MT+ KA2 How to complete and submit the final beneficiary report

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This page describes the steps to be taken to complete and submit the final beneficiary report for KA2 Erasmus+ projects. Before submitting the report, please ensure that all of the project data is up to date. While drafting the final report it is still possible to update the project information under the various project tabs in Mobility Tool+.

Please read the onscreen instructions carefully. There may be differences between the beneficiary reports for the different key actions but the basic functionality remains the same. The instruction in this page are based on a KA205 - Strategic Partnerships for youth project example.

Relevant for...

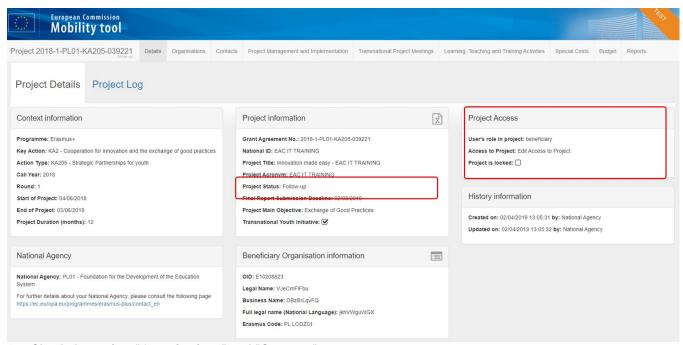
Call Year	Key Action	Action
All	KA2 - Cooperation for innovation and the exchange of good practices	All

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.

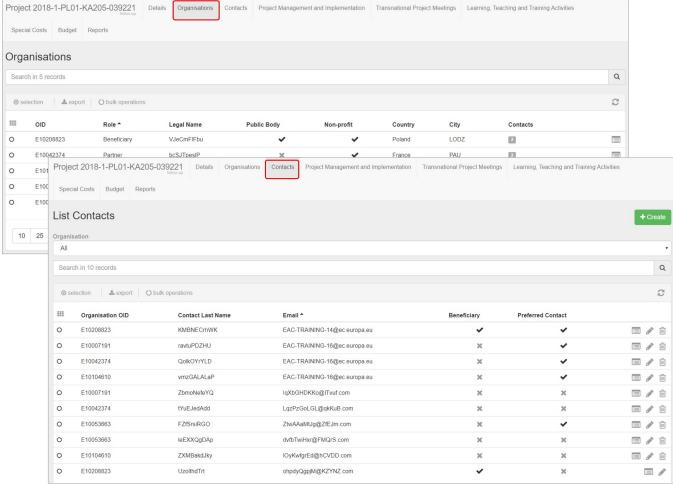


1.2. Check the project "Organisations" and "Contacts"

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

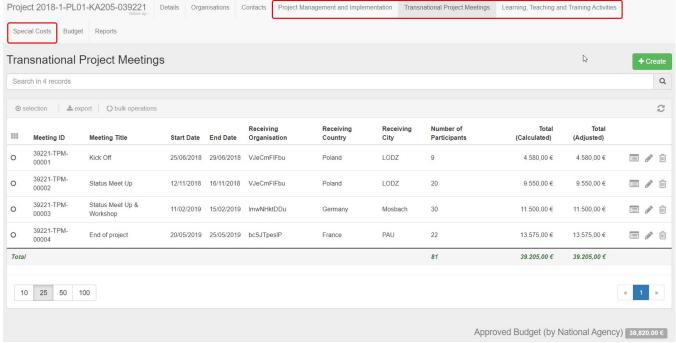
If any organisation details need to be updated, the National Agency should first be notified and the details should be updated in the Organisation Registration system. O nce the changes are made in the National Agency's project management system, they will be reflected in Mobility Tool+.

