

APPLICANT GUIDANCE

Appointing an authorised signatory on partner level

Version 1.0

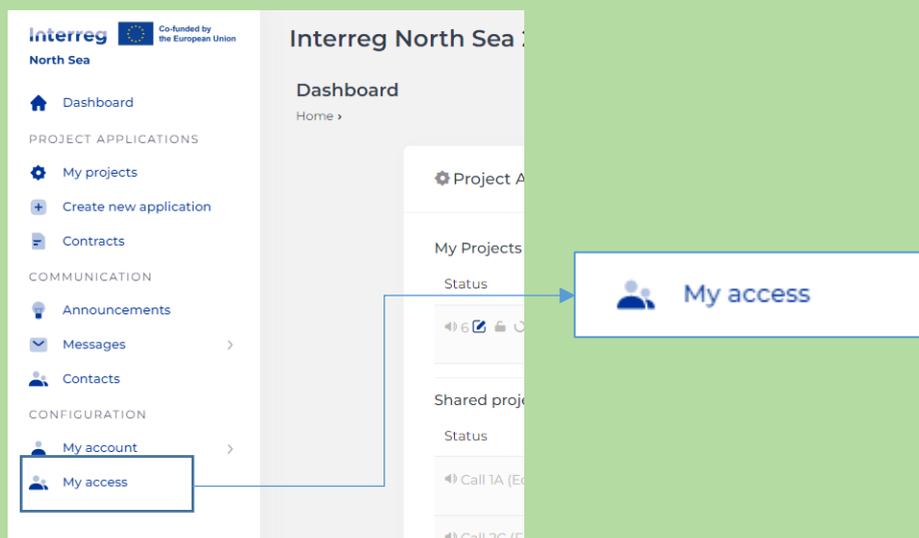
Appointing an authorised signatory for a project partner involves three distinct roles and this is identical to the appointment on project level. This guidance covers the entire flow and tasks of each role. When the guidance changes from one role to another, a text in bold indicates the next role involved.

The three distinct roles are:

- **Partner manager** – The partner manager initiates the appointment procedures by entering the contact details of the suggested authorised signatory.
- **Authorised signatory** – The suggested authorised signatory (also mentioned as the authorised signatory in this document) confirms the legal capacities needed by involving a legal representative. The Authorised signatory is considered to be an individual who, on a daily basis, will be able to validate and legally sign documentation from the project partner to the programme. The capacity of the authorised signatory can be by a delegated mandate.
- **Legal representative** – The legal representative confirms (by an electronic signature) that the authorised signatory in fact do hold the capacity to legally represent the organisation.

STEP 1

In the menu located to the left choose the item "My access".



STEP 2

Under "My access" you can find the projects you are involved in and what your access rights in these projects are.

Click on the button "Project Access" for the project to which you want to designate an authorised signatory for your own organisation.

The screenshot shows the 'Interreg North Sea 2021-2027 Online Monitoring System' interface. The page title is 'Project access: My access' with a breadcrumb trail 'Home > Project access > My access details'. There are three project cards, each with a 'Project Access' button:

- DEMO OMS DEMO**: View access, Partner Authorised Signatory for North Sea Programme, Project Authorised Signatory.
- C7Da New SSP in Call 1**: View access, Partner Manager of The Agency Engine.
- test22 test27092022**: View access, Partner Manager of New LB, Project Owner/Manager.

A 'Summary of permissions' box on the right lists:

- View access allows non-editing permission on project application and periodic reports.
- Partner Managers can edit LoI and Self-declaration documents during application submission, assign Controllers and Partner Authorised Signatories, and can edit periodic reports.
- Partner Authorised Signatories can submit periodic reports.
- Project Authorised Signatories can submit the project application and project-level periodic reports. Limited to a total of 3 persons.
- Project Managers can edit the project application and project-level periodic reports, as well as assign Project Authorised Signatories and Partner Managers.
- Project Owners have all rights of Project Managers and also are the ultimate administrator of the project and main contact with the JS.

