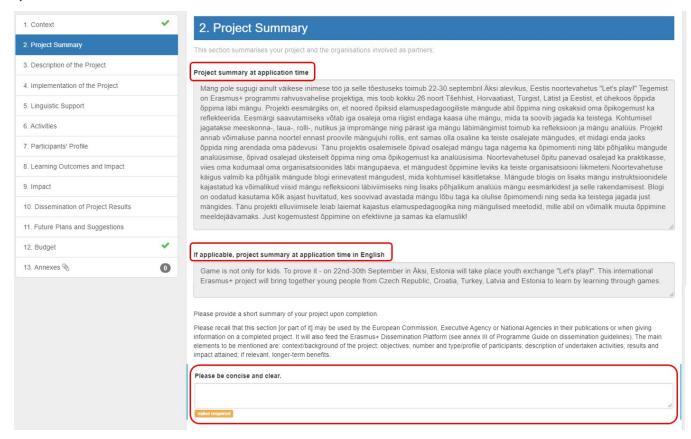
Navigate to the following sections by scrolling down or by clicking on the desired section in the left column of the report screen. The selected section is highlighted in blue.

As you fill in each section, it will be marked with a green check.

4.2. Fill in the "Project Summary"

Click on the Project Summary section and add a summary for the project.

Remember that the project summary will be displayed in the **Project Results Platform** once the Final Report is finalised in the National Agency's project management system.





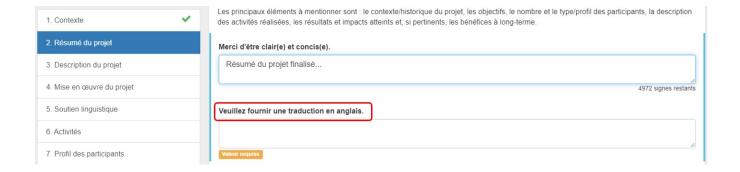
Information

Since 2016, a read-only copy of the summary provided at application stage is also included in the beneficiary report. It should be used as the base for the summary of the finalised project.

The summary is only requested in English, if the English version of the report is being used. For other language versions, the user needs to provide a summary in the language selected for the report and an English translation.

The application stage summary is also provided in both the specific national language and in English if the web application form was completed in a language other than English.

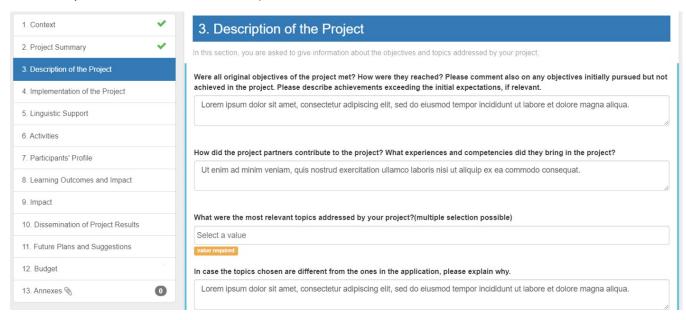
Remember that the project summary will be displayed in the **Project Results Platform** once the Final Report is finalised in the National Agency's project management system.



4.3. Fill in the "Description of the Project"

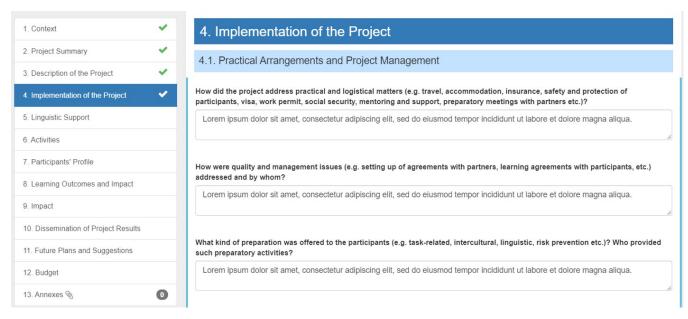
Once the next section Description of the Project is clicked, the previous section receives a green check mark, as all fields for that section have been completed.

In a similar way all other sections will be marked as completed.