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. Check the other project items

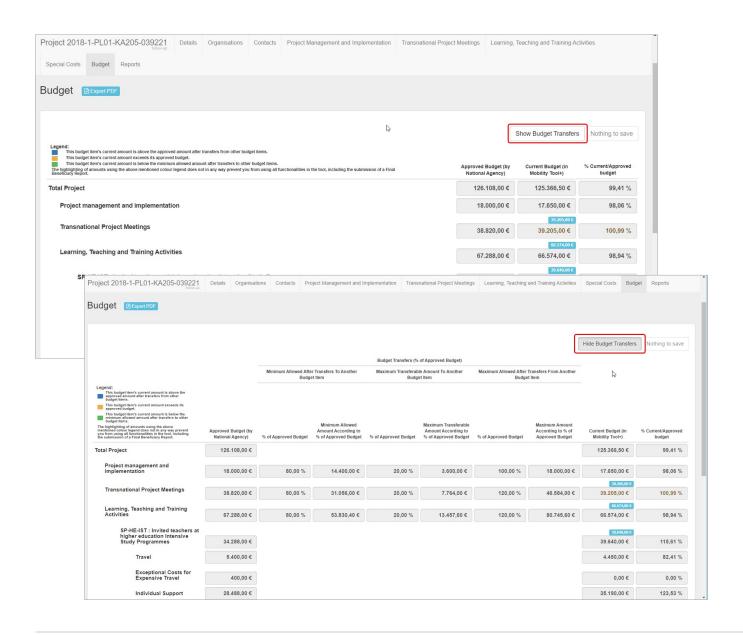
Check all the other projects tab and ensure they are updated with the latest and correct information.



1.4. Check the "Budget" tab

Check the Budget tab to view the summary of the project budget as entered under the various project tabs.

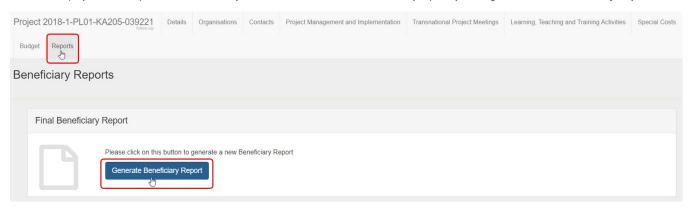
The **Show Budget Transfer** option allows you to view the minimum and maximum allowed budget transfers, which provide more detailed information on the entered budget.



2. "Generate" the Beneficiary Report

2.1. Click the "Reports" tab

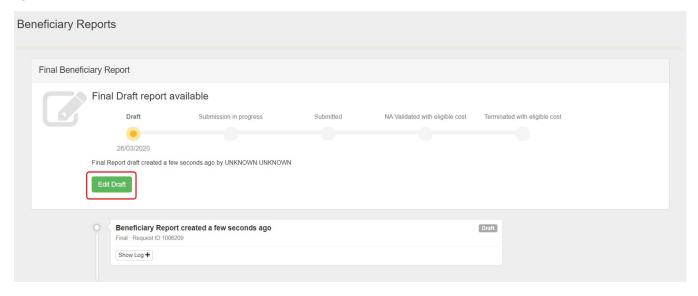
When all the project data is up to date, click the Reports tab and create the draft beneficiary report by clicking the Generate Beneficiary Report button.



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 to the report screen. Note that the project status has now changed to **processing**.



3. General report functionality

3.1. Report options and information

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

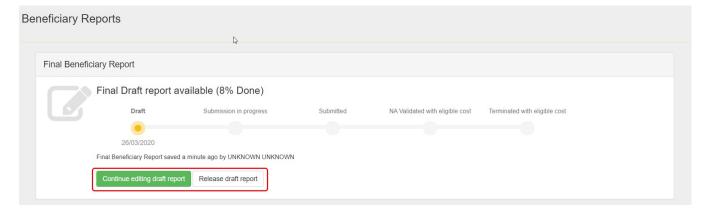
- 1. The time the draft report was last saved.
- 2. A progress bar indicating the percentage of the report that has been completed to date.
- 3. When the report is complete, the submission button will become active.
- **4.** The options to:
 - a. Return to report page this will save the current draft 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:

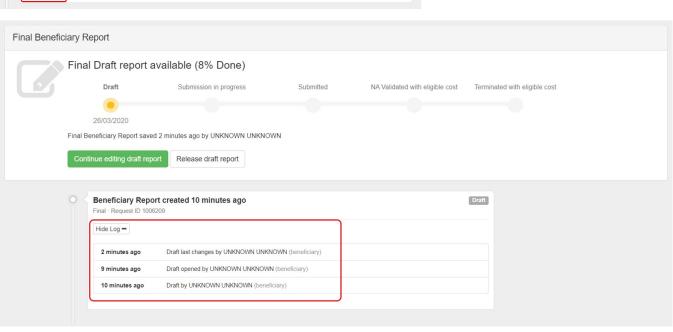
- 1. Continue editing draft report click this button if you wish to continue filling in the report yourself.
- 2. Release draft report click this button if you wish to allow other beneficiary contact users to edit the draft report. Please note that two or more users are not allowed to edit the report 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. Inactive Organisations within Project Activities

At the top of the beneficiary report screen there is an overview of the **Inactive Organisations within Project Activities** section. This is for your information only and will not block the submission of the report.



