Project progress report guidelines

DRP Calls for Proposals

April 2024, v1

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List of abbreviations

AF   Application Form

AfR   Application for Reimbursement

Jems   Joint Electronic Monitoring System

LP   Lead Partner

MA/JS   Managing Authority / Joint Secretariat

PP   Project Partner

PPR   Project Progress Report

PR   Partner Report

SC   Subsidy Contract

SO   Specific Objective

Introduction

This document provides an overview on the content of the Project Progress Report (PPR) and the information to be provided by the LP in each section of the PPR.

Reporting is one of the tools used by the Programme to regularly monitor the progress of the projects implementation both financially (spending, budget reallocations) and content-wise (progress of activities, delivery of outputs and results, subsequent contribution to the achievement of Programme output indicators and objectives).

Reporting also represents the basis for the reimbursement of the EU contribution (INTERREG funds) associated with incurred project expenditures.

Based on the contractual obligation, the LP has to submit a half-yearly PPR. The reporting periods are regulated in the Subsidy Contract (SC). The Application for Reimbursement (AfR) is an integral part of the PPR.

The PPR and AfR have to be submitted by the LP to the MA/JS within 3 months from the end date of each reporting period. The PPR is compiled by the LP based on the information provided by the project partners (PPs) in the Partner Report [1](PR). The PPR must contain a detailed description of the activities implemented as well as the expenditures in relation to a given reporting period.

In the content-related sections of the PPR, the LP has to provide a comprehensive account of the general progress of project activities and related status of deliverables and outputs. Implemented activities have to be in line with the ones described and approved in the AF and have to provide proper justification for the reported expenditure.

In the financial sections, the LP will include all expenditures verified by the Controllers at national level in relation to the reported activities of the project, which are incurred and paid by the LP and the PPs during the respective reporting period.

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[1] [1] In order to ensure acces for the LP to the PRs of the PPs, in the „project priviledges" section in Jems the LP user shall be added with „view" right to each PP.

