Manage Preparatory visits in KA121, KA122, KA182 and ESC51 projects

Preparatory visits under the Erasmus+ programme are defined as:

> *Visits to the country of the receiving organisation prior to the start of mobility activities to prepare and ensure high quality of those activities. Examples include tasks to facilitate administrative arrangements and build trust and understanding between organisations involved.*
>
> *Source: Erasmus+ Programme Guide 2024 (Version 1, 28.11.23), Glossary of terms*

Preparatory visits under the European Solidarity Corps programme are defined as:

> *Planning visit to the host country prior to the start of a volunteering activity. The purpose of the visit is to prepare and ensure high quality of those activities, build trust, understanding and a solid partnership between organisations and participants involved.*
>
> *Source: 2024 European Solidarity Corps Guide, Glossary of terms*

In beneficiary projects, information regarding preparatory visits, where applicable, can be provided. Depending on the action type of the project, preparatory visits can be added from the **Preparatory visits** section, **Activities** section and/or **Mobility activities** section of the project in Beneficiary module.

This page explains how to add and manage **Preparatory visits** in **KA121**, **KA122, KA182** and **ESC51** projects, using a KA122-ADU, call 2021 project as an example. Each preparatory visit must be recorded in the project separately, and will have its own ID. Only associated persons with edit rights on the project are able to perform these actions while the project is in status **Project ongoing**.

⚠️ **Information**

Fields may vary depending on the action type of you project. Please read the onscreen information carefully to complete the relevant fields.

This page is relevant for:

- **Erasmus+ Call 2021 onward**
  - KA121 - Accredited projects for mobility of learners and staff
  - KA122 - Short-term projects for mobility of learners and staff
- **Erasmus+ Call 2023 onward**
  - KA182 Mobility of Sport Coaches and Staff
- **European Solidarity Corps Call 2021 onward**
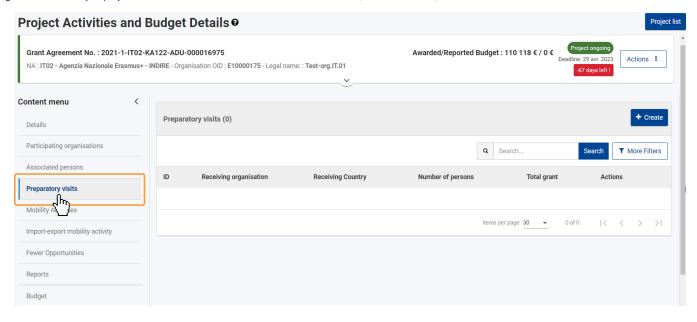 - ESC51 - Volunteering Projects

ⓘ The illustrations in the provided Wiki pages are for consultation purpose only and may not always reflect the latest implementation.
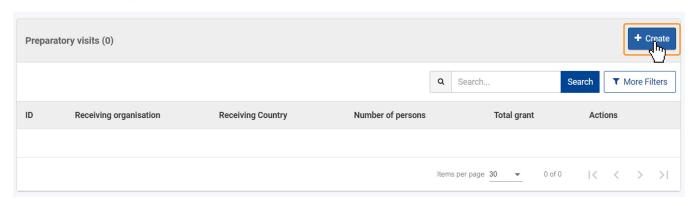
Steps

1. Click on "Preparatory visits" in the Content menu

Click on **Preparatory visits** in the **Content menu**. In this screen you will see the list of preparatory visits, as you add them to the project. Initially, the list is empty. See the page List functionality in projects for additional information on the list functionalities, such as Search, Filters and the Bulk Actions.

