

MT+ How to manage final beneficiary report

One of the final stages of the project is the submission of the final beneficiary report. The beneficiary can manage the beneficiary report of a project in the **Reports** tab in Mobility Tool+. This page provides you with an overview on the life cycle for the report, from report request notification until project closure.

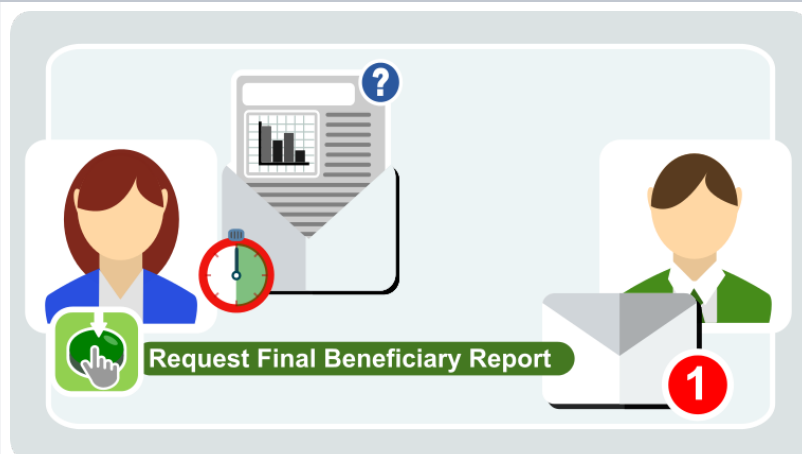
Preparation and (first) submission of the final beneficiary report

Report Request

The NA will request the final beneficiary report and the beneficiary will receive a standard Final Report reminder notification email with the final report submission deadline. As from this moment it is possible for the beneficiary to create and submit the report.

- [MT+ Notifications](#)

Eventually the NA will send reminders on the end date of the project and 53 days after the end date of the project. This 53 days is a default and your National Agency may adjust the timing and the content of the message to their needs.



Check project data and generate the report

The Final Beneficiary Report can be created, edited and submitted when the **project** is in status **Follow-up**. Once the Beneficiary report is generated the status of the project will change to **Processing**. It is recommended to check that all project data is up to date before submitting the report.

Check the organisation information is up to date:

- [MT+ How to manage organisations for KA1 & KA3 projects](#)
- [MT+ How to manage organisations for KA2 projects](#)
- [ESC MT+ Manage organisations](#)

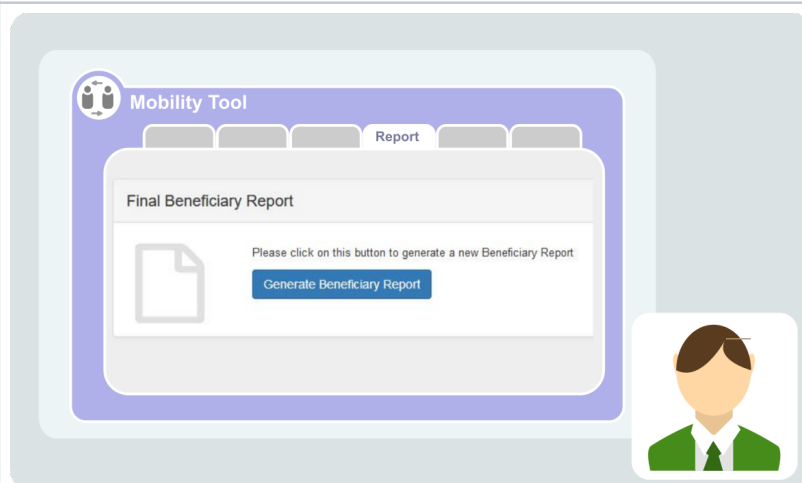
Check that the project information is complete and up to date.

- [MT+ Manage KA1 and KA3 mobilities](#)
- [MT+ Project Outline for KA2 projects](#)
- [ESC MT+ Project management overview](#)

Check the budget summary. Additional project costs may be entered under the budget tab depending on the action type. For example the **Excoptional costs - Guarantee** field can be edited for KA105.

