

# How to complete an expert assignment

## Prerequisites

### Steps

1. Access "My Assessments" from Single Entry Point
2. Filter your assignment(s) and open the expert assignment to work on
3. View the "Assessment Details" and begin the assessment process
4. Review the documentation of the project in the "Project information" section
5. Complete the "Award criteria" section
6. Answer the "Typology" questions
7. Complete the "Comments" section
8. Indicate if there is a "Conflict of interest" or not
9. Click the "Submit" button and confirm to submit the assessment results
10. Navigate back to "My Assessments"

### Expected Outcome

### Related articles

This page explains how to complete an expert assignment in the Assessment module given to the expert by the National Agency and available under [My Assessments](#).

Please consult the page [Assessment Details basic functionalities](#) to familiarise yourself with the general functionalities of and navigation within the Assessment Details screens.

## Prerequisites

- Existing EU Login and expert account. See the page [Expert login to EESCP and Assessment module](#) for details.
- Expert assignment(s) to assess application or report given by the National Agency
- Assignment status of the expert assignment is **Assignment ongoing**

## Steps

### 1. Access "My Assessments" from Single Entry Point

Log in to the Single Entry Point and select **My Assessments** from the Assessment module. The **My Assessments** screen opens with the **Search Filter** and the **Search results** panels, displaying all your available assignments.

See [My Assessments](#) for details on the basic functionalities of this screen.

The screenshot shows the 'My Assessments' interface. On the left, there is a 'Search Filter' panel with an 'Active filter' dropdown set to 'Default', a 'Delete' button, and an 'Actions' menu. Below this are 'Quick filters' for 'Programmes' (Erasmus+, European Solidarity Corps) and 'Calls' (years 2020-2027). At the bottom are 'Rounds' (1, 2, 3). The main area is titled 'Search results' and shows '2 Assessments found'. It contains a table with columns: Project Code, Assignment ID, Assignment status, Assignment Role, Assessment type, Threshold Reached, Beneficiary organisation name, Conflict of Interest, and Actions. Two rows are visible, both with 'Assignment ongoing' status. The first row is for project 2021-1-RO01-KA122-SCH-000007173, and the second is for 2021-1-RO01-KA153-YOU-000007165. Both are assigned to 'Expert1 (E1)' and are of type 'Application'. The first beneficiary is 'Asociatia pentru Initiative Durabile-Alternative' and the second is 'Hélène BEAUGEARD'. Each row has an 'Actions' button. The interface also includes a 'Welcome Bertie EXPERT-One AM-Expert, R001' header and an 'Export' button.

Project Code	Assignment ID	Assignment status	Assignment Role	Assessment type	Threshold Reached	Beneficiary organisation name	Conflict of Interest	Actions
2021-1-RO01-KA122-SCH-000007173	APP-E1-01	Assignment ongoing	Expert1 (E1)	Application		Asociatia pentru Initiative Durabile-Alternative		Actions
2021-1-RO01-KA153-YOU-000007165	APP-E1-01	Assignment ongoing	Expert1 (E1)	Application		Hélène BEAUGEARD		Actions

### 2. Filter your assignment(s) and open the expert assignment to work on

Expert assignments requiring your attention will be in status **Assignment Ongoing**.

You can use the available **Search filters** to filter the results list according to your needs. See [My Assessments](#) for details on the search filters available.

To open the assessment click on the **hyperlinked project code**, or click on the **Actions** button in the Actions column and select the option **Open assessment** to open the **Assessment Details** basic functionalities.

**My Assessments** Export

Search Filter Search results  
1 Assessments found

Active filter: Default Delete Actions

Quick filters

Search from found results  
2021-1-RO01-KA122-SCH-000007173

Project Code	Assignment ID	Assignment status	Assignment Role	Assessment type	Threshold Reached	Beneficiary organisation name	Conflict of Interest	Actions
<a href="#">2021-1-RO01-KA122-SCH-000007173</a>	APP-E1-01	Assignment ongoing	Expert1 (E1)	Application		Asociatia pentru Initiative Durabile-Alternative		<span>Actions</span>

### Take note

If you notice there is a **Conflict of interest** with the project assigned you should not perform the assessment. For such project assessments, you have to declare the conflict as described [below](#).