STEP 3

Scroll down to the section "Partner Authorised Signatories", and click the button "New invitation".

The screenshot shows the 'Partner Authorised Signatories' section. Below the title, it states 'Partner Authorised Signatories can submit periodic reports.' There is a table with the following columns: Partner Authorised Signatory, Partner, Invitation date, Status, and Manage.

Partner Authorised Signatory	Partner	Invitation date	Status	Manage
Demo User DemoCorp	SSP Lead Partner	04/09/2022	Accepted	
SSP Lead Partner	SSP Lead Partner	08/11/2021	Accepted	
vasso t	The Agency Engine	20/09/2022	Pending	Re-send invite Cancel

At the bottom right, there is a green button with a plus icon and the text 'New invitation'.

STEP 4

Now you enter the personal contact details for the individual you want to appoint as authorised signatory for your organisation.

NOTE: The authorised signatory should be able to legally represent the partner organisation either by direct mandate or delegated mandate. The Joint Secretariat do not control the mandate of the suggested authorised signatory and rely purely on the signed declaration when performing the designation.

Interreg North Sea 2021-2027 Online Monitoring System

OMS DEMO / Invite user

Home > Project access > OMS DEMO > Project access: Invite user

Access to Project	OMS DEMO
Project Rights	Authorised Signatory (AS) of Project
First name *	<input type="text"/>
Last Name *	<input type="text"/>
Organisation *	North Sea Programme
E-mail address *	<input type="text"/>

[Save](#)

Please check for errors: E-mail address, First name, Last Name

[Return to the application form](#)

STEP 5

Once you have saved the contact information in the previous step, you can see that the invitation is sent and pending acceptance.

Interreg North Sea 2021-2027 Online Monitoring System

OMS DEMO / Project access

Home > Project access > OMS DEMO > Project Access

[Re-send invite](#) [Cancel](#) [Project access](#)

Your invitation has been sent and is pending acceptance

Information	
Parent user	Demian LeadBen @ OMS-LB
Access to Project	OMS DEMO
Access to Partner	
Project Rights	Authorised Signatory (AS) of Project
Partner Rights	
First name	Christoffer
Last Name	Villsen
Organisation	North Sea Programme

NOTE: The partner manager can monitor the progress from the same overview as this process was started.

The following steps is conducted by the invited authorised signatory.

STEP 6

The invited and suggested authorised signatory now receives an email with information on how to access the OMS.

NOTE: Please follow the guidance in the email to activate the user account. The designation process can only be continued once the user account has been activated.

Invitation to join the North Sea OMS

User Demian LeadBen in the North Sea OMS (Online Monitoring System) has invited you

North Sea Programme ([\[redacted\]@gmail.com](#))

to join the system and have access to the following submissions:

OMS DEMO

To complete the process and access the Online Monitoring System, please confirm your e-mail address by following the steps below:

1. Go to [https://oms.interregnorthsea.eu/app/partners-access/accept-invitation/&\[redacted\]](https://oms.interregnorthsea.eu/app/partners-access/accept-invitation/&[redacted])
2. Your e-mail address will be confirmed and you will be given your password.
3. Write down your password and store it in a safe place.
4. Use the login form to enter the system.
5. Your account will be connected to the submissions mentioned above and you will have viewing access on them.

This is an automated message. Please do not reply. For support requests please mail support@oms.interregnorthsea.eu

Kind regards,

The North Sea Team

STEP 7

Once the user account has been activated the suggested authorised signatory can log into the system. From the dashboard it is indicated that missing documents is required in order to proceed with the appointment of the authorised signatory.

Click the button "Start Process" in order to proceed.

