

**Interreg
Danube Region**



**Co-funded by
the European Union**

SMF project progress report guidelines



DRP SMF Call

October 2024, v1



Table of contents

Table of contents	2
List of Illustrations	2
List of abbreviations	3
Introduction.....	4
1. PART 1 TECHNICAL GUIDELINES	5
1.1. ACCESSING AND OPENING A PPR.....	5
1.2. EDITING THE PPR	7
1.3. CERTIFICATES	7
1.4. APPLICATION FOR REIMBURSEMENT	7
1.5. ATTACHMENTS	7
1.6. SUBMIT	8
1.7. STATUSES OF PPRS	9
1.8. AUTOMATIC NOTIFICATIONS TO LP AND CHANGE OF PASSWORD	10
2. PART 2 CONTENT OF THE PPR.....	11
2.1. PROJECT REPORT IDENTIFICATION	11
2.2. WORK PLAN PROGRESS	11
2.3. HORIZONTAL PRINCIPLES	13
2.4. LIST OF PARTNER CERTIFICATES	14
2.5. PROJECT PROGRESS REPORT ANNEXES	14
2.6. FINANCIAL OVERVIEW	15
2.7. REPORT EXPORTS.....	15

List of Illustrations

Picture 1	Project overview.....	5
Picture 2	Adding a report	6
Picture 3	Creating a report.....	6
Picture 4	Uploading annexes	8
Picture 5	Run pre-submission check.....	8
Picture 6	Submitting the PPR.....	9
Picture 7	Status change after submission of the PPR	9
Picture 8	User data.....	10
Picture 9	Work plan progress	11
Picture 10	Progress in Sos and Communication objectives	12



Picture 11	Progress on activities	12
Picture 12	Progress on deliverables	13
Picture 14	Progress on horizontal principles.....	13
Picture 15	Upload of annexes.....	14

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 is binding only on SMF call projects and it 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).

In order to understand if the seed money project progresses according to the work plan, in the middle of the implementation period (e.g. 6 month), the **LP** has to submit in Jems to the MAJS PO a summary of the project implementation (Annex 3 of the SMF-Manual) highlighting the progress in developing the mandatory outputs, potential delays and plans for recovery (template provided by the MAJS). All PPs support the LP in the creation of this summary. The filled in Annex 3 has to be uploaded to the "Shared folder" in Jems.

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 only one PPR in the SMF call. The reporting period is regulated in the Subsidy Contract (SC). The Application for Reimbursement (AfR) is an integral part of the PPR. *In case the partnership finalises the activities and the 3 mandatory outputs earlier than 12 months they can ask for expenditure verification earlier and consequently submit the PPR earlier to MAJS.*

The PPR and AfR have to be submitted by the LP to the MAJS within 3 months from the end date of the project. The PPR is compiled by the LP based on the information provided by the project partners (PPs) in Partner Reports 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.

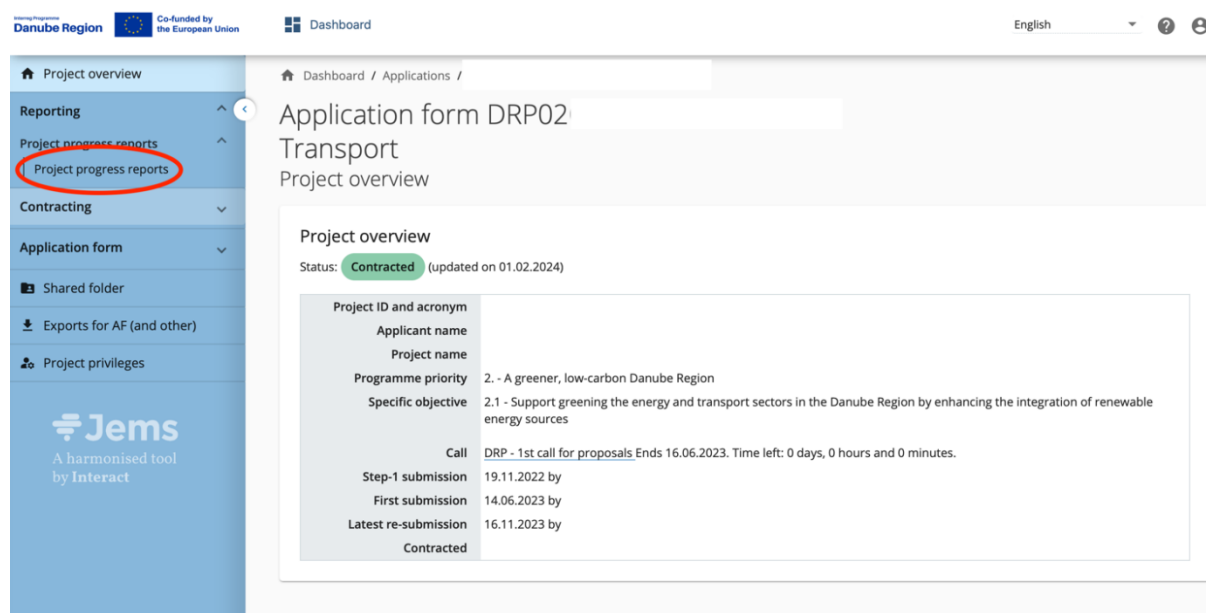
¹ ¹ In order to ensure access for the LP to the PRs of the PPs, in the „project privileges“ section in Jems the LP user shall be added with „view“ right to each PP.

