

# MT+ Manage Interim Report

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## Managing an Interim Report

During the project lifecycle and before the submission of the final beneficiary report the NA can request an **Interim Report**.

Under **Key Action 2**, beneficiaries will be asked to submit this report together with a progress or technical report informing the NA on the project status and, in some cases, accompanying the request for a further pre-financing payment. The interim and the progress or technical reports must be submitted by the deadline indicated in the grant agreement or grant decision.

Mobility Tool+ behaves as the interface for the beneficiary where data for the report is entered and notifications from the NA are received. The NA requests a new interim report from their project management system which sends a notification to the beneficiary in MT+ prompting them to fill in the interim report. The beneficiary then completes and submits the report in MT+ and submits it back to the NA for review. The NA assesses the report and, in the optimistic scenario, approves it. Mobility Tool+ then receives a notification that the report has been accepted.

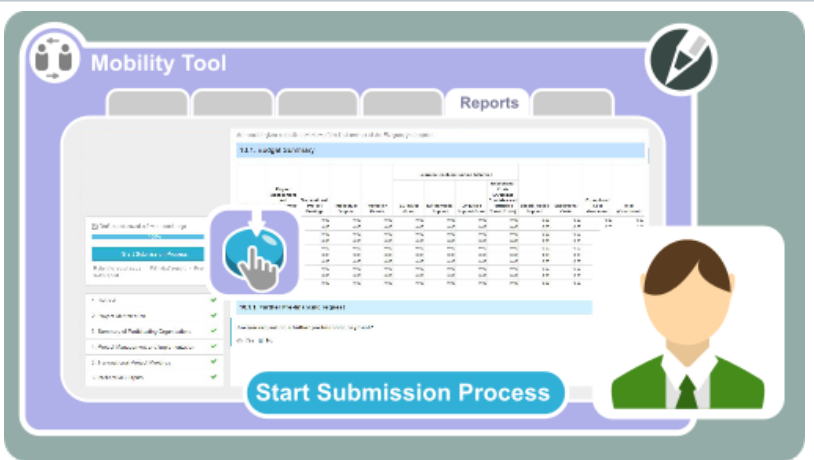
**Extension:** If necessary, the NA can add a deadline date which is then sent to Mobility Tool+ and communicated to the beneficiary. If the beneficiary does not submit the report in time an automatic reminder will be sent 15 days before the deadline date to the contacts who have access to the project in Mobility Tool+.

### Relevant for...

Call Year	Key Action	Action
2016 onward	KA1 - Mobility of individuals  KA2 - Cooperation for innovation and the exchange of good practices.	KA107 - Higher education student and staff mobility between Programme and Partner Countries  KA200 - Strategic Partnerships addressing more than one field.  KA201 - Strategic Partnerships for school education.  KA202 - Strategic Partnerships for vocational education and training.  KA203 - Strategic Partnerships for higher education.  KA204 - Strategic Partnerships for adult education.  KA205 - Strategic Partnerships for youth.  KA219 - Strategic Partnerships for schools only.

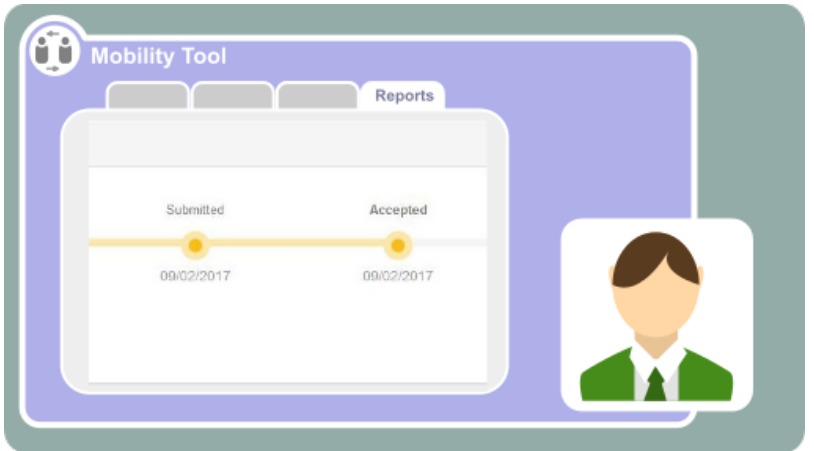
# Approving an Interim Report

After an **Interim Report** request has been made by the NA, the beneficiary drafts and submits the report via the Mobility Tool.

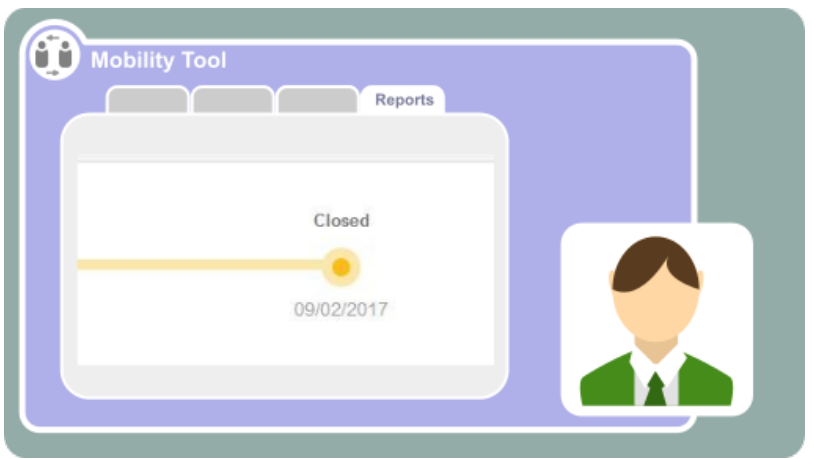


When the NA receives the Interim Report, they can acknowledge the receipt in their project management system. The acknowledgement of the submission of the report does not change the status of the interim report in MT+.

