# PROJECT GUIDANCE

# **Changes**

Version 2.0

This guidance covers the steps necessary to start and submit a change in the Online Monitoring System for small-scale projects and regular projects. The guidance covers examples of changes that can be requested as part of a basic information, minor or a major change. For more information about the scope of minor or major changes, please consult <u>Fact Sheet 25</u>.

Functions directly involved in the procedure covered by this guidance;

- **Project managing user** Will request the minor or major change and provide good arguments for why the respective change is needed.
- **Partner managing user** Will initiate the signing procedure of a new letter of intent (see example major change) or self-declaration (see second example minor change) if needed.

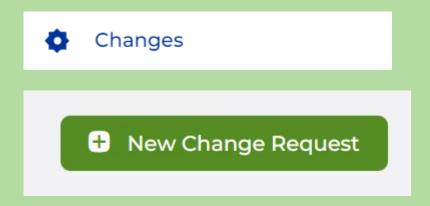
Functions **affected by** the procedure covered by this guidance;

- **Project authorised signatory** Will submit the change request to the Joint Secretariat.
- **Signatory** –The term "signatory" used in this guidance is not to be mistaken for the term "Project authorised signatory". In this guidance the term "signatory" covers an individual who legally will and can sign self-declaration and letters of intent on behalf of the partner organisation. The signing of the self-declaration and the letter of intent by the signatory is carried out electronically outside the OMS and no OMS user account will be created for the individual during this process.



## How to start a change?

You can start a change request by clicking on "Changes" in the left hand menu and afterwards add a "+New Change Request" in the upper right corner.



A title for the change request must be filled out that will reflect what the content of the change is about.

Project *	C7Da
Change Request number	1
	The change request number refers to which change this is for the project as a whole, rather than which change this is for an individual partner.
Title *	Budget line shifts for one partner
	When submitting a change request, there are two possibilities. Either you submit one change for approval or you submit several changes as a bundle. The title of your change request must make sense and reflect what the content of the change request is about.

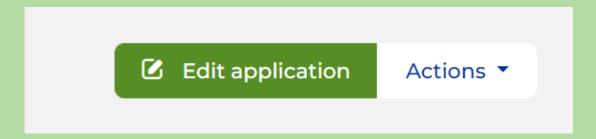
The type of change (basic information, minor change or major change) must be chosen.

The type of change (basic information, minor change of major change, mast be chosen.			
Request Type *	Basic Information Minor Change Major Change		
	<b>Basic Information</b> requests may contain changes in the details of Partners (but not the organisation name) and details of Partner Contacts. Basic Information requests can be submitted by Partners and approved by a Project Manager without confirmation from the North Sea JS.		
	<b>Minor change</b> requests are approved by the North Sea JS. They include changes in partners' organisation names (but not replacements) and legal status as well as project objectives and other parts of the application form that do not result in significant changes in the outputs and budget.		
	<b>Major change requests</b> are approved by the Monitoring Committee and include changes to the most critical parts of the application form including significant changes to the budget. During the lifetime of your project you can submit two major changes.		

You can then make use of the button "Edit application" in the upper right corner.





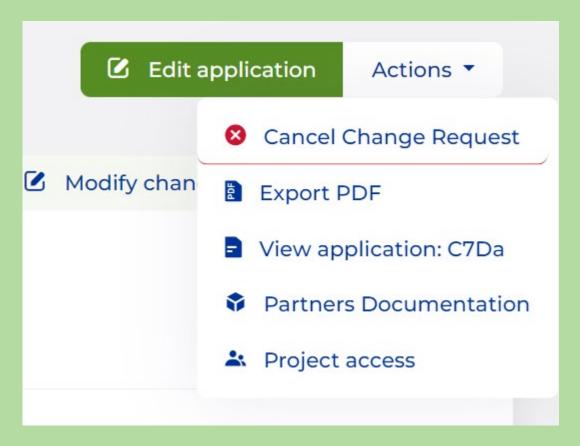


All fields that are editable are marked by a little pen icon. In the example below, the section B.1 Partners is editable.



### How to cancel a change?

If you have started a change request by mistake you can cancel it by clicking on the "Action" and "Cancel Change Request" button in the upper right corner.