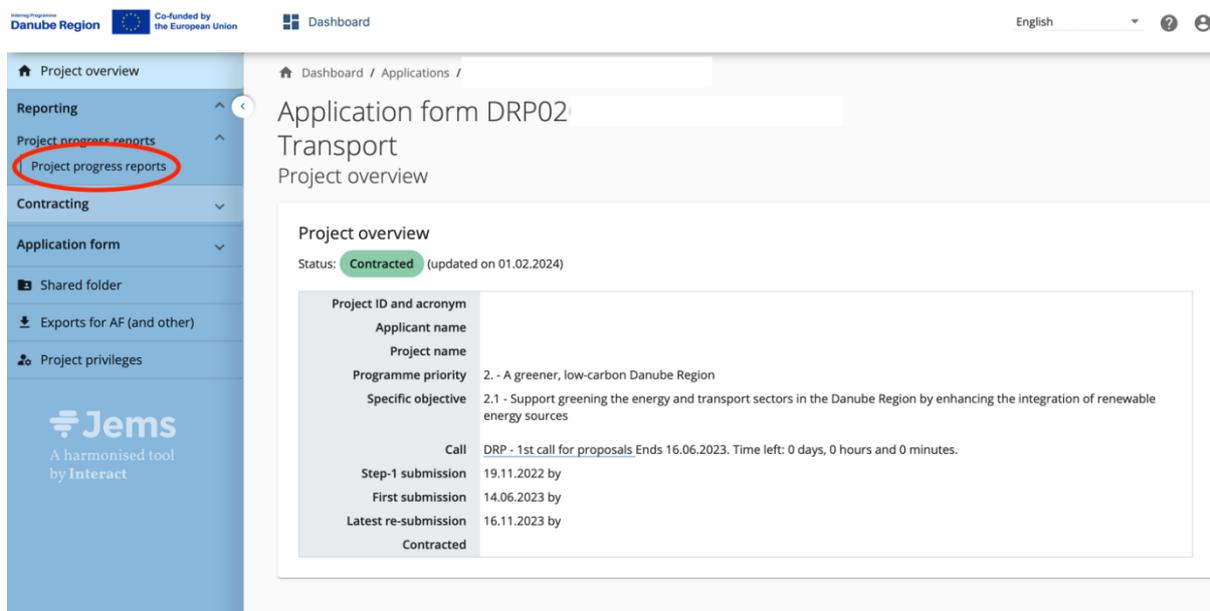# 1. PART 1 TECHNICAL GUIDELINES

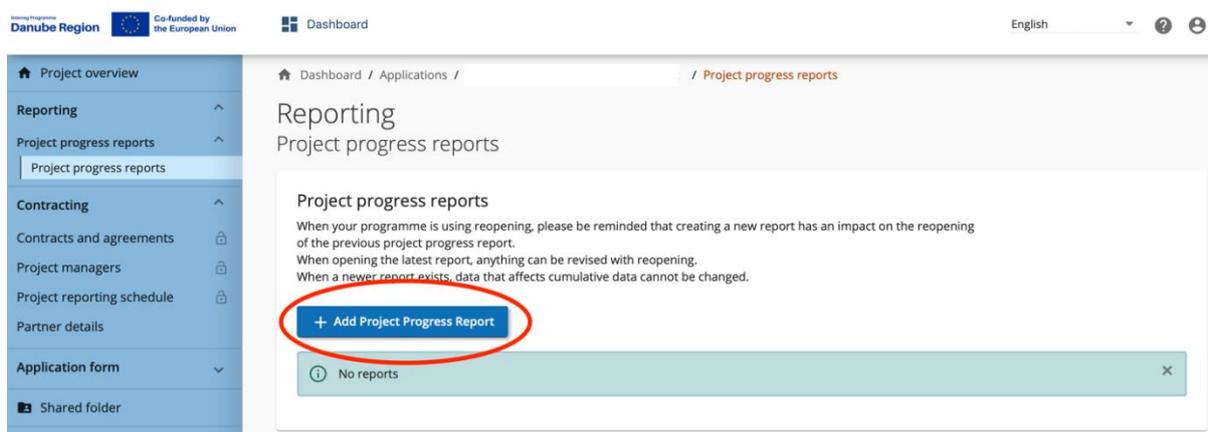## 1.1. Accessing and opening a PPR

Once a project is set to the status "contracted" in Jems, all steps in relation to the reporting can be performed by the LP.

When entering a project, the section "Project progress reports" can be found in the upper left menu.

Picture 1   Project overview

For creating a PPR the button "Add Project Report" shall be clicked.

Picture 2   Adding a report

The reporting period shall be selected under (1) "Link to the reporting schedule". The fields (2) "reporting period starting date" and (3) "reporting period ending date" have to be filled in manually, ensuring that the inserted dates are fully in line with the ones defined in the Subsidy Contract the project. Further fields are auto-generated.

The "create"-button shall be clicked for creating and opening the PPR.
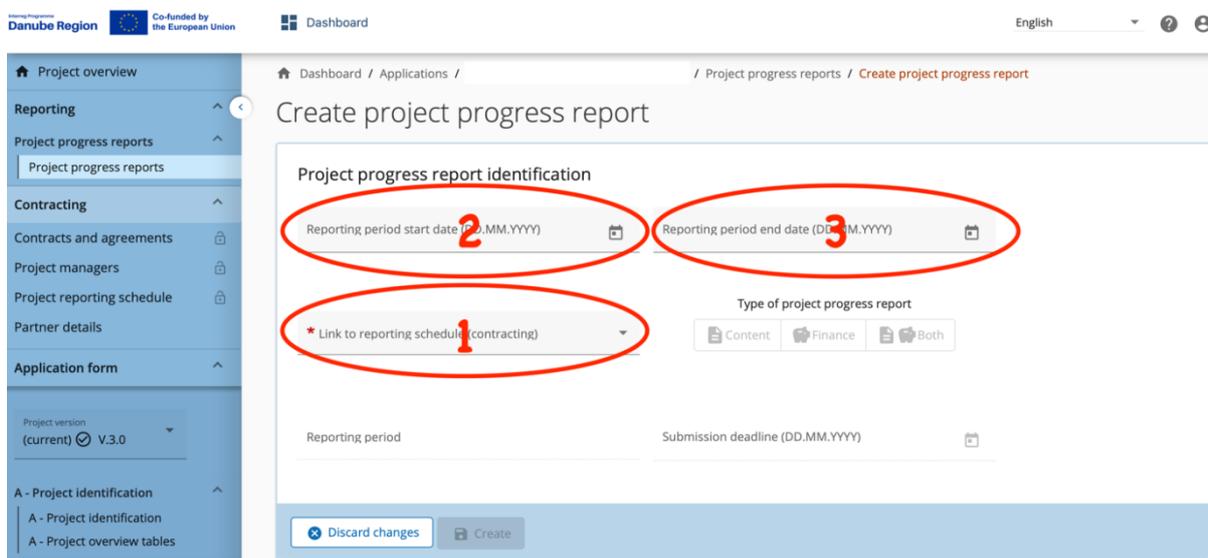
Picture 3   Creating a report

Multiple PPRs can be created at any time. There are no restrictions for the number of reports created. Any report (if in draft) can be deleted from the overview (most likely only used in the case of a misclick). When reports are created they can be accessed via the overview table.

Important to note is that the data from the last approved AF version is taken into the PPR in the moment of its creation. Ongoing modifications will have no impact on the data in existing reports.

1.2. Editing the PPR

The different sections of the PPR are completed either by inserting text, figures, selecting options from drop-down menus and uploading supporting material.

Please always remember to press "Save Changes" before leaving a section!

Guidance on how to edit each section are provided in Part 2 of this guidelines.

1.3. Certificates

Partner certificates are issued by controllers, who verify of the expenditures reported by PPs in Partner Reports. Partner certificates are electronic, and are used by LPs to consolidate and to compile PPRs.

1.4. Application for Reimbursements

The Application for Reimbursement is the official document used by LPs to claim the reimbursement of Interreg funds from DRP MA/JS. Application for Reimbursements are partially automated, meaning that it is generated through JEMS but needs to be signed (manually or by electronic signature) by the official representative of the LP. Signed AfRs needs to be uploaded in the Report Annexes section of the PPR.

1.5. Attachments

Supporting material can be attached to the PPR either under "Deliverables", Outputs" and "Results" by clicking on the respective symbol.
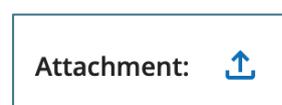
Attachment: ⬆

The attachments uploaded in these sections shall specifically relate to certain deliverables, outputs or results (e.g. evidence for a specific deliverable, output or result, output factsheets or quality reports).

