# Agenda

10:00 – 10:15   Welcome notes (JS)

10:15 – 10:30   Introduction to the User management function of the I+ monitoring system (Mr. Dániel Krimer, I+ Office)

10:30 – 10:40   Q&A

BREAK

10:45 – 11:30   Introduction to the FO Reporting module of the I+ monitoring system (Mr. Dániel Krimer, I+ Office and Ms. Zelei Marian, JS)

11:30 – 11:40   Q&A

BREAK

11:45 – 12:10   Programme level requirements towards reporting

12:10 – 12:20   Q&A

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Purpose and goal

- Raising quality of project implementation / administration / PRs

- Improving liquidity of LB/B organizations

- Sharing good practices (DOs and DON'Ts)

- Experience of the 1st CfP (statistics)

- PR Approval in 1st CfP:
  - **without completion – 24%**
  - after 1 completion – 44%
  - After 2 completion – 26%
  - After 3 or more completions – 5%

- Average no. of days of approval: **56**, including:
  - 39 between initial and satisfactory submittion of PR
  - 7 days for JS validation
  - 10 days for CA transfer

Milestones of Project Life Cycle
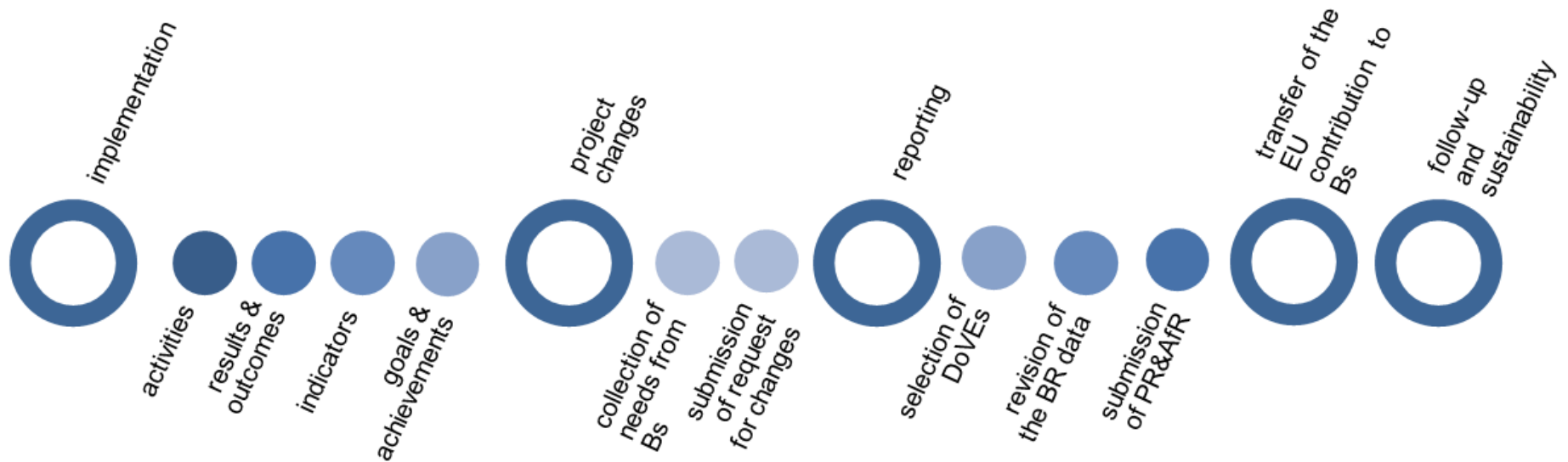
Lead Beneficiary principle

SC signed by LB

Main aspects of responsibility:

1. Coordinating among Bs
2. Implementating of activities
3. Reporting on achievements (submitting PRs)
4. Project modification (content & budget)
5. Communication (Bs, public, JS/MA)
6. Transfer of funds (to Bs)
7. Maintaining results (follow up)

LB principle – implementation of activities

- Following the **entire progress** of your project (be proactive, coordinate with Bs)

- Monitoring the implementation of **all** planned activities

- Reacting in due time if implementation is **delayed** (reasons, solutions)

- Sharing its good (or bad) experiences and practices

...LB organization and its staff are in charge of...

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LB principle – communication

Main levels of communication:

1.**Between the partnership** regarding implementation and reporting

2.**Towards Programme Bodies** JS/MA (official comm.)

3.**Towards the wider public** (information & publicity) in line with Project Communication Guidelines

...LB organization and its staff are in charge of...

LB principle – project modification

- Effective **collection of needs from Bs**

- Checking if all of the **needs** (content & budget) **are justified** and no calculation mistakes exist

- Ensuring timely **submission of request to the JS** and confirmation of approval to Bs

...LB organization and its staff are in charge of...

