

# Project and Financial Management Training

Global Health EDCTP3 Joint Undertaking



Co-funded by  
the European Union

25-26 April 2025

Johannesburg, South Africa

The Global Health EDCTP3  
Joint Undertaking

# Disclaimer

This document/presentation is non-binding and designed for information purposes to support participants to GH EDCTP3 JU actions in the management of their projects.

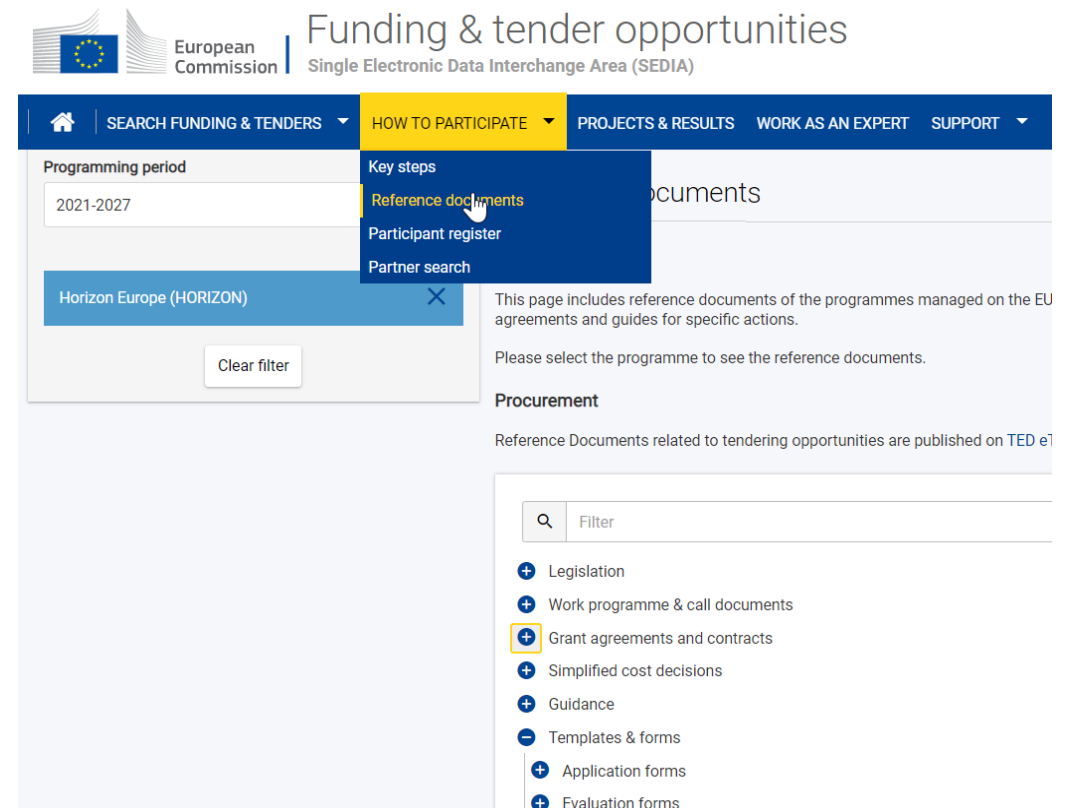
It is based on the legal framework applicable to GH EDCTP3 JU activities, namely Council Regulation 2021/2085 (basic act), European Parliament and Council Regulation 2021/695 (Horizon Europe Regulation), the GH EDCTP3 JU 2022 work programme and the Horizon Europe Model Grant Agreement.

# Global Health EDCTP3 Grant Management Tool

# Funding and tender portal

## Single Electronic Data Interchange Area (SEDIA)

- Participant register & management of roles
- Search & contact partners (no personal info is disclosed)
- Search for funding opportunities
- Proposal Submission and follow-up
- Grant Management
- Registration to work as an expert
- Reference documents
- Projects & results
- Manage your EU Login account
- Manage your notifications



Manage my area

My Person Profile

My Organisation(s)

Grants

My Proposal(s)

Technical Support Instrument (TSI)

Monitor requests

Monitor projects

My Formal Notification(s)

My Task(s)

SEARCH FUNDING & TENDERS

HOW TO PARTICIPATE

PROJECTS & RESULTS

WORK AS AN EXPERT

SUPPORT

edctp3

☒ Match whole words only

☒ GRANTS

☒ TENDERS

Submission status

Forthcoming (2)

Open for submission (5)

Closed (5)

Programming period

Select a Programme period...