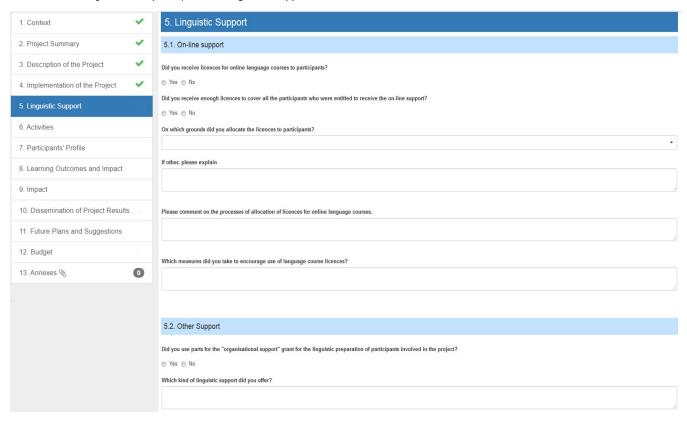
4.4. Fill in the "Implementation of the Project"

Complete the section Implementation of the Project, detailing the practical arrangements and project management.



4.5. Fill in the "Linguistic Support" (if applicable)

In the case of a long-term activity, complete the Linguistic Support section.



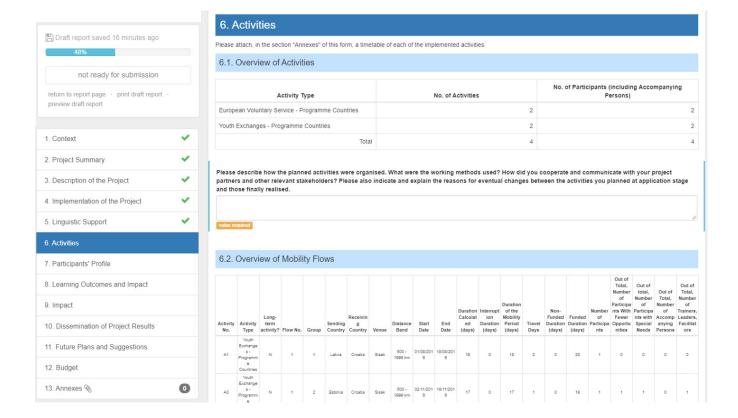
If this section is not applicable to the project, it is already highlighted with a green check or it may not appear at all. For other key actions this section will not appear.



4.6. Fill in the "Activities"

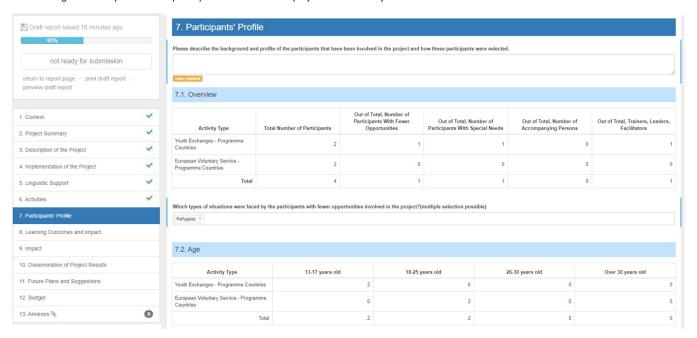
In the Activities section, an overview of the activities and mobility flows are automatically inserted based on the budget outline.

You are also prompted to fill in organisational details of the organisation of planned activities.



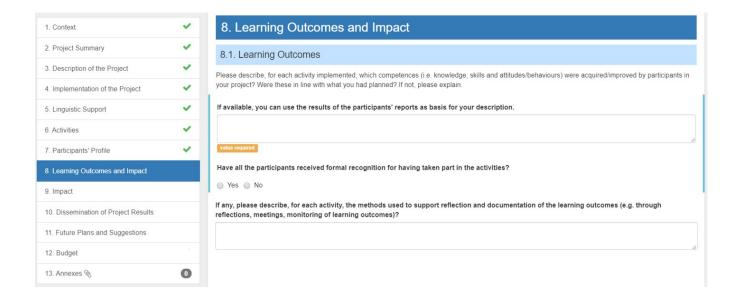
4.7. Fill in the "Participants' Profile"

In the **Participants' Profile** you will see a breakdown of the participants by activity, age, gender, sending organisation, etc. In addition, you are required to fill in details of the background and profile of the participants involved in the project and how they were selected.