The screenshot shows the 'Interreg North Sea 2021-2027 Online Monitoring System' dashboard for user 'Christoffer'. The 'Dashboard' section includes a 'Legal Status' card with the following text: 'You are set as the Authorised Signatory as follows: Partner Authorised Signatory for partner North Sea Programme of project OMS DEMO (Process not completed yet); Project AS for OMS DEMO (Process not completed yet). We are missing required document(s) (Appointment of authorised signatory document) for your validation as an Authorised Signatory. Please proceed.' A green 'Start process' button is visible. To the right, an 'Announcements' section shows dates 08/11/2021 and 03/07/2021 with messages about preparing project proposals and welcome messages. Below, a 'Project Applications' section shows 'My Projects' (none saved) and 'Shared projects' (one application: DEMO OMS DEMO Full Application). A blue box highlights the 'Legal Status' card, and a blue arrow points from it to a larger, detailed view of the same card on the right.

STEP 8

Now the suggested authorised signatory can start the signature process of the needed documents.

Click the button "Start signing".

The screenshot shows the 'Interreg North Sea 2021-2027 Online Monitoring System' 'Authorised signatory appointment' page for user 'Christoffer'. The page title is 'Authorised signatory appointment' with a breadcrumb 'Home > Authorised Signatory Appointment'. A central white box contains the text: 'Signing Process. Currently you don't have any pending signature process. Press the button below to start.' Below this text is a green 'Start Signing' button.

STEP 9

Now the authorised signatory has to fill in the contact details of a legal representative who can delegate or confirm the rights for her/him to legally represent and commit the organisation in the project. Typically, the contacts details will in this case be to a senior manager or a legal representative.

Once the information has been entered, click the button "Proceed".

NOTE: Self-employed and one man operations can enter their own contact details.

The screenshot shows the 'Legal Representative' form within the 'Interreg North Sea 2021-2027 Online Monitoring System'. The page title is 'Authorised signatory appointment' with a breadcrumb 'Home > Authorised Signatory Appointment'. A user profile for 'Christoffer' is visible in the top right. The form contains the following fields:

- Legal Representative** (Section header)
- Please fill Legal Representative details.
- Fullname**: Enter Legal Representative Fullname
- Title**: Enter Legal Representative Title
- Email address**: Enter Legal Representative email
- Mobile Phone Number**: Format: +Code Number
- Proceed** button

STEP 10

A preview of the letter is displayed. The letter is ready to be signed by the legal representative. Click the button "Submit". An email is sent to the legal representative.

The screenshot shows the 'Document Preview' page. The page title is 'Authorised signatory appointment' with a breadcrumb 'Home > Authorised Signatory Appointment'. A user profile for 'Christoffer' is visible in the top right. The document preview contains the following information:

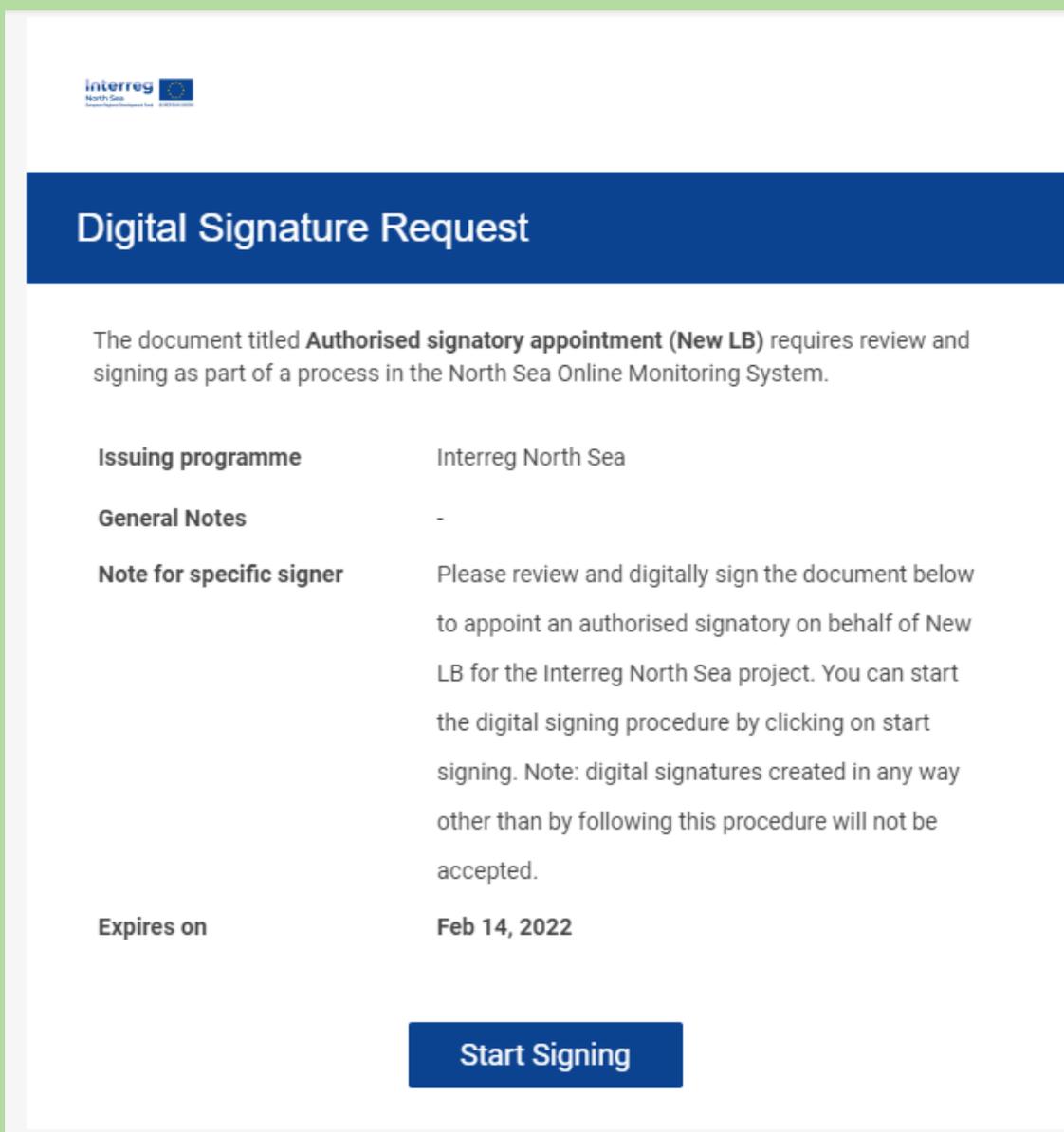
- Document Preview** (Section header)
- Please check document below and confirm for start the signing process.
- Interreg North Sea** logo (European Regional Development Fund, EUROPEAN UNION)
- Appointment of authorised signatory for New LB**
- I, C. S. Villsen, in my capacity as AS and authorised to legally represent New LB, have appointed as our authorised signatory in a Interreg North Sea project.
- Contact details of the authorised signatory**
- Full name:** Villsen Christoffer
- Organisation:** New LB
- Address:** Toldboden 3E, 8800, Viborg, Denmark
- E-mail:** [redacted]@il.com
- Telephone:** +4530351124
- Date**
- Signature**
- To be signed by the authorised signatory:**
- I Villsen Christoffer confirm that I am aware of my role and responsibilities as an authorised signatory (annex I). This means that I am entitled to (digitally) sign all formal documents between the project(s) I represent and Interreg North Sea.
- Date**
- Back to Apointee** button
- Submit** button

Note: The suggested authorised signatory and the project manager can monitor the process. Once the procedure is ongoing the authorised signatory has a button called "Check status" on the dashboard. By clicking this button, the authorised signatory can follow the process.

The following steps is performed by the legal representative.

Step 11

The legal representative receives an email with a link to start the signatory process. The legal representative initiate the procedure by clicking the button "Start Signing".



The screenshot shows an email interface with the following content:

- Logo:** Interreg North Sea logo with the European Union flag.
- Section Header:** "Digital Signature Request" in a blue bar.
- Text:** "The document titled **Authorised signatory appointment (New LB)** requires review and signing as part of a process in the North Sea Online Monitoring System."
- Table:**

Issuing programme	Interreg North Sea
General Notes	-
Note for specific signer	Please review and digitally sign the document below to appoint an authorised signatory on behalf of New LB for the Interreg North Sea project. You can start the digital signing procedure by clicking on start signing. Note: digital signatures created in any way other than by following this procedure will not be accepted.
Expires on	Feb 14, 2022
- Button:** "Start Signing" in a blue box.