Filter by Programme / Programme group

Select a Programme...

Filter by call

Select a Call...

Funding and tenders (12)

Need help?

Sort by:

Submission status

Global Health EDCTP3 Training Networks - Clinical Research Fellowships

HORIZON-JU-GH-EDCTP3-2023-01-01

Programme

Horizon Europe (HORIZON)

Status

Open for submission

Type of action

HORIZON JU Research and Innovation Actions

Deadline model

single-stage

Opening date

10 May 2023

Deadline date

29 June 2023 17:00:00 Brussels time

Call for proposal

Grant

Funding to successfully finalise EDCTP2-funded clinical trials that were negatively impacted by the COVID-19 pandemic

HORIZON-JU-GH-EDCTP3-2023-01-02

Programme

Horizon Europe (HORIZON)

Status

Open for submission

Type of action

HORIZON JU Research and Innovation Actions

Deadline model

single-stage

Opening date

10 May 2023

Deadline date

29 June 2023 17:00:00 Brussels time

Call for proposal

Grant

Research to rapidly evaluate interventions on Ebola outbreaks in sub-Saharan Africa

HORIZON-JU-GH-EDCTP3-2023-01-04

Programme

Horizon Europe (HORIZON)

Status

Open for submission

Type of action

HORIZON JU Research and Innovation Actions

Deadline model

single-stage

Opening date

10 May 2023

Deadline date

29 June 2023 17:00:00 Brussels time

Call for proposal

Grant

Strengthening ethics and regulatory capacity

HORIZON-JU-GH-EDCTP3-2023-01-05

Programme

Horizon Europe (HORIZON)

Status

Open for submission

Type of action

HORIZON JU Coordination and Support Actions

Deadline model

single-stage

Opening date

10 May 2023

Deadline date

29 June 2023 17:00:00 Brussels time

Call for proposal


Grant

Search and filter area

Personalized access to eGrants IT tools

The menu adjusts according to the user roles and access rights


Access to both grants and tenders

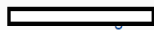



 Global Health  
EDCTP3

My Project(s)





 [Need help?](#)

Results: 2



ACRONYM	TOPIC ID	PROGRAMME	PROJECT	PHASE	ACTIONS
	<a href="#">HORIZON-JU-GH-EDCTP3-2022-CALL1-01-05</a>	<a href="#">HORIZON</a>		Active	<div>Actions<ul style="list-style-type: none"><li>Manage Consortium</li><li>Manage Project</li></ul></div>
	<a href="#">HORIZON-JU-GH-EDCTP3-2022-CALL1-01-01</a>	<a href="#">HORIZON</a>		Active	