- [MT+ KA1 and KA3 Budget screen](#)
- [MT+ KA2 Budget](#)
- [ESC MT+ Budget](#)

The project information can be updated while the project status is in **Follow-up** or **Processing**.



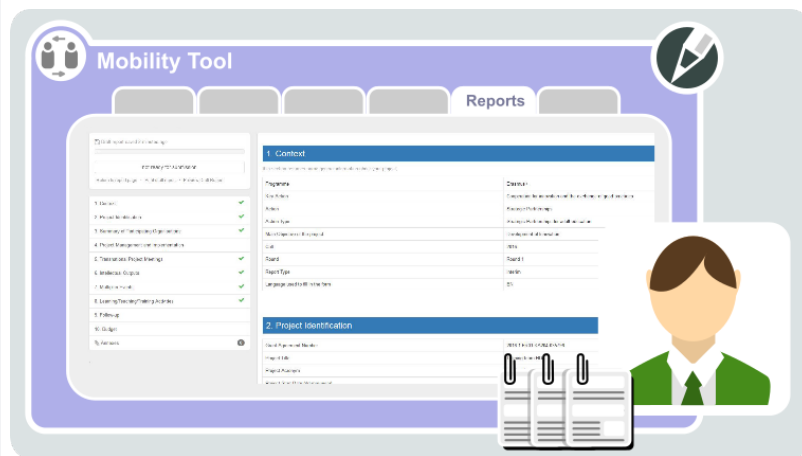
Creating the report

The report is to be created under the Report tab in Mobility Tool+. Navigate through the different sections of the report using the side menu and update, if applicable, according to the information on screen. Once a section is completed a green check appears.

For Erasmus+ mobility projects, at least one re-validation of mobilities is necessary before the final report can be submitted. The draft version of the Final Beneficiary Report will display a warning and the Start Submission Process button is inactive.

- [MT+ Re-validation of mobilities - Revalidation of mobilities via the "Reports" tab](#)

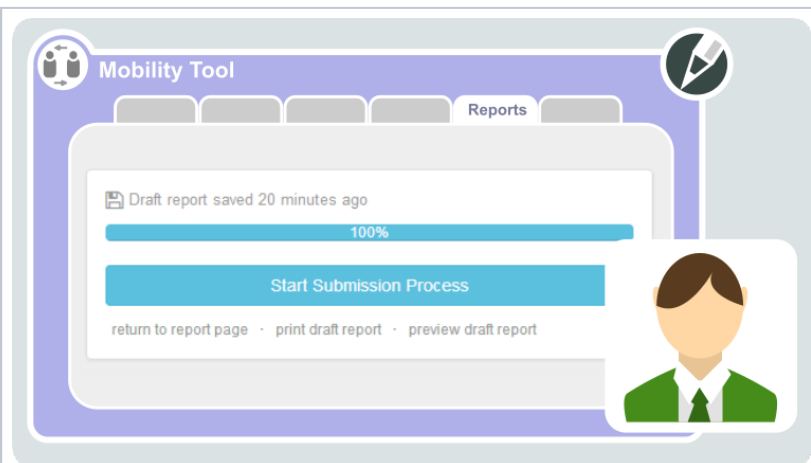
Additional documentation can be attached to the report in section Annexes. The Declaration of Honour is mandatory.



Printing and Sharing the beneficiary report

The report, while still in draft, can be printed and previewed from within Mobility Tool+.

The Preview Draft Report option will export the file as *.pdf, which could be shared.

