

Fifth Call Induction – part 2

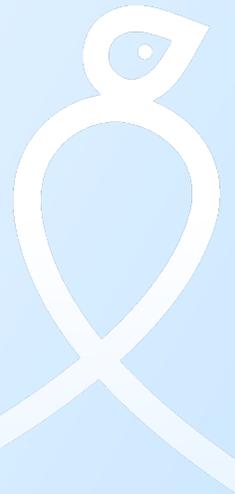
Lead Partner seminar
19thth March 2025, Cork, Ireland

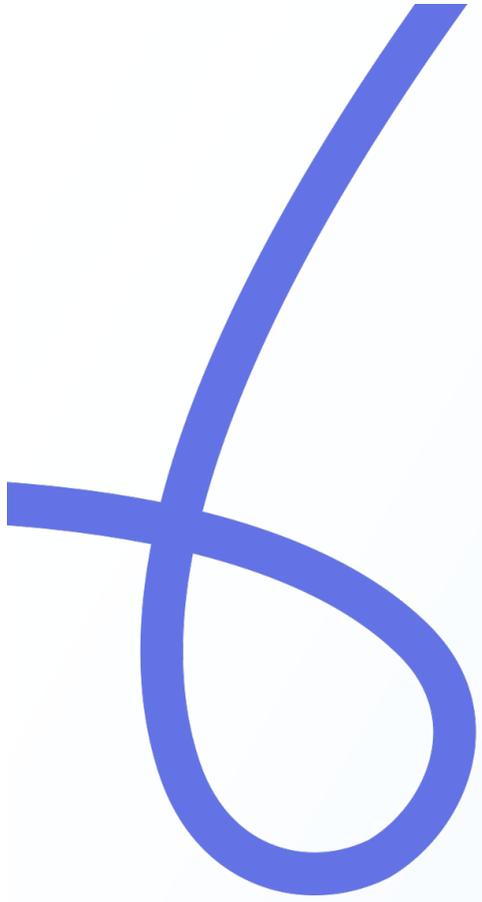
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What to expect from this session

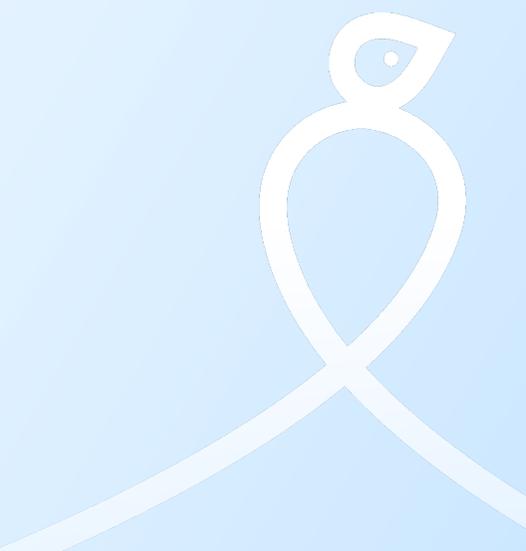
- Eligibility rules of expenditures and audit trail
- Project implementation and reporting
- Reporting on Horizontal Principles
- Getting started in JEMS

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Eligibility of Expenditure and Audit Trail

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Hierarchy of rules on eligibility of expenditure

1. Rules defined in EU legal framework

2. Programme rules

- ✓ Established jointly by the Programme partner countries in the programme monitoring committee
- ✓ Apply to the programme as a whole
- ✓ Without prejudice to the rules on EU level

3. National rules

- ✓ For any other matters not covered by EU rules and programme rules
- ✓ Stricter rules in areas prescribed by EU rules

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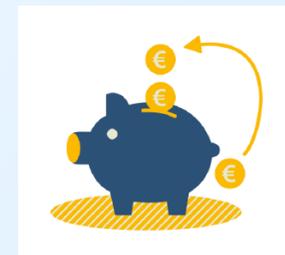
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General principles of eligibility (1)

All expenditure in the allowed cost categories has to be:

- Project-related.
- Clearly connected to project activities traceable in the approved application form.
- incurred, entered in the project accounts and paid by, or on behalf of, the project partner during the project period.



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General principles of eligibility (2)

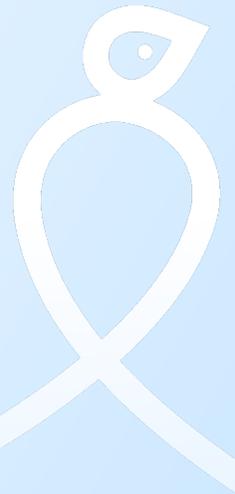
- National public procurement rules have to be observed for all purchases and full documentation is needed. Even below national and EU thresholds, contracts with external providers, shall comply with the principles of transparency, non-discrimination, equal treatment and effective competition

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General principles of eligibility (3)

- All or part of an operation may be implemented outside of the programme area, provided that the Interreg operation contributes to the objectives of the Programme.
- The project should have made a written request to the JS if not already in the approved application.

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General principles of eligibility (4)

- Value added tax (VAT) is normally eligible (even if it is recoverable for the project partner). Please note that for partners funded under GBER 20 + GBER 20a then VAT is not eligible. Check the Grant Letter.



Cost Categories

1. Staff costs
2. Office and Administrative costs
3. Travel and accommodation costs
4. External expertise and services costs
5. Equipment costs



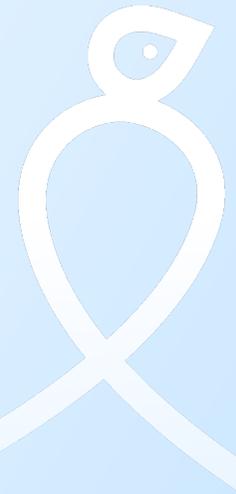
(Infrastructure and works not allowed in NPA)

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Audit trail for Staff Cost

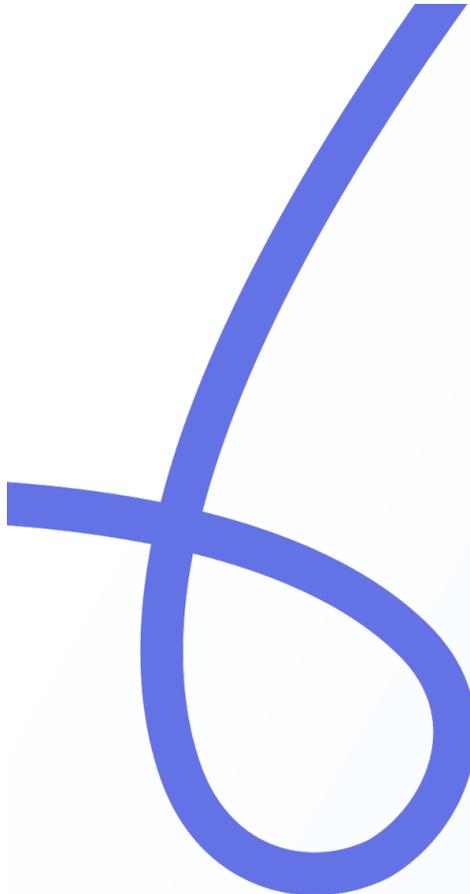
Required documents depending on the reimbursement option	Real costs	
	Full- time	Part time (Fixed percentage)
Employment/work contract/ <u>other</u> document	✓	✓
Job description	✓	✓
Payslips	✓	✓
Data from time registration system	✗	✗
Proof of payment	✓	✓

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Audit trail for Travel and Accommodation costs

If the real costs reimbursement option is used then the following documents must be available:

- Agenda or similar of the event.
- Paid invoices (e.g. hotel invoice, travel tickets).
- Daily allowance claim (costs cannot be claimed in addition to daily allowances).
- Proof of payment.

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Audit trail for External expertise and services costs

The following main documents must be available for control purposes:

Evidence of the procurement process in line with the legal status/organisational/regional/national procurement rules or the EU procurement rules.

A document (contract) laying down the services to be provided with a clear reference to the project and the programme. Any changes must comply with public procurement rules and must be documented.

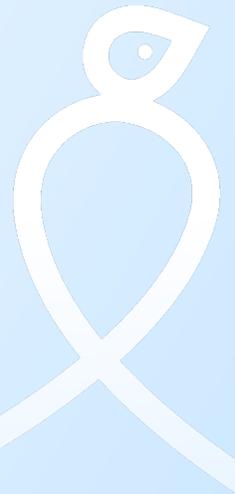
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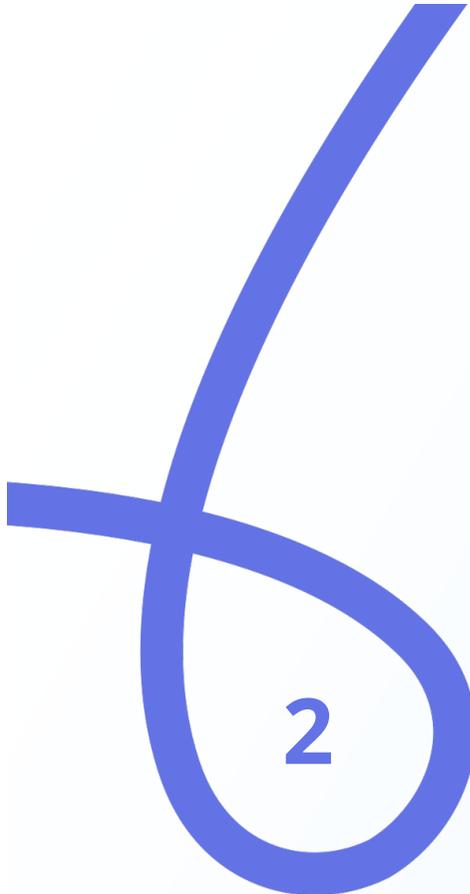
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Audit trail for External expertise and services costs

The following main documents must also be available for control purposes:

- An invoice or request for reimbursement.
- Outputs of the work of external experts or service deliverables.
- Proof of payment

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Audit trail for Equipment costs

The following main documents must be available for control purposes:

Evidence of the procurement process in line with the legal status/organisational/regional/national procurement rules or the EU procurement rules depending on the amount on the contract.