LB principle – reporting

- Reporting of the partnership according to schedule (**keeping reporting deadlines** set in SC)

- Submitting relevant and **satisfactory descriptions, supporting documents**

- Submitting Progress Reports (and completions) on time

...LB organization and its staff are in charge of...

The B/PR Validation Process
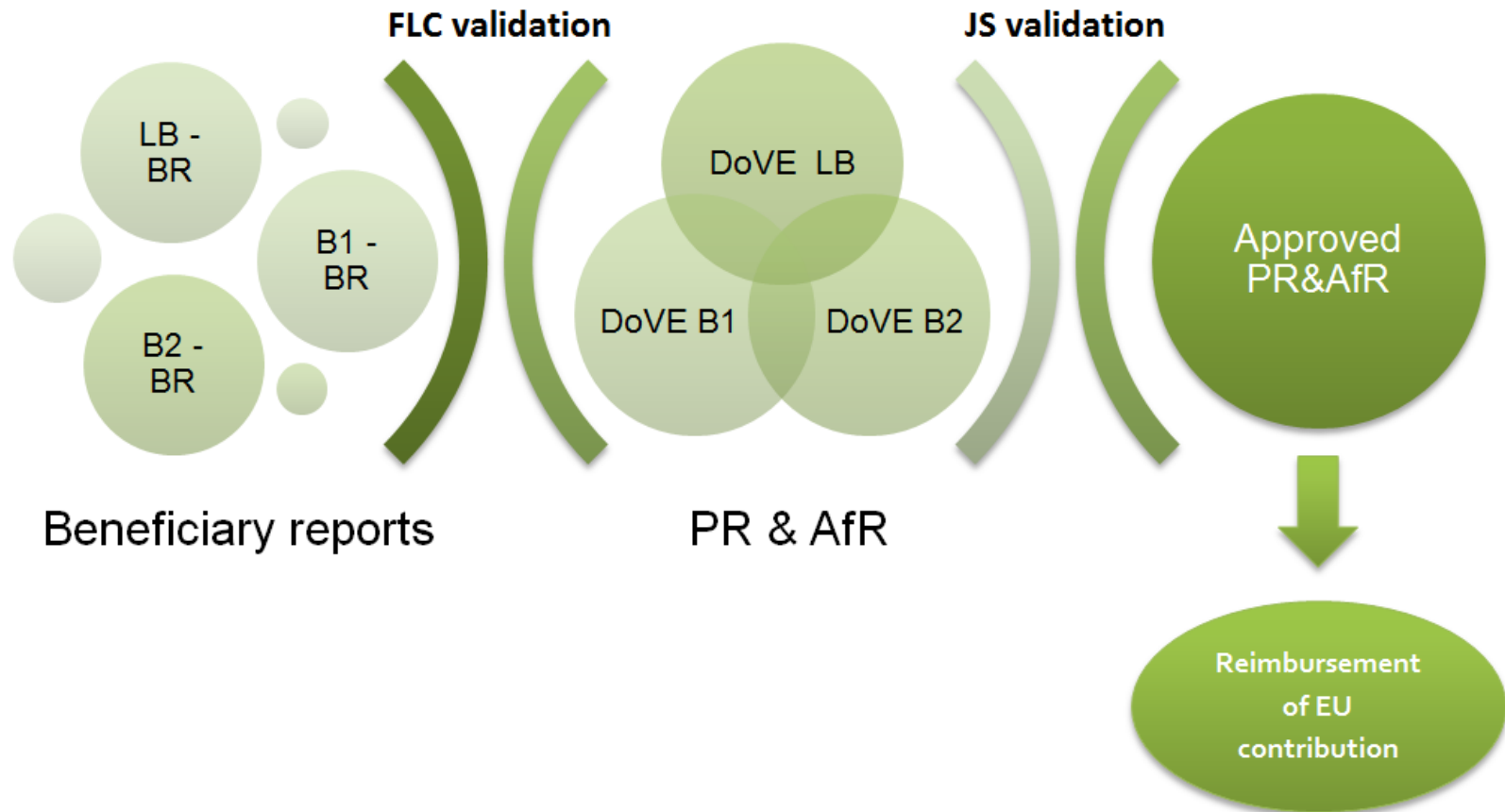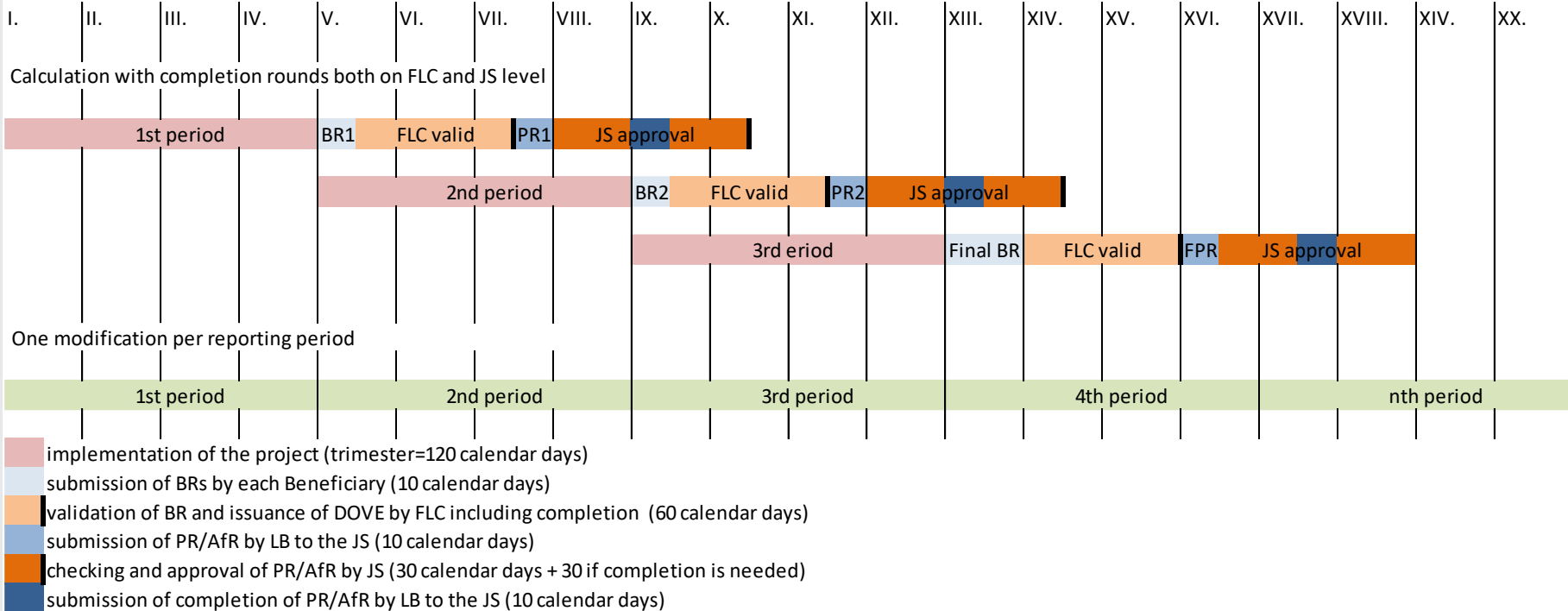
LB principle – transfer of funds