You can access the **Conflict of interest** section of the project assessment directly from My Assessments by selecting Conflict of interest from the **Actions** button.

**Search results**  
4 Assessments found

Active filters: Erasmus+ 2021 All Rounds KA130-HED Assessment type: All Assignment status for Editor: All  
Reset all Assignment status for Expert: All Assignment status for Consolidator: All Assignment role: All

Project Code	Assignment ID	Assignment status	Assignment Role	Assessment type	Threshold Reached	Assignment submission date	Actions
<a href="#">2021-1-RO01-KA130-HED-000007219</a>	APP-E2-02	Assignment ongoing	Expert2 (E2)	Application			<span>Actions</span>
<a href="#">2021-1-RO01-KA130-HED-000007171</a>	APP-E2-01	Consolidation approved	Expert2 (E2)	Application	YES	13/04/2021, 14:21:38	<span>Open assessment</span> <span>Conflict of interest</span> <span>Submit assessment</span>

### 3. View the "Assessment Details" and begin the assessment process

The **Assessment Details** screen opens in a new tab.

The **header** in the Assessment Details screen displays basic information about the project under assessment. By default, it only shows key details. To expand and view further information, click the available arrow.

The page **Assessment Details** provides additional information on the header in assessments.

**Assessment Details** Print Submit

Project Code: 2021-1-RO01-KA122-SCH-000007173

Project Title : Short-term projects for mobility of learners and staff in school education 01 - EAC IT TRAINING - Beneficiary organisation name : Asociatia pentru Initiative Durabile-Alternative - Assignment type : Application - Assignment ID : APP-E1-01 / Version : v01 - Language : Romanian

Threshold reached: 1/80

Navigation

- Project information**
- ✗ Award criteria
- ✗ Typology questions
- ✗ Comments
- ✗ Conflict of interest

**Project information**

Application

Document name Download PDF/ See PDF on line/ See Application Details

[application\\_forms.pdf](#) Download View

[Declaration Honour.pdf](#) Download View

Budget information

Grant Requested 70825

### 4. Review the documentation of the project in the "Project information" section

When opening an assessment from My Assessments it will always open the assessment on the **Project Information** by default. The information available here is relevant for the given assignment.

Available subsections under Project Information may include **Application**, **Budget information**, **Assessments** and **Reports**:

- **Application** - contains the PDF version of the application submitted by the beneficiary organisation and all annexes submitted with it
- **Budget information** - contains information about the budget linked to the project
- **Reports** - only visible when assessing reports; contains the Beneficiary report(s) file(s) as well as the outputs and/or results of the project
- **Assessments** - only visible for completed expert assignments, as well as in consolidator and editor assignments; contains the PDF versions of already submitted assessments
  - Experts only have access to their own submitted assessment in this section after it was submitted

For available files, you have the options to:

1. Download each file individually, using the **Download** button, and
2. View as a PDF version online, using the **PDF** button.

The screenshot shows the 'Project information' section. Under 'Application', there is a table with two rows. The first row has 'application\_forms.pdf' and a 'Download PDF files' button. The second row has 'Declaration Honour.pdf' and a 'Download PDF files' button. To the right of the table, there are links for 'Download PDF/ See PDF on line/ See Application Details' and two icons for downloading and viewing PDFs. Below the 'Application' section is the 'Budget information' section, which shows 'Grant Requested' as 70825.

## 5. Complete the "Award criteria" section

Use the content menu to access the **Award criteria** section. It contains the criteria to be evaluated. All of the available sub-sections must be completed and given a score.

### Information

The assessment is automatically saved as you fill it in. After closing the form, even if not completed, you can open it again from [My Assessments](#).

You will also notice the **Award criteria** is opened on a specific tab, in our example **Expert 1**. Any other displayed tabs, for the other expert(s) participating in the assessment of the same project, are greyed out. You do not have access to these.