Any changes must comply with public procurement rules and must be documented.

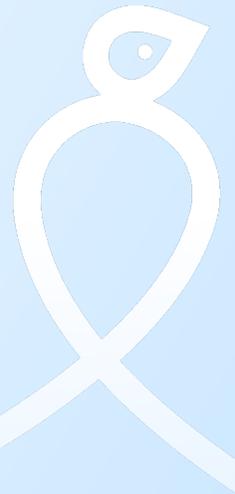
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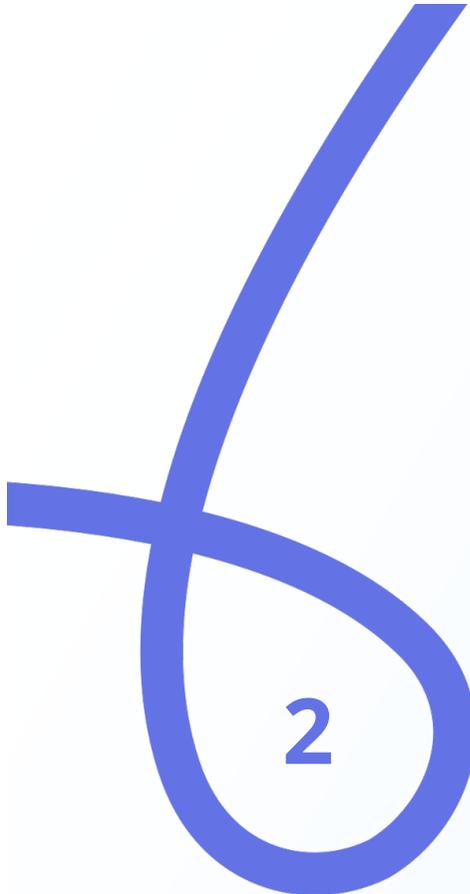
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Audit trail for Equipment costs

The following main documents must also be available for control purposes:

An invoice or a request for reimbursement.

Actual equipment purchased and evidence of equipment purchased, rented or leased.

Calculation scheme of depreciation, if applicable.

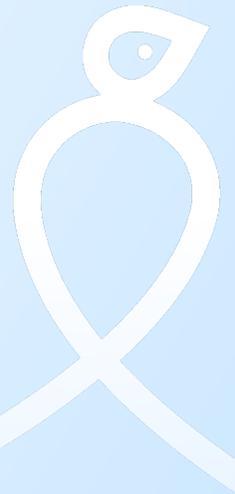
Proof of payment.

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Ineligible expenditure



There are a few cost items that will not be eligible in NPA 2021-2027:

(a) fines, financial penalties and expenditure on legal disputes and litigation.

(b) costs of gifts.

(c) costs related to fluctuation of foreign exchange rate.

(d) Recoverable VAT for partners funded under GBER Article 20 and 20a.

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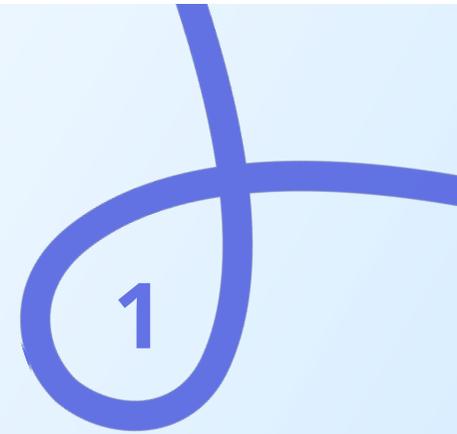
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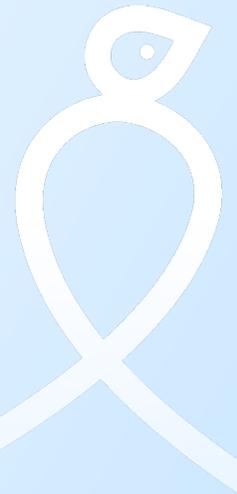
SCO – Simplified Cost Options

In order to minimize the administrative burden on the beneficiaries the below Simplified Cost Options (SCO's) provided in the EU regulations are made available:

- It is mandatory to use a 15 % flat rate for office and administration on staff costs.
- It is optional to use a 15 % flat rate for travel on staff costs.



1



SCO – Simplified Cost Options

There is also an option to report costs as staff cost + a 40 % flat rate for all other costs than staff. Only the staff cost will be verified by the controllers. This SCO will be available on a case-by-case basis.

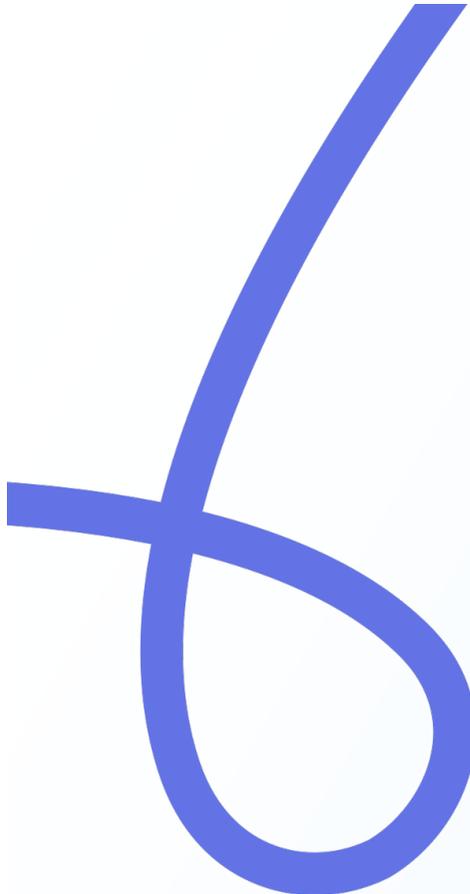
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Audit trail for SCO's

For flat rates: programme rules to verify that the flat rate takes into account: correct cost categories, correct percentage used, correct calculations and correct basis cost (not including cost items covered by flat rates). For travel cost meeting minutes will be requested by the JS.

For lump sums: evidence of lump sum deliverables as outlined in the Grant Letter; criteria for the payment of the lump sum (payment triggers); verification that other reported project expenditure is not already covered by the lump sum.

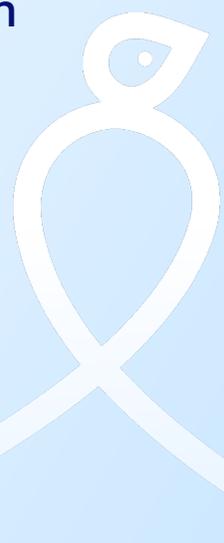
Underlying financial and procurement documents shall not be requested with a view to check the amounts incurred and paid.

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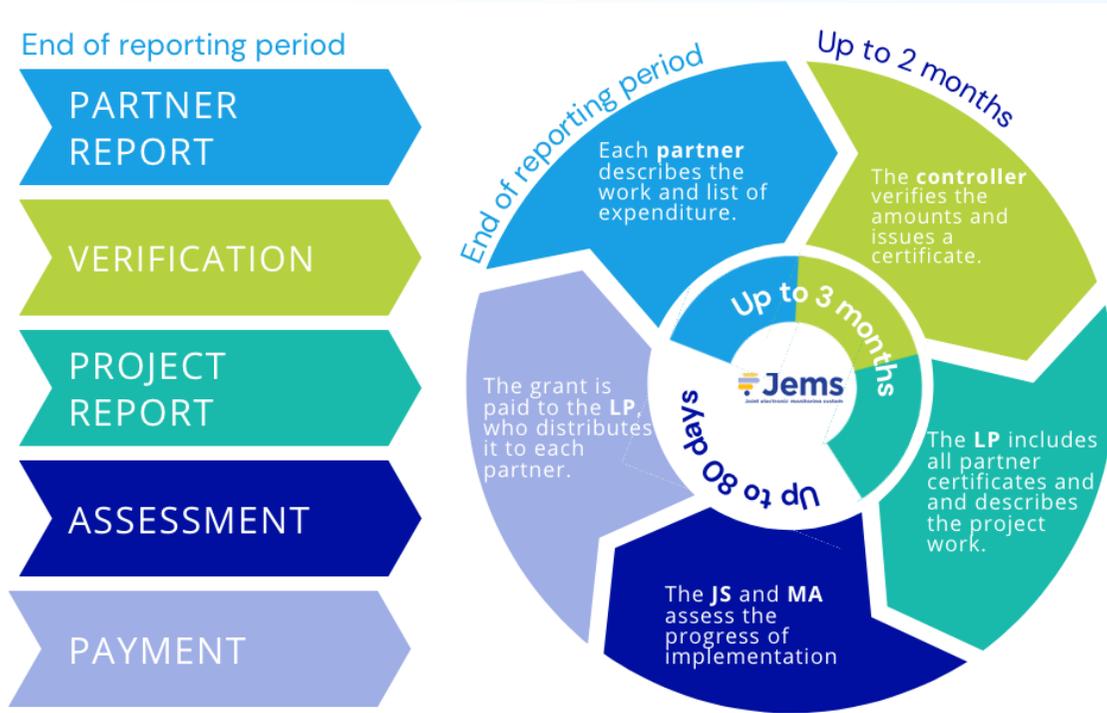
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Project Implementation and Reporting