Improving the liquidity of LB/Bs:

- Submitting **quality** PR/AfR in order to **avoid completions**

- **Transfering** timely the validated expenditure amounts to Bs

- Providing correct information related to the bank account for the transfer

...LB organization and its staff are in charge of...

Project Life Cycle timeframes

HUHR reporting timeframe (presuming that all deadlines are kept by the actors)

I. II. III. IV. V. VI. VII. VIII. IX. X. XI. XII. XIII. XIV. XV. XVI. XVII. XVIII. XIV. XX.

Calculation with completion rounds both on FLC and JS level

| 1st period | BR1 | FLC valid | PR1 | JS approval |

| 2nd period | BR2 | FLC valid | PR2 | JS approval |

| 3rd eriod | Final BR | FLC valid | FPR | JS approval |

One modification per reporting period

| 1st period | 2nd period | 3rd period | 4th period | nth period |

- implementation of the project (trimester=120 calendar days)
- submission of BRs by each Beneficiary (10 calendar days)
- validation of BR and issuance of DOVE by FLC including completion (60 calendar days)
- submission of PR/AfR by LB to the JS (10 calendar days)
- checking and approval of PR/AfR by JS (30 calendar days + 30 if completion is needed)
- submission of completion of PR/AfR by LB to the JS (10 calendar days)

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JS suggestions on 'How to' questions

DOs

DON'Ts

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PROJECT IMPLEMENTATION

Ignore the risks (COVID-19!)

Keep the contact with all Bs

Keep the bad practices

Postpone decissions and actions

Make sure achievements are documented

Benefits of the target groups

Read PIH

Transfer knowledge to BS (from JS)

PROJECT COMMUNICATION

Consult PCG (and JS)

Get outdated (on-line)

Show promo materials in use (when distributed)

Forget to match tools with beneficiary groups

Ignore the importance of internal communication

Think GREEN (less paper and plastic)