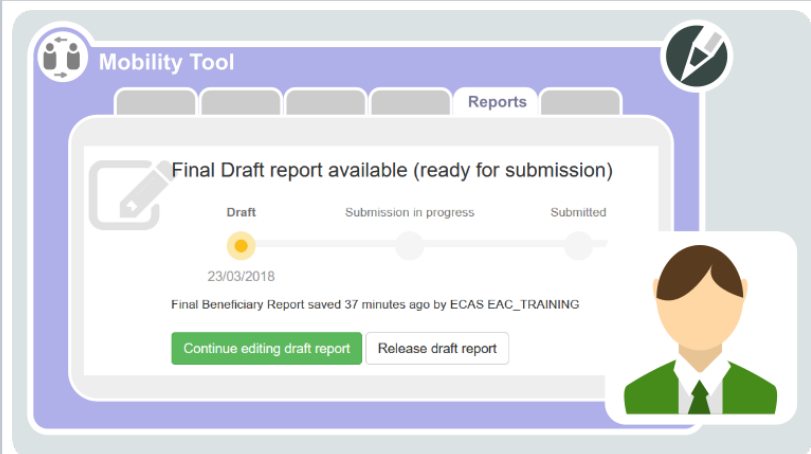


Releasing a draft report

It is also possible to release a current draft of a final beneficiary report. This option is available in the Mobility Tool+ Reports tab.

Using this functionality will allow other beneficiary contact users to edit the draft report. Those additional beneficiary contacts must have access to the project in MT+.

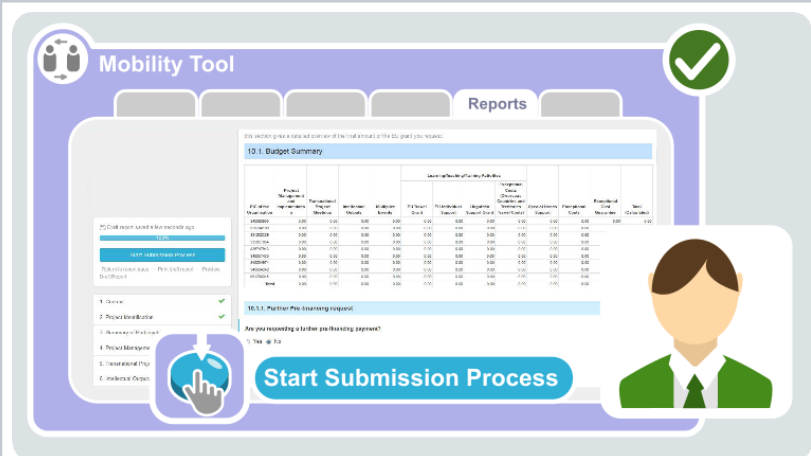
Note: Only one person at the time can edit the report. Releasing it allows others (with the correct access rights) to start editing. If a 3rd person wants to edit, the report must be released again.



Submission of the beneficiary report in Mobility Tool+

Once all sections of the report are complete and the needed documents attached, the report can be **submitted** from Mobility Tool+.

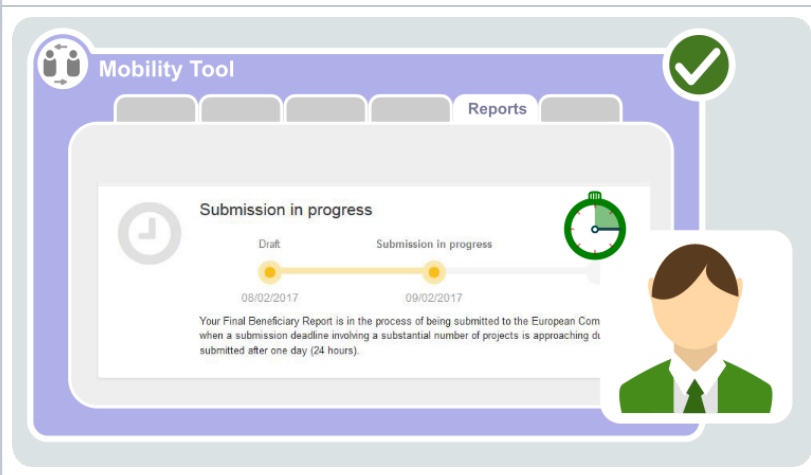
- [MT+ How to complete and submit the final beneficiary report](#) (Example for KA105 project)
- [MT+ KA2 How to complete and submit the final beneficiary report](#)
- [MT+ KA229 Partnership Dashboard](#)
- [ESC MT+ Submit final report](#)



Submission Progress

Mobility Tool+ will display the progress of the submission and keep you informed on the **status of the report**.