It has to be noted, that just 1 file can be uploaded here. If an output consists of more than 1 file, a "zipped" file-format has to be used.

More general material (e.g. press releases, information on additional/unforeseen measures or similar) as well as the AfR can be uploaded under the tab "Project progress report annexes". The number of file uploads is not restricted in this section.
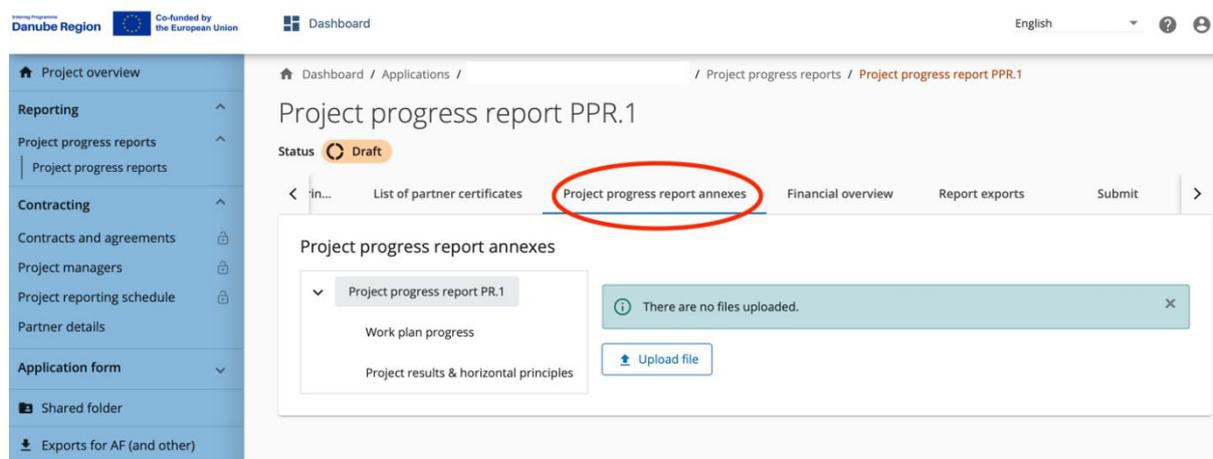
Picture 4   Uploading annexes

1.6. Submit

The section "Submit" of the PPR is used for a last "pre-submission check" and for the final submission of the PPR.

The "Run pre-submission check"-button shall be clicked.
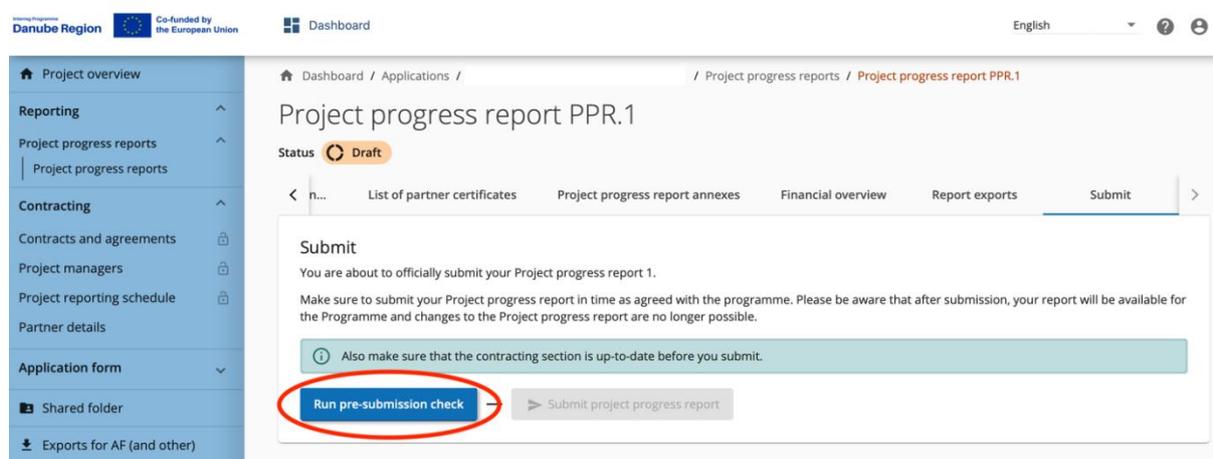
Picture 5   Run pre-submission check