STEP 12

By clicking "Start Signing" in the previous step this triggers a verification code being sent to the mobile phone of the legal representative. Enter the six-digit verification code into the field and click the button "Proceed to document".

Document info

Document name	Authorised signatory appointment (New LB)
Sender	Interreg North Sea <system@oms.interregnorthsea.eu>
Organization	Interreg North Sea
Sent on	Feb 04, 2022 <Expires in 10 days>
Private notes	Please review and digitally sign the document below to appoint an authorised signatory on behalf of New LB for the Interreg North Sea project. You can start the digital signing procedure by clicking on start signing. Note: digital signatures created in any way other than by following this procedure will not be accepted.

Enter access code (SMS)

The sender has enabled additional access restrictions for this document. Please enter the access code received on your phone via SMS(*****24) to access this document.

#####

Proceed to document

Didn't receive the authentication code?

[Resend code](#)

STEP 13

The legal representative inserts the signing date by clicking on the field "Sign date". By clicking the field today's date will be inserted. The letter is signed by clicking the field below the "date" field.

I confirm that I have read and understood the ["Electronic Record and Signature Disclosure"](#) and consent to use electronic records and signatures.

Agree & Continue More actions ▾

Zoho Sign Document ID: FDG2MS0CSMPFX3G307HFF800N3F32EXTCFWT49J_50

Appointment of authorised signatory for New LB

I, C.S. Vilisen, in my capacity as AS and authorised to legally represent New LB, have appointed as our authorised signatory in a Interreg North Sea project:

Contact details of the authorised signatory

Full name:	Vilisen Christoffer
Organisation:	New LB
Address:	Tolsteboden 3E, 8800, Viborg, Denmark
E-mail:	#####@gmail.com
Telephone:	+4530351124

Date * Sign Date

Signature*

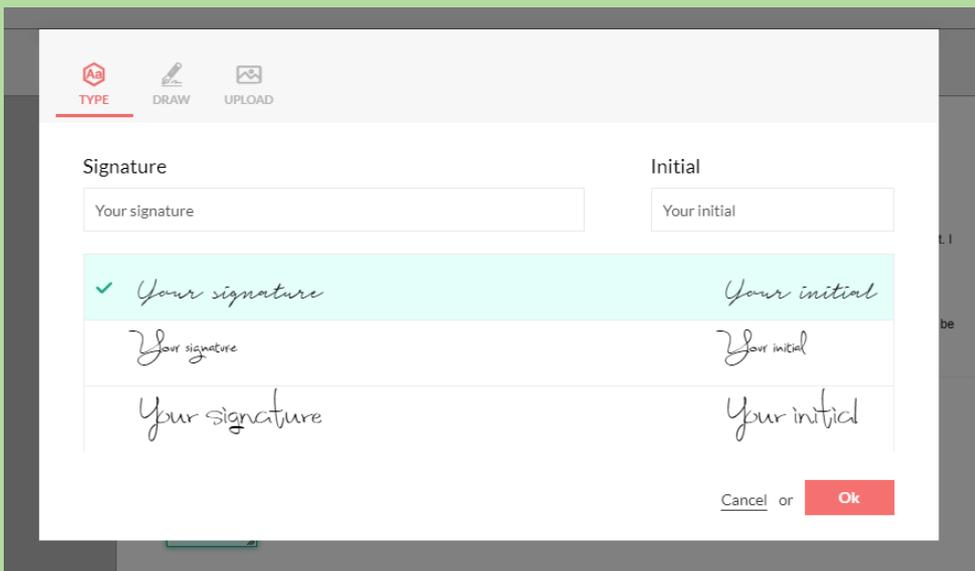
To be signed by the authorised signatory:

I Vilisen Christoffer, confirm that I am aware of my role and responsibilities as an authorised signatory (annex I). This means that I am entitled to (digitally) sign all formal documents between the project(s) I represent and Interreg North Sea.