- [MT+ How to complete and submit the beneficiary report](#)



National Agency check of the report

The National Agency checks if all necessary information and required documents were submitted with the report.



Report Reception by the National Agency

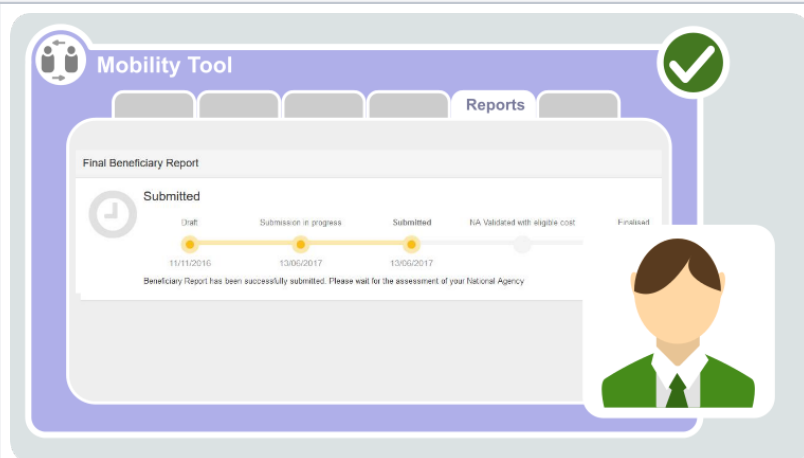
Accepted Report Reception

If the National Agency accepts the report, the assessment of the report will start. The status of the report in Mobility Tool+ will stay **Submitted**.

- [MT+ How to complete and submit the beneficiary report](#)

The National Agency has 60 calendar days from report reception to either:

- Issue the final payment or
- Submit comments to the report that require the beneficiaries attention. If the report is sent back to the beneficiary for corrections, the 60 days counter is paused until a new report is submitted by the beneficiary to the National Agency.



Report Reception not accepted due to additional /missing information required

The National Agency will check that all necessary information is available and/or satisfactory. If not, a new report will be requested. Details of the request for additional reasons will be sent in a notification to the beneficiary by the National Agency.

Reasons for requesting new report may be:

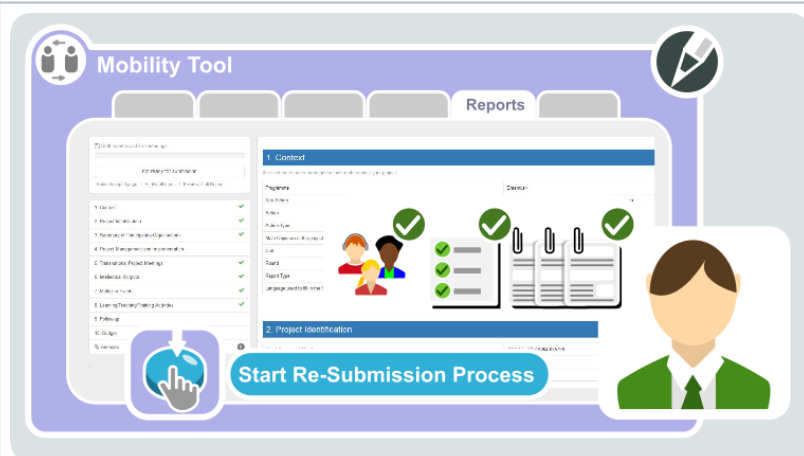
1. missing documentation
2. additional information needed
3. other ... (reason to be specified)

The beneficiary can then edit the re-opened beneficiary report and/or add additional documentation or information in Mobility Tool+.