LPs are advised to go through all sections of the PPR and to double check if all sections of the PPR are correctly completed. "Submit project progress report"-button shall be clicked to finalise the reporting procedure.
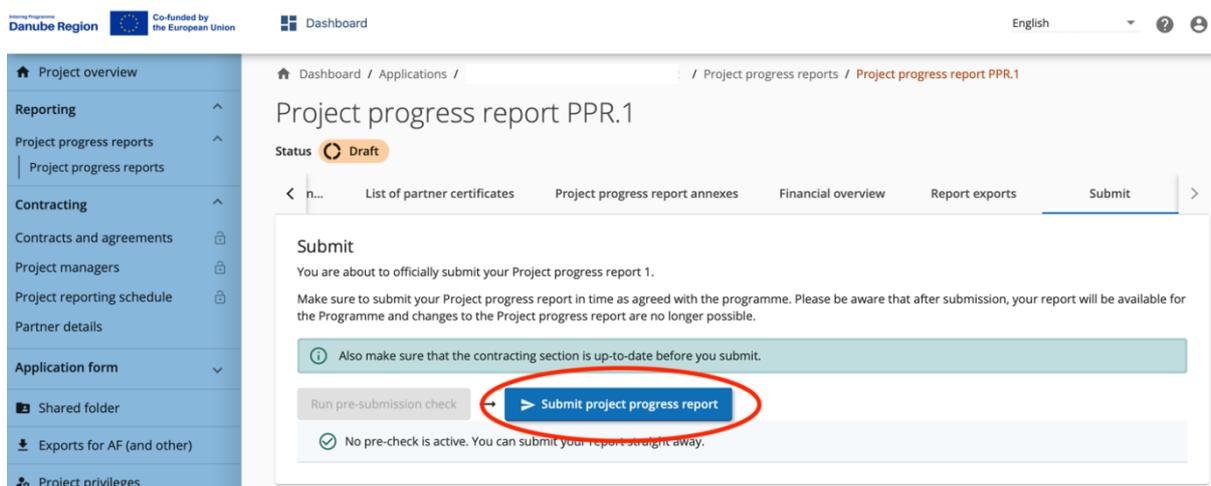
Picture 6   Submitting the PPR

After a successful submission, the PPR cannot be modified any longer and the MA/JS verification can be started.

Once submitted, the status of the report changes, which is shown in the project reports section:
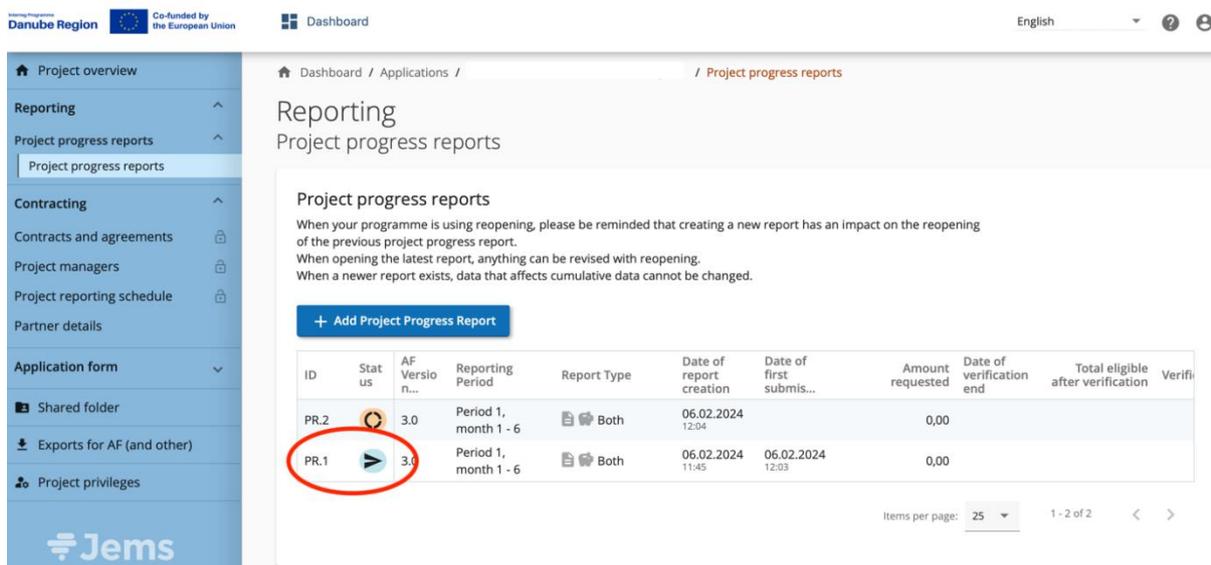
Picture 7   Status change after submission of the PPR

1.7. Statuses of PPRs

The Status of the PPR reflects different stages of processing for the PPR.

Upon creating a PPR and while editing PPR its status is Draft. PPRs completed and submitted to MA/JS are in status Submitted, and while MA/JS proceeds with the content check, the status of the PPR is Verification ongoing. PPRs checked and approved by MA/JS have status Verified.

In case the PPR does not meet all conditions to be accepted and approved, the PPR is re-opened, meaning it is returned to the LP for adaptation and changes. In case the LP expressed consent, an automatic notification is sent by email to the LP informing about the re-opened PPR but the actual reason for re-opening is sent with a different message by the project officer. After the PPR is successfully updated it needs to be re-submitted.

1.8. Automatic notifications to LP and change of password

JEMS sends automatic notification to LPs in case a PPR needs completions (the PPR is re-opened) or in case the PPR is accepted and approved by MA/JS. Pre-requisite for receiving automatic notifications by email is the expressed consent of the LP.