Take note

For call year 2018 and earlier projects the PIC of the organisation will still be displayed in report tables. As of call year 2019 the OID of organisations is displayed in report tables.

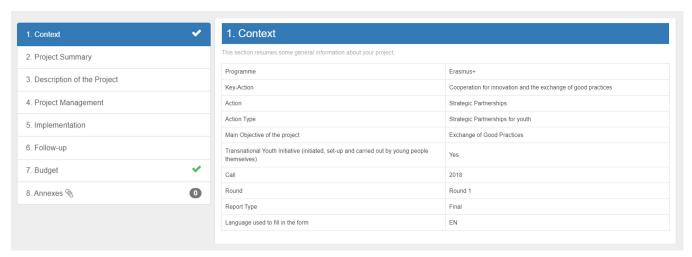
4.2. Check the "Context" section

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.



4.3. Fill in the "Project Summary"

Click on the Project Summary section, add a summary for the project and provide all other mandatory information in this section.



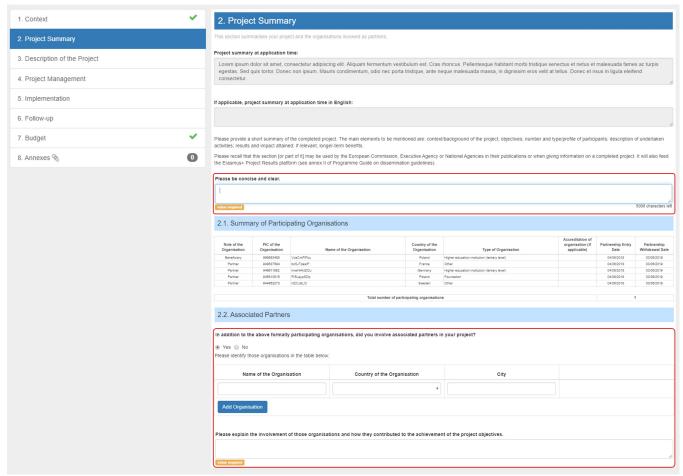
Information

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.

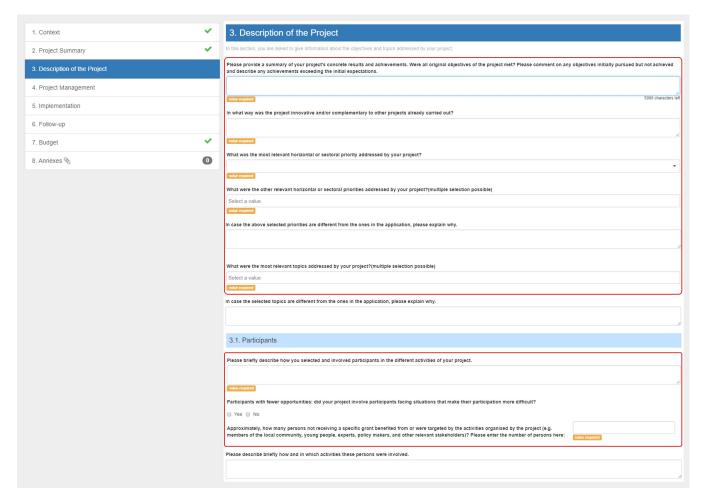
The application stage summary is also provided in both the specific national language and in English if the web application form was completed in a language other than English.

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.



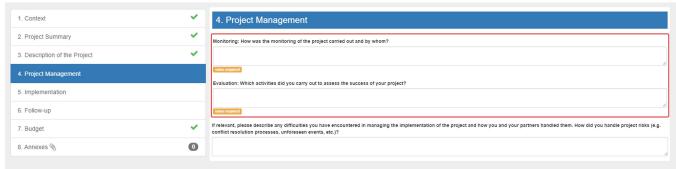
4.4. Fill in the "Description of the Project"

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.