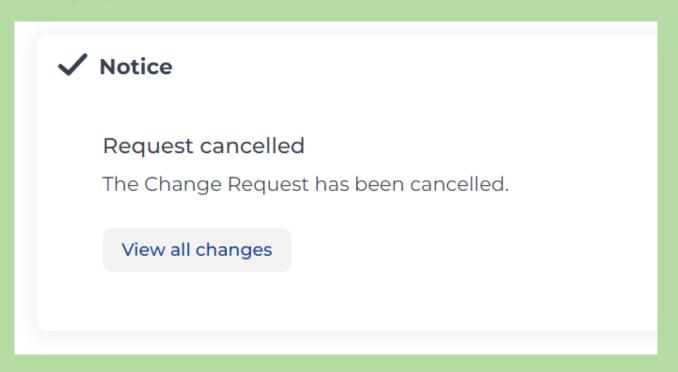
You will be asked to confirm the cancellation of the change request. If you can agree, please click on "Proceed".







The change request has been cancelled.



## Editable sections (basic information change)

When working on a basic information change, only the section "Partners" is editable.

## Editable sections (minor change)

When working on a minor change the sections "Partners", "Work Plan", "Budget", "Funding" and "Spending" are editable.





#### **Editable sections (major change)**

When working on a major change the sections "Identification", "Partners", "Work Plan", "Results", "Budget", "Funding" and "Spending" are editable.

### Example basic information change: changing the address of a partner

In case you want to change the address of a partner, you have to edit the section "Partners".



You are able to edit the partner's details by clicking on the blue plus.



#### SSP Lead Partner A



Address: Delfon 192, 54248 Thessaloniki,

188€

Lead Partner

VAT number: 1111

Entitled for VAT recovery: Yes

Legal status: Public

State aid:

Letter of intent:

Self declaration:

Belgium (NUTS: BE100)

Website: www

Contacts: Demian LeadBen

You have the possibility to make changes to "Partner identity", "Partner address" and if applicable "Department address".

# Partner identity

Partner address

Department

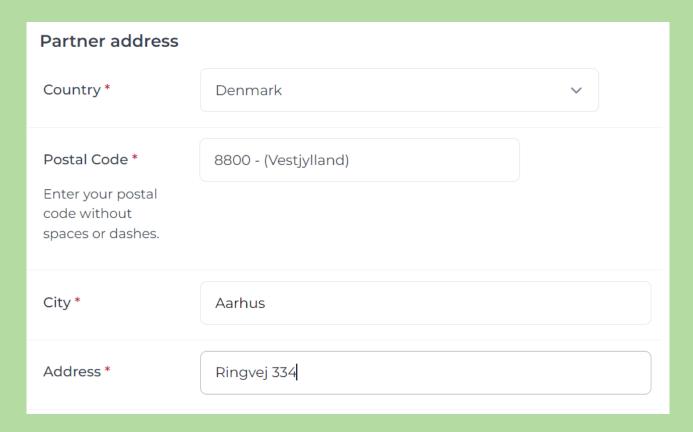
address **(1)** 



You can then change the address by clicking on "Partner address".



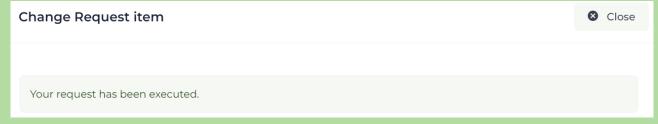




Make sure that all mandatory fields are filled out (also under "Partner identity" and if applicable "Department address"). Click on the "Save" button to save the changes made.



You will receive a confirmation.



The entry that has been changed is now highlighted in yellow.

You always have the possibility to cancel the change by clicking the yellow cross.





#### SSP Lead Partner

Lead Partner

VAT number: 1111

Entitled for VAT recovery: Yes

Legal status: Public

State aid:

Letter of intent: Self declaration: Address: Delfon 192, 54248

Thessaloniki, Belgium (NUTS: BE100)

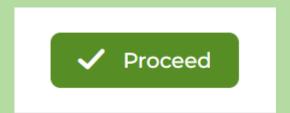
Website: www

Contacts:

When clicking on the yellow cross you will be able to see the change that you have requested.



When clicking on "Proceed", the change will be cancelled.



#### Example minor change: making a partner inactive

In case a partner must be made inactive in the partnership, you have to edit the section "Partners".