Note: Documents previously attached by the beneficiary have to be attached again, including the Declaration of Honour.

After the changes are done in Mobility Tool+, the beneficiary re-submits the updated report.

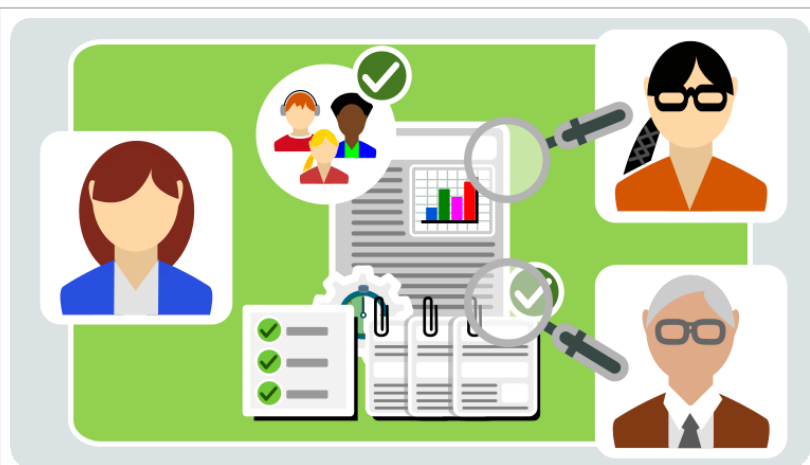
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Report Assessment

Sending the report for assessment

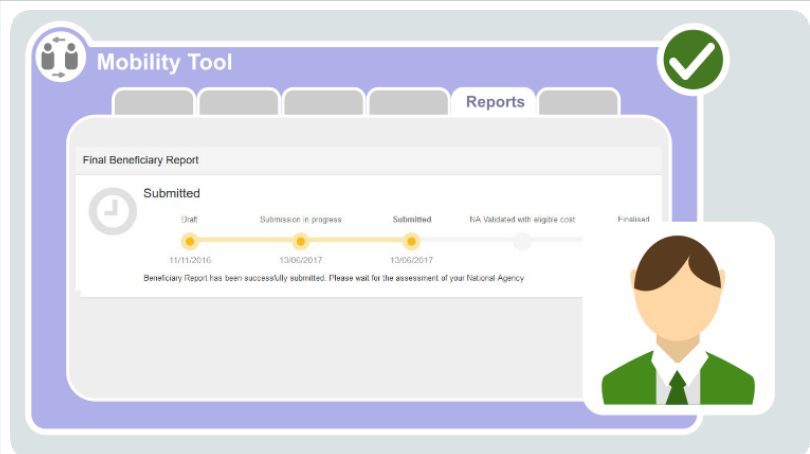
After the report acceptance the National Agency can begin - or send the report to (external) experts for - the **Report Assessment**.



Accepted Assessment

After the assessment of the final report is finished, the National Agency **accepts the assessment**. This triggers the update of data in Mobility Tool+. The project can be finalised by the beneficiary.

The report status in Mobility Tool+ will stay **Submitted**.



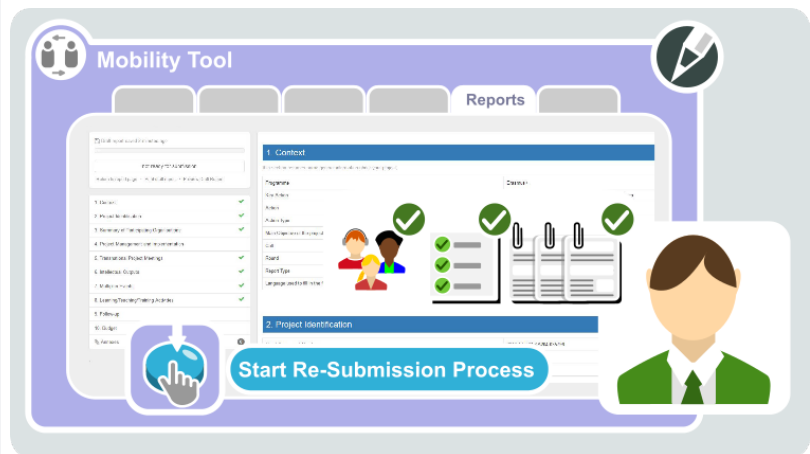
Missing/Additional information required as a result of assessment