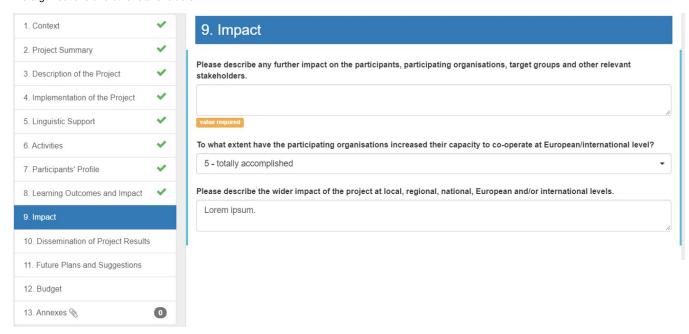
4.8. Fill in the "Learning Outcomes and Impact"

The Learning Outcomes and Impact section prompts you to fill in details of learning outcomes acquired and/or improved by the participants and the impact of these outcomes.



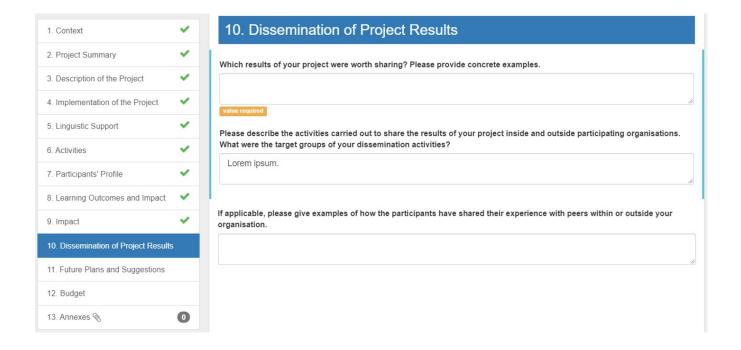
4.9. Fill in the "Impact"

The **Impact** section is only available for projects as of call year 2016. It requires you to provide further explanations about the impact of your project on the participants, the organisations and other stakeholders.



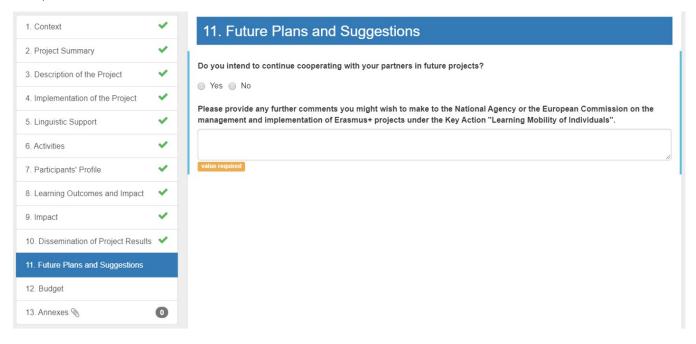
4.10. Fill in the "Dissemination of Project Results"

Provide details of the results of the project you would like to share together with descriptions of the activities carried out and target groups.



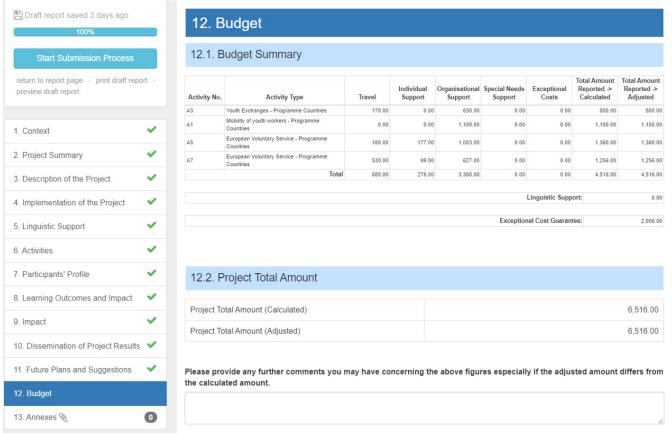
4.11. Fill in the "Future Plans and Suggestions"

In the Future Plans and Suggestions section, indicate if you intend to continue cooperating with partners on future projects and provide further comments regarding this aspect.