Items per page: 10

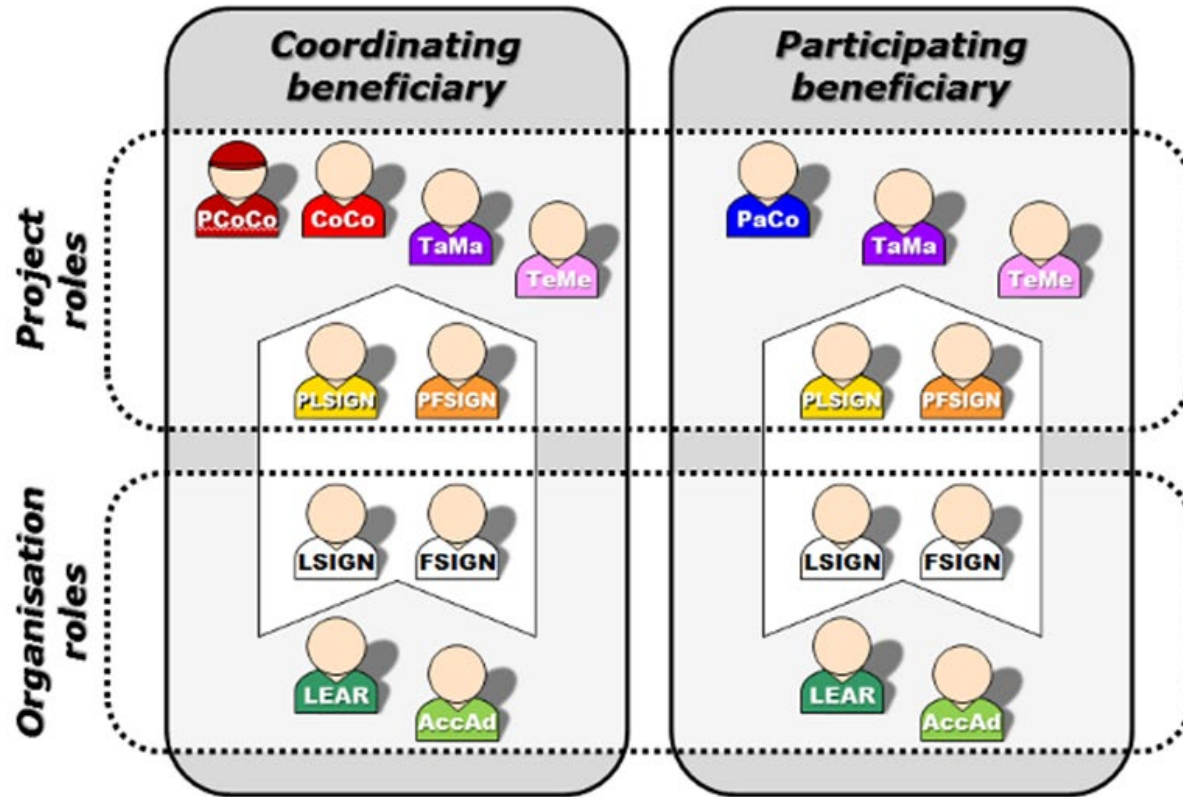
Showing 1 - 2 of 2 items

# Manage Consortium

## Roles & Access Rights

### Roles - Overview

The picture below shows all the roles involved in managing projects and organisational data on the Participant Portal.



*LEAR: Legal Entity Appointed Representative*

*- Administrative Contact for the Commission*

*- Appoints LSIGN, FSIGN*

*- 1 per Organisation*

*PCoCo: Primary Coordinator Contact*

*- Responsible for a Project*

*- Appoints CoCo*

*- 1 Per Project*

# Manage Project

- My Person Profile
- My Organisation(s)
- Grants
- My Proposal(s)
- My Project(s)
- Technical Support Instrume...
- Monitor requests
- Monitor projects
- My Formal Notification(s)

## My Project:

Details Consortium

Project ID:

Programme: HORIZON

DG/Agency: EDCTP3

Actions

Need help?

COORDINATOR	Organisation - <input type="text"/>	EDIT ROLES
BENEFICIARY	Organisation - <input type="text"/>	EDIT ROLES
BENEFICIARY	Organisation - <input type="text"/>	EDIT ROLES
BENEFICIARY	Organisation - <input type="text"/>	EDIT ROLES



- communication centre

[illegible]