You are able to edit the partner's status by clicking on the blue plus.





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Vasso Org 🛕



Abrv.: ςςς Project Partner

VAT number: 222222

Entitled for VAT recovery: No

Legal status: Public

State aid: Not State Aid Relevant

Letter of intent: Self declaration: Address: Delfon 192, 54249 Thessaloniki,

84€

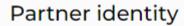
Norway (NUTS: EL522)

Website: www

Department: thes

Dept. Address: Delfon 192, 50100 Thessaloniki, Greece (NUTS: EL531) Contacts: PrtNorway Manager

You have the possibility to make changes to "Partner identity", "Partner address" and if applicable "Department address".



Partner address

Department address (1)

The status of a partner (active/ inactive) can be found and edited under "Partner identity".

In order to make a partner inactive, the button must be switched to "Yes".

#### Inactive Partner

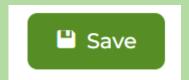


This function should only be applied to partners that are prevented from continuing in the project because of bankruptcy reasons etc. If enabled, this partner will be permanently marked as inactive. It will not be possible to be edited in a future change. Inactive partners are not part of periodic reports and cannot claim any expenditures to the programme.

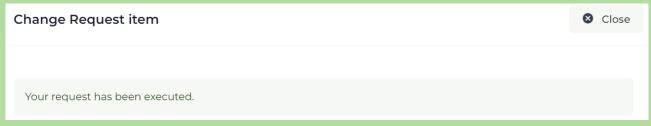
Make sure that all mandatory fields are filled out (also under "Partner identity" and if applicable "Department address"). Click on the "Save" button to save the changes made.







You will receive a confirmation.



The entry that has been changed is now highlighted in yellow. The partner is now marked as "Inactive".



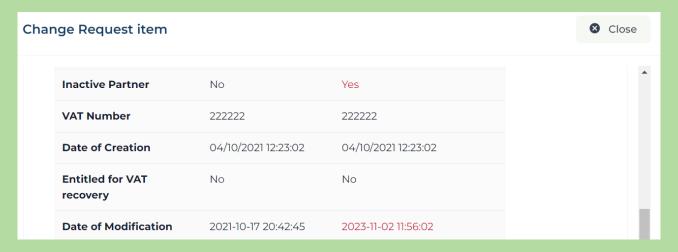
You always have the possibility to cancel the change by clicking the yellow cross.



When clicking on the yellow cross you will be able to the change that you have requested.







When clicking on "Proceed", the change will be cancelled.



### Example minor change: Changing the state aid status of a partner

In case the state aid status of a partner must be changed, you have to edit the section "Partners".

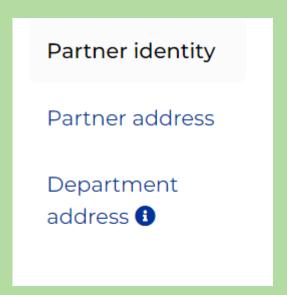


You are able to edit the partner's state aid status by clicking on the blue plus.



You have the possibility to make changes to "Partner identity", "Partner address" and if applicable "Department address".



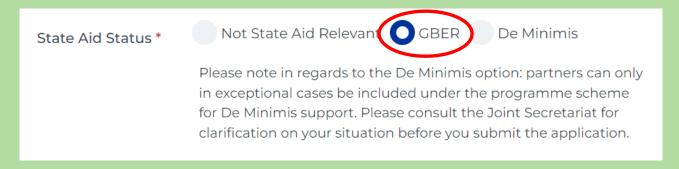


The state aid status can be found and edited under "Partner identity".

In the example the legal status has to be changed from public to private.



Afterwards the state aid status will be changed from "Not State Aid Relevant" to "GBER".

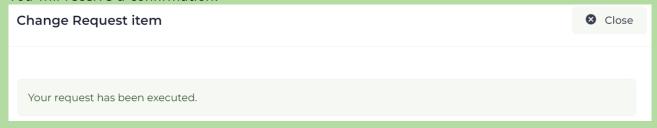


Make sure that all mandatory fields are filled out (also under "Partner identity" and if applicable "Department address"). Click on the "Save" button to save the changes made.





You will receive a confirmation.



The entry that has been changed is now highlighted in yellow.

You always have the possibility to cancel the change by clicking the yellow cross.