2. Click on the "Create" button

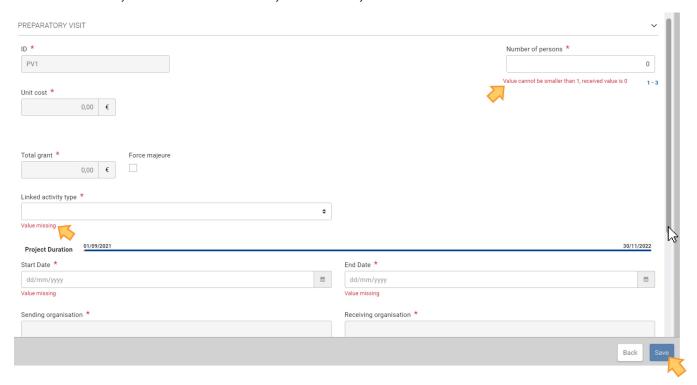Click on the **Create** button at the top of the list.

3. Fill in the Preparatory Visit details and click "Save"

The **Preparatory Visit** details screen opens. Please read the onscreen information carefully before you fill in the details.

All mandatory fields are marked with a red asterisk (*), displaying the text Value missing under the field, and must be all filled in, to be able to save the preparatory visit. It is not possible to save draft records.

The **Save** button will only become active once all mandatory fields are correctly filled in.
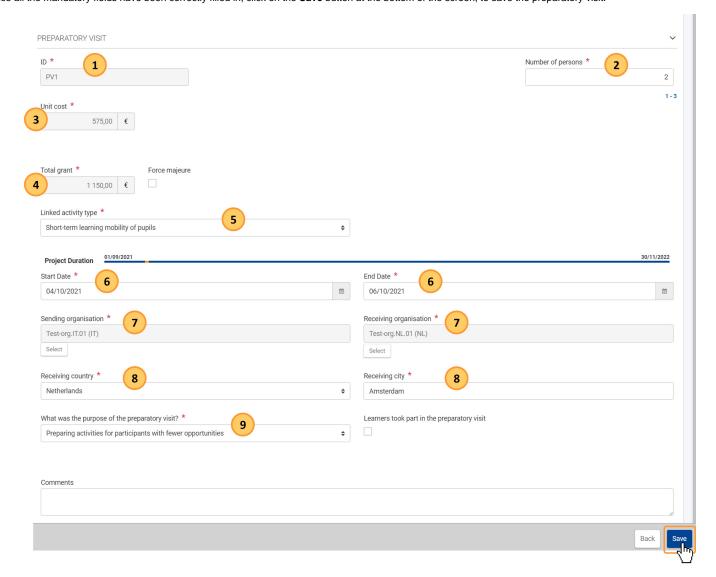

⚠ The fields to fill in depend on the action type and call year of the project. The form content will adapt based on the information you provide.

Take note of the following:

1. The preparatory visit **ID** is assigned automatically and incrementally, and it cannot be changed.
2. The **Number of persons** must be filled in. The minimum and maximum number of people allowed is displayed below the field.
   - **KA121 and KA122, Call 2023, projects**: After you provide the Number of persons, the fields **First name, Last name** and **Email** for each of these persons display. Fill in accordingly with the required personal data.
3. The **Unit cost** field is read-only, containing the defined rate for each participant to the preparatory visit.
4. The **Total grant** amount is calculated automatically, based on the **Unit cost** and the **Number of persons** involved in the visit. This amount cannot be changed manually, except in cases of force majeure.
5. The **Linked activity type** drop-down list, if available, contains the **activity types** the preparatory visit can be associated to.
   - For **ESC51 projects**, the **Activity** drop-down list contains the **activities** added to the project to choose from.
6. The **Start Date** and **End Date** of the visit must be within the project duration (including the start and end dates), which are indicated on a blue timeline. Use the date pickers to select the applicable dates.

7. Select the **Sending Organisation** and the **Receiving Organisation** using the **Select** button displayed below each of the fields. A pop-up with the organisations in your project opens, where you can select the relevant organisation. If an organisation is not available for selection, it must be added to the project first, from the **Participating organisations** section in your project.
8. The **Receiving Country** and **Receiving City** are filled in automatically, based on the selected **Receiving Organisation**, but they can be changed, if required. Select the receiving country from the drop-down list, and manually enter the receiving city in the appropriate field.
9. Under **What was the purpose of the preparatory visit?**, use the drop-down list to select the applicable option.
   - If you select **Other** from the drop-down list, you must fill in the additional field, **Please explain the purpose of the preparatory visit.**

Once all the mandatory fields have been correctly filled in, click on the **Save** button at the bottom of the screen, to save the preparatory visit.