To express consent click on the user icon in the upper right corner (1) of the screen. In the drop-down menu click on the user name then tick the check-box regarding on Notifications (2).
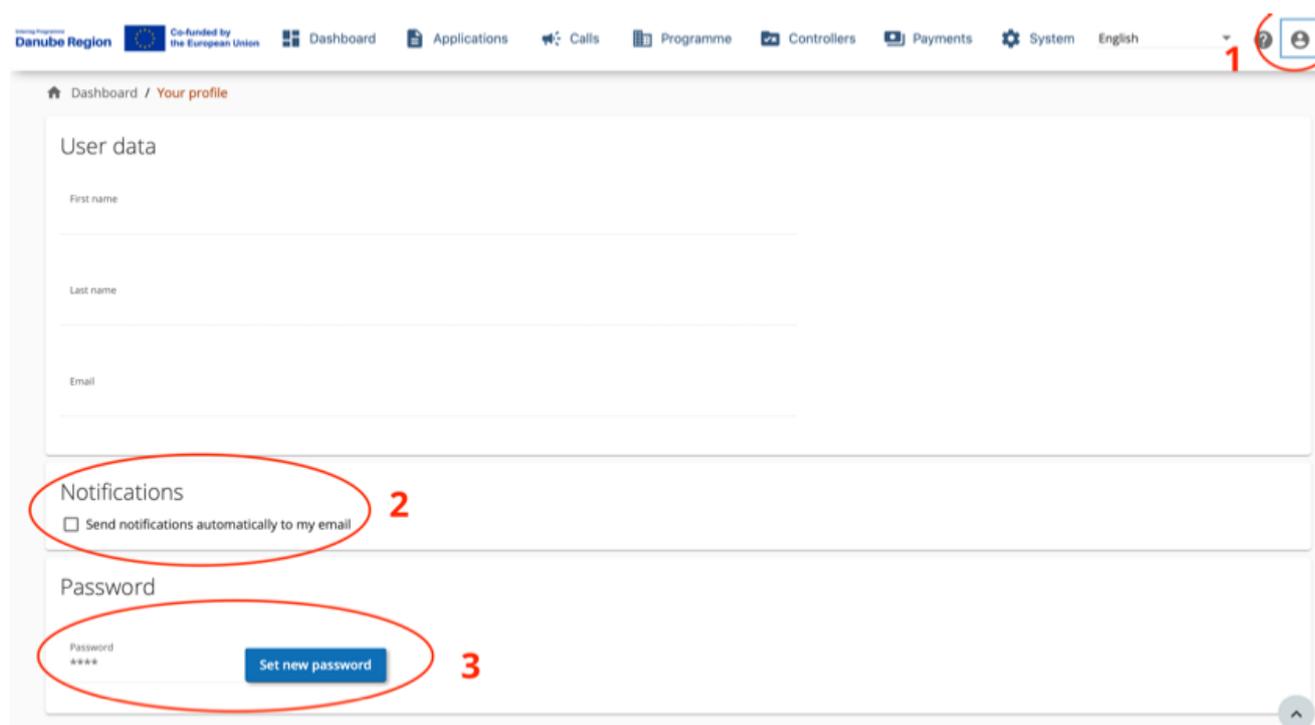
Picture 8   User data

On the same page you also may change your password (3).

# 2. PART 2 CONTENT OF THE PPR

2.1. Project Report Identification

This section is used for general information on the overall progress of the project, especially "Highlights of main achievements", "Partner problems and deviations" as well as "Target Groups" and their involvement. The LP is asked to provide a concise and authentic snapshot of the project progress, avoiding as far as possible mere duplications of details described in the further section of the PPR.

In addition this section serves to visualize accumulated features of the PPR. These self-generated parts – like an overview table of the outputs and results– do not require any action from user-side.

2.2. Work Plan Progress

This section is used for specific descriptions of the progress and status on activities under each "Specific objective", each "Specific project objective" and each "Communication objective", as well as report on the progress and completion of "Deliverables", "Outputs" and the planned investments.

At the top of each SO form, there is a tickbox to confirm whether "This specific objective is completed.", which has to be marked only when all related activities, deliverables and outputs have been finalised and submitted to MA/JS via Jems, including Output factsheet and Output quality report.
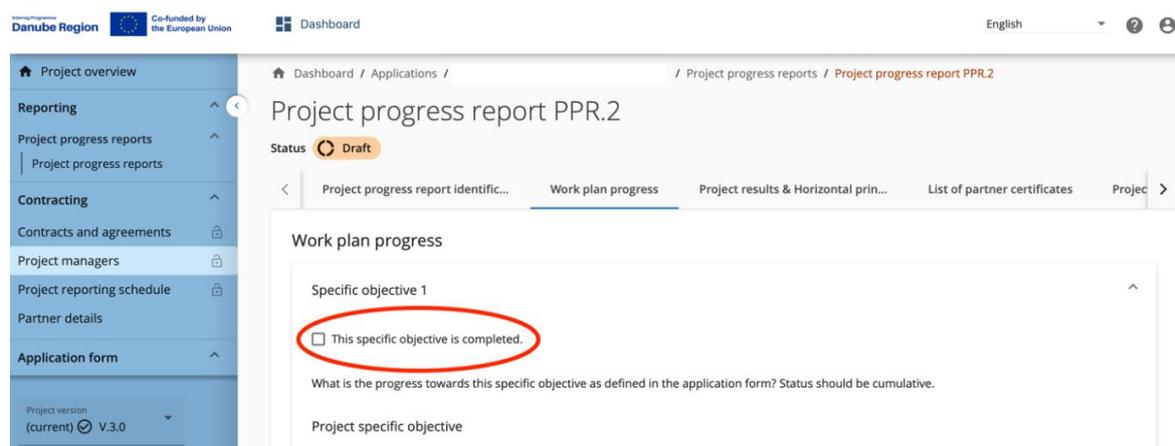
Picture 9   Work plan progress