When clicking on the yellow cross you will be able to the change that you have requested.



When clicking on "Proceed", the change will be cancelled.





In order to complete the state aid status change, a new GBER self-declaration must be signed.

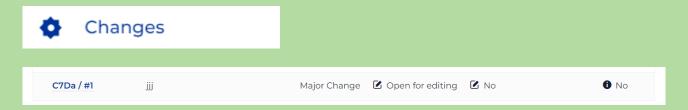
Please click on "Partners Documentation".



You will be informed that a self-declaration for the respective partner (Vasso Org) is needed. This procedure can be initiated by the respective partner managing user.

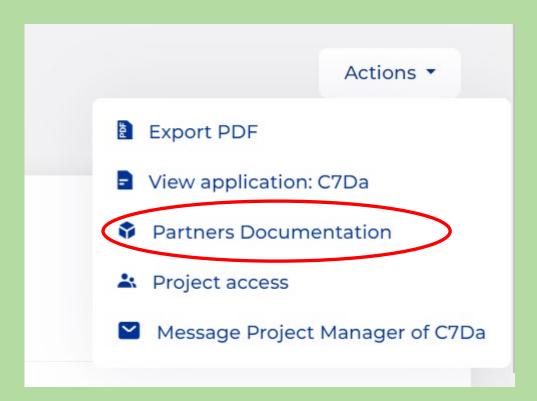


The partner managing user will be able to start the process under "Changes" in the left hand menu and by clicking on the respective change.



Afterward the partner managing user must click the "Actions" button in the upper right corner and click on "Partners Documentation".





The partner managing user will receive the same information as the project managing user. The partner managing user will be informed that a self-declaration for the respective partner (Vasso Org) is needed.



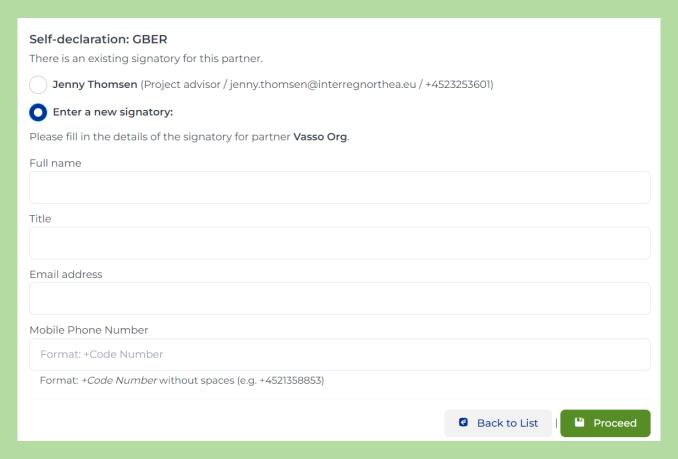
This procedure can be initiated by clicking the "Start" button in the column "Self-declaration".



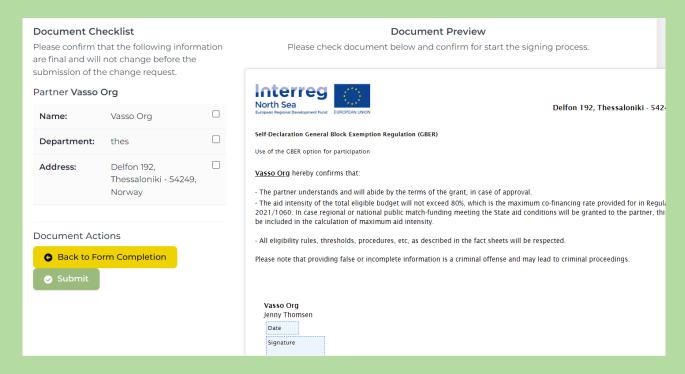
The partner managing user can either enter new contact details of a signatory that is supposed to sign the self-declaration or let the system fill out the text boxes with the contact details of a signatory who has already signed self-declarations in the past.







The partner managing user will be forwarded to the self-declaration and must confirm that certain information is correct and will not change before the submission of the change request.



When the information in the text boxes has been confirmed, the "Submit" button will be available. The self-declaration must be submitted and a signature process will be initiated.





# **Document Checklist**

Please confirm that the following information are final and will not change before the submission of the change request.