Reporting Cycle



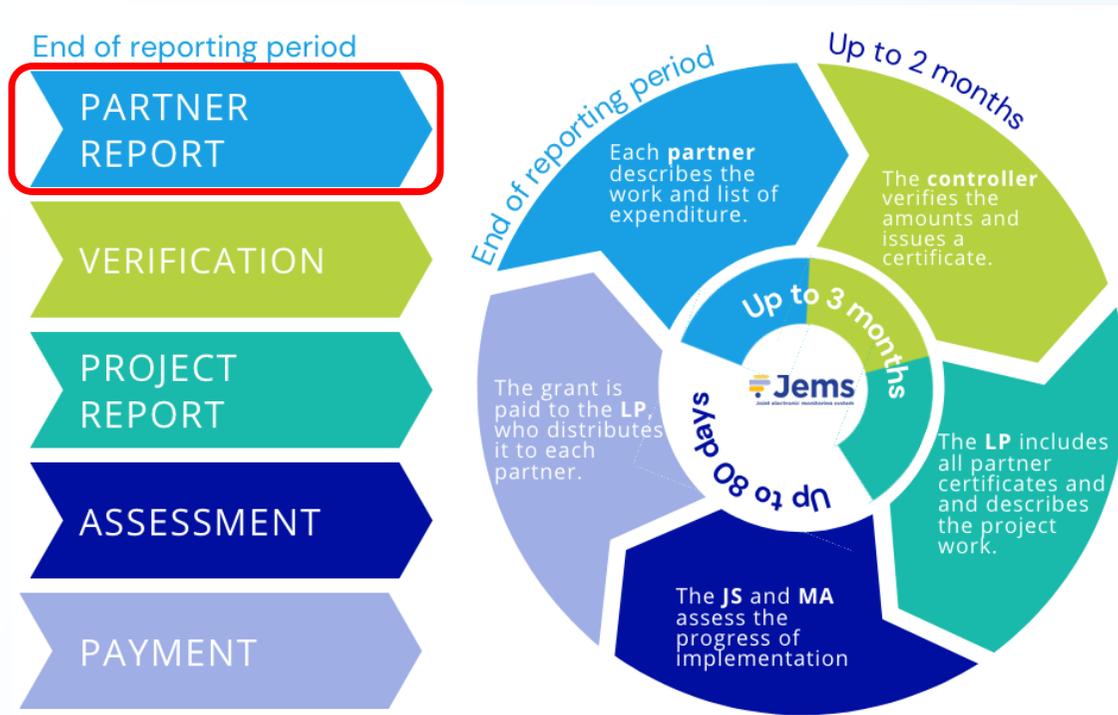
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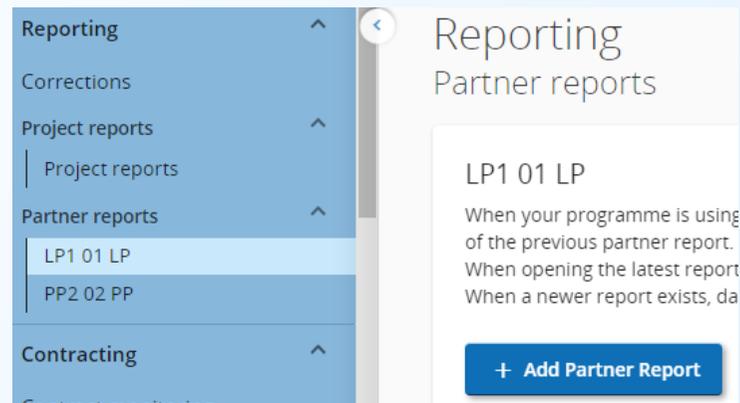
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Partner reporting



Partner reporting

- The Partner reporting section appears when the project is set to the status **Contracted**.
- Each partner report is based on the **currently valid version** of the application form. Modifications do not affect existing reports.
- It is possible to follow the report **status** (Draft, Submitted, Control ongoing, Certified).



Creating the partner report

- Summarize the partner's work and describe deviations from plan.
- Explain which target groups that have been involved, in what way and to what extent.
- Describe the partner's contribution to activities carried out.
- List the cost items in the List of expenditure section. Mark GDPR sensitive information, e.g. staff costs.
- List any procurements.
- Indicate any amounts received from external contributors.
- Upload supporting documents.
- Check the financial overview.
- Submit (after pre-submission check).

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To have in mind!

Try to report to your controller as soon as your **financial data** for the reporting period is **confirmed**.

Make sure to follow the NPA **eligibility rules** in our Programme Manual and **national rules** in your country to make the certification process as quick as possible.

The controllers check that:

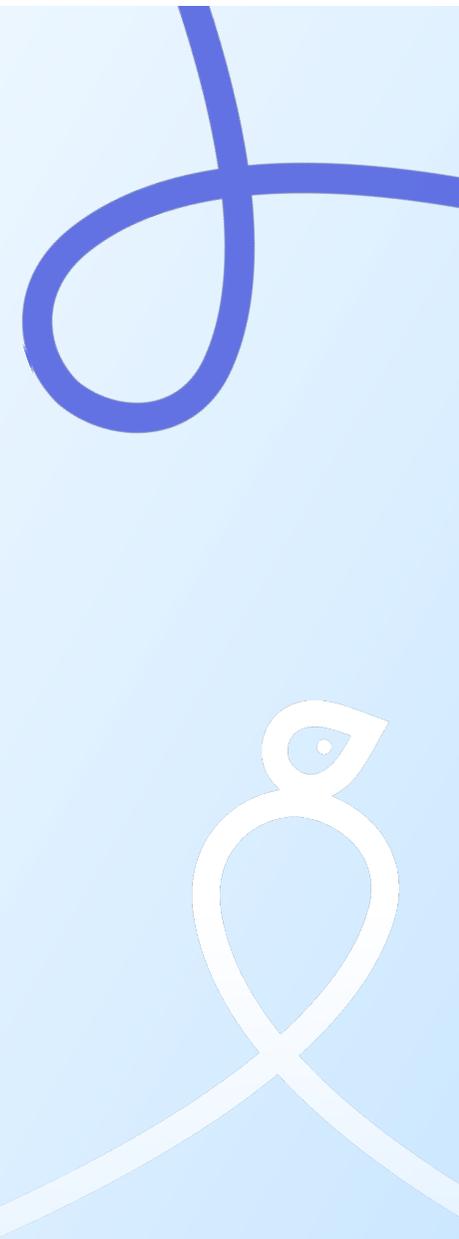
- The incurred and paid expenditure items are connected to activities described in the application form. It is important to set up a unique project account to avoid double financing.
- National public procurement rules have been respected. Contracts with external providers shall always comply with the principles of transparency, non discrimination, equal treatment and effective competition.
- There are audit trails for the reported cost items. Our Programme manual describes what is needed.

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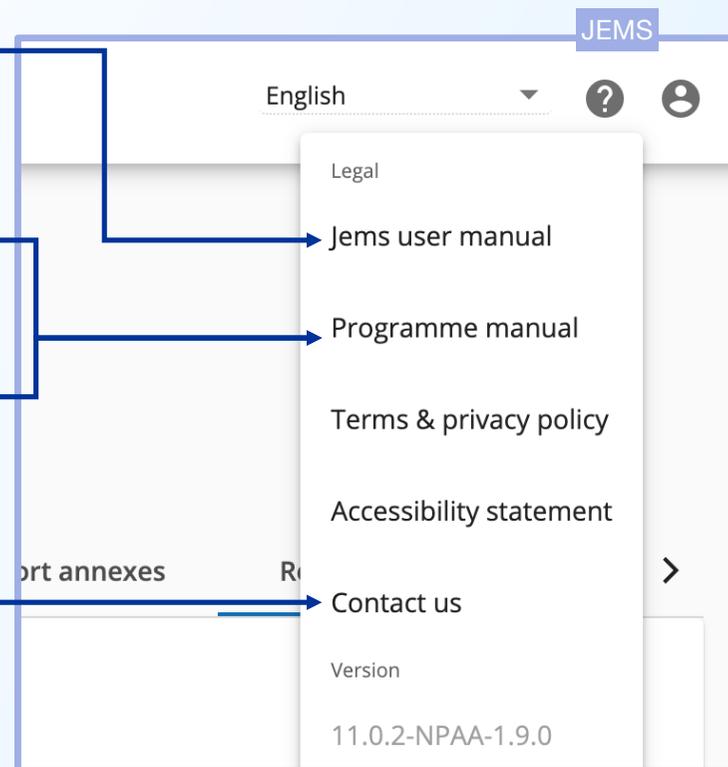
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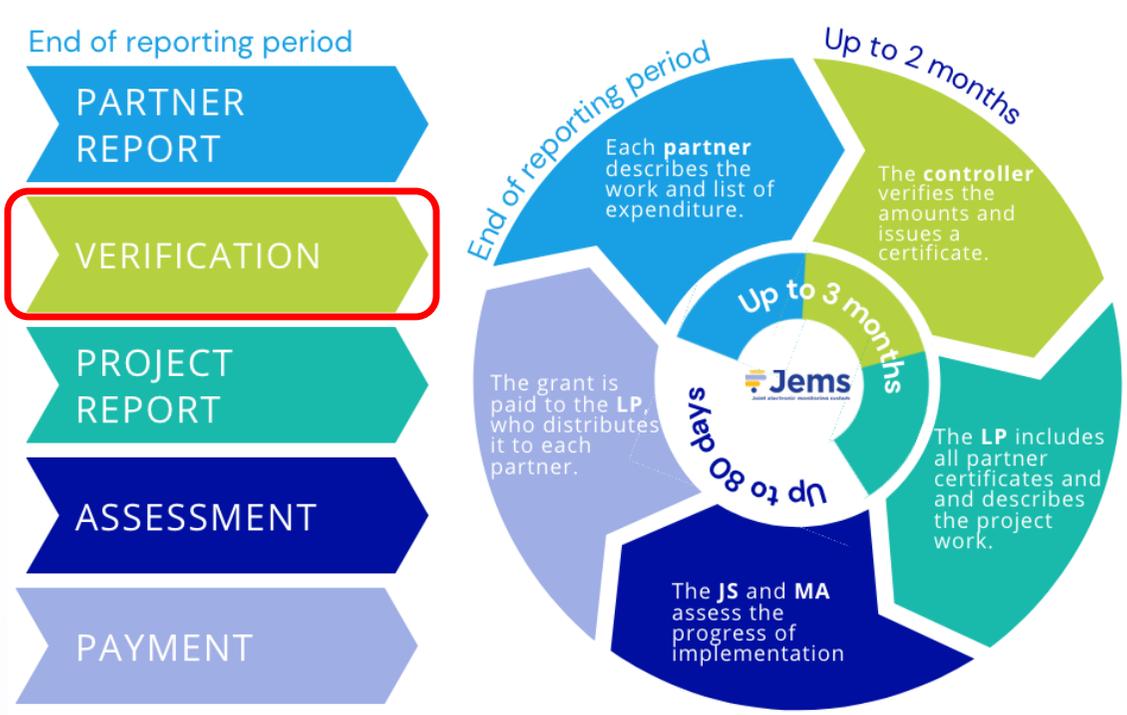