1.PART 1 TECHNICAL GUIDELINES

1.1. Accessing and opening a PPR

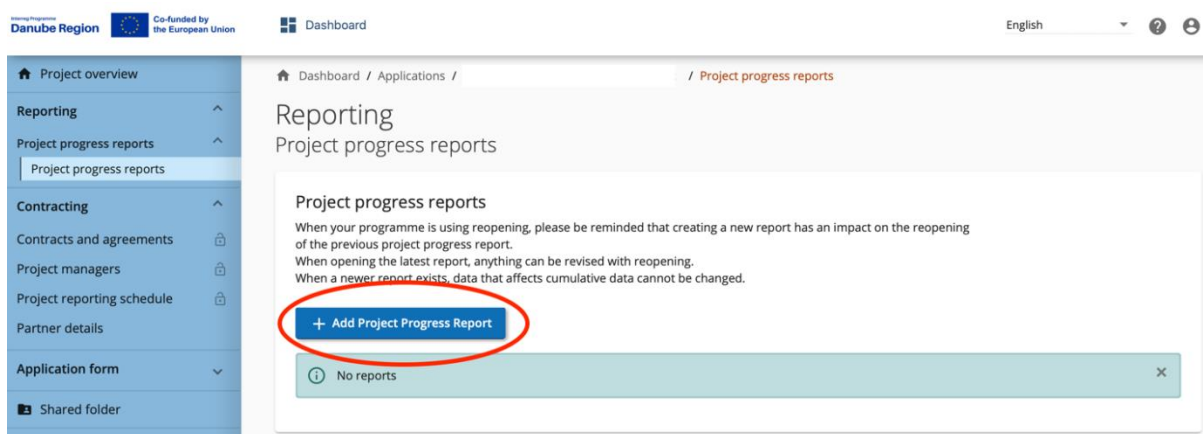
Once a project is set to the status “contracted” in Jems, all steps in relation to the reporting can be performed by the LP.

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



Picture 1 Project overview

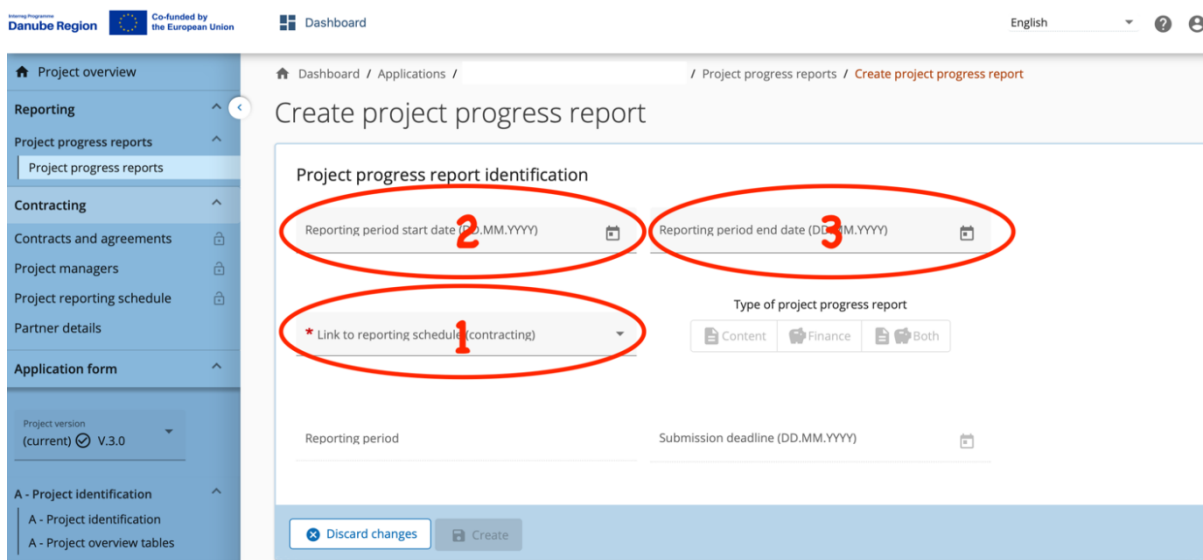
For creating a PPR the button “Add Project Report” shall be clicked.



