**ACCESS:**

1. When is the project created/becoming available in the BM?: Once the grant agreement is recorded in the Project Management Module (Completion of Task: “Receive signed agreement or consent”)
2. How is the primary contact person of each partner organisation notified about the creation of their project in the BM?: Notifications are automatically sent to them, once the project becomes available under My Projects. The legal representatives are not notified.
3. How to access a specific project in the tool:

* Sign in to the [Erasmus+ and European Solidarity Corps platform](https://webgate.ec.europa.eu/erasmus-esc/index/) with a valid EU Login account: It must be an EU Login account that is associated with one of the email addresses that are visible under the section “Contacts” \*

\*By default, the emails of the legal representatives and the contact persons of all partner organisations – as they were registered in the application form – are visible under “Contacts” and are automatically given edit access (access to project management and project dissemination) to the project. However, these default users can add additional partner organisations and contacts to the project and define their access rights to the project.

* In the main menu of the platform select **Projects** and then **My Projects.**
* Open the project (by clicking on the view-eye icon) from the project list that appears ☞ The list of projects with which a person is associated: As explained above, to be associated with a project, a person must have been: a. defined as legal representative/contact person of one of the participating organisations in the respective application form or b. granted access (to project management and to project dissemination) rights to the project by one of the default users
* The project information screen opens for the selected project and by default, the [Details](https://wikis.ec.europa.eu/display/NAITDOC/Project+details) section is displayed. From here you can easily navigate to the other sections using the **Content Menu**.

\*Access to Project Management/Access to Project Dissemination

**CONTENT MENU:**

* **Details** - shows the basic project information (Context Information, Project Information, National Agency, Beneficiary Organisation, Project Access, History Information)
* [**Organisations**](https://wikis.ec.europa.eu/display/NAITDOC/Organisations+in+projects) - allows you to manage the participating organisations in your project
* [**Contacts**](https://wikis.ec.europa.eu/display/NAITDOC/Contacts+in+projects)- allows you to manage the project contacts and their access rights
* **Activities** – allows you to manage the activities of the project
* **Budget** - provides an overview of the declared/reported budget
* [**Reports**](https://wikis.ec.europa.eu/display/NAITDOC/Manage+the+final+beneficiary+report)- allows you to submit the final beneficiary report

[**Organisations**](https://wikis.ec.europa.eu/display/NAITDOC/Organisations+in+projects)**:**

Here, someone can find the details of the partner organisations of a project, that is the organisations mentioned in the grant agreement ☞ Some of these details can be changed directly in the BM and others have to be updated in ORS (the fields that are grey can only be updated in ORS).

More organisations can be added to a project, with or without an OID, using the **Create** option. When an organisation with OID is added to the list, most of the fields are automatically filled in, as soon as the OID is typed into the respective field (info coming from ORS).

Actions for an organisation:

A picture containing icon

Description automatically generated View: allows you to view the organisation details

 Edit: allows you to make changes to organisation details that are not derived from the Organisation Registration system

A picture containing icon

Description automatically generated Delete: allows you to delete the organisation from the project ☞ Not available for the coordinating organisation in KA2 projects

**Contacts:**

Two contacts for each partner organisation will be available in the list by default, the **Primary Contact** and the **Legal Representative** of the project, as submitted with the related Application form. These contacts are by default granted edit rights.

Only the contacts with edit rights are able to add/create new contacts in the Beneficiary module and also, update/edit and delete them.

Actions for a Contact:

1. View

2. Delete

3. Edit ☞ Available only for added/created contacts, as default contacts cannot be updated/edited or deleted (this means that the default contacts will always have edit rights)

Rules for contacts in the BM:

* The email address used for a contact must be unique across all organisations within the same project, except when the legal representative and the primary contact person share the same email.
* A contact may not belong to any organisations other than the beneficiary organisations or other organisations participating in the project.
* There can only be one Legal Representative for any given participating organisation within the same project.
* The list of contacts belonging to the beneficiary organisations must include at least one contact flagged as the primary contact. This will ensure that automatic notifications can always reach a valid recipient.
* The list of contacts belonging to the beneficiary organisations must include at least one contact with full access to the project (i.e., **Edit access).**
* By default, all contacts from the other participating organisations (not beneficiary organisations) have view access to the entire project data, but this can be changed by beneficiary contacts with edit access.
* Email notifications are sent to added contacts as well

**Activities (KA210):**

The activities defined in the grant agreement are created automatically in the project when it becomes available in the Beneficiary Module. Ιn the Beneficiary module you are required to answer additional questions related to the implementation of the activities. You will be able to do so by **editing** the activities.