Do the bare minimum

Think of aesthetics

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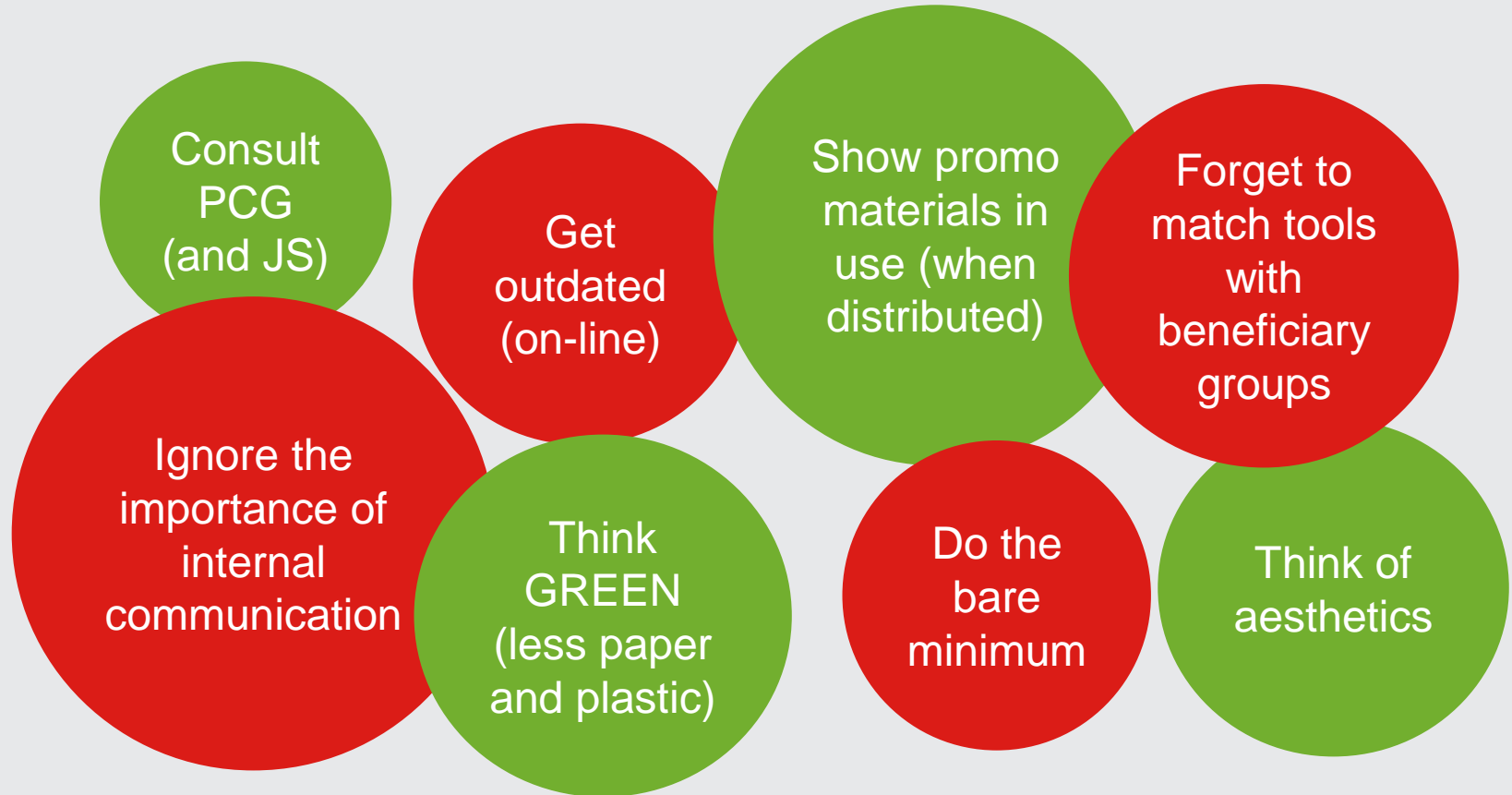
PROJECT COMMUNICATION

- Minimum requirements (at least 1 event, 1 trilingual promotional material, 1 media activity, project specific web/subpage, poster/billboard, stickers for equipment)
- Flexible solutions
- Innovative approach
- Synergies with Programme/EC comm activities
- Green options
- Inclusive approach/events
- Online and „offline" activities
- MA Guidance on COVID-19

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PROJECT COMMUNICATION

- Schedule communication paralel to other activities
- Tailored messaging
- Ready-made material for the media
- Social Media
- Website ready by end of 1st RP and updated regularly
- Apps practical and user friendly
- Use preset designs in appropriate sizes
- Use of appropriate disclaimer (available on Programme web)
- GDPR related guidance, especially in projects involving children

PROJECT COMMUNICATION

- Use of wrong templates, other programmes' logos
- Mixing of languages
- No mention of EU/Programme co-financing in videos/articles/interviews
- One-sided communication, representation
- Unappealing visuals
- Pictures that do not „say" anything
- Copyright violation
- Inappropriate size of signage
- Too long acronyms
- Results „hidden" on the websites
- Partially or google translated websites
- Use of unofficial translations of beneficary names
- Inactive websites
- Technical problems at events (sound, translation, catering...)