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

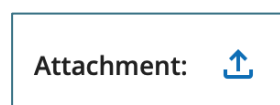
Partner certificates are issued by controllers, who verify of the expenditures reported by PPs in Partner Reports. Partner certificates are electronic and are used by LPs to consolidate and to compile PPRs.

1.4. Application for Reimbursement

The Application for Reimbursement is the official document used by LPs to claim the reimbursement of Interreg funds from DRP MAJS. Application for Reimbursement 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 AfR needs to be uploaded in the Report Annexes section of the PPR.

1.5. Attachments

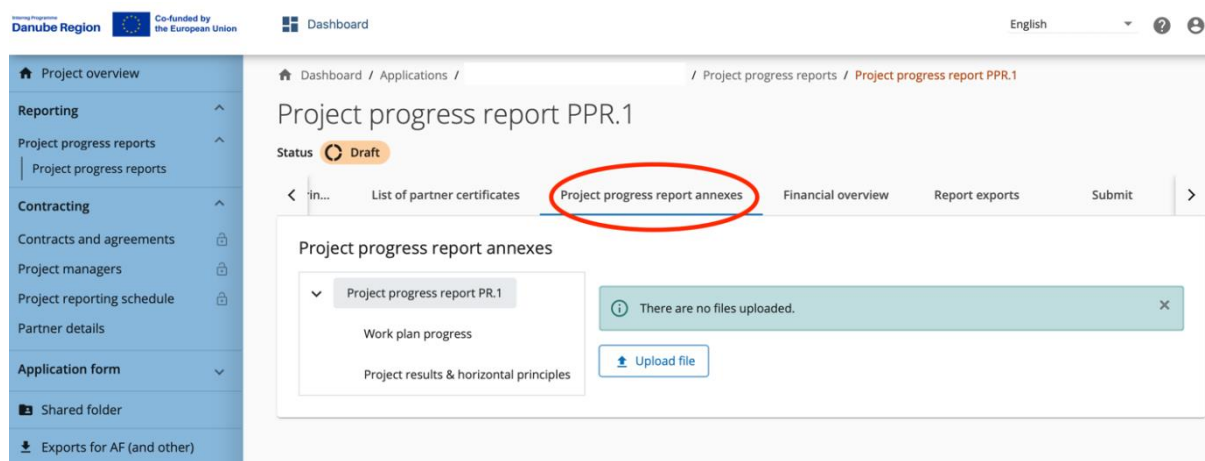
Supporting material can be attached to the PPR either under “Deliverables” by clicking on the respective symbol.



The attachments uploaded in these sections shall specifically relate to certain deliverables (e.g. evidence for a specific deliverable).

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

More general material (e.g. mandatory project outputs, 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.