Where to find guidance

- **Jems User Manual:**
Step-by-step guidance for completing partner information and reports
- **Programme Manual:**
All the need-to-know information for each phase of your project
- **Download Centre:**
 - Offline report templates with guidance, logo files, etc.
 - Frequently Asked Questions
 - Recordings and Tutorials
- **Jems Helpdesk**



Controller verification



NPA methodology for management verifications

GENERAL PRINCIPLES:

Same verification process in ALL countries

Verifications include both administrative and on-the-spot verification

Verifications shall be based on risk assessments and be proportionate to risks identified

All documentation shall be in Jems.

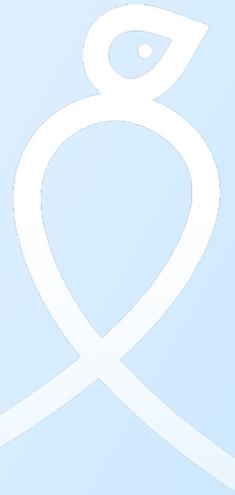
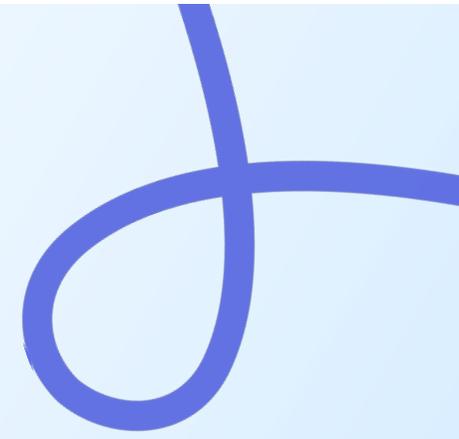
The formal role of the MA is to satisfy itself that the expenditure of each beneficiary, participating in a project, has been validated by the identified controller.

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Controller verification

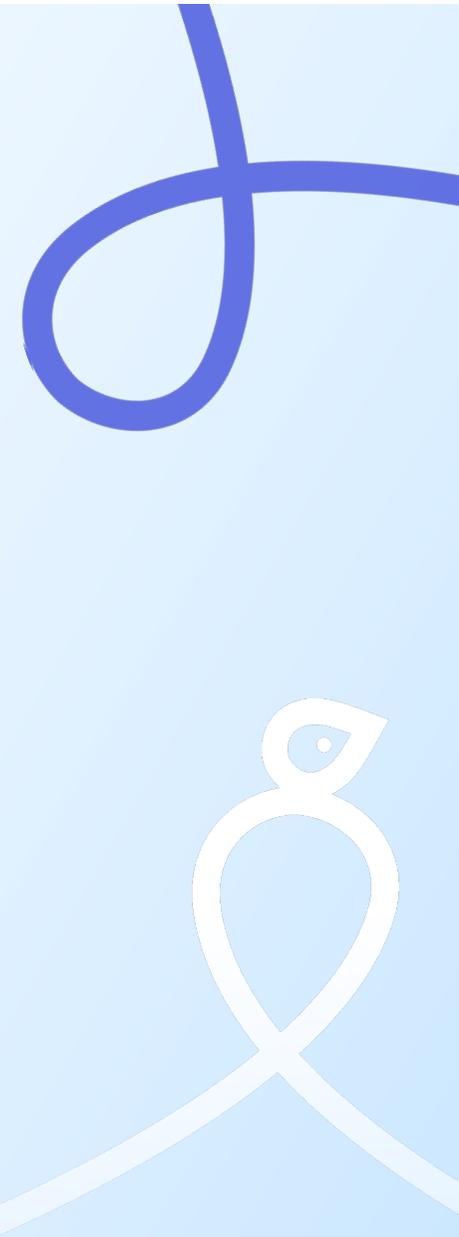
- When the partner report is being verified the status changes to **Control ongoing**.
- During control the partner cannot view the work performed by controllers but can access the control communication section in order to **exchange**.
- Controllers can deduct or park cost items if needed.
- It is possible to return a partner report to the partner. In that case the status changes to **reopened**.
- When the controller finalizes the control then the status changes to **Certified** and a finalized **Control certificate and Control report** is created.
- The controllers have **two months** for the verification process.

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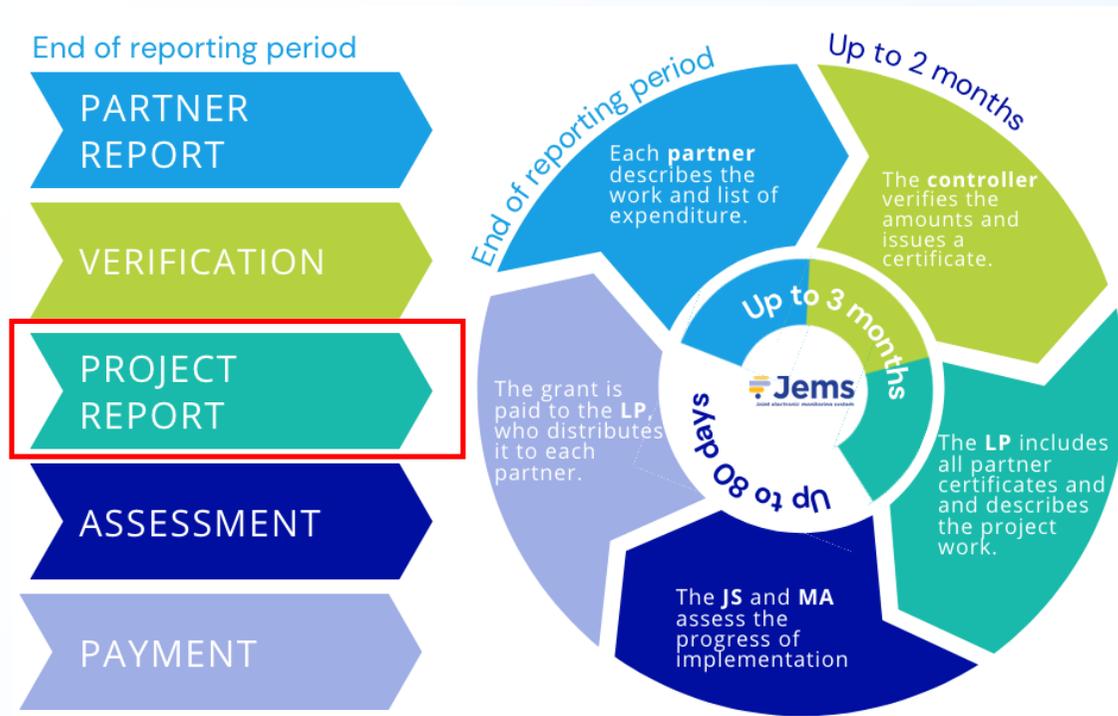


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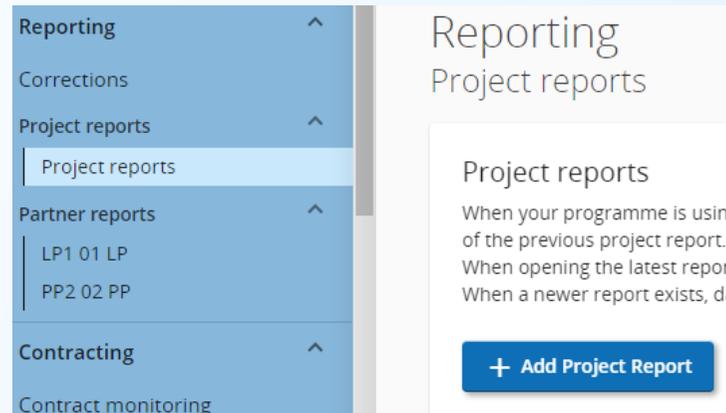


Project reporting



Project reporting

- Each project report is based on the **currently valid version** of the application form. Modifications do not affect existing reports.
- It is possible to follow the report **status** (Draft, Submitted, Verification ongoing, Verified).
- **Detailed guidance** for reporting on communication, horizontal principles, and outputs & results



Project report sections

Project report section	What to fill in
Report identification	Reporting dates, highlights and main achievements, partner problems and deviations target groups.
Work plan progress	Progress achieved on objectives, activities, deliverables, and outputs in this reporting period.
Project results & Horizontal principles	Progress achieved on project results, and horizontal principles.
List of partner certificates	Partner certificates included in the project report. Available certificates are automatically added. Please only include certificates from the current period!
Report annexes	Upload area to attach supporting documents other than the evidence uploaded in the Work Plan or Project results & Horizontal principles sections.
Financial overview	Aggregated overview of the project's financial data, including information submitted in previous reports.
Report export	Optional feature to export the project report budget (Excel) or the full project report (PDF)
Submit	Pre-submission checks and submission function.