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PROJECT MODIFICATION

Consult PIH (and JS)

Forget to prove special circumstances if imposed by external actors

Think about improvements to the project

Send officialy only when agreed with JS

Leave out some Bs needs

Use the right templates
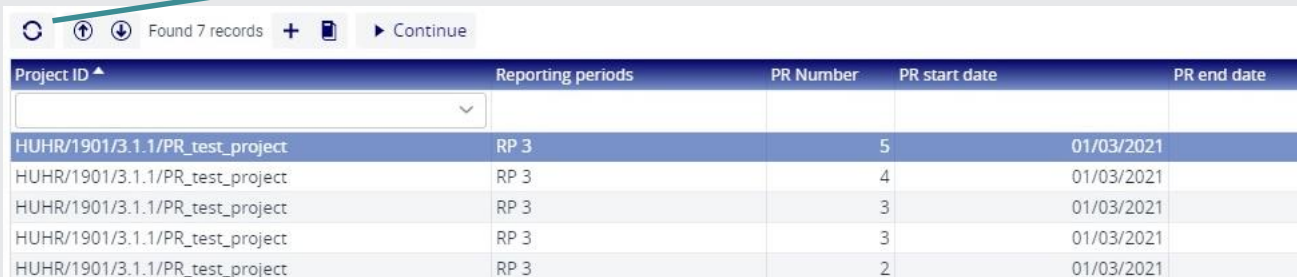
Re-allocate to the cut (QA) budget items

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PROJECT MODIFICATION

! in case modification has been applied (by JS) while BRs/PR is under preparation...

...please make sure to ask Recording Users of Bs to refresh the relevant datasheets (affected by modifications) in their BRs...

Refresh

Project ID ▲	Reporting periods	PR Number	PR start date	PR end date
HUHR/1901/3.1.1/PR_test_project	RP 3	5	01/03/2021	
HUHR/1901/3.1.1/PR_test_project	RP 3	4	01/03/2021	
HUHR/1901/3.1.1/PR_test_project	RP 3	3	01/03/2021	
HUHR/1901/3.1.1/PR_test_project	RP 3	3	01/03/2021	
HUHR/1901/3.1.1/PR_test_project	RP 3	2	01/03/2021	

◯ ⬆ ⬇ Found 7 records + ▮ ▶ Continue

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PROJECT REPORTING

Consult PIH and User Manual for I+ (and JS)

Report on previous or planned (future) achievements

Always answer Qs: What by whom, when, where and with what result?

Copy paste Bs reports (summarize!)

Match reported statuses, values, description and supporting documents

Structure the content

Leave out justifications for changes of Bs reported content or values

Get acquainted with the system's functions

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PROJECT REPORTING

- Ideal reporting scenario and reimbursement of ERDF achieved in **17** days since submission (in case of high quality of PR) in **1st CfP**

7 d for JS validation	10 d for CA transfer

- Real reporting scenario and reimbursement of ERDF achieved in **56** days since first submission (in case of lower quality of PR) in **1st CfP**

39 days of average completion rounds until satisfactory quality of PR

7 d for JS validation	10 d for CA transfer

PROJECT REPORTING

...important facts...

- via FO of Interreg+ monitoring system (link)

- two user roles: RU and SU

- registration and connection of B users to project parts

- more user roles connected to one account

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Recording user (RU)

Signatory user (SU)

Recording user

Signatory user

Project level (LB) – data management comprises all Bs data (Project Report, PR)

Project Part level (Bs) – data management of one B (Beneficiary Report, BR)

Front Office (LB & Bs) - based on the 4-eye principle (RU, SU) and usage of the e-signature

Back Office (FLC, JS, MA, CA)