After the experts/National Agency reviewed the report and noted missing information or requires additional information in relation to the report and/or standards not been met, a new report will be requested. The details of the reasons for requesting a new report will be provided by the National Agency in their notification to the beneficiary. The reasons for requesting a new report may be:

1. insufficient quality of the report or its parts
2. missing/wrong attachments
3. wrong budget
4. other ... (reason to be specified)

The report will be unlocked in Mobility Tool+. The beneficiary can edit the report and/or add additional documentation or data. As with a report reception, documents that were previously attached by the beneficiary have to be attached again. Once complete, the **beneficiary must re-submit the report** in Mobility Tool+.

- [MT+ How to complete and submit the final beneficiary report \(Example for KA105 project\)](#)
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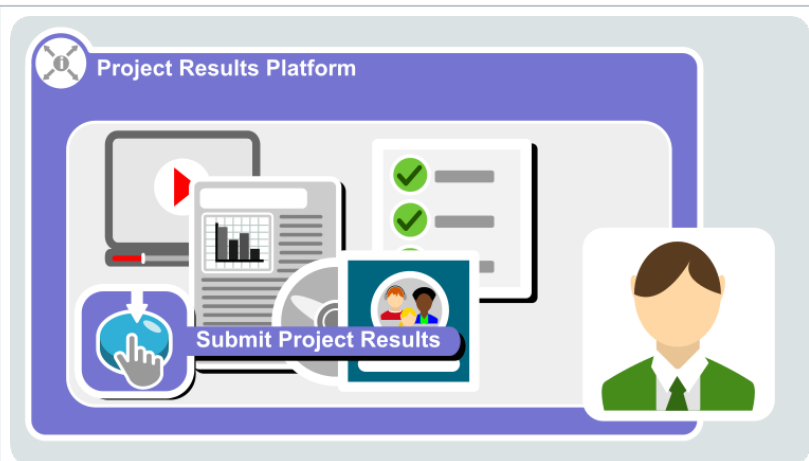
Final report assessment and results management for Erasmus+

The beneficiary can **upload project results** to the Erasmus+ Project Results Platform at any time during the project life cycle; however, the results cannot be **submitted** for review until the **end date of the project**.

Latest at final report stage, it is obligatory to upload the final project results on the Erasmus+ Project Results Platform.

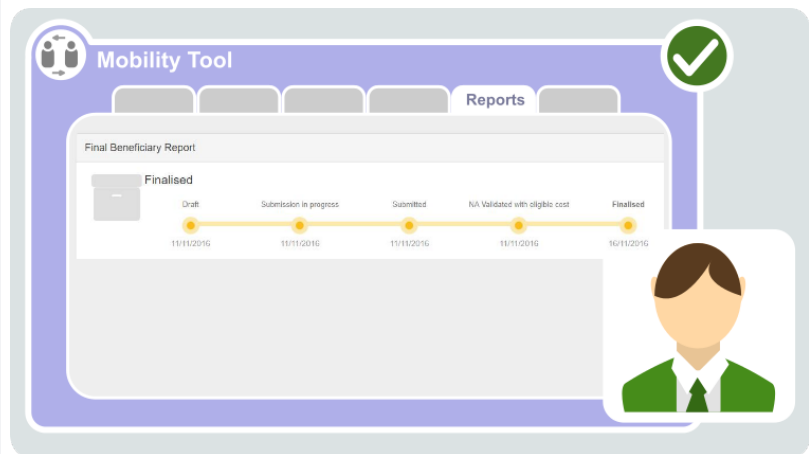
- [Project Results Platform](#)

The National Agency will also log into the Project Results Platform to ensure all documentation, information and results are correct and complete. Additionally the information uploaded by the beneficiary to the Project Results Platform is checked by the external experts assessing the Final Beneficiary Report.