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Highlights & main achievements

Reporting Key Achievements:

- Describe progress toward specific objectives including target groups and outline main outputs delivered.
- Highlight any **notable achievements** that demonstrate **added-value** from the project cooperation.
- Use non-technical language to make the **report engaging and accessible** for non-specialists.

Instructions for Reporting:

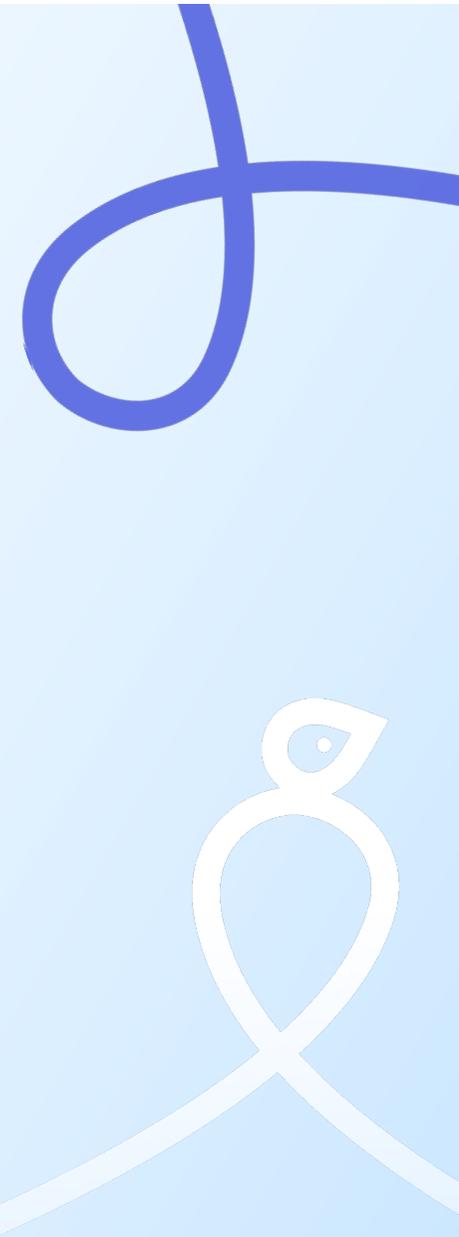
- Keep summaries clear and concise; avoid jargon.
- Focus on outcomes that illustrate the project's value and impact.

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Problems & Deviations from Project Plan

Addressing Partner Problems & Deviations:

- Describe any issues encountered and how they were managed or resolved.
- List any delays and outline mitigation strategies implemented.

Assessing Risks and Mitigations

- Objectives, Outputs, Results: Potential impact on project success and mitigation strategies.

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Problems & Deviations from Project Plan

Partnership

Issues in cooperation and partner dynamics, along with solutions.

Budget

Highlight deviations from planned spending, risk level (low/medium/high), and corrective actions.

Any additional concerns that could affect the project's success.

Guidance for Reporting

Include only relevant details to avoid overwhelming readers.

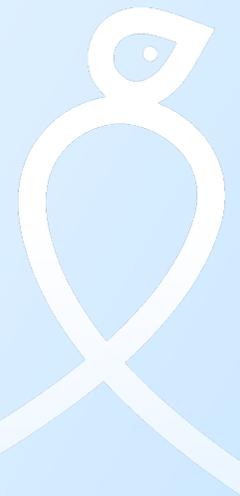
Provide honest assessments of risk levels and articulate clear mitigation strategies.

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Financial Reporting and Deviations

Reporting Financial Deviations

- Outline any spending profile changes and justify deviations from the original budget.
- Ensure all budget changes are documented as in the Programme Manual guidelines.
- Be precise and use figures to clarify financial deviations.

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Tips for Effective Reporting

- Keep it Structured: Use clear headings and bullet points to make sections easy to follow.
- Focus on Key Insights: Highlight significant achievements, obstacles, and changes.
- Be Transparent: Acknowledge all challenges and explain solutions to maintain credibility.
- Avoid overloading details; keep the report to the essentials.
- Remember the report is not only for specialists; make it understandable for all.
- Review and Proofread, Ensure readability before submission.

Workplan

- The work plan is pre-filled with information from the project application.

Inside each work package, indicate the status of:

- Work package
- Project specific objective: Provide a short justification.
- Communication objective: Provide a short justification.

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Workplan – Activities & Deliverables

For each activity:

- Provide a short update of progress made during the reporting period.
- Select the relevant status from the drop-down menu, e.g. partly achieved.
- It is optional to upload a file.

For each deliverable:

- Provide a short update of progress made during the reporting period.
- Indicate the value of what was achieved during the reporting period. Jems calculates the cumulative value. Please do not report the same deliverable more than once during the project lifetime.
- For any achieved deliverable, please upload supporting documentation.

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Workplan – Activities & Deliverables

Good practice:

- Make it easy for the assessor to follow your progress, and highlight achievements.
- Do not upload the same document more than once in the same report.
- Please remember the publicity requirements and GDPR for all your uploads!

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Expectations for Outputs & Results

- In your application, each output and result has an indicator, a target value, and a delivery period.
- Outputs are generally expected in the second half of the project. Results by the end of the project.
- The Programme Manual (Chapters 6.1 & 6.2) describes how the indicators are counted, and how achievements are expected to be documented.
- Please only report outputs and results when you have met the indicator description fully.

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Workplan – Outputs (1)

In the project report (Work Plan):

- Indicate the indicator value achieved during the reporting period. Please avoid counting the same output more than once during the project lifetime.
- Upload supporting documentation for each achieved output, in line with the documentation requirements.
- Ideally, all documentation is gathered in one document, or in a clearly named and numbered set of documents, in a zip-folder.
- You are welcome to enrich the documentation with visuals, e.g. photographs, screenshots, etc.
- Please remember that the documentation should follow the publicity requirements!

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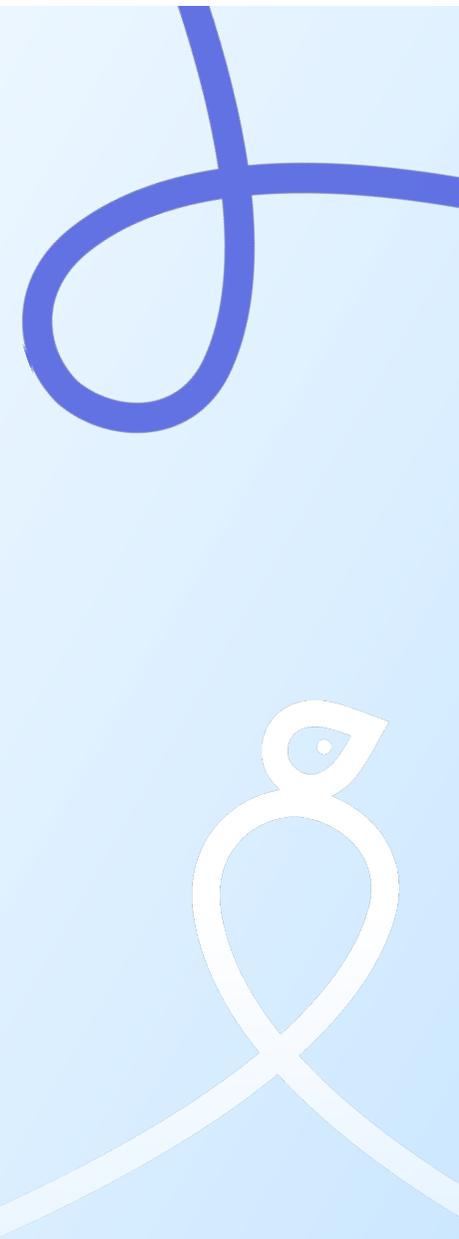


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Workplan – Outputs (2)

Indicator: RCO 116 - Jointly developed solutions	Minimum documentation requirements
<p>The indicator counts the <u>number of jointly developed solutions from joint pilot actions implemented by supported projects</u>. In order to be counted in the indicator, an identified solution should include <u>indications of the actions needed for it to be taken up or to be upscaled</u>.</p> <p>A jointly developed solution implies the involvement of organizations from at least two participating countries (for programmes falling under strands A, B, C as defined in the Interreg Regulation) in the drafting and design process of the solution or is developed in the scope of programmes within strands D or E as defined in the Interreg Regulation.</p>	<ul style="list-style-type: none">• Documentation should clearly address the underlined elements in the indicator definition• Adaptation or new solution• Purpose• Target groups• Stakeholder needs incorporated• Functionality and delivery format



Project Results (1)

- Each result has an indicator, a target value, and a delivery period.
- Programme Manual (Chapter 6.2) describes: how the indicators are counted, and how achievements are expected to be documented.
- Results are normally expected by the end of the project. More guidance on final reporting will follow.
- Already now, you can start collecting information, e.g. listing the organisations/enterprises taking up your solutions, and testimonials/stories about impacts.