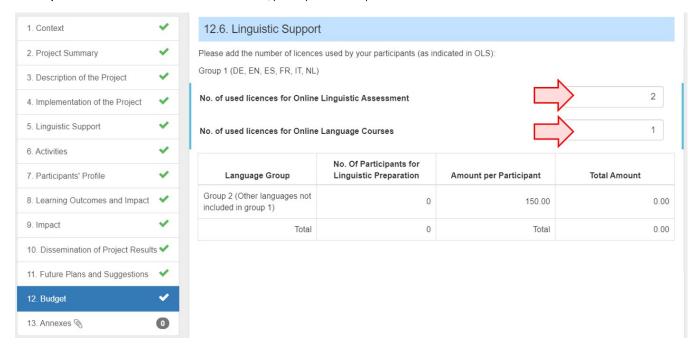
4.12. Check the "Budget" section

The Budget section is automatically filled in with the Budget Summary, the Project Total Amount and Travel costs.



In subsection 12.6, please add the number of licences for Online Linguistic Assessment and Online Language Courses.

If the adjusted amount differs from the calculated amount, please provide an explanation.



Note that the **Start Submission Process** button at the top left side of the report screen is now available. This is because supporting documentation (**Annexes**) can also be added after you have started the submission process.

4.13. Attach the required Annexes

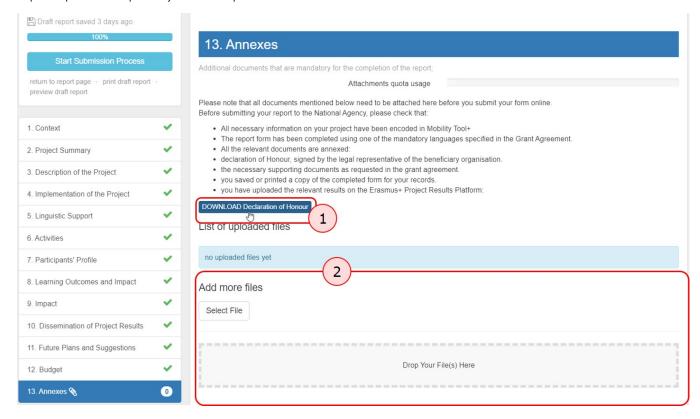
Click on **Annexes** and upload the supporting documentation as required.

The **Declaration of Honour** is mandatory for all projects and you must use the template provided with the report for each project:

- 1. Click the DOWNLOAD Declaration of Honour button and follow the onscreen instructions to save the template locally.
- **2.** Upload the duly signed declaration:
 - a. Click on the Select file button and follow the onscreen instructions to locate and upload locate the declaration file OR
 - b. Locate the file on our computer, then drag and drop it to the Drop Here Your File(s) area.

Please note that according to national context, a signature may not suffice and a stamp for the organisation might be needed as well.

Repeat step 2 above to upload any additional required documents.

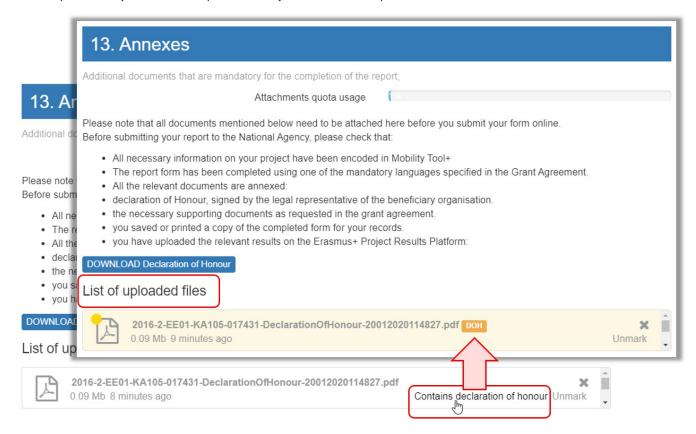


4.14. Mark the "Declaration of honour"

The uploaded files, including the declaration of honour, are listed in the List of uploaded files section.

However, you must mark the Declaration of Honour as such by clicking on **Contains declaration of honour** next to the correct file. The declaration is now highlighted in yellow and bears the mention **DOH**.