The screenshot shows the 'Assessment Details' section. On the left is a navigation menu with 'Award criteria' selected. The main area shows 'Award criteria' for 'Expert 1'. There are two criteria: 'Relevance \*' with a score of 30 and 'Quality of project design \*' with a score of 40. Each criterion has a 'Comments' field. The 'Relevance \*' field has a message: 'Minimum Characters 50 The minimum characters have not been reached'. There are 'Print' and 'Submit' buttons at the top right.

### 5.1. Provide "Comments" per sub-section

Depending on the type of assessment as well as programme and/or action being assessed, different supporting comments must be added in the available **Comments** field. All comment fields available are mandatory.

In our example, we have to provide comments on topics such as **Relevance**, **Quality of project design** and **Quality of follow-up actions**. As the fields are filled, a message appears indicating the **auto-save** feature.

The maximum number of characters that can be used per available comment field in the **Comment** section is indicated in the top right corner of the text boxes, for example 3000 characters. The counter updates automatically while you type. If the maximum number of characters has been reached, a red **0** is displayed and no more text can be added. No minimum number of characters is required for the comments fields in the Comments section of the assessment.

The Comment field size will expand automatically while you type.

The screenshot shows the 'Award criteria' section with a text area containing Lorem Ipsum text and a 'Minimum Characters 50' indicator. Below it is the 'Quality of project design' section with a score of 40 and a comments field containing Lorem Ipsum text, with a character count of 2426. The third section is 'Quality of follow-up actions' with a score of 30 and an empty comments field with a character count of 3000. A green success message box in the bottom right corner reads 'SUCCESS Successfully auto-saved'.

## 5.2. Provide the scores for each sub-section

Provide a score for each of the sub-sections available in the **Award criteria** screen. This is done in the **Score** field available in the top right-hand corner of each specific sub-section. The maximum score that can be given for each is also displayed.

### Information

Similar to the coloured side bar of the header, the **Score** fields (completed when working on an expert or consolidator assignment for an application) also have a colour indicator that changes on the completion of the relevant score fields:

1. **Orange**: Initial display, no threshold scores yet entered in the relevant score field
2. **Green**: Threshold reached
3. **Red**: Threshold not reached

Completion of the score fields is mandatory. Hovering over the coloured dot will display a tooltip.

**Award criteria**

Expert 1 | Expert 2 | Consolidator

Open all criteria

Relevance \* Score  >

Quality of project design \* Score  >

Quality of follow-up actions \* Score  >

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Open all criteria

Relevance \* Score   >

Quality of project design \* Score   >

Quality of follow-up actions \* Score   >

SUCCESS  
Successfully auto-saved

While you enter the individual scores, the **Threshold reached indicator** in the header of the Assessment Details will also update automatically.

Initially, for ongoing expert assignments, an **orange badge** is displayed, showing the initial score as /100. The badge will change colour:

- to **red** for award criteria threshold not reached, and
- to **green** for award criteria threshold reached

### 5.3. "Award Criteria" section complete

When all information is provided, **Award criteria** in the Content menu is marked with a green check.