You are also able to add activities to a project as it progresses, and these are displayed in the activities’ list along with the pre-defined/default activities.

Actions for an Activity:

1. **Create** an activity - add a new activity directly in the project and fill in its details.
2. **View** an activity - open the activity details in read-only mode (changes are not allowed). While in view mode, you can click the **Edit** button at the bottom of the screen to switch to the edit mode.
3. **Edit** an activity - open the activity details screen in order to make updates.
4. **Delete** an activity - not available for predefined activities.

**Budget:**

The budget screen shows the budget summary, where someone can view the awarded budget and the actual project costs (reported costs), broken down per budget item.

On the left side of the screen, the budget items are listed. This part of the screen may include fields where you should provide information, in order for certain cost calculations to be made on the right side.

There are three columns for each budget item:

1. **Awarded Budget** - this is the latest grant amount awarded by the National Agency
2. **Reported Budget -** these are the actual amounts used in the project, calculated based on the information provided throughout the project sections. This column may include fields where you must fill in data yourself.
3. **% Reported/Awarded**- the percentage of the awarded budget that has been consumed so far.

Reported costs are calculated automatically based on the information you have provided either in the budget screen (where applicable) or in the other sections of the project.

If the amount of the**Reported Budget** is higher than the amount **awarded**by the NA for a given budget item or for the total project budget, a warning message is displayed. This does not prevent you from submitting the final beneficiary report. However, if the **Total Reported Budget** submitted with the final report is higher than the **Total** **Awarded** **Budget**, then the budget approved by the National Agency while validating the final report will be capped at the amount of the total awarded grant.

**Reports - Final beneficiary Report:**

The primary contact of the beneficiary will receive two reminder notification emails with the final report submission deadline.

The first will be sent on the end date of the project and the second 53 days after the end date of the project (the timing and content of the second notification may be adjusted by the NA to its own needs). From the moment the first notification is sent, it is possible for the beneficiary to submit the report.

The Final Beneficiary Report can be submitted when the **project** has the status **Project Ongoing.**The report is filled in using a dedicated functionality from the **Reports** tab of the project in the BM. Once the report is generated, the project status changes to **Submitted.** Once the report is submitted to the NA,the project is locked, and no more changes are allowed in the tool. It is recommended to check that all project data is up to date before submitting the 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. The details of the reasons for requesting a new report will be provided by the National Agency in their notification to the beneficiary.

While the report is assessed, the National Agency also verifies the project information recorded by the beneficiary in the Erasmus+ and European Solidarity Corps platform, including the reported project budget.

**PROJECT STATUSES IN THE BM:**

* **Project Ongoing** - this status is displayed:

1. When the project becomes available under “My Projects”
2. For as long as the beneficiaries fill in the project data (submission process not initiated)

* **Submitted** - this status is displayed:

1. Once the beneficiary report is generated and until it is submitted to the National Agency.
2. When the report is submitted to the National Agency

* **NA validated** - this status is displayed once the final report and project data have been validated by the National Agency.

**USEFUL LINKS:**

* **Beneficiary Guides: Project Implementation Phase – Beneficiary Module** ☞ <https://wikis.ec.europa.eu/display/NAITDOC/Beneficiary+Guides+Project+implementation+phase>
* **Automatic Notifications from BM to project contacts** ☞

[Notifications to project contacts](https://webgate.ec.europa.eu/fpfis/wikis/display/NAITDOC/Notifications+to+project+contacts)