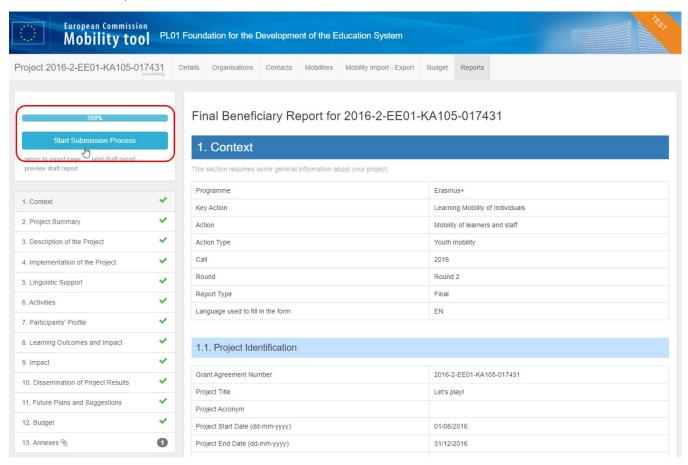
This is step is mandatory but it can also be performed after you have started the report submission.



5. Submit the report

5.1. Click on "Start Submission Process"

Once all sections are completed, click on Start Submission Process.



5.2. Revalidation of outdated mobilities

Eventually you might not be able to submit the report, even if it is 100% complete. A warning message is displayed under the **Start Submission Process** button, informing you the mobilities are outdated and have to be revalidated. You will not be able to submit the report until this is done. The **Start Submission Process** button is inactive. Click on **Revalidate Mobilities now** to start the revalidation process. See MT+ Re-validation of mobilities for details on this functionality.



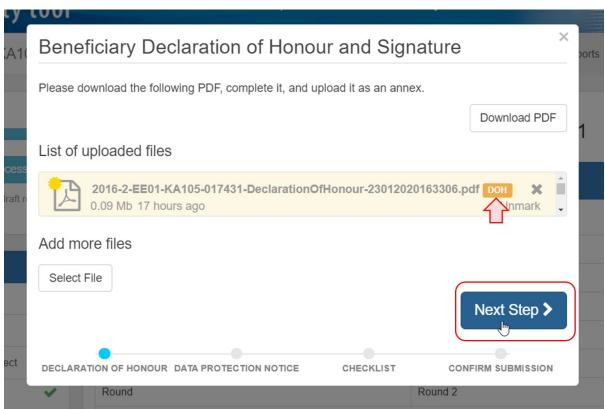
5.3. Check the "Beneficiary Declaration of Honour and Signature"

Once you have started the submission, the Beneficiary Declaration of Honour and Signature screen is displayed.

Here you can check that all of the required supporting documentation has been attached and Add more files if necessary.

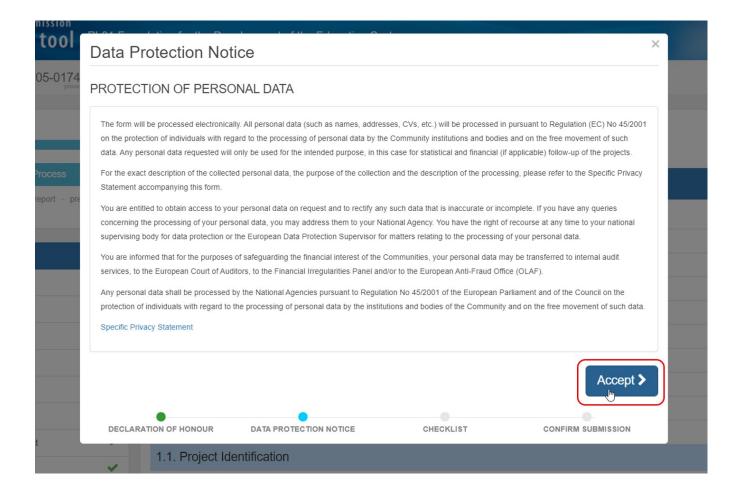
If you did not mark the declaration of honour when you uploaded it, you must mark it at this stage.

Then, click the **Next Step** button to continue.