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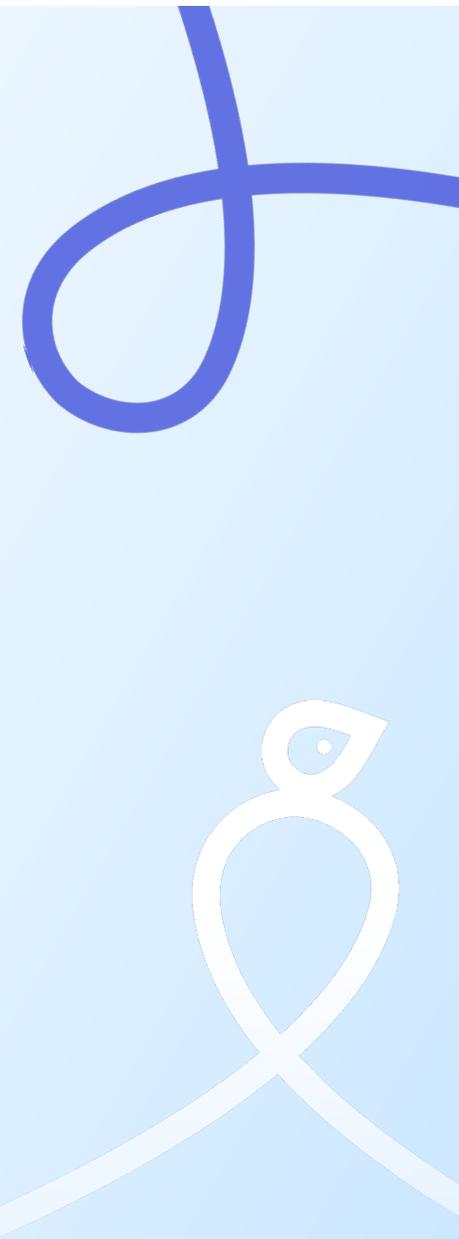


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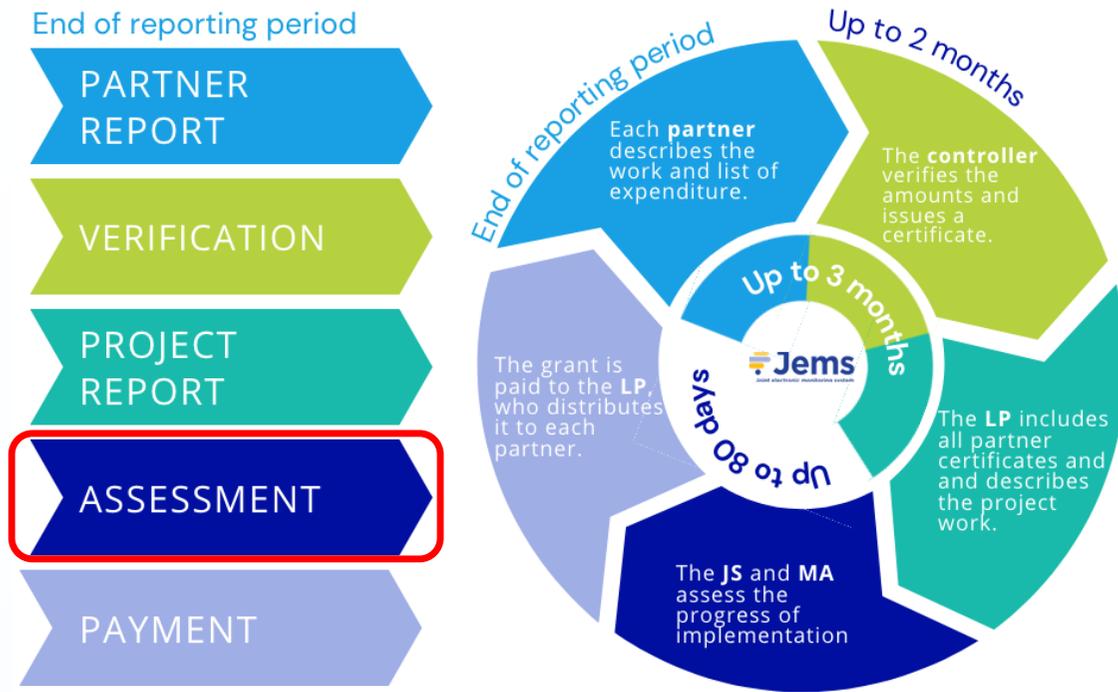
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Project Results (2)

Indicator: RCR 104 - Solutions taken up or up-scaled by organisations	Minimum documentation requirements
<p>The indicator counts the <u>number of solutions</u>, other than legal or administrative solutions, <u>that are developed by supported projects and are taken up or upscaled during the implementation of the project or within one year after project completion</u>. The organisation adopting the solutions developed by the project may or may not be a participant in the project. The <u>uptake / up-scaling should be documented by the adopting organisations</u> in, for instance, strategies, action plans etc.</p>	<ul style="list-style-type: none">• Documentation should clearly address the underlined elements in the indicator definition• Name and unique identifier (e.g. VAT number) of the adopting organisation• End user testimonial and/ or story demonstrating project impact



JS and MA verification



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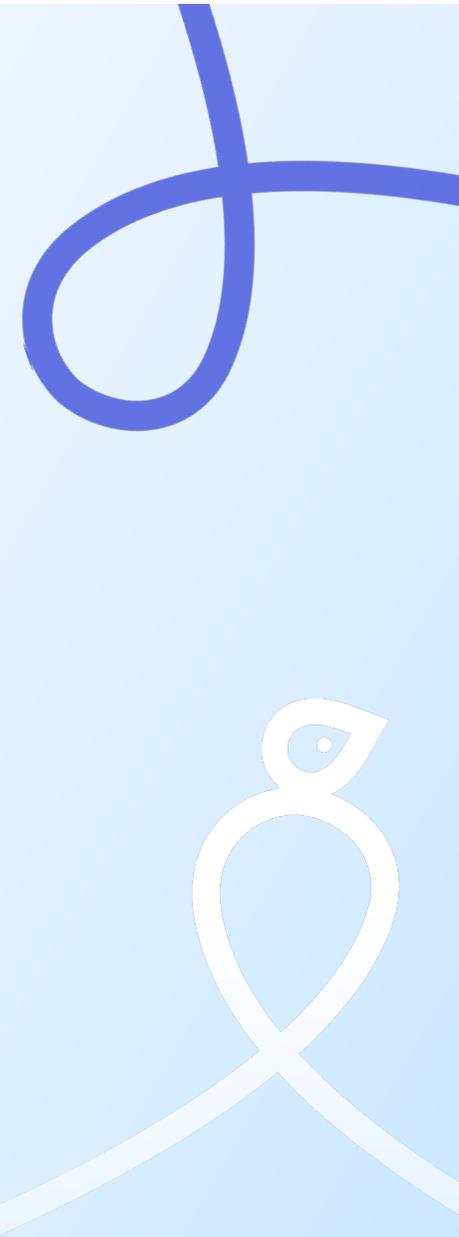
JS and MA verification

JS assessment

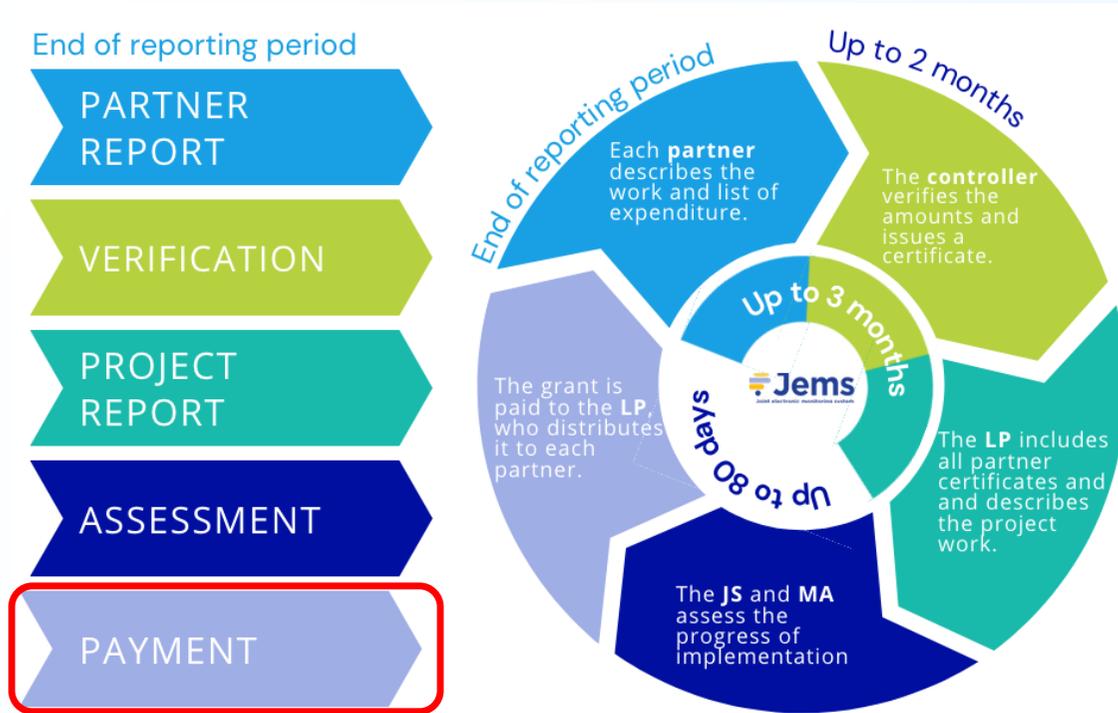
- Completeness (clarifications)
- Coherence with application
- Quantity and quality of outputs and results
- Spending, value-for-money
- Partnership dynamics
- Synergies with other strategies
- Horizontal principles actions
- Changes to the risk level

MA assessment

- Completeness, incl bank details.
- Analysis of certified amounts and controller comments.
- Comparison to partner budget and Grant Letter.
- Check that partners receive the NPA grant from the correct funding source and according to the latest version of the Grant Letter.