4.5. Fill in the "Project Management"

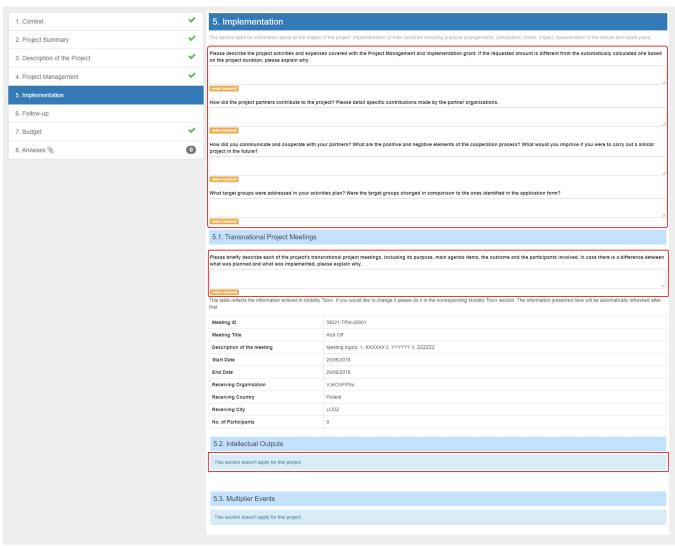
Please provide answers to the questions above each field.



4.6. Fill in the "Implementation"

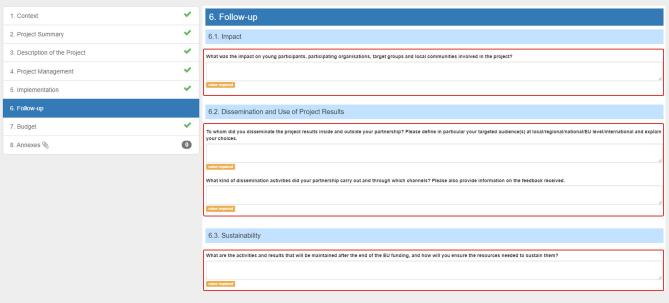
Complete the Implementation section, detailing the practical arrangements, participants' profile, impact, dissemination of the results and future plans.

Certain subsections may display the information This section does not apply for this project. No action is required in these subsections.



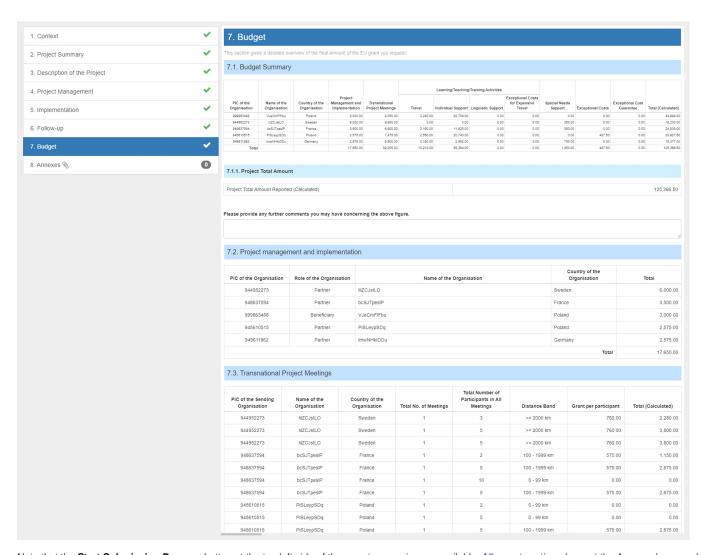
4.7. Fill in the "Follow-up"

Please provide answers to the questions above each field to complete the Follow-up section and its subsections.

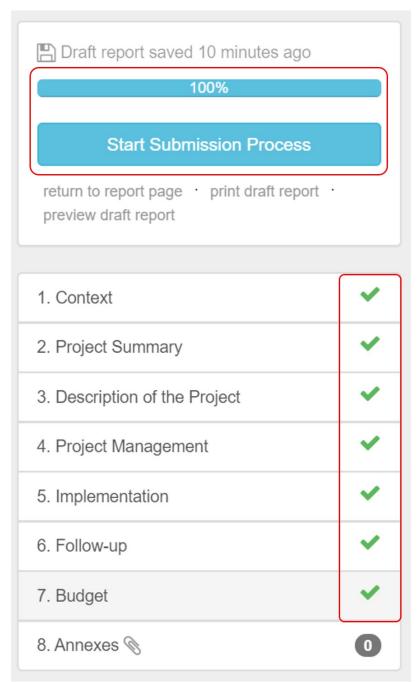


4.8. Check the "Budget" section

The **Budget** section is automatically filled in with the Budget Summary, providing an overview of the budget of the various project items, such as Project Management and Implementation.