STEP 14

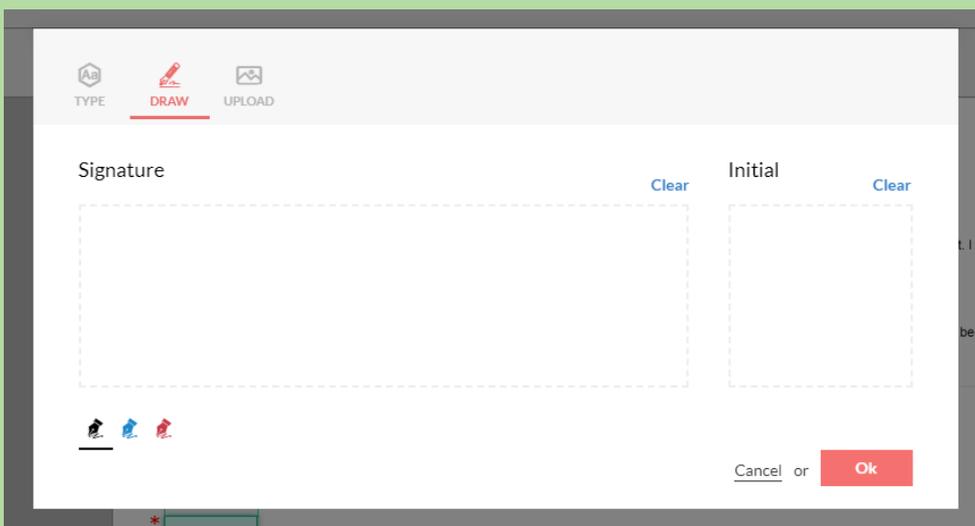
The legal representative can now enter a signature in one of three ways. Either the document can be signed by typing the signature (**14a**), by drawing the signature (**14b**), or by uploading an image file with a pre-existing signature (**14c**).

14a) Signing the letter by entering the name and initials of the signatory. The signatory can choose between various fonts.



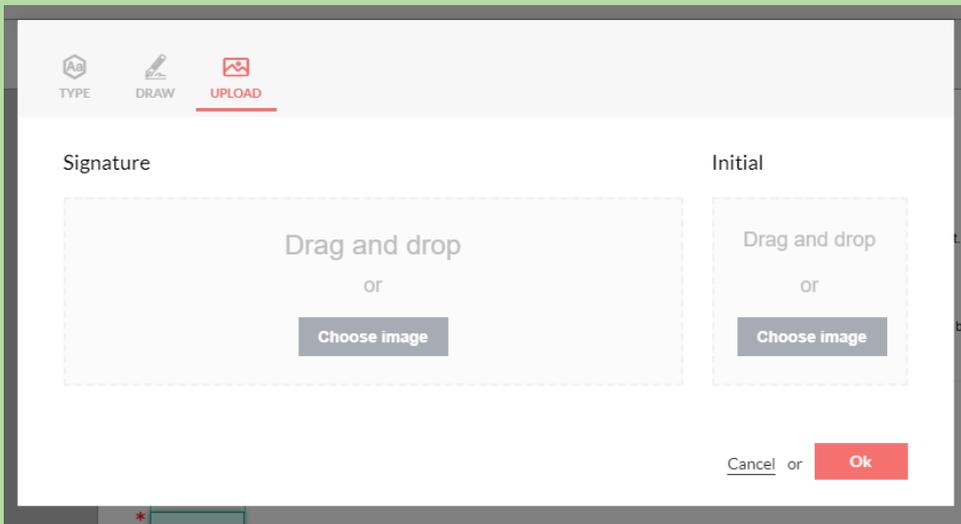
The screenshot shows the 'TYPE' signing interface. At the top, there are three tabs: 'TYPE' (selected), 'DRAW', and 'UPLOAD'. Below the tabs, there are two input fields: 'Signature' and 'Initial'. The 'Signature' field contains the text 'Your signature' and the 'Initial' field contains 'Your initial'. Below these fields, there are three rows of signature and initial options. The first row is highlighted in light blue and shows a checkmark next to 'Your signature' and 'Your initial'. The second row shows 'Your signature' and 'Your initial' in a different font. The third row shows 'Your signature' and 'Your initial' in a third font. At the bottom right, there are 'Cancel' and 'Ok' buttons.