# Partner Vasso Org

Name:	Vasso Org	<b>~</b>
Department:	thes	<b>~</b>
Address:	Delfon 192, Thessaloniki - 54249, Norway	<b>~</b>

# **Document Actions**







The signatory that is supposed to sign the self-declaration will receive a mail and must click on the link "Start signing".

# Digital Signature Request

The document titled **Self-Declaration GBER C7Da** - **Vasso-Org** requires review and signing as part of a process in the North Sea Online Monitoring System.

Issuing programme Interreg North Sea

General Notes -

Note for specific signer -

Expires on Dec 06, 2023



The signatory will be forwarded to a browser window.





# Document info

Document name Self-Declaration GBER C7Da - Vasso-Org

Sender Interreg North Sea < system@oms.interregnorthsea.eu>

Organization Interreg North Sea

Sent on Nov 06, 2023 < Expires in 30 days>

Recipient authentication SMS OTP

# Enter access code (SMS OTP)

The sender has enabled additional access restrictions for this document. Please enter the access code received on your phone via SMS(\*\*\*\*\*\*\*\*01) to access this document.

Please enter the authentication code shared to your email address



The signatory must type in the code received by sms in the meantime. Afterwards the signatory must click on "Proceed to document".

# Enter access code (SMS OTP)

The sender has enabled additional access restrictions for this document. Please enter the access code received on your phone via SMS(\*\*\*\*\*\*\*01) to access this document.

Please enter the authentication code shared to your email address

7 8 1 9 4 3 Proceed to document

Didn't receive the authentication code? Resend code

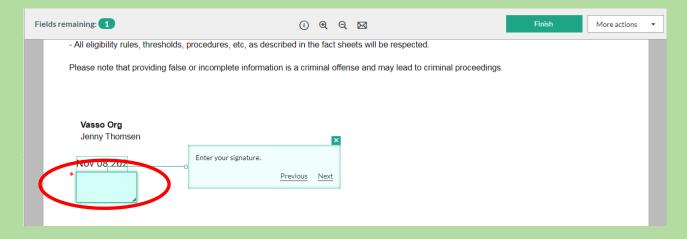




The signatory will be forwarded to the self-declaration that must be signed by clicking the confirmation box at the top of the screen. Afterwards please click on "Agree & Continue".

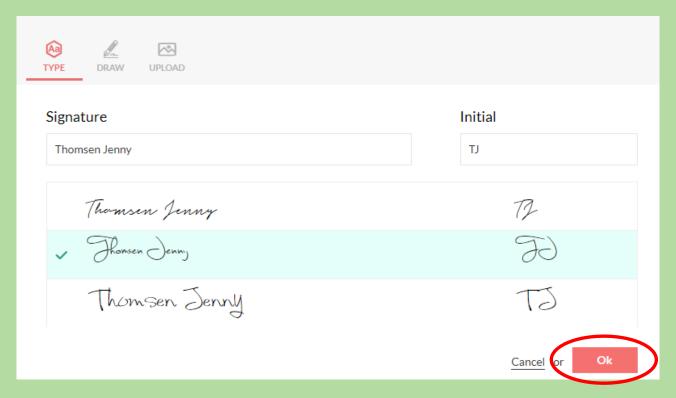


The signatory's signature can be entered by clicking into the signature field.

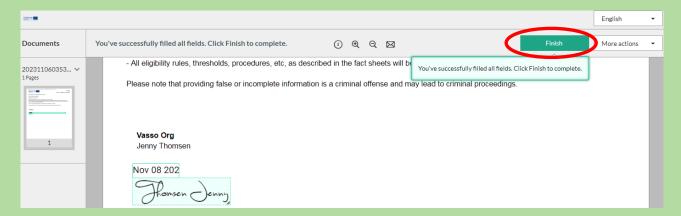


A signature type can be chosen by clicking on it. Afterwards the "Ok" button must be pressed.





The signatory received a notification that the fields are filled out and the signature process can be finalized by clicking the button "Finish".



There is a notification in the Online Monitoring System that confirms the completion of the signature process.



The project managing user as well as the partner managing user will also be able to check that the self-declaration signing procedure has been completed (under partner documentation – see further up).







## How to submit a change?

When everything has been entered properly into the change request, the Authorised Signatory must be informed to submit the change request to the Joint Secretariat.