Note that the **Start Submission Process** button at the top left side of the report screen is now available. All report sections (except the Annexes) are marked complete. The supporting documentation (**Annexes**) can be added after you have started the submission process.



4.9. 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.

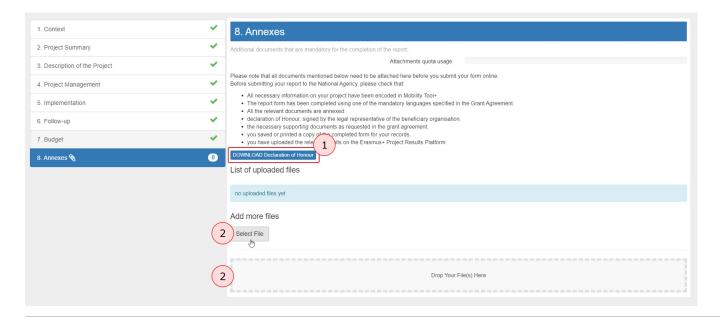
Please note that according to national context, a signature may not suffice and a stamp for the organisation might be needed as well.

Repeat step 2 above to upload any additional required documents.



Take note

- A maximum of 10 files is allowed.
- The maximum size per file is 10MB.
- The maximum total size of all files combined is 10MB.
- The file types allowed to upload are PDF, DOC, DOCX, XLS, XLSX, JPG, TXT, ODT, ODS.



4.10. 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**.

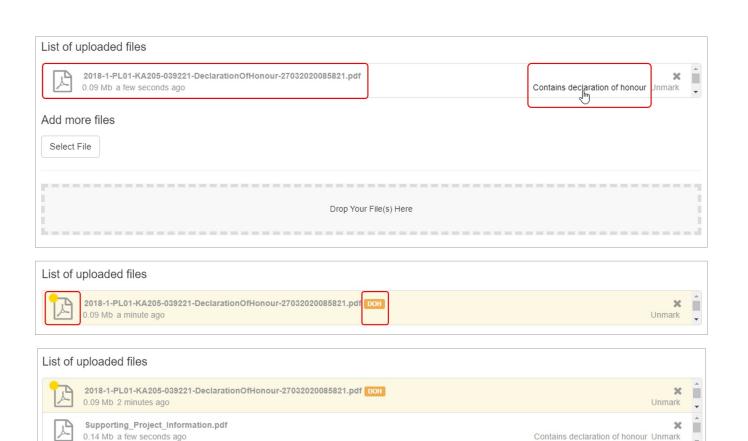
This is step is mandatory but it can also be performed after you have started the report submission.



Take note

- · According to national context, a signature may not suffice and a stamp for the organisation might be needed as well.
- A total of 10mb is allowed to be attached to the report.
- Relevant results for the project should be uploaded on the Erasmus+ Project Results Platform (http://ec.europa.eu/programmes/erasmus-plus/projects/).

You can delete an already uploaded document by clicking the ${\bf X}$ icon.