# Manage Project

launch request for amendment

→ launched amendments will be under **Active Processes**

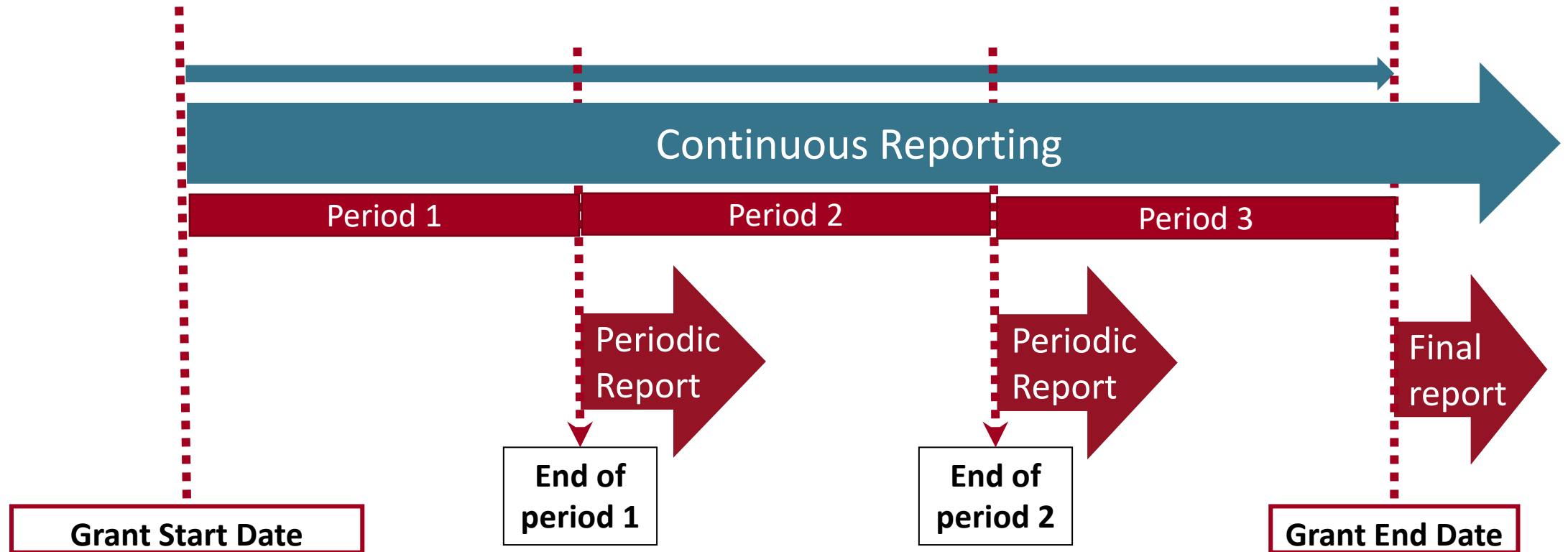
The screenshot displays the 'RESEARCH & INNOVATION Grant Management Services' portal. The user is logged in as Gauthier HIERNAUX. The main navigation bar includes the European Commission logo and a 'Help' dropdown. The left sidebar, titled 'MY PROJECT', shows details for a 'HORIZON 2020' project: Call: H2020-SC1-FA-DTS-2018-2, Type of Action: IA, Acronym: [redacted], Current Phase: Grant Management, Number: [redacted], Duration: 42 months, Start Date: 01 Oct 2019, Estimated Project Cost: [redacted] 8, Requested EU Contribution: [redacted] €, and Contact: [redacted]. Below this are buttons for 'Latest Legal Data' and 'Active Processes'. The main content area shows a 'Periodic Reporting' section for REP-857223-1, period 01/10/2019 > 31/03/2021, with a timeline from 01 Apr 2021 through Draft, Submitted, Observations, and Paid. A red box highlights a '+' button next to 'Launch new interaction with the EU'. A red arrow points from this button to a modal window titled 'Launch new interaction with the EU'. The modal contains four options, each with a 'Launch' button: 1. 'Request for Amendment' (highlighted with a red box): Including notification on termination of the participation of one or more beneficiaries. Choose the data set based on which you would like launching a new amendment request: ☒ latest legal data. 2. 'Grant Agreement Termination by beneficiaries': Attention! This option is reserved for the termination of the grant agreement. The termination of the grant agreement is considered as a last resort measure, if all other efforts to continue the action fail. Termination is irrevocable and comes into force immediately after signature and submission. You are advised to consult the available guidance of the corresponding funding programme or contact the responsible officer in charge of your grant agreement. 3. 'Formal Notification': Attention! The use of the formal notification channel is reserved for specific purposes e.g. for communication as set out in the model grant agreement (MGA) e.g. obligation to provide information upon request or obligation to inform). If you wish to interact with officers, please use the messaging facility ( see below ). 4. 'Communication to the Project Officer': At any time, you may wish to informally exchange messages or ask questions to the Service via the electronic

# Project reporting

## Article 21 – Reporting

### 21.1 Continuous reporting

### 21.2 Periodic reporting: Technical reports and financial statement




# Continuous Reporting Module

(activated at the time project starts)

**MY PROJECT**







**Call:** HORIZON-JU-GH-EDCTP3-2022-01  
**Type of Action:** HORIZON-JU-CSA  
**Acronym:**   
**Current Phase:** Grant Management  
**Number:**   
**Duration:** 36 months  
**GA based on the:** HE MGA — Multi & Mono - 1.1  
**Start Date:** 01 Jun 2023




Launch new interaction with the EU 

**Continuous Reporting**

01 Jun 2023

 Started  Completed


  Continuous reporting data


-  Process documents
-  Process communications
-  Process history

- Summary for Publication;
- Deliverables, Ethics, DMP (Data Management Plans), Other Reports;
- Report progress in achieving Milestones;
- Follow-up Critical Risks;
- Publications;
- Dissemination and Communication activities;
- Patents;
- Questionnaire on horizontal issues
- ...