Interreg Plus IT system
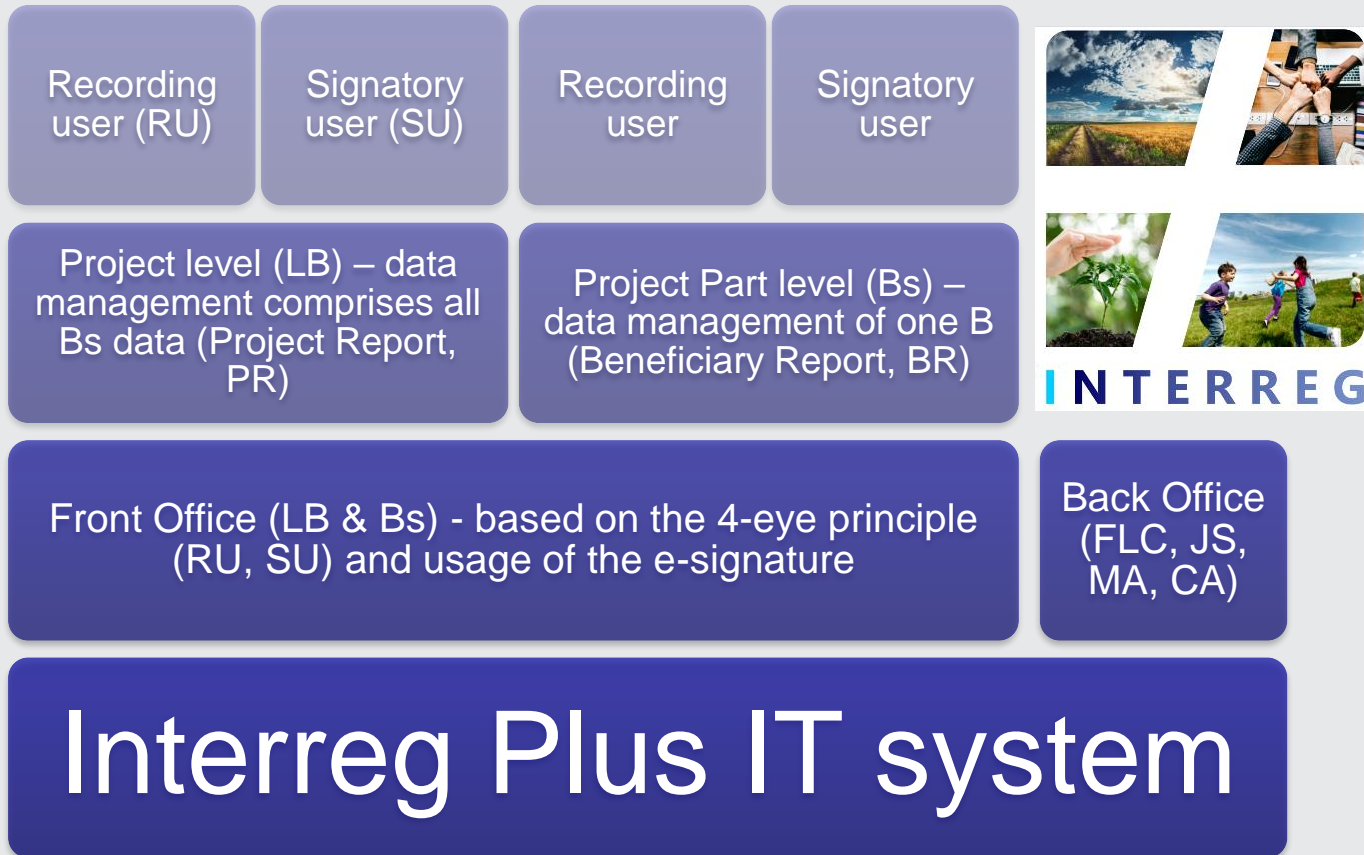
- division of roles (Recording and Signatory) is to be decided by each Beneficiary within their own organisation having on mind that:

  1. **Recording User** – person responsible for the provision and management of the data on progress of project inside the I+ system;

  2. **Signatory User** – person responsible for trustworthyness of the data provided inside the I+ system and submitted to the management bodies (FLC, JS, MA, CA)

! Both roles can be managed by single person / single account (in case in reality B organization does not practice double checking on data provided)

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- You are appointed as Recording or/and Signatory user for your Project - Do you already have an user account? (e.g. from B-level reporting)

YES (extension of the user role) → Enter your existing I+ FO account		**NO** (registration of the new user) → Use FO link: https://huhr.interregplus.eu → Choose Register option on the log-in page

Enter your User profile in the upper right corner → Choose *Request role* option	Fill-in the required data and send the request → Use the automatic e-mail to enter FO → Enter your User profile in the upper right corner and choose *Request role* option

Fill-in the required data and send the request → Log-in after received the automatic e-mail confirming the approval of request	Fill-in the required data and send the request → Log-in after received the automatic e-mail confirming the approval of request

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PROJECT REPORTING – General (RU)

Project ID ▲	Reporting periods	PR Number	PR start date	PR end date	Reported amount	Status ⇕	PR approval date
HUHR/1901/3.1.1/PR_test_project	RP 3	5	01/03/2021	30/06/2021	536,11	Under preparation	
HUHR/1901/3.1.1/PR_test_project	RP 3	4	01/03/2021	30/06/2021	458,88	Submitted PM1	
HUHR/1901/3.1.1/PR_test_project	RP 3	3	01/03/2021	30/06/2021	458,88	Rejected	
HUHR/1901/3.1.1/PR_test_project	RP 3	3	01/03/2021	30/06/2021	458,88	Deleted	
HUHR/1901/3.1.1/PR_test_project	RP 3	2			458,88	Rejected	
PR_test_project	1, RP 2			2/2021			
0102		1		3/2020			