Contains declaration of honour Ur

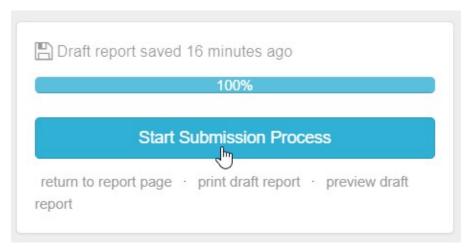
 $Project_Results_AdditionalInfo.pdf$

0.08 Mb a few seconds ago

5. Submit the report

5.1. Click on "Start Submission Process"

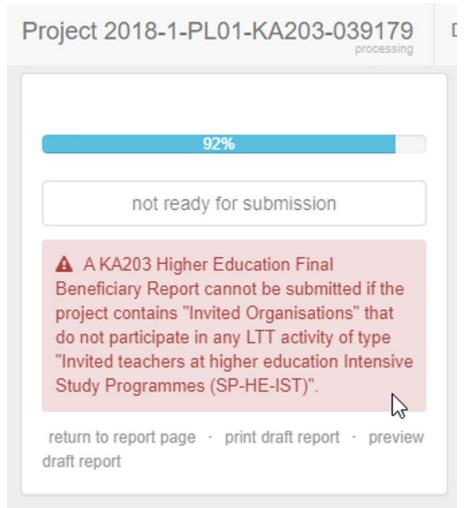
Once all sections are completed, click on the Start Submission Process button.



5.2. Unable to submit: KA203 - Invited organisations error

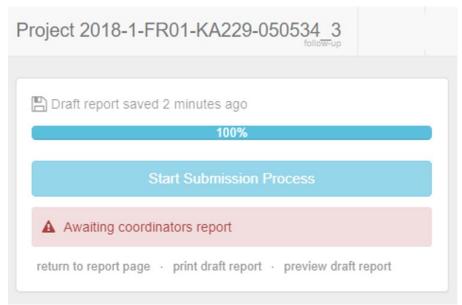
A KA203 Higher Education Final Beneficiary Report cannot be submitted (submission button inactive) if the project contains invited organisations that do not participate in any Learning, Teaching and Training activity of type Invited teachers at higher education Intensive Study Programmes (SP-HE-IST). In such situations an error message is s displayed under the submission button. To submit the report, the beneficiary must delete the invited organisation(s) not participating in any Learning, Teaching and Training Activities from the organisation list in Mobility Tool+.

See MT+ KA203 Invited organisation from enterprise for details.



5.3. Unable to submit: KA229 - Warning messages

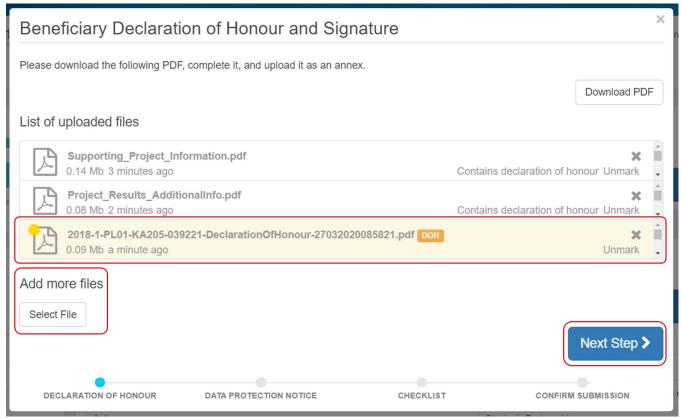
For specific information concerning warning messages displayed for KA229 projects, see MT+ KA229 School Exchange Partnerships Overview.



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

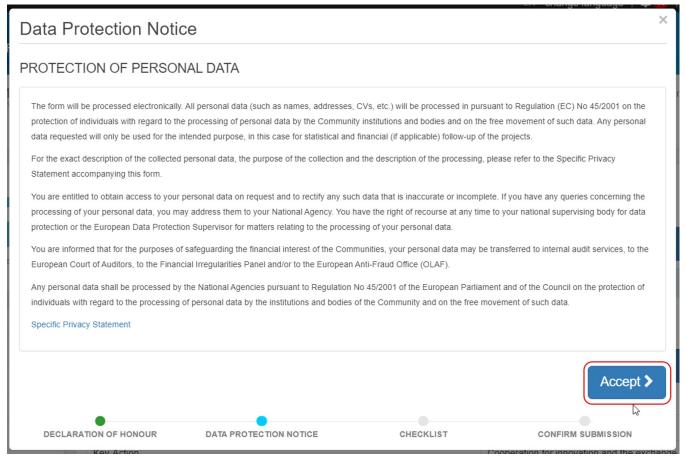
Once you have started the submission, the **Beneficiary Declaration of Honour and Signature** screen is displayed. Here you can check that all of the required supporting documentation has been attached and **Add more files** if necessary.

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.