# Summary For Publication Tab

- All fields are mandatory
- The text have to be entered gradually
- Strongly recommended to upload at least one image under « Images attached to the Summary for publication »
- Texts automatically transferred to CORDIS or an other repository at the end of the project.

**Grant Management**

**Project Continuous Report**

761493 (5GTANGO) IA

THE FRAMEWORK PROGRAMME FOR RESEARCH AND INNOVATION  
**HORIZON 2020**

Call: H2020-ICT-2016-2017  
Topic: ICT-08-2017 Unit: CNECT/E/01

Summary for publication

Deliverables Ethics, DMP, Other Reports

Milestones

Critical Risks

Publications


Disseminat...


Patents (IPR)


Innovation


SME Impact


Gender



























### Summary for publication

 The summary for publication should be written as a "stand-alone" text, in a language easily understandable by a broader public and must not contain any confidential data

**Summary of the context and overall objectives of the project (For the final period, include the conclusions of the action)**

[ No text provided ]

**Work performed from the beginning of the project to the end of the period covered by the report and main results achieved so far (For the final period please include an overview of the results and their exploitation and dissemination)**



# Deliverables and milestones

## Annex 1 – Description of the Action

## ARTICLE 21 — REPORTING; 21.1 Continuous reporting

The beneficiaries must continuously report on the progress of the action (e.g., **deliverables**, **milestones**, ...) in the Portal Continuous Reporting tool

### LIST OF DELIVERABLES

#### Deliverables

Grant Preparation (Deliverables screen) — Enter the info.

The labels used mean:

Public — fully open (⚠ automatically posted online)

Sensitive — limited under the conditions of the Grant Agreement

EU classified — RESTREINT-UE/EU-RESTRICTED, CONFIDENTIEL-UE/EU-CONFIDENTIAL, SECRET-UE/EU-SECRET under Decision 2015/444. For items classified un...

Deliverable No	Deliverable Name	Work Package No
D1.1	Project annual reports	WP1
D2.1	Project initiation meeting Notes	WP2
D2.2	Staff recruitment report	WP2

### LIST OF MILESTONES

#### Milestones

Grant Preparation (Milestones screen) — Enter the info.

Milestone No	Milestone Name	Work Package No
1	Project initiation meeting held	WP2
2	Project staff recruited	WP2
3	Stakeholder's engagements held	WP2

**Project Continuous Report**

103332 (SCALE-IT) HORIZON-...

Project Summary Researchers involved in the project Deliverables Milestones Critical Risks Publications Results Dissemination

Deliverables and Other Reports

Indicate actual delivery dates (or new due date for late deliverables, together with an explanation for the delay). In the Comments, please indicate if the deliverable is late.

The labels used mean:

- Public — fully open
- Sensitive — limited under the conditions of the Grant Agreement
- EU classified — RESTREINT-UE/EU-RESTRICTED, CONFIDENTIEL-UE/EU-CONFIDENTIAL, SECRET-UE/EU-SECRET under Decision 2015/444. For items classified un...

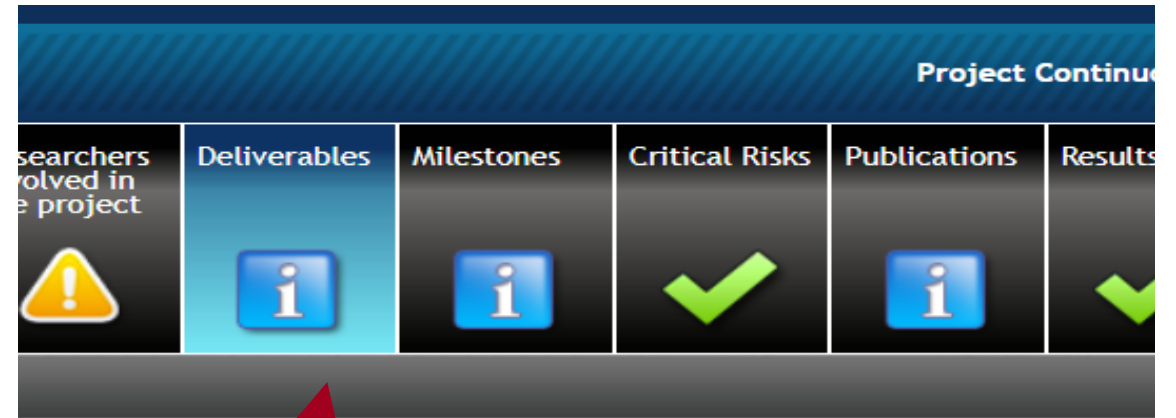
[Link to anti plagiarism tool](#)