**Navigation** <

Project information

**Award criteria**

Typology questions

Comments

Conflict of interest

## 6. Answer the "Typology" questions

### 6.1. Use the available radio buttons to answer the available questions

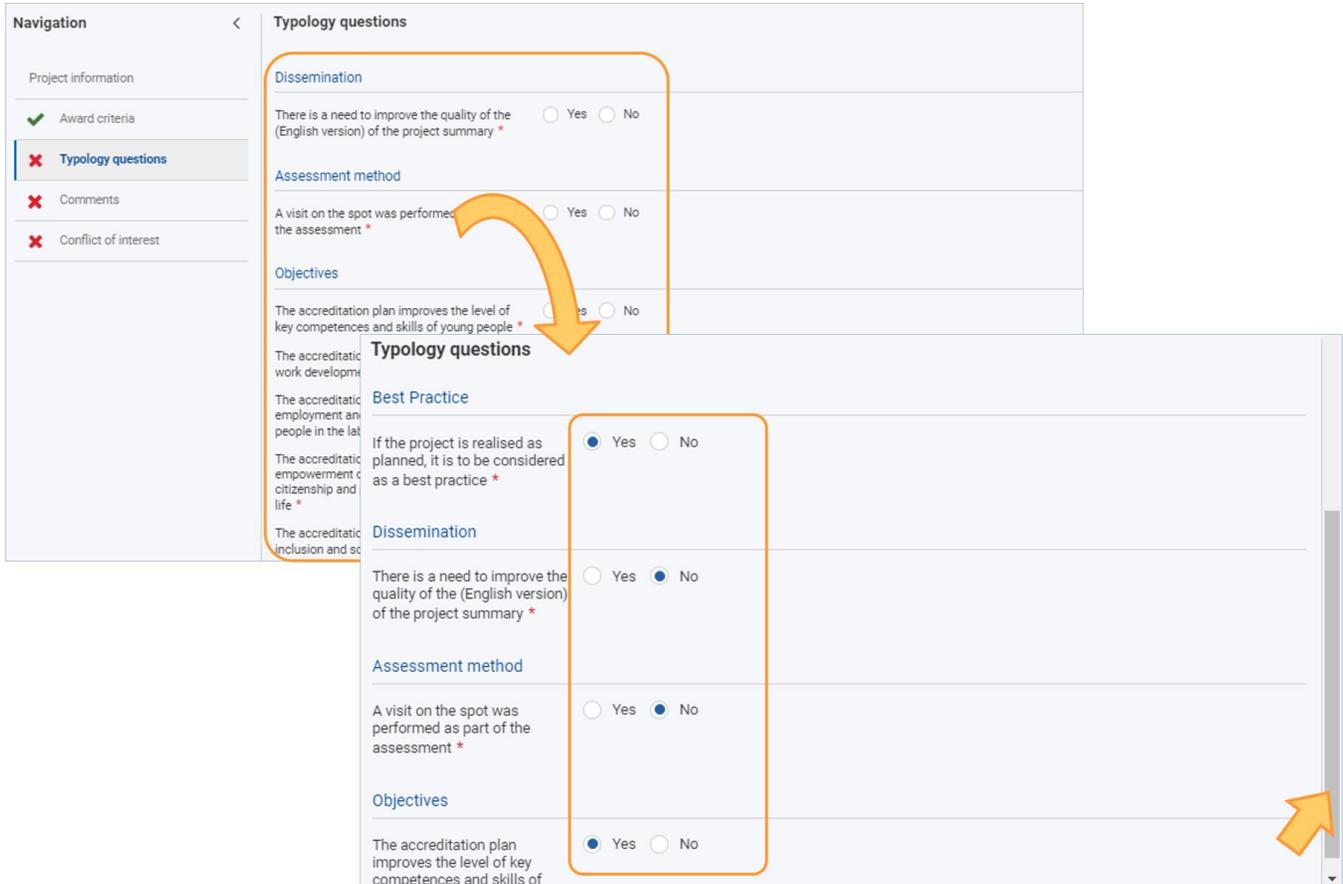
Use the **Navigation** to access the **Typology** section.

This section contains a set of questions to be answered using the available radio buttons to select either **Yes**, **No** or **NA**, if available. The questions displayed vary depending on the type of assessment as well as the programme and/or action the project under assessment belongs to.

Mandatory questions are marked with a red asterisk **\***.