After checks and assessment are complete, and no further issues encountered, the project will be finalised; meaning the National Agency approves the final report budget. The National Agency will mark the results in the Project Results platform as **To publish** and this will trigger the publication of the results online.

In Mobility Tool+ the beneficiary now sees the final report status changed to **finalised**.



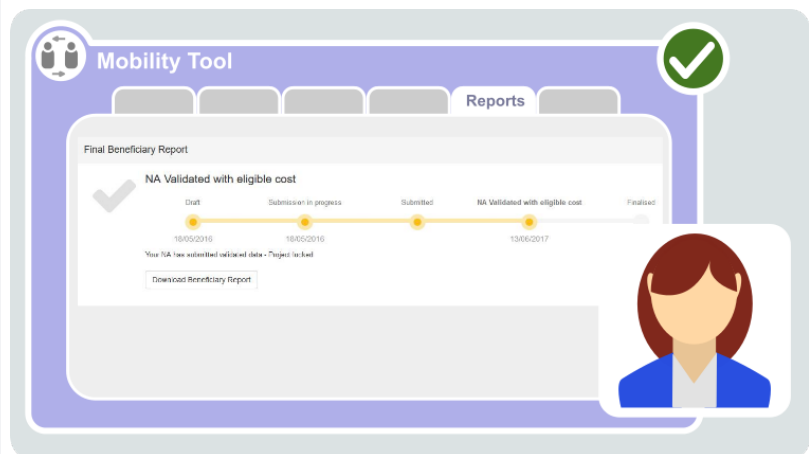
NA Validation & Checks

At the same time as the assessment takes place, the National Agency can start the **NA Validation** in Mobility Tool+ and submit a **NA Validation Report**.

Eventually your project will be subject to additional checks by the National Agency. The outcome of such checks may have financial implications to the project budget, which is recorded in Mobility Tool+ for KA1 and KA3 projects by the National Agency.

As the beneficiary, you see such updates in Mobility Tool+ only after the project is finalised.

- [MT+ KA1 and KA3 Validated and checked versions](#)
- [MT+ KA2 Validated and checked versions](#)

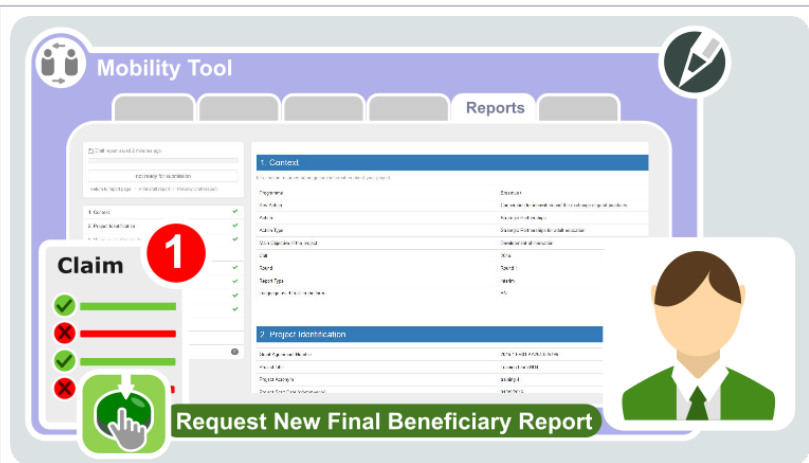


Claims/Appeals

It might happen the NA requests another final beneficiary report as a result of an **Appeal/Claim** received, after the first final beneficiary report was submitted.

Depending on the outcome of the claim or an appeal, a new final beneficiary report may have to be drafted and submitted by the beneficiary. In such cases the NA will inform you and the functionality to edit and redraft the project information and beneficiary report will become active.