5.5. Accept the "Data Protection Notice"

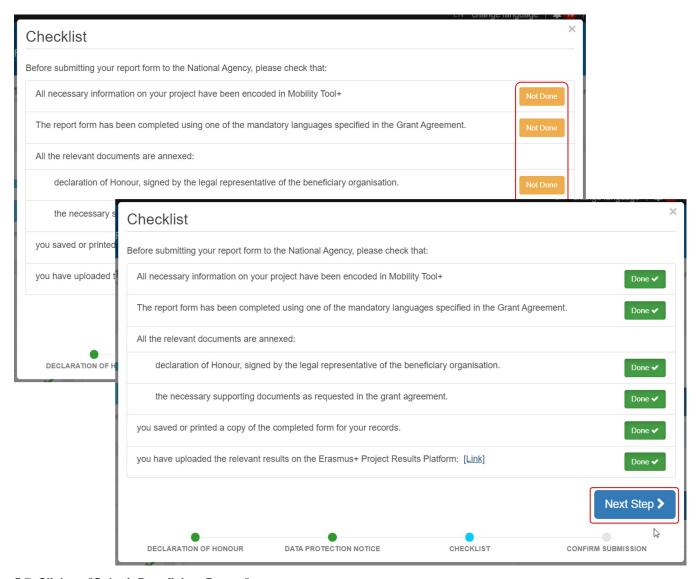
Read the Data Protection Notice and click Accept to continue.



5.6. Click the "Not Done" buttons 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.

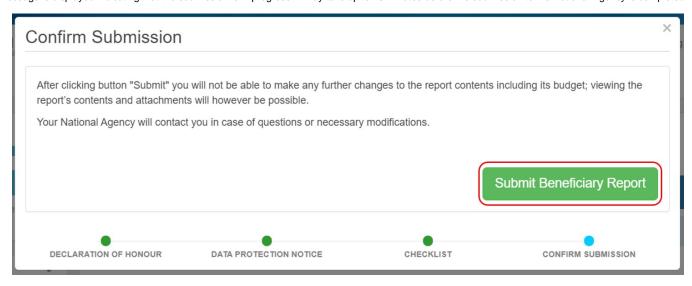


5.7. Click on "Submit Beneficiary Report"

To finish, click the Submit Beneficiary Report button. The project will be locked once the button is clicked and can no longer be updated.

For KA229 projects the submit button will be replaced by Ready for Submission. Additional information available under MT+ KA229 School Exchange Partnerships Overview.

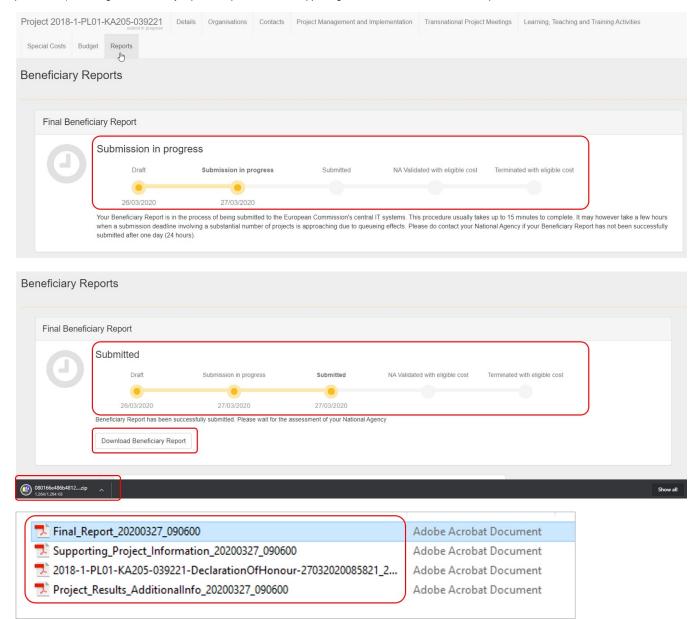
A message is displayed indicating that the submission is in progress. It may take up to 15 minutes before the submission to the National Agency is completed.



6. Report Status and Report Download

Back in the **Reports tab**, you will be able to see when the report is successfully submitted - once the report is received, the status of the report submission changes from **Submission in progress** to **Submitted**.

When the status is **Submitted**, you have the option to download the report by clicking on the **Download Beneficiary Report** button. The download will save a *.zip file (compressed file) including the beneficiary report as *.pdf file and all supporting documents submitted with the report.



Related articles

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