 **Take note**

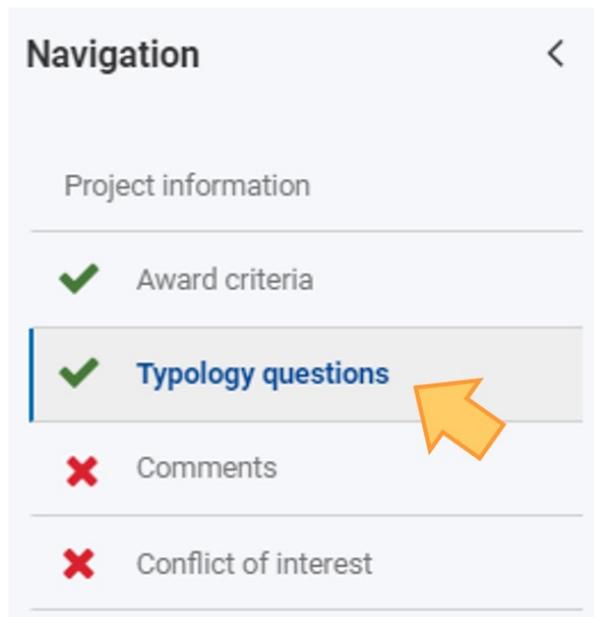
Questions are positively formulated, meaning that selecting **Yes** indicates the requirement has been met.



The screenshot shows a mobile application interface for 'Typology questions'. On the left, a navigation menu lists 'Project information', 'Award criteria', 'Typology questions' (selected with a red 'x'), 'Comments', and 'Conflict of interest'. The main content area is titled 'Typology questions' and contains several sections: 'Dissemination', 'Assessment method', and 'Objectives'. Each section has a question with radio buttons for 'Yes' and 'No'. A specific question is highlighted with an orange box: 'If the project is realised as planned, it is to be considered as a best practice \*'. The 'Yes' radio button is selected. Other questions include 'There is a need to improve the quality of the (English version) of the project summary \*' and 'A visit on the spot was performed as part of the assessment \*'. An orange arrow points from the 'Take note' section to the highlighted question. Another orange arrow points to the bottom right corner of the screen.

## 6.2. "Typology questions" section complete

When all questions are answered, **Typology questions** in the Navigation is marked with a green check.



## 7. Complete the "Comments" section

### 7.1. Provide the comments required

Use the **Navigation** to access the **Comments** section.

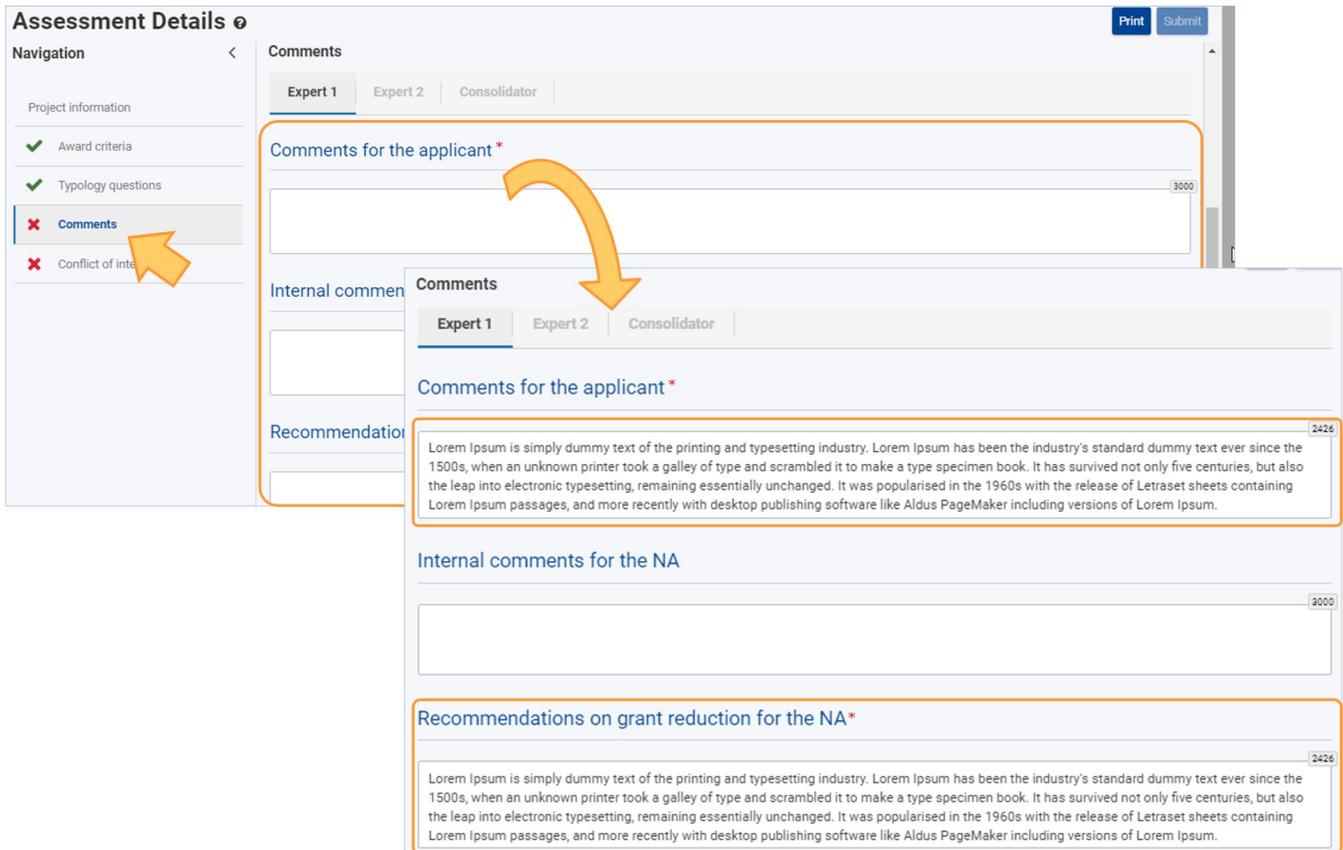
The **Comments** section of an assessment allows the expert to provide additional commentary for applicant, beneficiary and/or NA. Some comment fields are mandatory. Depending on the type of assessment and the action type of the project under assessment, different comment fields may be available. The following options are possible:

- **Comments for the applicant**
- **Comments for the beneficiary**
- **Internal comments for the NA**
- **Recommendations on grant reduction for the NA**
- **Comments on Erasmus Plan Objectives**

Comments that are mandatory are marked with a red asterisk \*.

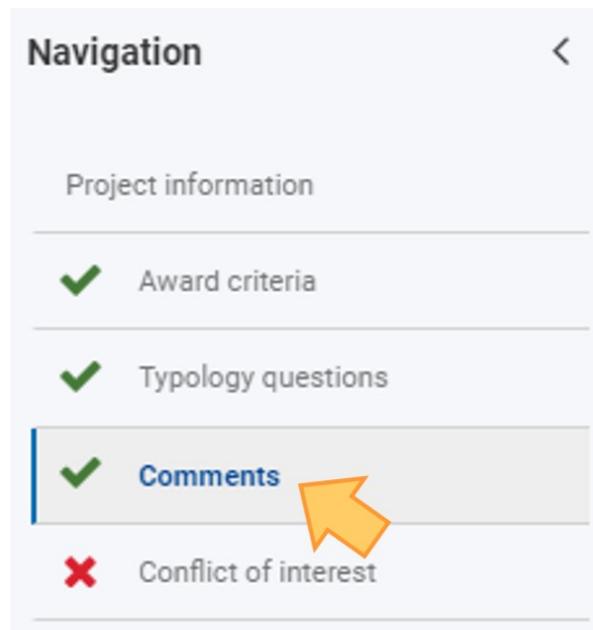
The maximum number of characters that can be used per available comment field in the **Comment** section is indicated in the top right corner of the text boxes, for example 3000 characters. The counter updates automatically while you type. If the maximum number of characters has been reached, a red **0** is displayed and no more text can be added. No minimum number of characters is required for the comments fields in the Comments section of the assessment.

The Comment field size will expand automatically while you type.



## 7.2. "Comments" section complete

When all mandatory comments are provided, **Comments** in the Navigation is marked with a green check.



## 8. Indicate if there is a "Conflict of interest" or not

### 8.1. "I declare absence of conflict of interest"

If there is no conflict of interest, confirm this by selecting the radio button for **I declare absence of conflict of interest**. After you confirm there is no conflict of interest, all menu items in the Navigation are marked with a green check, indicating completion. The **Submit** button then becomes active.