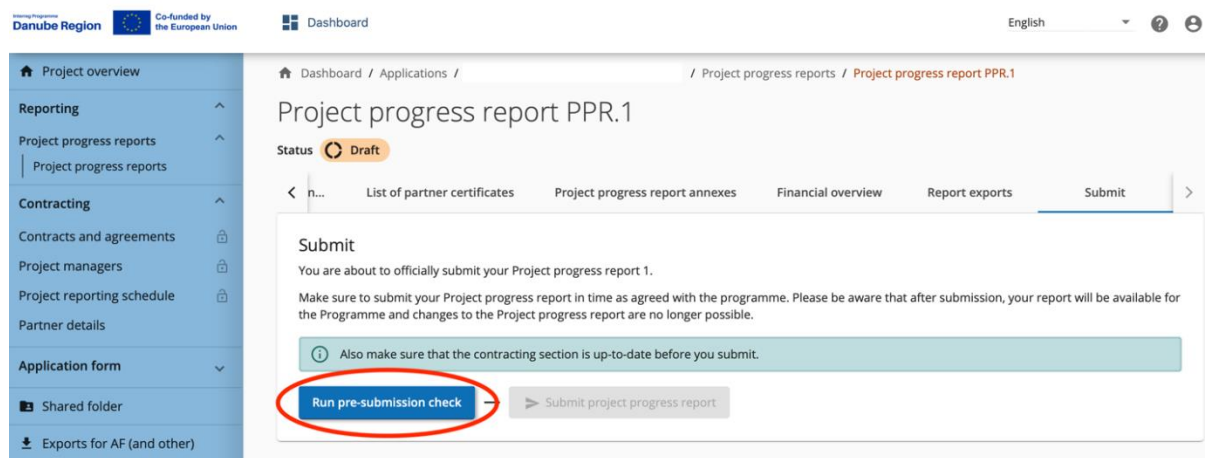


Picture 4 Uploading annexes

1.6. Submit

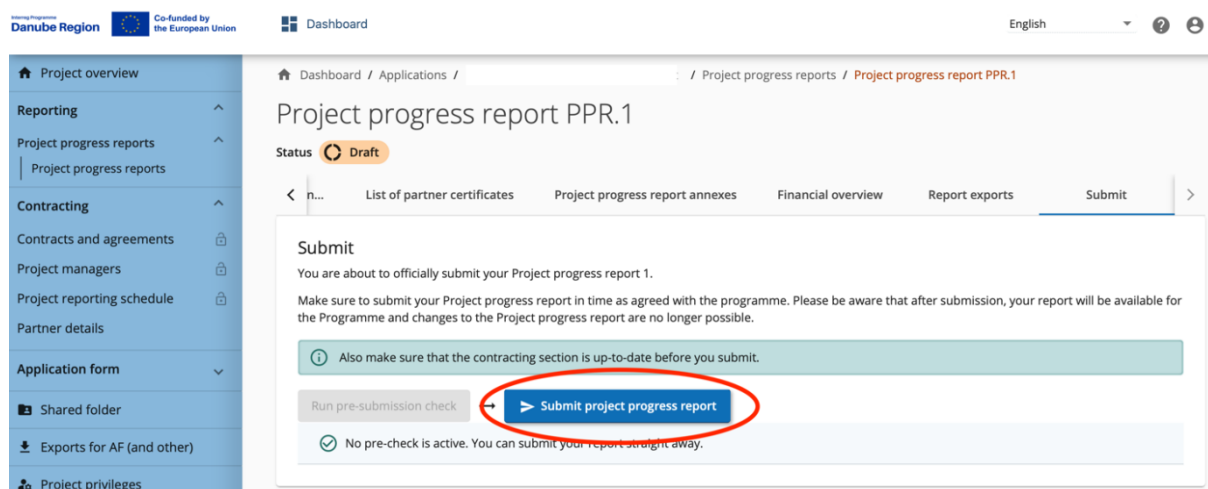
The section “Submit” of the PPR is used for a last “pre-submission check” and for the final submission of the PPR.

The “Run pre-submission check”-button shall be clicked.



Picture 5 Run pre-submission check

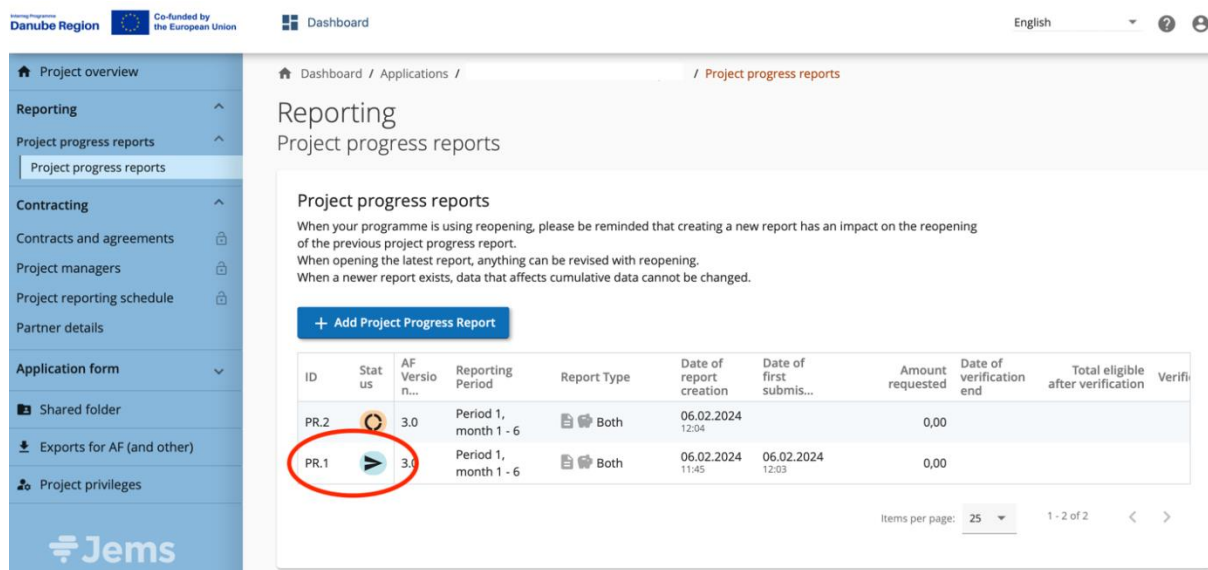
LPs are advised to go through all sections of the PPR and to double check if all sections of the PPR are correctly completed. “Submit project progress report”-button shall be clicked to finalise the reporting procedure.