- [MT+ How to complete and submit the final beneficiary report](#) (Example for KA105 project)
- [MT+ KA2 How to complete and submit the final beneficiary report](#)

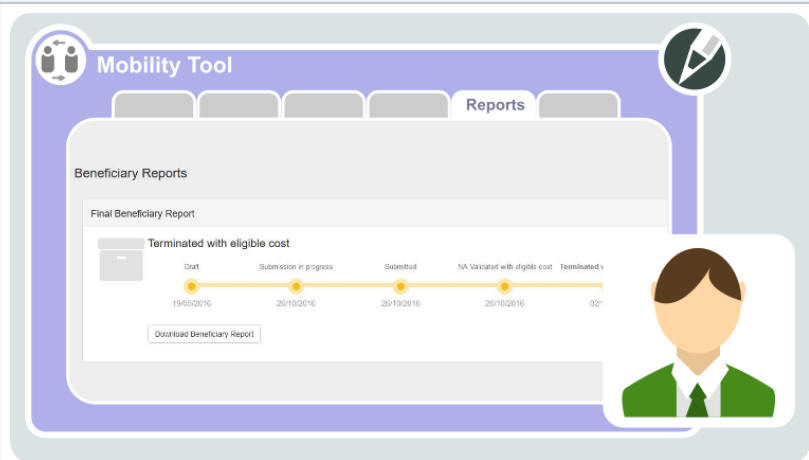


Beneficiary report - Submit Terminate with Eligible Costs

The project may also be terminated with eligible costs, this implies that the project stopped earlier than contractually agreed without any results, but **with eligible costs**.

The beneficiary has to provide project data (such as mobilities, Intellectual Outputs, Multiplier Events) and all other relevant information for a report.

The beneficiary can submit the **final beneficiary report to terminate with eligible costs at any time**. The budget summary of the project in Mobility Tool+ is automatically updated.



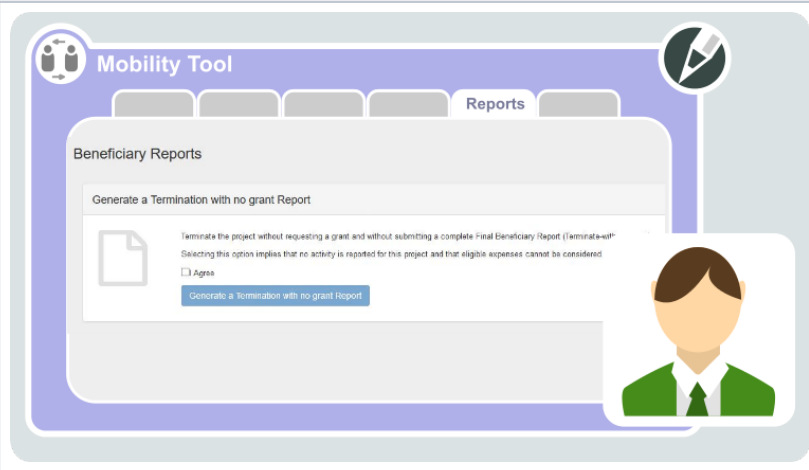
Beneficiary report - Submit Terminate No Grant

Terminate No Grant means a project ended **without any costs**, for example no mobilities took place. In such cases it is possible to **terminate the project with no grant**.

The beneficiary does not provide any project data (such as mobilities, intellectual outputs, multiplier events) once the project is available in Mobility Tool+. The beneficiary can initiate termination by submitting the final beneficiary report at **any time**, under the condition the **declared budget** (under the budget tab) **is 0**.

In the **Reports** tab, the only available option is **Termination with no grant**.

- [MT+ Submit Terminate-with-no-grant Report](#)
- [MT+ How to stop the terminate-with-no-grant Report](#)
- [MT+ How to remove a final report to create a termination report](#)



How to do this in the tools

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