3.1. "Force majeure" flag

Force majeure is:

> *An unforeseeable exceptional situation or event beyond the participant's control and not attributable to error or negligence on their part.*
>
> **Source:** *Erasmus+/European Solidarity Corps programme guides 2024, Glossary*

Force majeure situations can arise anywhere and at any time, and include factors such as sudden disease, accidents, death, earthquakes and other causes.
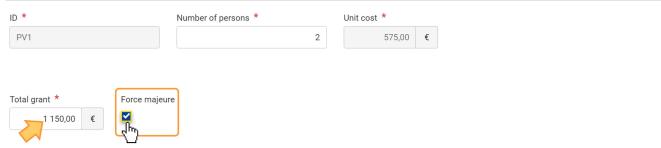
In a project, check the **Force majeure flag** to indicate that a project activity (i.e. mobility activity, group activity, participations, events, transnational project meetings, etc.) is considered as a case of force majeure.

When you check this flag (tick box), certain fields and grants for the activity may be affected and must be checked and/or updated.

In addition, you must fill in the additional **Force majeure explanations** field, describing the facts that prove the activity should be accepted as a case of force majeure.

If you check the **Force majeure** flag, the limitations on the number of persons are removed and the **Total grant** field becomes editable. No **Force majeure explanations** must be provided.

3.2. ESC51 Specifics

3.2.1. Activity field in Call 2024

Preparatory visits in ESC51, Call 2024, projects must be linked to a specific activity. Therefore, in the preparatory visit details in ESC51 projects, the **Activity** field is displayed and must be filled.

This field contains a drop-down list with all **Activities** already added in the project. If none are yet available, you must first add the project activities, as explained on page Activities in ESC51 projects.

3.2.2. "Virtual" flag

Tick the **Virtual** flag, to indicate that the preparatory visit took place exclusively online, without the physical presence of the participant(s). Therefore, the **Total grant** for the visit will be set to **0 EUR.**

3.3. KA121, KA122 Specifics

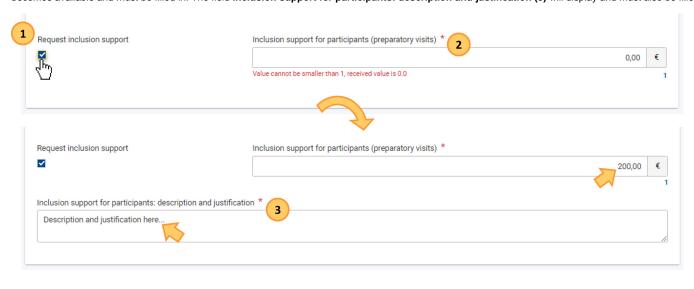#### 3.3.1. "Learners took part in the preparatory visit" flag

The flag **Learners took part in the preparatory visit,** where applicable, is displayed if the selected purpose of the visit can contain learners. Tick the flag if learners took part in the visit, as applicable for your project.

What was the purpose of the preparatory visit? *

Preparing activities for participants with fewer opportunities

Learners took part in the preparatory visit

3.3.2. "Request inclusion support" flag (Call 2023 only)

In **KA121** and **KA122**, **call 2023** projects, it is possible to **Request inclusion support** for participants to the preparatory visit.

The **Request inclusion support (1)** flag is displayed at the bottom of the screen. Once ticked, the field **Inclusion support for participants (preparatory visits) (2)** becomes available and must be filled in. The field **Inclusion support for participants: description and justification (3)** will display and must also be filled in.