For both the project specific objective and the connected communication objective the LP should select the status of achievement between "Fully achieved", "Partly achieved" or "Not achieved" and summarise the progress made within the reporting period. When the first PPR is created, the Status

fields of the Project specific objective, the Communication objective or the Activities are empty. If a prior submitted PPR exists, the Status fields and related text fields of a newly created report are pre-filled with the Status selected for the respective objective or activity in the latest submitted PPR.
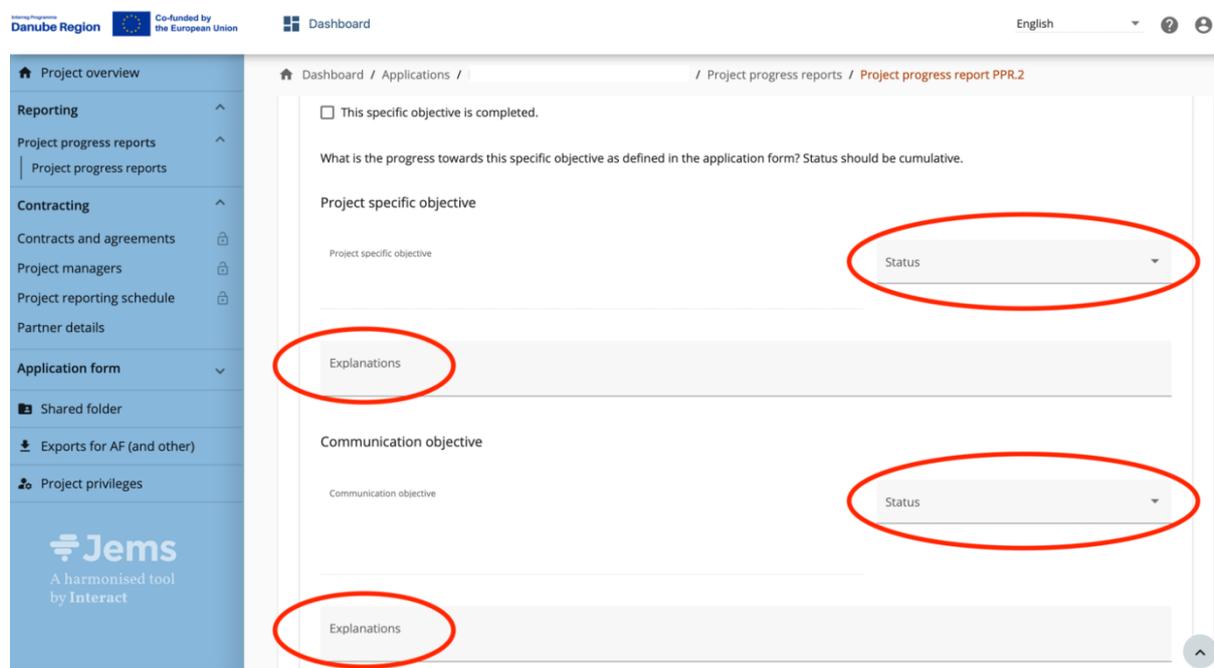
Picture 10   Progress in Sos and Communication objectives

In case the project planned investments the LP should continue by describing the progress in the reporting period.

For each activity, deliverable and output, there is a separate section with text fields to describe the progress in the reporting period. Similar as for objectives, for each activity there is a drop down menu to define the Status of implementation. The description of the activities should be concrete and precise highlighting who did what, where and how. The LP should avoid generic description such as description of content of outputs and deliverables.
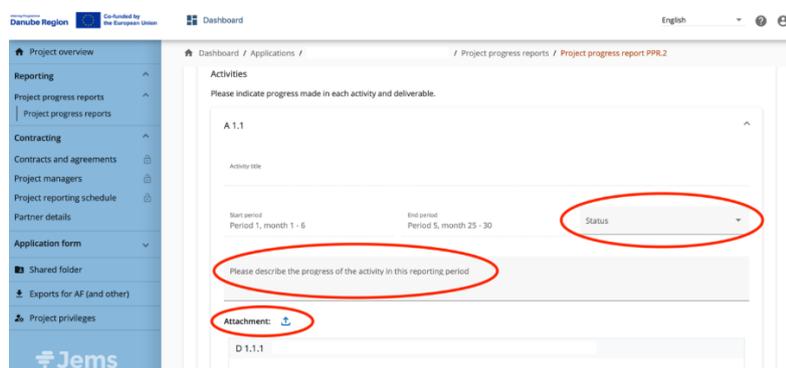
Picture 11   Progress on activities

For Deliverables, the LP should indicate the values achieved in the reporting period and provide a brief explanation on the actual progress. The evidence to support the reported finalised deliverables shall be uploaded by clicking on the Attachment button.