[Show Filters](#) [Clear Filters](#)

Work Package	Deliverable	Deliver	Deliverable Name	Description	Lead	Type	Dissemination	Due Date
WP1	D1.1	D15	Project annual reports	An periodic (technical and financial) report wi...	EPIC	R	PU	31 May
WP2	D2.1	D1	Project initiation meeting	An inaugural project meeting will be held to en...	IDI	R	PU	30 Jun
WP2	D2.2	D2	Staff recruitment report	IDI will work together with the DI to identif...	IDI	R	PU	31 Jul




# Status of deliverables in the reporting portal

- **Pending** - a deliverable hasn't been uploaded yet.
- **Draft** - a deliverable has been uploaded but not yet submitted
- **Submitted** - a deliverable has been submitted.
- **Approved** - a deliverable has been approved
- **Rejected** - a deliverable has been rejected



either with an explanation for the delay). In the Comments, please indicate if th

E/EU-CONFIDENTIAL, SECRET-UE/EU-SECRET under Decision 2015/444. For items

Description	Lead	Type	Dis
periodic (technical and financial) report wi... 	EPICI	R	
naugural project meeting will be held to en... 	IDI	R	
will work together with the PI to identify ... 	IDI	R	S

# Milestones

- Milestones entered in Annex 1 during the Grant Preparation are displayed here in the Portal
- Through continuous reporting, it must be indicated whether the milestone has been achieved or not and select the delivery date.

Project Continuous Report													
Project Summary	Researchers involved in the project	Deliverables	Milestones	Critical Risks	Publications	Results	Disseminati... activities	Communic... Activities	Standards	Intellectual property rights (IPR)	Datasets	Impact	Impact Continuatio
k Package No	Lead Beneficiary	Means of Ver	Delivery Date	Delivery Date (actual)	Achieved	Comments							



# Reporting of Dissemination and Communication activities

101103... SyGMa System for Grant Management habarje (INTERNAL)

Project Continuous Report

101103... HORIZON-...	Project Summary	Researchers involved in the project	Deliverables	Milestones	Critical Risks	Publications	Results	Dissemination activities	Communication Activities	Standards	Intellectual property rights (IPR)	Datasets	Impact	Impact Continuation	Other Results
Call: HORIZON-JU-GH-EDCTP3-2022-01 Topic: HORIZON-JU-GH-EDCTP3-2022-CALL1-01															

## Dissemination Activities

☐ There is no dissemination activity for this project yet  
List the dissemination activities carried out in the context of the project.  
Include dissemination activities mentioned in the proposal and new ones.

Dissemination Activity Name	What? Type of dissemination activity	Who? Target audience Reached	Why? Description of the objective(s) with reference to a specific project output (max 200 characters)	Status of the dissemination activity
-----------------------------	--------------------------------------	------------------------------	-------------------------------------------------------------------------------------------------------	--------------------------------------

To be continuously reported - Dissemination and Communication activities carried out in the context of the project, including those mentioned in the proposal and new relevant ones (*not initially mentioned in the DoA*)

# Periodic Reporting

## (Activated at the end of a reporting period)

### Technical part

**Part A** (structured information through **continuous reporting**)

- Project summary
- Deliverables, milestones, risks, etc.
- Impact questionnaire

**Part B** (narrative part submitted in a PDF through **periodic reporting**)

- Explanation of the work carried out by the beneficiaries and overview of progress
- Explanations on deviations from DoA

### Financial part

**Financial statements** (individual and consolidated).

Explanation on the **use of resources** and information on subcontracting and in-kind contributions by third parties (*Not applicable for lump sum grants*).

**Certificates on the financial statements** (CFS), only at final payment if threshold is reached (uploaded as PDF) (*Not applicable for lump sum grants*).