1 Request inclusion support

Inclusion support for participants (preparatory visits) * 2

0,00   €

Value cannot be smaller than 1, received value is 0.0   1

Request inclusion support

Inclusion support for participants (preparatory visits) *

200,00   €

1

Inclusion support for participants: description and justification * 3

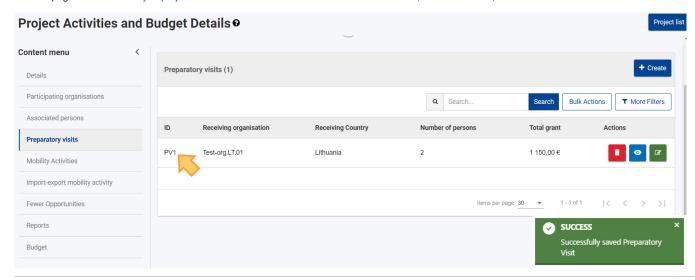Description and justification here...

4. Preparatory visit added to the project

Once saved, a success message is displayed, and you will be redirected to the **Preparatory Visits** screen, where the newly-added visit is now displayed in the list. Once items are added to the list, the following icons become available under the **Actions** column:

1. **Delete** - click on this icon in line with the item you wish to delete, and follow the onscreen instructions.
2. **View** - click on this icon to open the details of the selected item in read-only mode. All fields are greyed out and you will not be able to change any details.
3. **Edit** - open the details of the selected item in edit mode. Make the desired changes, then click on the **Save** button at the bottom of the screen to save the updated information.

See the page List functionality in projects for additional information on the list functionalities, such as Search, Filters and the Bulk Actions.

Expected Outcome

Preparatory visits have been added to the project, and the related costs are reflected in the **Budget** tab of your project.

For details on the budget, see:

- Budget in KA182 Mobility of Sport Coaches and Staff projects
- Budget in projects (ESC51-VTJ)
- Budget in projects (KA121, KA122)
- New budget screen functionalities in beneficiary projects

Related Articles

- Access rights in Beneficiary projects
- Activities in ESC51 projects
- Activity Types in KA121 projects
- Activity Types in KA122 projects
- Add mobility activities to projects
- Amendment request for KA121 and KA151 projects
- Associated persons in projects
- Beneficiary Guides - Project implementation phase
- Beneficiary module FAQs
- Beneficiary module guide
- Budget in KA182 Mobility of Sport Coaches and Staff projects
- Budget in projects
- Budget in projects (ESC51-VTJ)
- Budget in projects (KA121, KA122)
- Data Dictionary and Mobility Import-Export templates
- Edit the mobility activity import file
- EPALE Electronic Platform for Adult Learning in Europe
- ESC51 Volunteering, Traineeships and Jobs Projects
- Exceptional cost for inclusion support
- Exceptional cost for visa and other entry requirements
- Exceptional costs
- Fewer opportunities in projects
- Final Beneficiary Report templates
- Group activities in KA121 and KA122 projects
- Inclusion support for participants
- Individual support - grant not required flag
- KA121 Accredited projects for mobility of learners and staff in school education, vocational education and training, and adult education
- KA122 Mobility for learners and staff in school education, vocational education and training, and adult education
- KA182 Mobility of Sport Coaches and Staff
- List functionality in projects
- Locations in projects (ESC51-VTJ)
- Manage participant reports in projects
- Manage Preparatory visits in KA121, KA122, KA182 and ESC51 projects
- Manage the final beneficiary report
- Mobility activities in KA121 and KA122 projects
- Mobility activities in KA182 Mobility of sport staff projects
- My Projects
- New budget screen functionalities in beneficiary projects
- Notifications to project contacts
- Organisation role in mobility activity
- Participants in ESC51 projects
- Participating Organisations in projects
- Participations in ESC51 projects
- Project details
- Project handling specifics related to the Russian aggression on Ukraine
- Project list
- Project versions in beneficiary projects
- Request fewer days for individual support flag
- Request second travel grant for obligatory pre-departure training flag
- Revalidate Mobilities in Beneficiary module