Refresh list screen

View

Edit

Search tabs

Exporting / Download options (MS Word, Excel, PDF) – only items visible on the screen will be visible in document

Create a new Project Report

✓ Validate   ✕ Cancel   PR refresh   💬 Task comment   🔧 Generate   ▼ Continue later   ▶ Send for signing

Checks if all mandatory fields are filled-in properly

Cancels current data input

Comment for the Signatory User

Draft PR & AfR

Saving unfinished PR

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PROJECT REPORTING -
Achievements

- structure (group by activities, use bulleting)
- **focus on present RP**

1) Yes/No
2) descriptive

PROJECT REPORTING - Activities

- not connected to indicative statuses given in BRs
- cannot be downgraded from previous PR (History)

- All supporting documents **have to be uploaded under the relevant individual tab** (**activities**/ indicators/ information and publicity/ works&permits/)

PROJECT REPORTING - Activities

When and how to change activity status properly?

Activity status	Procurement procedures	Performance of tasks related to the certain activity	Achievement of results (indicators)
Not started	Not started	Not started	None
In progress	Partially / Entirely	Not started / Partially	None / Partially / Entirely
Completed	All and entirely	All and entirely	All and entirely

! Please note that you cannot rank-down the activity status in the consecutive PRs (e.g. you cannot set activity status as „In progress" in current reporting period if previous PR was approved with status „Completed"!

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PROJECT REPORTING - Activities

Where to find the relevant supporting documents?

Works & Permits **BRs in PR** Financial Progress Sou

- Access supporting documents from all Beneficiary Reports in **BRs in PR** tab by selecting the relevant Beneficiary Report and clicking on **i**

| Main data | Achievements | Activities | Indicators | Information and publicity | Works & Permits | BRs in PR | Financial Progress | Sources of funding Progress | Payments | Transfer from LB | Documents | History |

Found 1 record **i**

Beneficiary ▲1	BR number ▲2	Relevant DOVE(s)	Reporting periods	BR start date	BR end date	BR approval date	Reported amount	Reported EU con
B2 - HR - ABC	3	DoVE_3_20210301_2021...	RP 3	01/03/2021	30/06/2021	11/01/2021	536,11	

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How to structure the documents properly?

Current description (by LB)

In this reporting period three workshops were held and a joint study trip in the region with the aim of strengthening the capacities of the local organisations :
Workshop 1: in Osijek on 22/08/2020 with 35 participants
Workshop 2: in Pécs on 29/09/2020 with 44 participants
Workshop 3: in Kaposvár on 05/10/2020 with 37 participants
Study trip: to Medimurje County on 07/11/2020 with 50 participants
As a result a joint document was elaborated and translated into Croatian and Hungarian

Documents | **History**

> Filters

Found 5 records

File name ▲1	Title	Creation date ▼2	Subject	Version	Generated	Not relevant
JOINT STUDY_HU-HR-EN.docx		20/01/2021 21:16:09				
STUDY TRIP_Medimurje_07112020.zip		20/01/2021 21:16:10				
WS1_Os_22082020.zip		20/01/2021 21:16:09				
WS2_Pecs_29092020.zip		20/01/2021 21:16:08				
WS3_Kapos_05102020.zip		20/01/2021 21:16:10				

✕ Close

- supporting documents have to **match given description and status**

Documents | **History**

> Filters

Found 5 records

File name ▲1

JOINT STUDY_HU-HR-EN.docx

STUDY TRIP_Medimurje_07112020.zip

WS1_Os_22082020.zip

WS2_Pecs_29092020.zip

WS3_Kapos_05102020.zip

- All supporting documents relating to one event can be uploaded as a single, **clearly marked** .zip file

- Supporting documents = e.g. agenda/invitation/ signed participants list/pictures/video material

- Please **make sure that the file's are named in English and in way that it clearly reflects the content of the file and the responsible B** (e.g. Study_topic of the study_B1)

PROJECT REPORTING - Indicators

- by updating the Actual value in this PR LB can confirm or correct values given in BRs (if not, the system will record it as 0!)

- supporting documents have to match given description and value
- have to be in line with defined sources of verification (agreed with JS)

- All supporting documents **have to be uploaded under the relevant individual tab** (activities/ **indicators**/ information and publicity/ works&permits/)

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PROJECT REPORTING - Indicators

Where to find the relevant supporting documents?