The next stage is **Report Assessment** where the NA then completes the full review of the interim report and based on their findings, can decide to approve. Once approved, the status is **Accepted** in MT+.



The interim report status will only appear as **Closed** when the Final Beneficiary report reception is acknowledged by the NA.



# Rejecting of an Interim Report

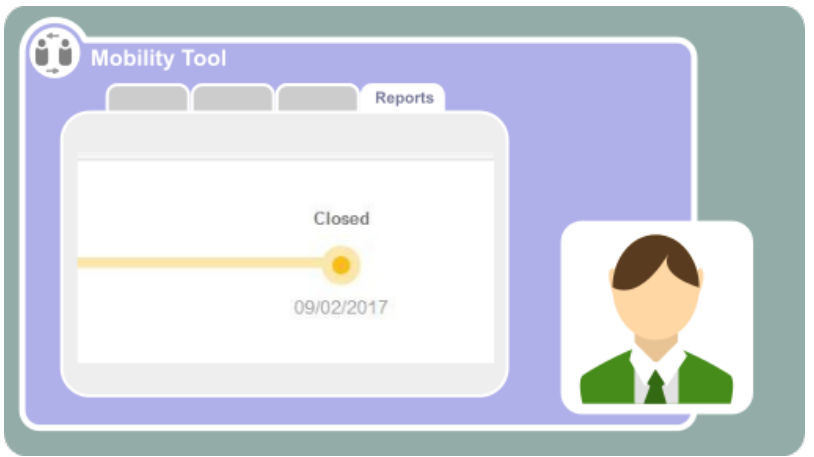
Situations can arise where the submitted interim report may have missing documentation or minor adjustments are needed to it. For example, if there is missing documentation, the NA can decide to decline the received report or as a result of assessment, they may reject the report. Please note that the automatic notification will read that the report is rejected for both cases. The NA will contact the beneficiary indicating the reason for rejection and how the report should be modified.



Once modified the beneficiary then submits the updated interim report. If the updates to the new version of the report have been successful, the NA can **Sign (to Accepted)** in EPlusLink and once accepted the beneficiary receives a notification that the report has been **Accepted** in the **Mobility Tool**.

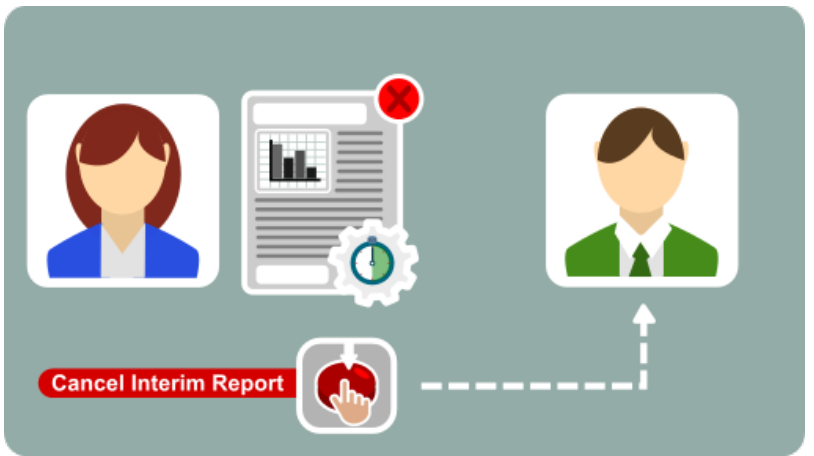


The NA can then begin the **Report Assessment** and once approved, the beneficiary will receive **Accepted** notification in MT+. The interim report status will only appear as **Closed** when the Final Beneficiary report reception is acknowledged by the NA.

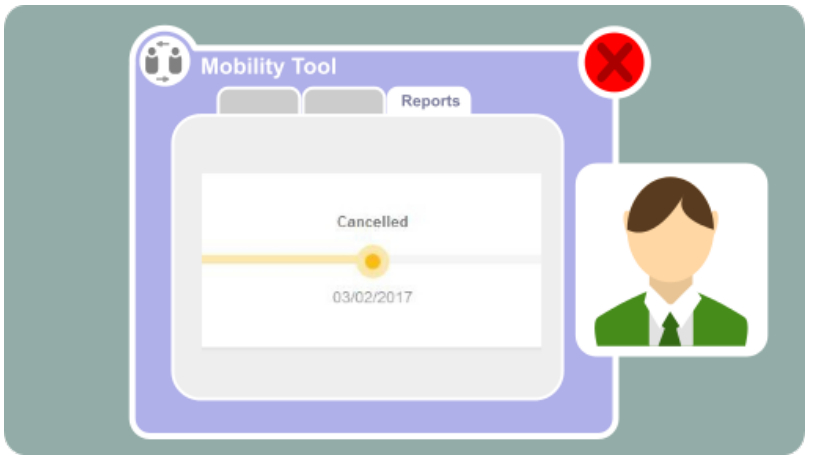


# Cancelling an Interim Report

The **cancellation** of an Interim Report is done by the NA in their project management system and can happen in different situations. For example an additional interim report was submitted by mistake or the project will terminate with no grant and will no longer require the interim report to be submitted.



When the interim report is cancelled, the beneficiary receives a notification of cancellation from the NA in the Mobility Tool and the report is locked so the beneficiary can no longer edit the report.



## How to do this in the tools

- [MT+ Manage Interim and Final reports for KA109 projects](#)
- [MT+ How to update an interim report](#)
- [MT+ How to submit an interim report](#)