It has to be noted, that just 1 file can be uploaded here. If an upload consists of more than 1 file, a "zipped" file-format has to be used.
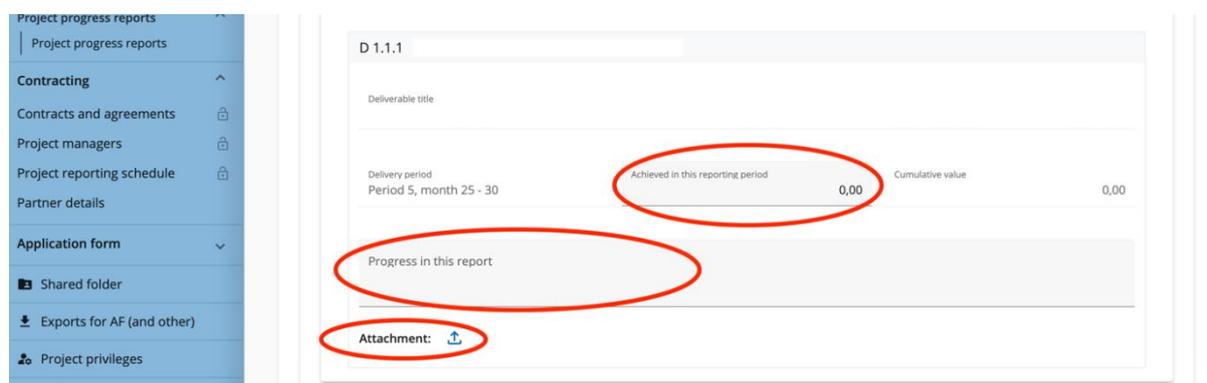

Picture 12   Progress on deliverables

The reporting of the outputs is to be included for each output belonging to the SO. The LP shall indicate the values achieved in the reporting period as well as provide a brief explanation on the actual progress made in reaching the project targets. The LP should upload the evidence to support the outputs reported as finalised in the respective period by clicking on the "Attachment"-button. The Output factsheet and the Output quality report documents are mandatory for each finalised output. Without them the MA/ JS will not reimburse the costs connected.

It has to be noted, that just 1 file can be uploaded here. If an upload consists of more than 1 file, a "zipped" file-format has to be used.
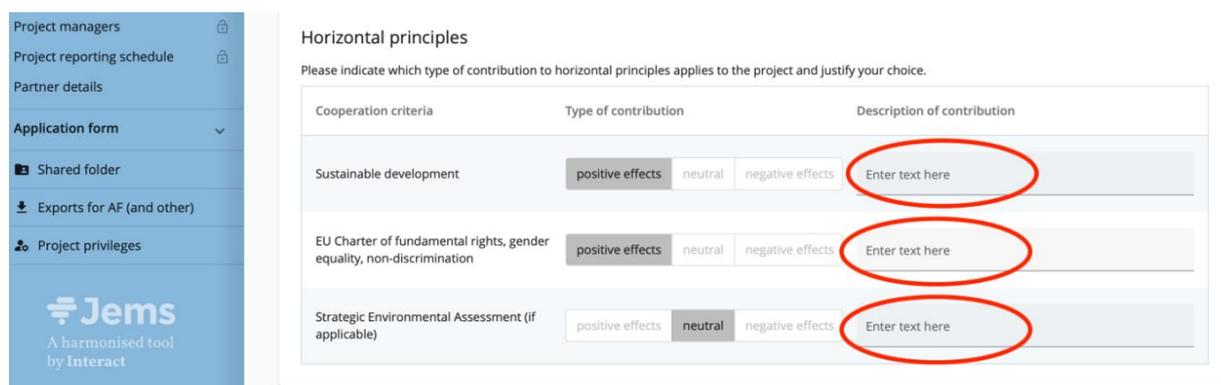
2.3. Project Results & Horizontal Principles

Similar to the outputs section, the reporting of the results is necessary to be included for each result of a specific objective. The LP shall indicate the values achieved in the reporting period as well as provide a brief explanation on the actual progress made in reaching the targeted project results. The LP has to upload the documents to support the result reported by clicking on the "Attachment"-button. In case a result is to be achieved after the project implementation period, the LP has to provide a detailed description about concrete measures that will lead to the achievement of the results.
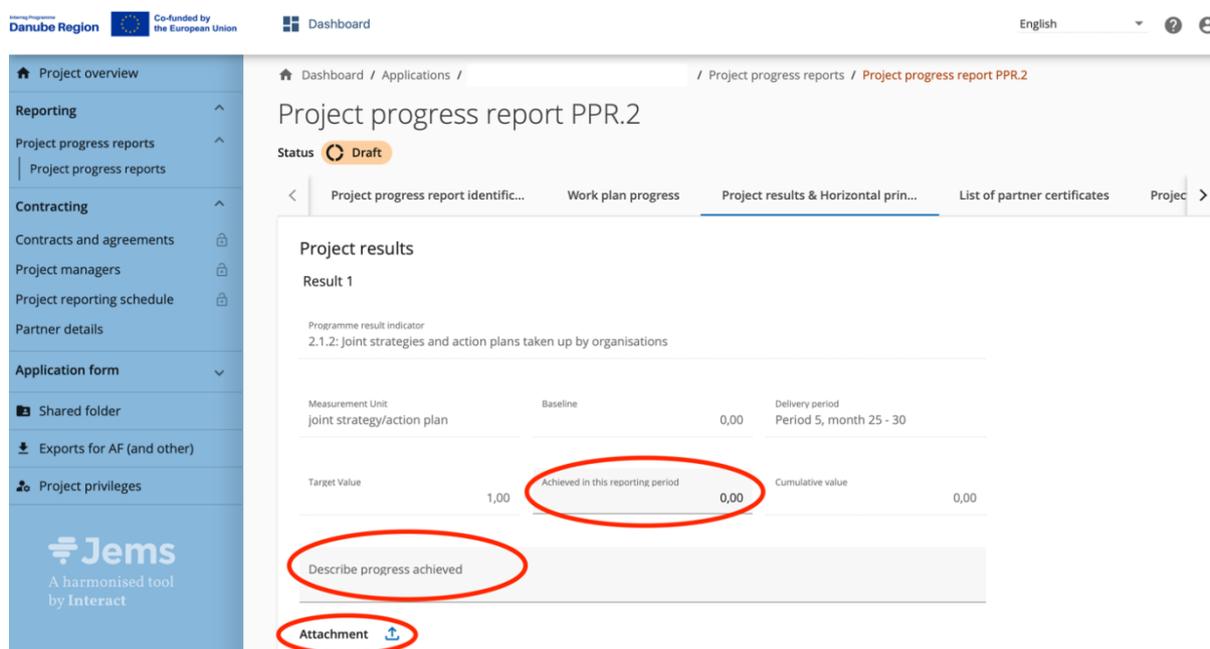
Picture 13   Progress on results