14b) The signatory can sign the letter by drawing a signature. This is easiest if done on a tablet or other touchscreen device.



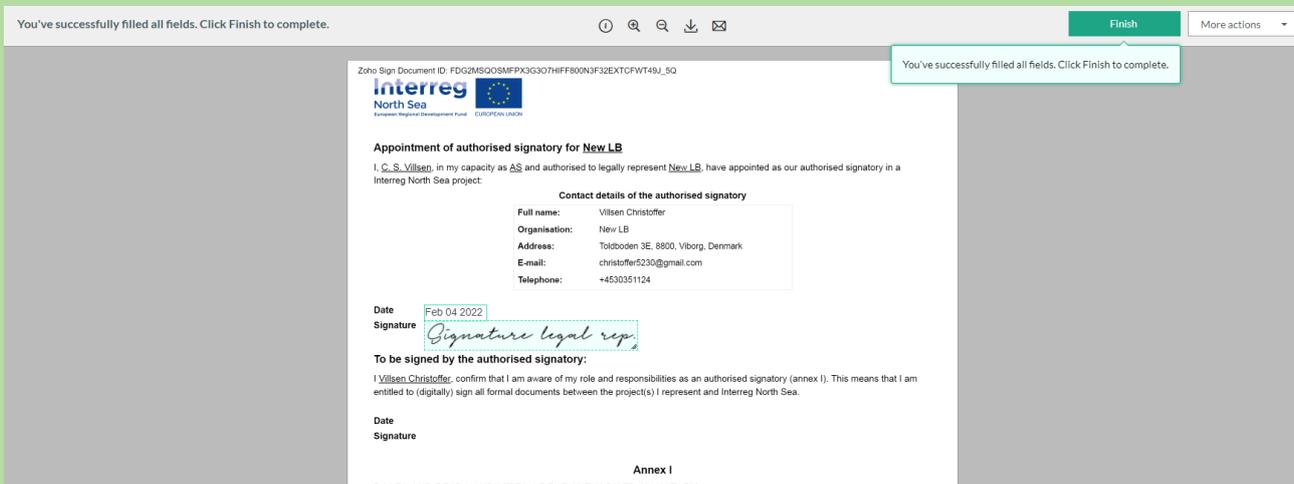
The screenshot shows the 'DRAW' signing interface. At the top, there are three tabs: 'TYPE', 'DRAW' (selected), and 'UPLOAD'. Below the tabs, there are two input fields: 'Signature' and 'Initial'. Both fields are empty and have a dashed border. To the right of each field is a 'Clear' button. At the bottom left, there are three drawing tools: a black pen, a blue highlighter, and a red highlighter. At the bottom right, there are 'Cancel' and 'Ok' buttons.

14c) If the signatory has a pre-existing signature saved as an image file this can be uploaded and inserted onto the document.