Picture 6 Submitting the PPR

After a successful submission, the PPR cannot be modified any longer and the MAJS 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.

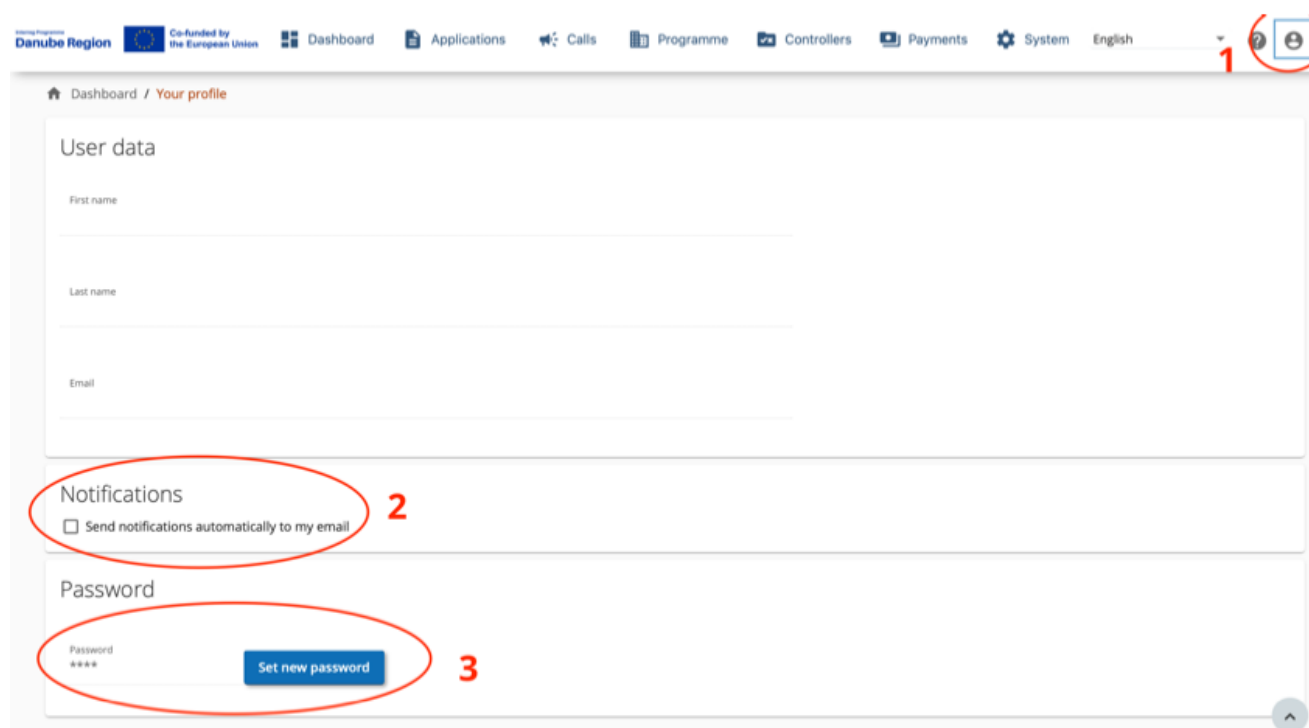
Upon creating a PPR and while editing PPR its status is **Draft**. PPRs completed and submitted to MAJS are in status **Submitted**, and while MAJS proceeds with the content check, the status of the PPR is **Verification ongoing**. PPRs checked and approved by MAJS have status **Verified**.

In case the PPR does not meet all conditions to be accepted and approved, the PPR is **Reopened**, 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 MAJS. 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