**Assessment Details** Print Submit

Project Code: 2021-1-R001-KA122-SCH-000007173 80/100

Project Title : Short-term projects for mobility of learners and staff in school education 01 - EAC IT TRAINING - Beneficiary organisation name : Asociatia pentru Initiative Durabile-Alternative - Assignment type : Application - Assignment ID : APP-E1-01 / Version : v01 - Language : Romanian Threshold reached:Yes

**Navigation**

- Project information
- ✓ Award criteria
- ✓ Typology questions
- ✓ Comments
- ✗ **Conflict of interest**

**Conflict of interest**

Expert 1 | Expert 2 | Consolidator

I hereby declare to the best of my knowledge that I have no conflict of interest (including family, emotional life, political affinity, economic interest or any other shared interest) with the organisation(s) or any of the persons having submitted this form. Furthermore, I confirm that I will not communicate to any third part any information that may be disclosed to me in the context of my work as expert

I declare absense of conflict of interest  I declare conflict of interest

**SUCCESS**  
Conflict of interest success

## 8.2. "I declare conflict of interest"

If there is a conflict of interest, you must indicate it by clicking the radio button **I declare conflict of interest**. This will result in the **Submit** button not being activated and the assessment results cannot be submitted. The **Conflict of Interest** section in the Navigation will not receive the green check.

For more details on conflicts of interests see the relevant programme guide for Erasmus+ and/or European Solidarity Corps.

### Take note

In case of a **Conflict of interest** you should not perform the given assignment. To declare the conflict of interest for a specific project assessment:

- In My Assessments, click the **Actions** button for the project assessment, then select the option **Conflict of interest**, or
- In the Assessment Details screen click **Conflict of interest** in the Navigation panel.

Then check the option **I declare conflict of interest**.

**Assessment Details** Print Submit

**Navigation**

- Project information
- ✗ Award criteria
- ✗ Typology questions
- ✓ Comments
- ✗ **Conflict of interest**

**Conflict of interest**

Expert 1 | Expert 2 | Consolidator

I hereby declare to the best of my knowledge that I have no conflict of interest (including family, emotional life, political affinity, economic interest or any other shared interest) with the organisation(s) or any of the persons having submitted this form. Furthermore, I confirm that I will not communicate to any third part any information that may be disclosed to me in the context of my work as expert

I declare absense of conflict of interest  I declare conflict of interest

**SUCCESS**  
Conflict of interest success

## 9. Click the "Submit" button and confirm to submit the assessment results

After you have completed the assessment, you have to submit the results. The header of your assessment will display, if expanded, the summary of the assessment result scores per **Award criteria** and the **Threshold indicator** is updated with the final score. The **Threshold reached**: information will displays Yes or No, as per the scores you entered.

If no conflict of interest was declared in the previous step and all mandatory information for the assessment is complete, the **Submit** button becomes active. Click on it to submit the assessment results.

**Assessment Details** Print Submit

Project Code: 2021-1-R001-KA122-SCH-000007173  
Project Title : Short-term projects for mobility of learners and staff in school education 01 - EAC IT TRAINING - Beneficiary organisation name : Asociația pentru Inițiativă Durabilă-Alternativă - Assignment type : Application - Assignment ID : APP-EI-01 / Version : v01 - Language : Romanian

Criteria	Expert1: Bertie EXPERT-One
Relevance	25
Quality of project design	31
Quality of follow-up actions	24
Scoring	80/100

80/100  
Threshold reached:Yes

**Navigation**

- Project information
- Award criteria
- Typology questions
- Comments
- Conflict of interest**

**Conflict of interest**

Expert 1 | Expert 2 | Consolidator

I hereby declare to the best of my knowledge that I have no conflict of interest (including family, emotional life, political affinity, economic interest or any other shared interest) with the organisation(s) or any of the persons having submitted this form. Furthermore, I confirm that I will not communicate to any third part any information that may be disclosed to me in the context of my work as expert

I declare absence of conflict of interest  I declare conflict of interest

Confirm the submission by clicking on the **Confirm and Submit** button in the pop-up dialogue box.