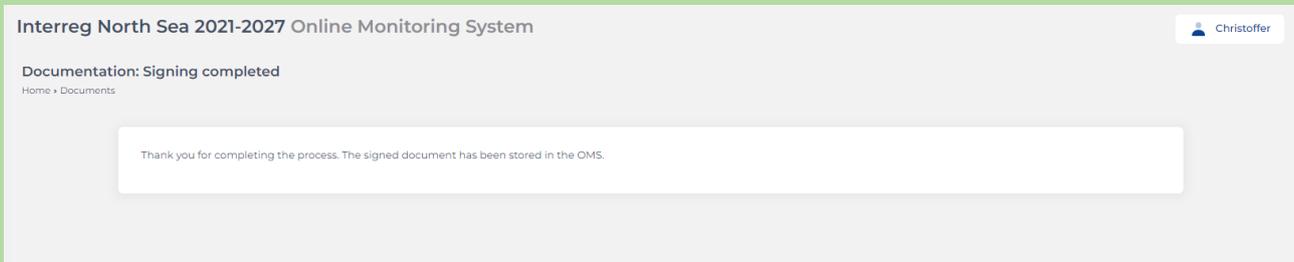
STEP 15

Once the legal representative has applied a digital signature (and clicked the button "OK" in the previous step) the letter is now in preview ready to be finalised. The legal representative finalises the signing process by clicking the button "Finish".



STEP 16

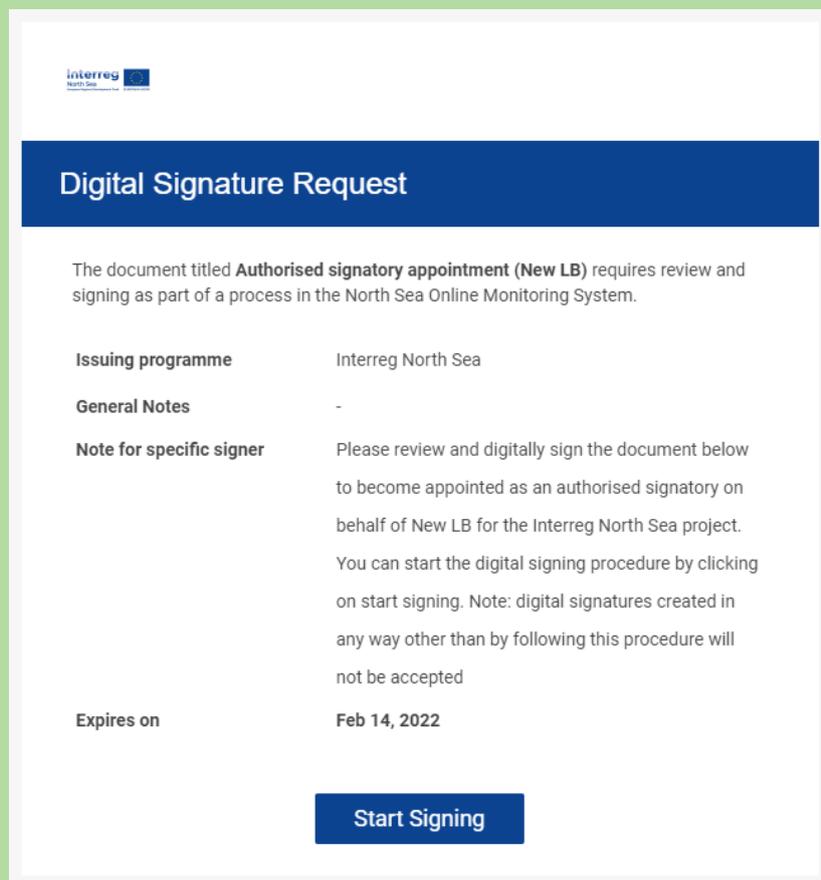
The legal representative is now directed to the Online Monitoring System, and a message stating that the process is completed is prompted.



The following steps are carried out by the authorised signatory.

STEP 17

Once the legal representative has signed the document and pressed the button "Finish", the authorised signatory receives an email with the content as displayed below. Click the button "Start Signing" to get the document signed and finalised.



Step 18

Follow steps 12-16 (above) to place the signature of the authorised signatory on the appointment document.

Step 19

You have now completed the signature process for appointing an authorised signatory. The Joint Secretariat has been informed.

NOTE: A member from the Joint Secretariat will look at the signed document and validate the user account for the authorised signatory.

Questions or comments?

Get in touch! Feel free to contact one of our project advisors. Find contact details for our staff at interregnorthsea.eu.