# Periodic Reporting

## Technical part

The screenshot shows the 'MY PROJECT' section for a Horizon 2020 project. The project details on the left include: Call: H2020-ICT-2015, Type of Action: RIA, Acronym: DE-ENIGMA, Current Phase: Grant Management, Number: 688835, Duration: 42 months, Start Date: 01 Feb 2016, Estimated Project Cost: €3,904,188.00, Requested EU Contribution: €3,904,187.75, and Contact: Michael BUSCH. The main area displays the 'Periodic Reporting' timeline for REP-688835-1, period 01/02/2016 > 31/07/2017. The timeline shows stages: Draft (10 Aug 2017), Submitted (30 Sep 2017, 21/60 days), and Paid. Below the timeline, there are links for 'Technical Part contribution' and 'Periodic Report composition'. A red arrow points from the 'Technical Part contribution' link to the 'Summary for publication' section of the 'Project Periodic Report' window.

The 'Project Periodic Report' form displays a progress bar with various indicators: Summary for publication (red X), Deliverables (info), Milestones (info), Critical Risks (warning), Publications (green check), Dissemination (green check), Patents (IPR) (info), Innovation (green check), SME Impact (green check), Gender (green check), and Tech. Report (Part B) (info). Below the progress bar, the 'Summary for publication' section is active, showing instructions and a text area for the summary. The text area contains the following content:

The summary for publication should be written as a 'stand-alone' text, in a language easily understandable by a broader public and must not contain any confidential data

▼ Summary of the context and overall objectives of the project (For the final period, include the conclusions of the action)


This section should include information on:

- What is the problem/issue being addressed?
- Why is it important for society?
- What are the overall objectives?

DE-ENIGMA aims to revolutionise Autism therapy by offering adaptive robot-mediated therapy. Specifically, DE-ENIGMA wants to realize robust, context-sensitive, multimodal and naturalistic human-robot interaction (HRI) aimed at enhancing the social imagination skills of children with autism. In the first year of DE-ENIGMA a total of 80 children were involved in therapeutic sessions with or without a robot mediator. The data collected will be annotated in year 2 and

Validate


# Technical Report



Grant Management

646286 (ALION)

RIA



THE FRAMEWORK PROGRAMME FOR RESEARCH AND INNOVATION

HORIZON 2020


Period No: 1











Duration (months): 18

Reporting Period : [01 Jun 2015 - 30 Nov 2016]



Project Periodic Report

Tech.Report (Part B)





Summary for publication	Deliverables	Milestones	Critical Risks	Publications	Dissemination Communicati	Patents (IPR)	Innovation	SME Impact	Gender
									


Technical Report (Part B)

Number	Attachment	Actions	Template
1	Explanation of the work - Overview of progress	No file selected  Upload	

Upload an attachment for the Technical Report

1	Explanation of the work - Overview of progress	 View File	 Remove File
---	------------------------------------------------	-----------------------------------------------------------------------------------------------	-------------------------------------------------------------------------------------------------

PDF format



Project Number: [insert project reference number]

Project Acronym: [insert acronym]

Project title: [insert project title]

Periodic Technical Report

Part B

1. Explanation of the work carried out by the beneficiaries and Overview of the progress

- Explain the work carried out during the reporting period in line with the Annex 1 to the Grant Agreement.
- Include an overview of the project results towards the objective of the action in line with the structure of the Annex 1 to the Grant Agreement including summary of deliverables and milestones, and a summary of exploitable results and an explanation about how they can will be exploited.  
(No page limit per workpackage but report shall be concise and readable. Any duplication should be avoided).

1.1 Objectives

List the specific objectives for the project as described in section 1.1 of the DoA and described the work carried out during the reporting period towards the achievement of each listed objective. Provide clear and measurable details.

1.2 Explanation of the work carried per WP

1.2.1 Work Package 1

Explain the work carried out in WP1 during the reporting period giving details of the work carried out by each beneficiary involved.


1.2.2 Work package 2

Etc.

1.3 Impact

Include in this section whether the information on section 2.1 of the DoA, how your project will contribute to the expected impacts is still relevant or needs to be updated. Include further details in the latter case.