**Submission of the assessment** ×

Once you have completed all pages and sections of the assessment, please click on the 'Confirm and Submit' button to submit it. After submission, you can still view and print the assessment, but no longer modify any of its content.

Cancel **Confirm and Submit**

The assessment is completed, all information on screen is greyed out and no more changes are possible. A notification displays on top of the screen, displaying the submission information.

**Assessment Details** Print Submit

× This assessment was submitted by the Expert1 on 25/03/2021, 10:24:34 (Brussels time) Brussels time. No further changes are possible.

Project Code: 2021-1-R001-KA122-SCH-000007173  
Project Title : Short-term projects for mobility of learners and staff in school education 01 - EAC IT TRAINING - Beneficiary organisation name : Asociația pentru Inițiativă Durabilă-Alternativă - Assignment type : Application - Assignment ID : APP-EI-01 / Version : v01 - Language : Romanian

80/100  
Threshold reached:Yes

**Navigation**

- Project information
- Award criteria
- Typology questions
- Comments
- Conflict of interest**

**Conflict of interest**

Expert 1 | Expert 2 | Consolidator

I hereby declare to the best of my knowledge that I have no conflict of interest (including family, emotional life, political affinity, economic interest or any other shared interest) with the organisation(s) or any of the persons having submitted this form. Furthermore, I confirm that I will not communicate to any third part any information that may be disclosed to me in the context of my work as expert

I declare absence of conflict of interest  I declare conflict of interest

## 10. Navigate back to "My Assessments"

Navigate back to the list of your assessments using the main menu.

The previously assessed project is now in the status **Assignment completed**. The Assignment submission date and Conflict of interest columns are filled in with the respective data. It is still possible to open the assessment by either clicking on the hyperlinked project code or via the **Actions** button. If selected, the submitted assessment opens in a new tab in **read-only** mode.

**My Assessments** Export

**Search results**  
5 Assessments found

Active filters: Active filter: Default  
[Reset all](#)

Search Filter	Project Code	Assignment ID	Assignment status	Assignment Role	Assessment type	Threshold Reached	Assignment submission date	Project title	Conflict of Interest	Actions
<input type="checkbox"/>	<a href="#">2021-1-RO01-KA122-SCH-000007173</a>	APP-E1-01	Assignment completed	Expert1 (E1)	Application	YES	25/03/2021, 10:24:34	Short-term projects for mobility of learners and staff in school education 01 - EAC IT TRAINING	NO	<a href="#">Actions</a>

If you open the submitted assessment, you will notice that under **Project Information** a new section is available called **Assessments**. You can download or open your submitted assessment as a PDF from here.

Home > My Assessments > Assessment Details: 2021-1-RO01-KA122-SCH-000007173

Bertie EXPERT-One  
AM-Expert, RO01

**Assessment Details** Print Submit

Navigation < Project information

- Project information**
- Award criteria
- Typology questions
- Comments
- Conflict of interest

**Application**

Document name: [application\\_forms.pdf](#) Download PDF/ See PDF on line/ Application Form link

Document name: [Declaration Honour.pdf](#) Download PDF/ See PDF on line

**Budget information**

Grant Requested: 70825

**Assessments**

Document name: [Application Expert 1 Assessment - Erasmus+ - 2021-1-RO01-KA122-SCH-000007173 - APP-E1-01-V1](#) Download PDF/ See PDF on line

## Expected Outcome

- Assessment is submitted and locked, meaning it cannot be updated further.
- The Assignment status of the submitted assignment changes to **Assignment completed** or, in the case of a declared conflict of interest, the assessment cannot be submitted and no further action is required from the expert



## Related articles

- [How to submit the consolidated version of an assessment to the NA](#)
- [How to approve a consolidated assessment as expert](#)
- [How to complete a consolidation assignment](#)
- [How to complete an expert assignment](#)
- [Assignment ID](#)
- [Expert Layout, menu items and navigation](#)
- [Expert Assessment](#)