5.4. Accept the "Data Protection Notice"

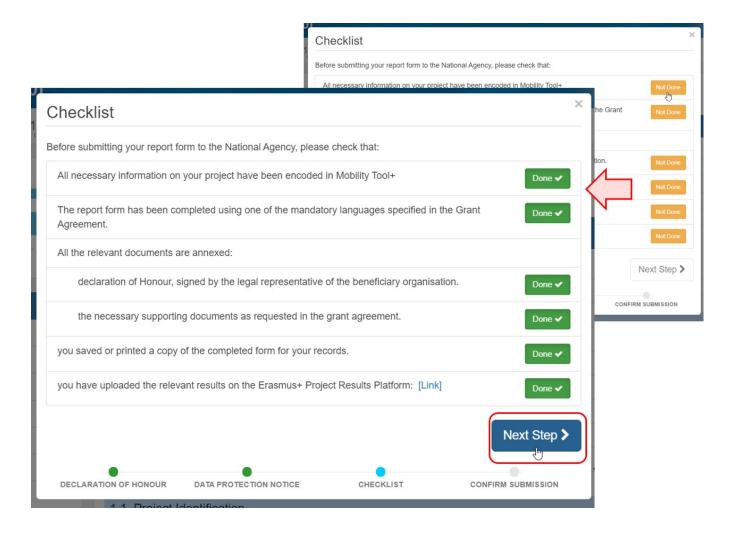
Read the Data Protection Notice and click Accept to continue.



5.5. Click the "Not Done" button to "Done" in the Checklist

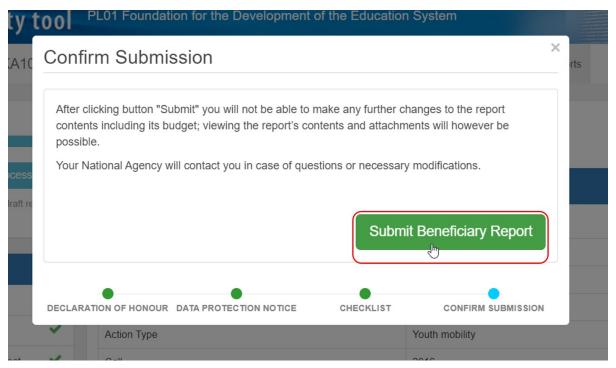
A checklist appears prompting you to ensure that all actions have been performed.

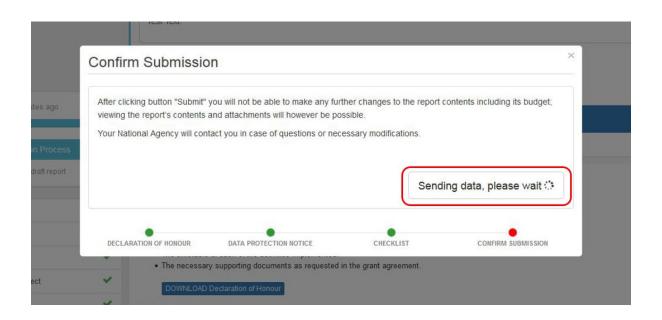
As each item is checked, change the **Not Done** button to **Done** by clicking the respective button. Once all items are marked **Done**, click the **Next Step** button to continue.



5.6. Click on "Submit Beneficiary Report"

To finish, click the Submit Beneficiary Report button. The project will be locked once the button is clicked.

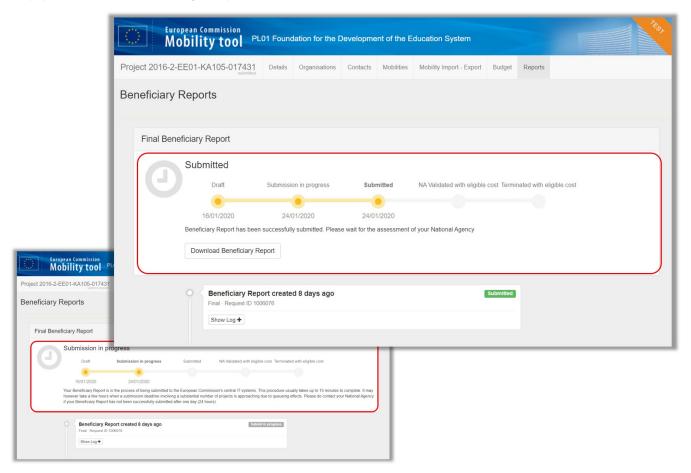




5.7. Check the status of the report

Back in the **Reports** tab, you will be able to see when the report is successfully **submitted**. The project status displayed under the project number has also changed to **submitted**.

The project is now locked and can no longer be updated.



Related articles

- MT+ Submit Terminate-with-no-grant Report
- MT+ KA2 How to complete and submit the final beneficiary report

- MT+ How to complete and submit the final beneficiary report
 MT+ How to stop the terminate-with-no-grant Report
 MT+ How to remove a final report to create a termination report
 MT+ Manage Interim Report