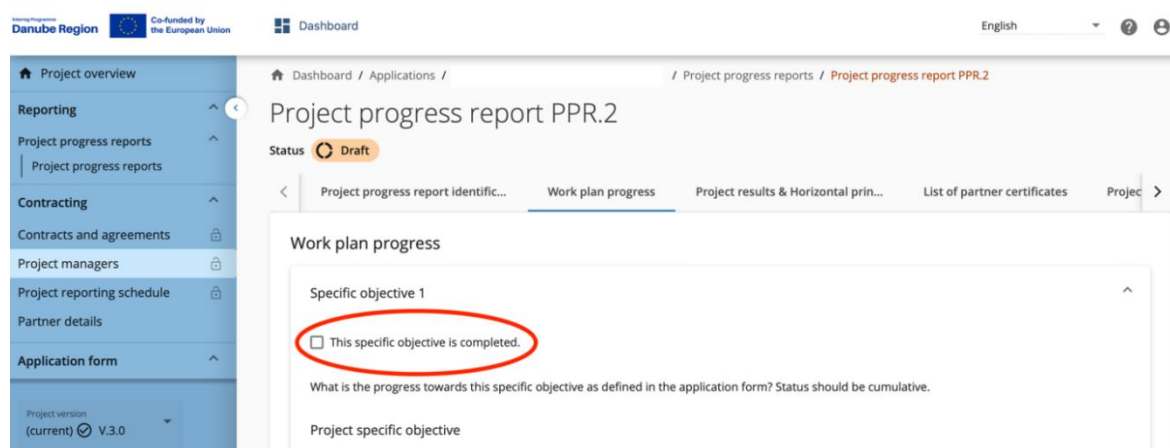
This section is used for general information on the overall progress of the project, especially **“Highlights of main achievements”, “Partner problems and deviations”** as well as **“Target Groups”** and their involvement. The LP is asked to provide a concise and authentic snapshot of the project progress, 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 – do not require any action from user-side.

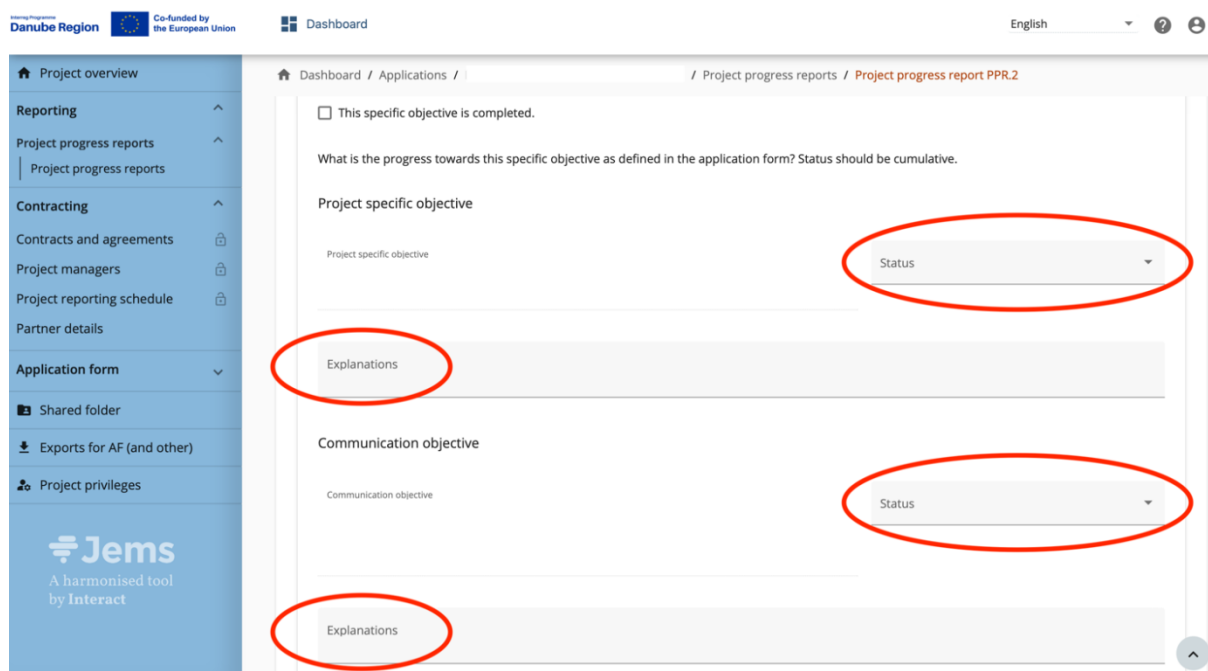
2.2. Work Plan Progress

This section is used for specific descriptions of the progress and status on activities under each “Specific objective”, as well as report on the progress and completion of “Deliverables”..

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 and deliverables have been finalised and submitted to MA/JS via Jems, including the mandatory outputs.