Works & Permits | **BRs in PR** | Financial Progress | Sou

- Access supporting documents from all Beneficiary Reports in **BRs in PR** tab by selecting the relevant Beneficiary Report and clicking on ℹ

| Main data | Achievements | Activities | Indicators | Information and publicity | Works & Permits | BRs in PR | Financial Progress | Sources of funding Progress | Payments | Transfer from LB | Documents | History |

Found 1 record ℹ

Beneficiary ▲1	BR number ▲2	Relevant DOVE(s)	Reporting periods	BR start date	BR end date	BR approval date	Reported amount	Reported EU con
B2 - HR - ABC	3	DoVE_3_20210301_2021...	RP 3	01/03/2021	30/06/2021	11/01/2021	536,11	

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PROJECT REPORTING - Indicators

! Target value = value of indicator planned to be achieved by partnership

! Actual value = value reported in current RP (indicative by Bs, actual confirmed/corrected by LB)

! Achieved value = values achieved in previous RPs and current Actual value

! Remaining value = Base value + Target value – Achieved value

Over and under – achievements should be justified and supported by documentation!

PROJECT REPORTING - Indicators

* Organizing the event with respect to the possible interest of persons with disabilities can be proven with adding the reference to the invitation that premises are suitable for wheelchair users (elevator, etc.);

* Efforts taken to include members of minorities community can be proven by invitation to the event sent to the organizations representing the rights of those minorities – the participation cannot be proven by labelling participants on the participants list, but effort can be taken;

* Organizing the event (e.g. education) both in real and virtual or exclusively virtual environment with the purpose to allow participation to persons with limited access (virtual tool screenshot with participants visible);

* Producing promo or educational material suitable for usage in electronic version beside printed can prove that beneficiary(s) invested effort in widening the participants spectre.

Horizontal indicators: basis for possible discrimination or environmental risks in relation to the given activity has to be defined and efforts to reduce / eliminate those effects have to be taken

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PROJECT REPORTING –
Information & Publicity

PROJECT REPORTING –
Information & Publicity

Where to find the relevant supporting documents?

- Access supporting documents from all Beneficiary Reports in **BRs in PR** tab by selecting the relevant Beneficiary Report and clicking on

PROJECT REPORTING –
Works & Permits

...in case of investment type of projects the following additional documents have to be submitted (uploaded to the Final PR/AfR in I+):

- Photo documentation of the works and equipment;

- Report of the technological delivery session (műszaki átadás-átvételi nyilatkozat / zapisnik o primopredaji radova);

- Statement of the responsible architectural supervisor (felelős műszaki vezető nyilatkozata / izjava nadležnog građevinskog nadzora);

- Valid permission of use (használatba vételi engedély / uporabna dozvola); any other permits prescribed by regulations or the Temporary permission of use (ideiglenes használatbavételi engedély / privremena uporabna dozvola) can be accepted from the Beneficiary, or it can submit the copy of the document (provided by the relevant authority) proving that the organisation has handed in its request for the initialisation of the permission procedure (if relevant).

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PROJECT REPORTING – E-Sign (RU)

Recording User interface shows PR status as Under signature and as Submitted PM1 when E-signed

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PROJECT REPORTING – E-Sign (SU)

Options of Signatory User. Satisfactory PR should result with Sign option (Back to modification requires Task comment!)

PROJECT REPORTING – Completion

...in case found necessary by Programme Manager (JS)...

- unsatisfactory quality of PR

- status „Need amendment" is visible on RU and SU screen (+ automatic e-mail with Competion letter attached)

- non-compliance with the aforementioned instructions

- means prolongation of transfer to the LB bank account

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Most Important DOCs

- Guidelines for Applicants (GfA)
- FO User Manual for Interreg+ PR Module
- Project Implementation Handbook (PIH)
- Project Communication Guidelines (PCG)
- Project Form (PF, Word format or I+)
- Subsidy Contract (SC)
- FAQ on the official website of the Programme

www.huhr-cbc.com

https://www.facebook.com/huhr.cbc/
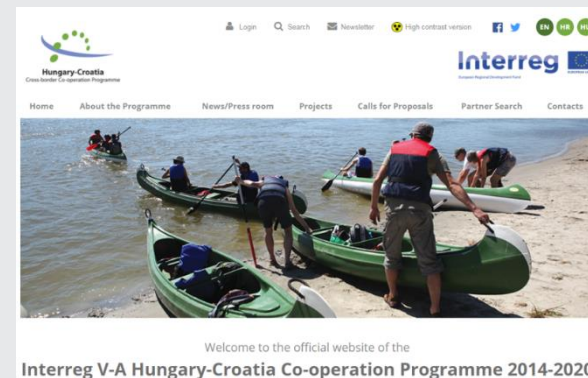
Contacts for support

Technical (I+ related) issues:

iplussupport@szpi.hu

Regarding project implementation, communication and reporting related issues please always contact your Programme Manager at:

http://www.huhr-cbc.com/en/js-and-contact-points

Thank you for the attention!