Payment



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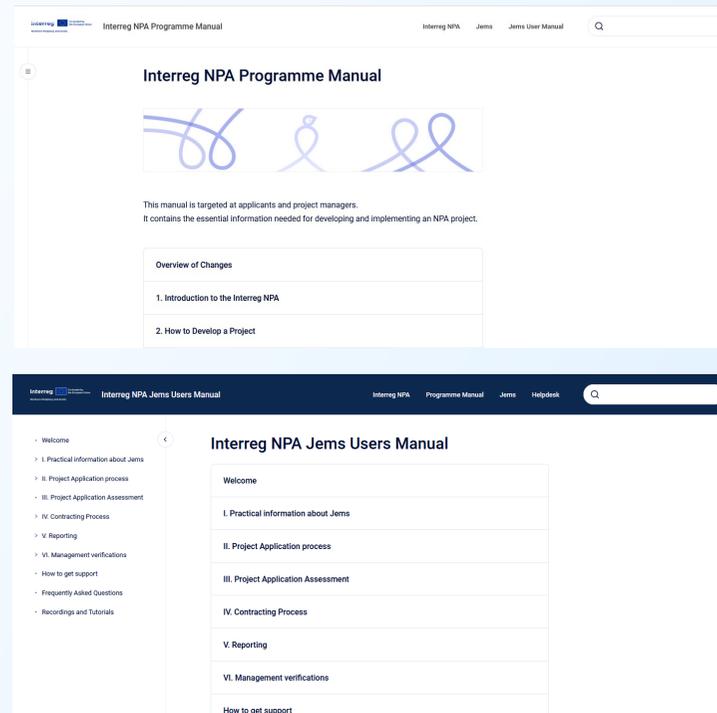
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Payment

- **The Managing Authority issues a Payment order**
This is the formal decision from the Managing Authority that a payment can be made in accordance with the Grant Letter.
- **The Accounting function transfers the payment to the Lead Partner**
The amounts stated in the Payment order are transferred to the Lead Partner's bank account, one transaction for each fund. A notification will be sent to the Lead Partner.
- **The Lead Partner distributes the co-financing to the project partners**
The Lead Partner is then responsible for distributing the received grant to the individual project partners in accordance with the partner budget and partnership agreement.

Where to find guidance

- **Programme Manual:**
All the need-to-know information for each phase of your project
- **Jems User Manual:**
Step-by-step guidance for completing partner information and reports
- **Download Centre:**
 - Offline report templates with guidance, logo files, etc.
 - Frequently Asked Questions
 - Recordings and Tutorials
- **Jems Helpdesk**
- **Basecamp for Lead Partners**



Reporting on Horizontal Principles



Horizontal Principles

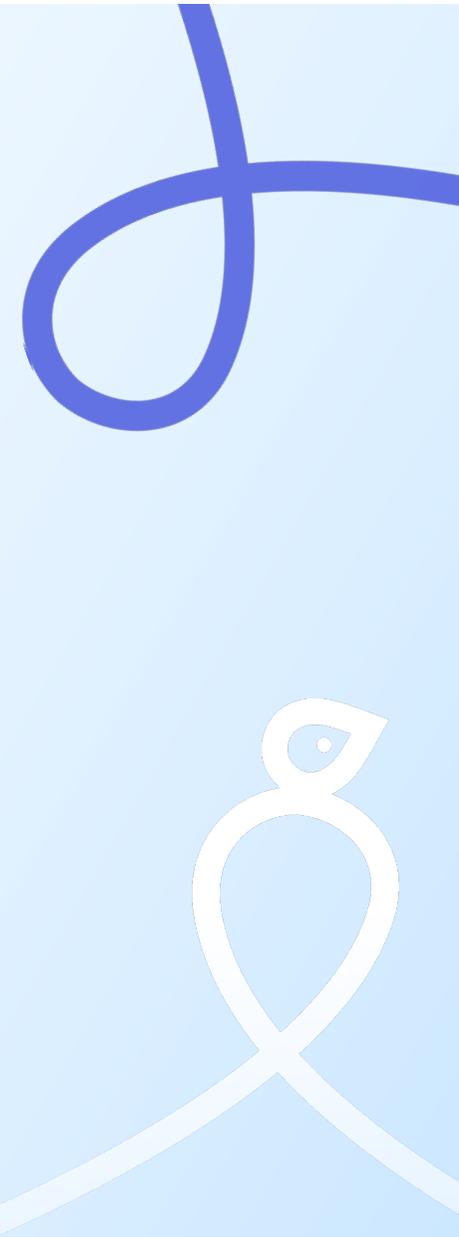
Horizontal principles are based on the proclamation of the Charter of fundamental rights of the European Union, They represent the core values of the EU and these must be incorporated in every project at all stages, from project design and implementation to outputs and project evaluation.

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2 levels of HP reporting

1. Project reports (every 6 months)
2. Partnership specific action plan and monitoring (step1 and step2 documents reporting)

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Kick-off your journey!

- Hold a kick-off meeting
- Discuss HPs at the kick-off meeting
- Move from discussion to action!



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STEP 1

- **Name your organization's best practices**
- 1: All partners, including the Lead Partner, complete a form listing 3 actions, guidelines, or best practices their organization uses to make events, activities, and performance more sustainable, inclusive, and gender-balanced.
- 2: At the kick-off meeting, partners share and discuss their selected practices with the partnership.
- 3: After the meeting, the Lead Partner collects the forms and uploads them to JEMS as part of the 1st period project report.

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Step 1

Name your organization's best HP practices!

In this form, the partners describe their organization's best practices towards sustainability, inclusion, and gender balance. The form is shared with the LP ahead of the kick-off meeting. At the meeting, the partners are asked to further describe their practices to the rest of the partnership. The LP uploads the forms in JEMS as part of the project's 1st period report.

For your inspiration, the JS team prepared [a set of guidelines and a checklist](#) to share with the projects what steps they can take on their way towards greener, more inclusive and gender balanced NPA.

Project name:

Partner organization:

Can you think of any actions, guidelines, or good practices that your organisation has implemented to make its events, activities, and performance more sustainable?

- 1.
- 2.
- 3.

Can you think of any actions, guidelines, or good practices that your organisation has implemented to have a higher and more inclusive reach of its events and activities?

- 1.
- 2.
- 3.

Can you think of any actions, guidelines, or good practices that your organisation has implemented to strive for gender balance in its leadership, activities, and events?

- 1.



STEP 1 – Examples from partners

Proactively engaging with youth, indigenous people, and other underrepresented groups

Using simple language

Equal gender-representation among conference speakers or presenters

Encouraging the use of regional trains instead of connecting flights

Less (or reusable) promotional materials

Offer local food at event catering

Videos with subtitles

Energy-efficient systems in buildings to reduce carbon footprint

Calculate the carbon footprint of your events!

Explore your organisation's sustainability policy/guidance



STEP 2

Following your best practices

- Adopting & Reporting Best Practices
- The partnership selects three best practices for each horizontal principle (9 total) and documents them in the Step 2 form. These practices can be:
 - Tailored to the project's needs
 - New ideas
 - Adopted from partner organizations (step1 meeting)
 - In Step 2, list specific actors and organizations you plan to share success stories with—this is part of your dissemination plan.
- Once completed, the Lead Partner uploads the form to the Shared folder in JEMS.
- The Lead Partner updates progress on horizontal principles after the 1st, 3rd, and 6th reporting periods.

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Towards a greener NPA!

Which 3 practices have you decided to implement into your project and/or partnership?	1. 2. 3.
Who should hear about your success?	
How are you going to tell them?	
How would you summarize your project's progress towards these 3 (or other) practices after the 1st period?	
How would you summarize your project's progress towards these 3 (or other) practices after the 3rd period?	
How would you summarize your project's overall contribution towards a greener NPA?	

STEP 2

Follow your best practices



- C.6 Project Time Plan
 - C.7 Project management
 - C.8 Long-term plans
 - D - Project budget ^
 - D.1 Project budget per fund
 - D.2 Overview partner / cost category
 - E - Project lump sums and unit costs ^
 - E.1 - Project lump sums
 - Application annexes
 - Assessment & Decision
 - Modification
 - Shared folder**
 - Export
 - Project privileges
-  **Jems**
A harmonised tool by Interact

Dashboard / Applications / NPA0100011 – RoboDemo / Shared folder

Application form NPA0100011 – RoboDemo

Shared folder

Shared folder

In this section programme and applicants can request or clarify anything related to the project by sharing documents with descriptions. Only programme users can delete files from this section.

Attachments

File name	Location	Upload date ↓	User	File size	Description	Actions
Payment order, Ro...	Shared folder	07.03.2024 14.58	marie.gruffman@lan:	843,7 kB		 

Items per page: 25 1 - 1 of 1 < >

 Upload file



Horizontal Principles

STEP 1 Name HP practices filled in
STEP 2 document drafted

STEP 2 document updated
(in Shared folder)

Kick-off meeting

1st period report

3rd period report

6th period report

STEP 1 documents submitted in Final
report attachments

STEP 2 document submitted and updated
in Shared folder

STEP 2 document finalized
(in Shared folder)

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Find STEP 1 & STEP 2 documents [here](#)

Be as concrete as possible!