As for the "Horizontal principles" the LP shall provide a concrete description on how these are observed by the project with references on how they are integrated in the work plan of the project.

If relevant for the project, the "Horizontal principles" / "Strategic Environmental Assessment" section has to be used for the description of the connection of a project output, deliverable, or investment to a SEA procedure or to a relevant EIA carried out by the relevant PP(s).

Picture 14   Progress on horizontal principles

2.4. List of Partner Certificates

Available partner certificates are listed in this section. The checkbox of the partner certificate shall be selected to be include their certificate in the PPR. All partner certificates are recommended to be included in the PPR, unless duly reasons suggest otherwise.

In case a reporting period has been configured only for content reporting, the sections "List of partner certificates" and "Financial overview" are not visible.

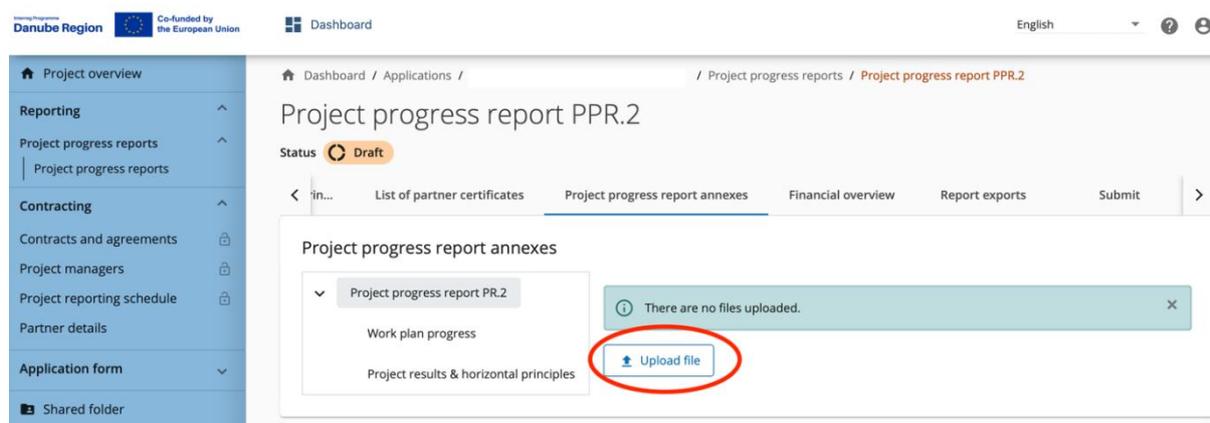## 2.5.   Project Progress Report Annexes

In this section the LP should upload documents that are relevant for the report but not connected to the evidence of the outputs/ deliverables/ results which are to be attached in the dedicated sections described above. The AfR has to be uploaded in this section as well as evidence for project achievements not planned in the AF, additional justifications, etc.

The tree structure represents the places within that report where files can be uploaded. All uploads from all sections are shown in this list.

Files uploaded in this section can be deleted here, other files can only be deleted in the section where they were uploaded.

IMPORTANT: The Application for Reimbursements and bank statements has to be uploaded in this section.

Bank statements representing proof of payments on previously reimbursed Interreg funds do also needs to be uploaded for having a complete PPR.

Picture 15   Upload of annexes

2.6. Financial Overview

This section is auto-generated and provides an overview on the financial progress of the project. It reflects expenditures included in the current report, amounts previously reported and also the remaining budget of the project.

In case a reporting period has been configured only for Content reporting than sections List of Partner Certificates and Financial Overview are not visible.

2.7. Report Exports

Report Export is the section to generate the AfR. Select the plugin for generating the AfR. The generated document needs to be printed and needs to be signed by the official representative of the LP. Please note that both pages of the AfR needs to be signed. Signature can be manual or it can be electronic signature as it is reflected in the document Annex A2 Proof of signature. Upload the signed AfR in the Project Progress Report Annexes section of the PPR.