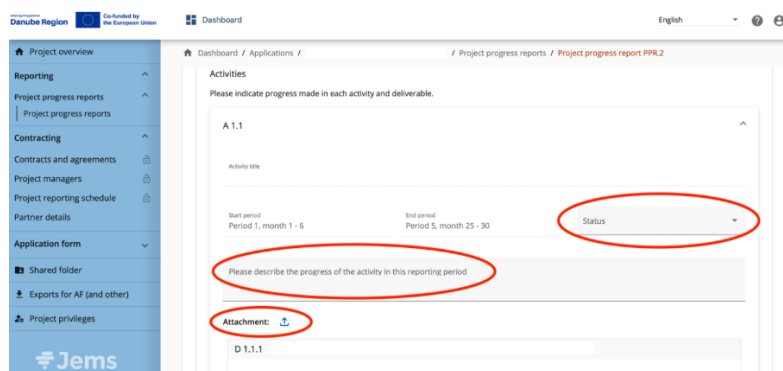


Picture 9 Work plan progress



Picture 10 Progress in Sos and Communication objectives

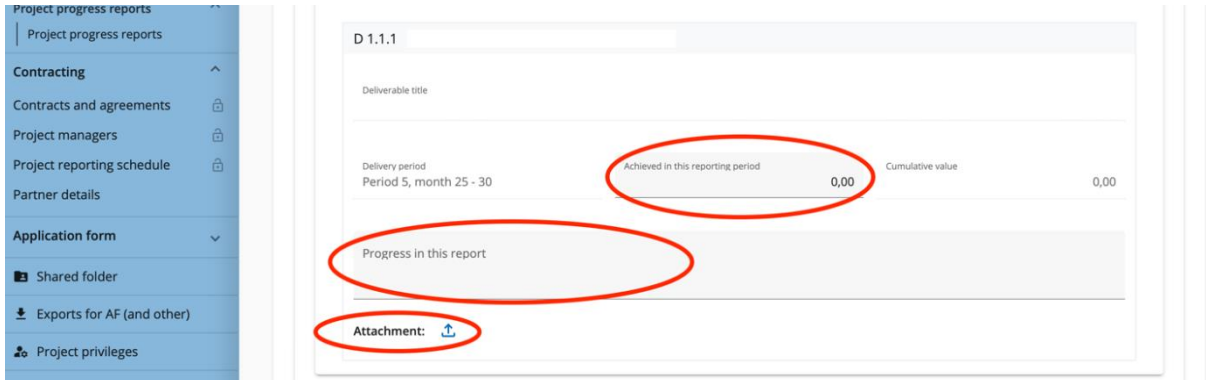
For each activity and connected deliverables there is a separate section with text fields to describe their implementation and development process. Similar as for objectives, for each activity there is a drop down menu to define the Status of implementation. The description of the activities should be 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 and provide a brief explanation on their development. 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.

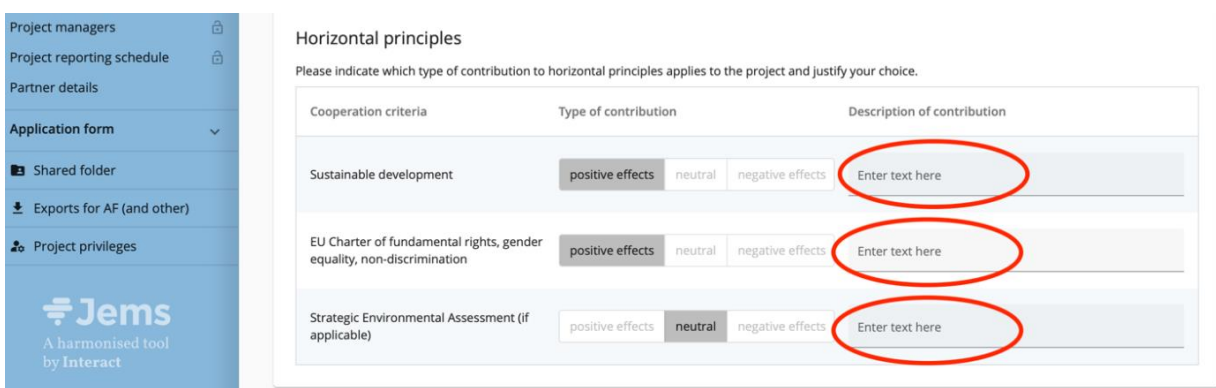


Picture 12 Progress on deliverables

2.3. Horizontal Principles

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 13 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.