[Option for Projects on Access to Research Infrastructures]



Global Health  
EDCTP3

# Financial reporting

- Each Beneficiary → Online Financial Statements including explanations on the Use of Resources

**Periodic Reporting**  
REP-781643-1 - period  
07/2015 > 03/2016

04 Mar 2016  
Draft

**Financial Statement** (shortname for 966984368 [P])

Periodic Report 1 composition

03 May 2016  
(19/60 days)

Period No: 1 Duration (months): 8  
Reporting Period : [04 Jul 2015 - 03 Mar 2016]

**Financial Statement**

Use of Resources

Financial information from contact

No contribution requested? ☐ Yes ☒ No

Financial Statements

Period	Adjustment	Requested Contribution
04/07/2015 - 03/03/2016 (Period No '1')	No	126,674.00 €

Financial Statement for period '1' (04/07/2015 - 03/03/2016)

Eligible costs:

Cost Category	Unit Cost	Number of Units	Subtotal	Total	Actions
a) Direct personnel costs declared as actual costs				100,000.00 €	<input type="text"/>
b) Direct personnel costs declared as unit costs (average cos				40.00 €	<input type="text"/>
▼ c) Direct personnel costs declared as unit costs				339.20 €	
c1) SME owner/Natural person costs	33.92 €	x 10	= 339.20 €		
d) Direct costs of subcontracting				1,000.00 €	
e) Direct costs of providing financial support to third parties				200.00 €	
f) Other direct costs				0.00 €	<input type="text"/>
h) Indirect costs (= 0.25 * (a + b + c + f - o))				25,094.80 €	
i) Total costs (= a + b + c + d + e + f + h)					

Validate

Automatic activation except if an **amendment** is on-going or a **previous periodic report** is still open



# Financial reporting

Period No: 1      Duration (months): 8  
Reporting Period : [04 Jul 2015 - 03 Mar 2016]

Legal Address: AMBACHTSTRAAT 20 , 7609 RA , ALMELO Netherlands

**Financial Statement** SAVE

**Financial information from contact**

No contribution requested? ☐ Yes ☒ No

**Financial Statements**

Period	Adjustment	Requested Contribution
04/07/2015 - 03/03/2016 (Period No '1')	No	0.00 €

**Financial Statement for period '1' (04/07/2015 - 03/03/2016)**

**Eligible costs:**

Cost Category	Unit Cost	Number of Units	Subtotal	Total	Actions
a) Direct personnel costs declared as actual costs				0.00 €	
b) Direct personnel costs declared as unit costs (average cost)				0.00 €	
▼ c) Direct personnel costs declared as unit costs				0.00 €	
c1) SME owner/Natural person costs	33.92 €	x 0 =	0.00 €		
d) Direct costs of subcontracting				0.00 €	
e) Direct costs of providing financial support to third parties				0.00 €	
f) Other direct costs				0.00 €	
h) Indirect costs (= 0.25 * (a + b + c + f - o))				0.00 €	
j) Total costs (= a + b + c + d + e + f + h)				0.00 €	
k) Receipts				0.00 €	
m) Maximum EU contribution (100%)				0.00 €	
n) Requested EU contribution				0.00 €	

**Additional Information for indirect costs:**

Use of 'costs of in-kind contributions not used on premises? (o) ☐ Yes ☒ No

**Validate**

Some costs have an editable field

Others have a link to click

Some have a Use of Resources to complete Link to '[How to complete your financial statement](#)' in the F&T Portal

# Periodic reporting – Submission to JU

Coordinator submits to JU

Periodic Reporting  
REP-781643-1 - period  
07/2015 > 03/2016

04 Mar 2016  
Draft

03 May 2016  
(19/60 days)  
Submitted

Paid

Periodic Report 1 composition

Submit to EU

Periodic Report 1 project No 781643

You are about to submit the periodic report to the EU. Press submit to EU to proceed.

☒ I agree with the conditions

Submit to EU

Once the elements of the Periodic Report are approved, the Periodic Report can be submitted to the JU in one single submission.

Only users with the role Primary Coordinator Contact and Coordinator Contact can perform this action

## Useful links:

F&T for beginners: <https://ec.europa.eu/research/participants/docs/h2020-funding-guide/other/event210527.htm>

F&T user profile: <https://ec.europa.eu/research/participants/docs/h2020-funding-guide/other/event201008.htm>

F&T partner search: <https://ec.europa.eu/research/participants/docs/h2020-funding-guide/other/event210928.htm>

Horizon Europe On-line Manual <https://webgate.ec.europa.eu/funding-tenders-opportunities/display/OM/Online+Manual>

HOW TO" on the Participant Portal  
<https://webgate.ec.europa.eu/funding-tenders-opportunities/display/IT/Reporting+and+payments>

Research Enquiry Service <http://ec.europa.eu/research/enquiries>