Remember: The development and activities related to Horizontal Principles must also be included in the standard project report in JEMS for all reporting periods.

Horizontal principles

Please indicate which type of contribution to horizontal principles applies to the project and justify your choice.

Cooperation criteria	Type of contribution	Description of contribution
Sustainable development	<input checked="" type="radio"/> positive effects <input type="radio"/> neutral <input type="radio"/> negative effects	<input type="text" value="Enter text here"/>
Equal opportunities and non-discrimination	<input checked="" type="radio"/> positive effects <input type="radio"/> neutral <input type="radio"/> negative effects	<input type="text" value="Enter text here"/>
Equality between men and women	<input checked="" type="radio"/> positive effects <input type="radio"/> neutral <input type="radio"/> negative effects	<input type="text" value="Enter text here"/>

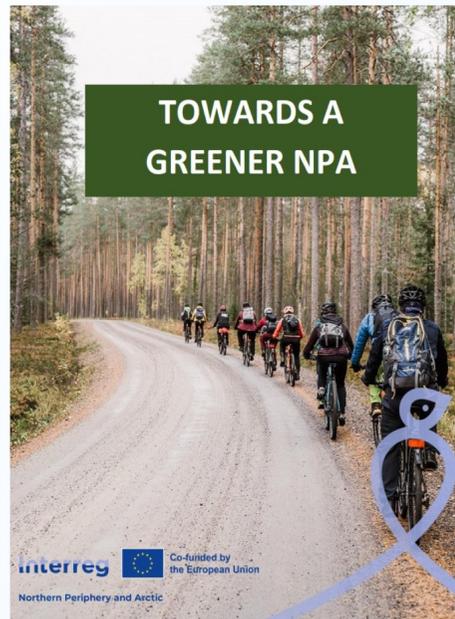
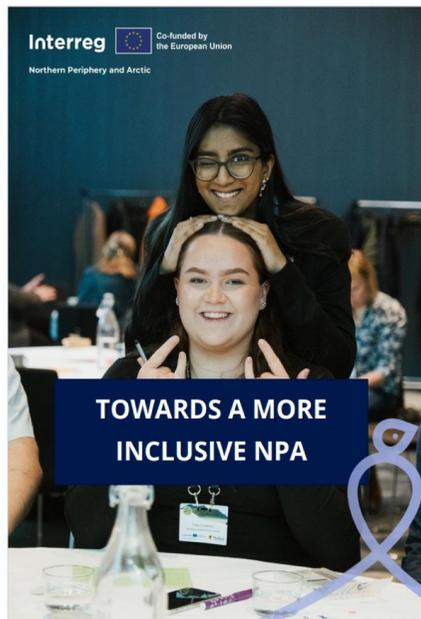
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Sharing is inspiring!



Horizontal Principles

What to keep in mind:

- Be as concrete as possible
- Check the guidelines and checklist (link [here](#))
- Stay in touch with your desk officer and share with us your achievements on the road towards sustainable, inclusive, and gender balanced NPA

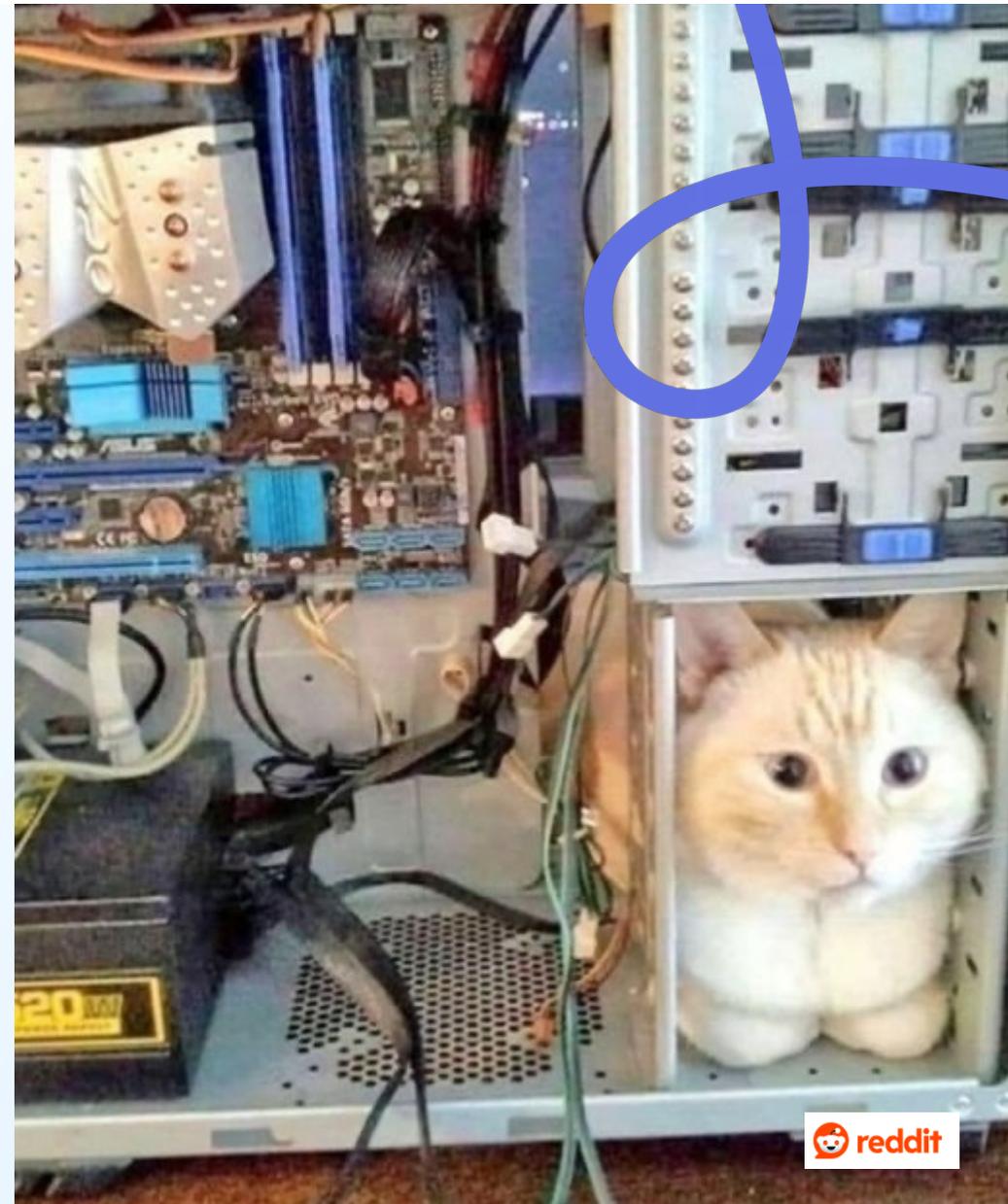
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Getting started in Jems



Contracts and agreements

- **Website:**
please insert link once available
- **Partnership Agreement:**
Please list entry into force date
- **Attachments Contracts:**
Grant Letter uploaded by MA
- **Attachments Projects:**
Please upload Partnership Agreement

Dashboard / Applications / NPA0300100 – Test project 16th Nov / **Contracts and agreements**

Contracting

Contracts and agreements

This section is dedicated to the formal uploading of signed contracts and partnership agreements.

Project start date (DD/MM/YYYY) Not defined yet	Project end date, calculated automatically (DD/MM/YYYY) Not defined yet
--	--

Website

Subsidy Contract	Partnership Agreement
Date entry in force (DD/MM/YYYY) Not defined yet	Date entry in force (DD/MM/YYYY) 

Attachments ⁱ

Contract & supporting documents

Contracts

Project

There are no files uploaded.

 Upload file

Project Managers

- Complete contact information for:
 - **Project manager**
 - **Financial manager**
 - **Communication manager**

Project managers
Please add contact information for the people who manage the project.

Project manager

He/She/They

First name

Last name

E-mail address

Telephone no.

Finance manager

He/She/They

First name

Last name

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Partner details

- **Ultimate Beneficial Owner:**
Add if requested by programme
- **Bank details of Lead Partner:**
Please insert details. JS locks.
- **Location of documents:**
Please list where they are kept.
- Repeat for **all** partners.

Bank details of lead partner

Account details

Holder of the account

Account number

IBAN

Swift/BIC code

Internal reference nr.

Bank details

Name of the bank

Street



Project Privileges

- **Application form users/ Project Managers:**
Users can create/edit project reports, see contracting, and optionally manage privileges for all other project users.

Please add on a **need-to-know basis!**
We recommend at least 2 users.

- **Project partner teams:**
Users can create/edit partner reports.

Please decide who can view **GDPR sensitive information!**

Lead Partner should add themselves to each partner organisation to see partner reports.

Application Form users / Project managers ⓘ

* jems username admin@jems.eu	<input type="button" value="view"/> <input type="button" value="edit"/> <input type="button" value="manage"/>
* jems username KM_Admin@jems.eu	<input type="button" value="view"/> <input type="button" value="edit"/> <input type="button" value="manage"/>

+

LP1 LP1 ? No control institution assigned

* jems username project@jems.eu	<input type="button" value="view"/> <input type="button" value="edit"/>	<input checked="" type="checkbox"/> Sensitive data
* jems username jems@interreg-npa.eu	<input type="button" value="view"/> <input type="button" value="edit"/>	<input type="checkbox"/> Sensitive data
* jems username KM_Admin@jems.eu	<input type="button" value="view"/> <input type="button" value="edit"/>	<input checked="" type="checkbox"/> Sensitive data

+

When a partner registers

- Use the Interreg NPA Jems webpage
jems.interreg-npa.eu
- Turn on notifications
- Manuals and Helpdesk at a fingertip