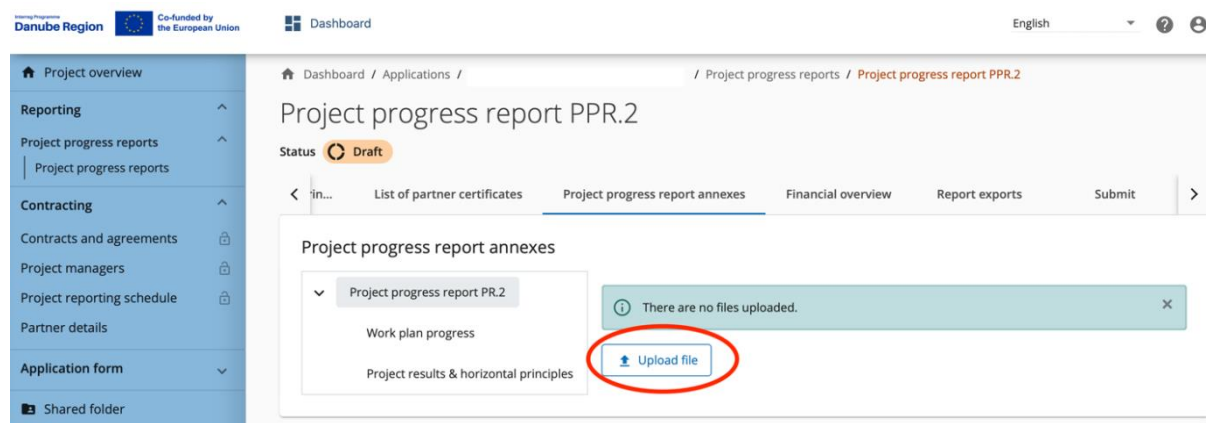
2.5. Project Progress Report Annexes

In this section the LP should upload documents that are relevant for the report but not connected to the evidence of the deliverables 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.

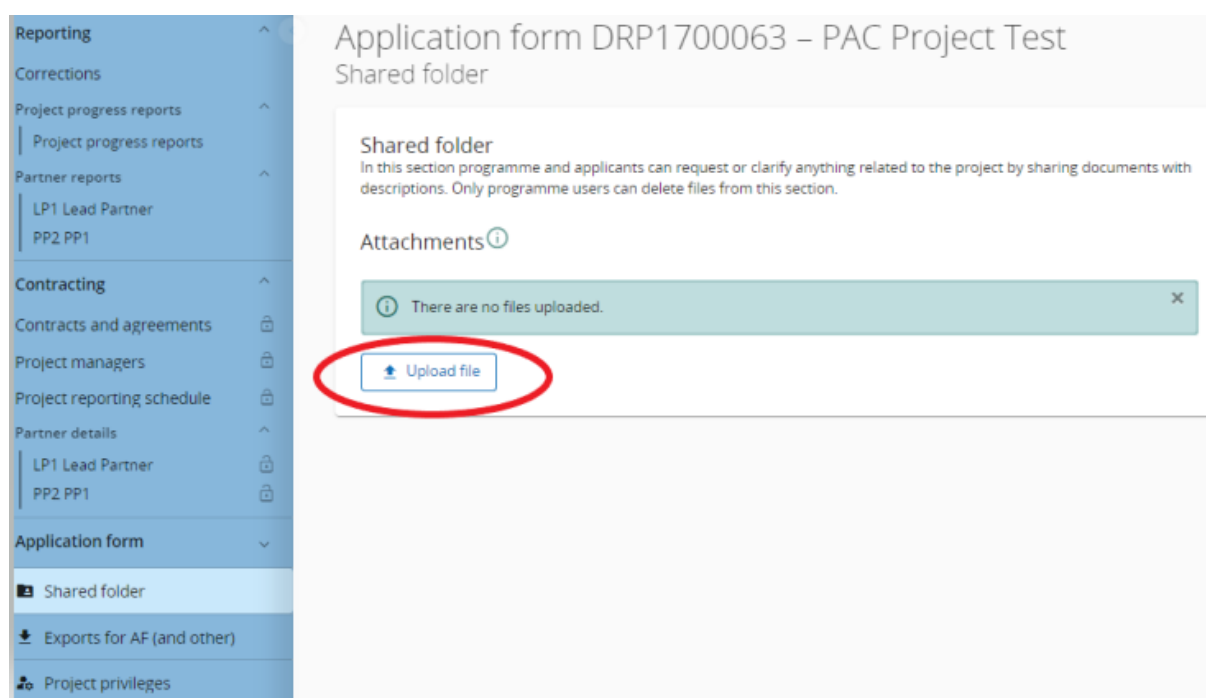
Files uploaded in this section can be deleted here, other files can only be deleted in the section where they were uploaded.

IMPORTANT: The Application for Reimbursement has to be uploaded in this section.



Picture 14 Upload of annexes

After the project end date, following the receipt of the Interreg fund reimbursement, LP will have to prove the transfer of Interreg funds to PPs with bank statements reflecting the transaction details. Bank statements will have to be uploaded in JEMS, to the “Shared folder” section of the Project. LP should notify the project officer by email about the upload.



2.6. Financial Overview

This section is auto-generated and provides an overview on the financial progress of the project. It reflects expenditures of the project.

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.

