

**Interreg-IPA CBC Programme**  
**CCI No. 2014TC16I5CB006**

# **USER MANUAL FOR BENEFICIARY PORTAL**

Version 3.0 - August 2020

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## LIST OF ABBREVIATIONS

<b>AF</b>	Application form
<b>BP</b>	Beneficiaries electronic exchange portal/ Beneficiary portal
<b>CVE</b>	Certificate for Validation of Expenditures
<b>FLC</b>	First Level Control
<b>IR</b>	Invoice Report
<b>JS</b>	Joint Secretariat
<b>LP</b>	Lead Partner
<b>MA</b>	Managing Authority
<b>MIS</b>	Management Information System
<b>MRDPW</b>	Ministry of Regional Development and Public Works
<b>PIM</b>	Project Implementation Manual
<b>PRAG</b>	Practical Guide for Procurement and Grants for European Union external actions
<b>PPR</b>	Project Progress Report
<b>TCM</b>	Territorial Cooperation Management Directorate
<b>VAT</b>	Value Added Tax

## I Work processes and User tasks

The Beneficiary Portal is available at the following address: <http://www.ipa-cbc-007.eu/>.

The BP supports all work processes of the Beneficiaries, related to interaction with the Programme authorities. The processes are split into tasks, assigned to different (groups of) users.

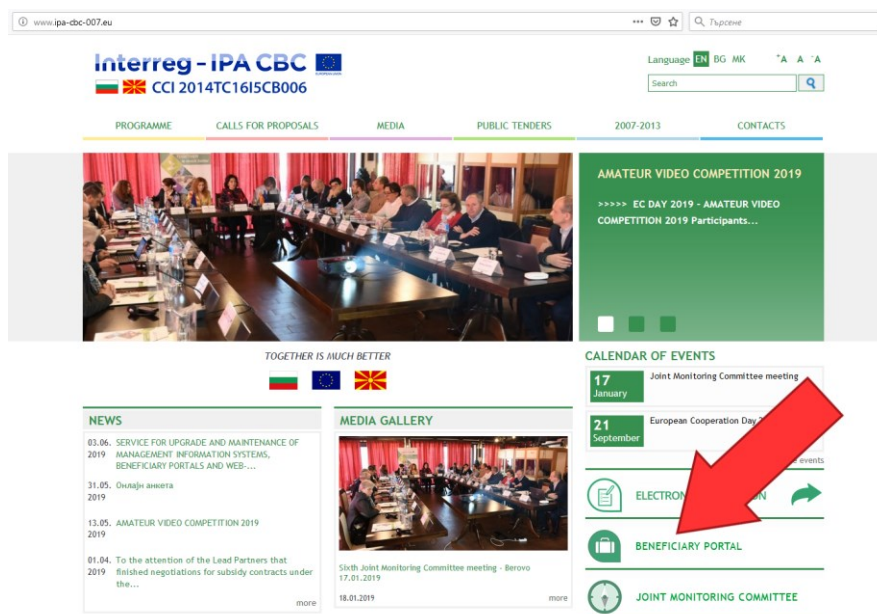
- Account management:
  - Creation of Lead partner account;
  - Creation of sub-users.
- General communication:
  - Reading messages;
  - Sending messages;
  - Uploading files.
- Financial reporting, FLC and payments:
  - Task: Recording of Invoices by project partners;
  - Task: Generation of Invoice reports and Requests for payment.
- Reporting:
  - Task: Recording of Progress by Indicator.
- Contracting and changes:
  - Task: Request for modifications in the AF/ contract;
  - Task: Upload of a contract or addendum.

## II Account management

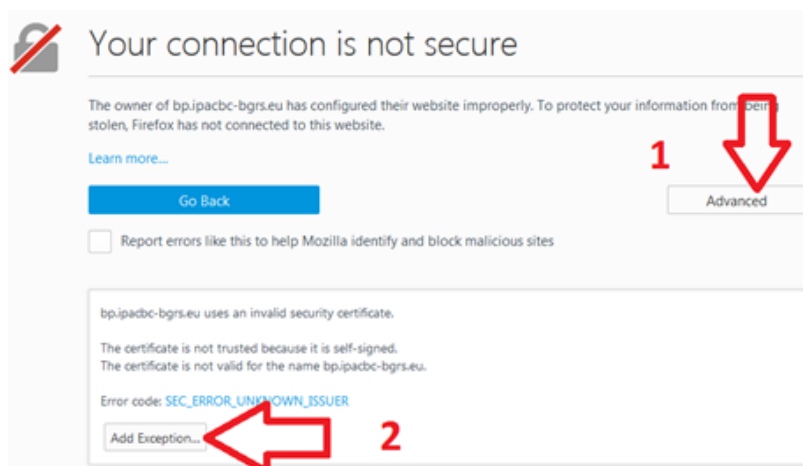
### 1. Creation of Lead partner account

**How to log in the Beneficiary Portal - Step by Step guide:**

1. Beneficiary portal is accessible through the Programme website: <http://www.ipa-cbc-007.eu/>



2. After you press the button for access, you will receive a **security warning message**, which you should **accept**:



3. You will access the **log in menu**, where you should **enter your account and password**:

Log in

Username

1\_123\_Lorem\_Ipsum

Password

●●●●●●

Log in

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## 2. Creation of sub-users

Lead partners have the right to create accounts for the Beneficiary portal to other project partner/s, which is recommended to be done at the start of the project implementation.

**Note:** Due to the fact that the reporting and communication with Programme authorities will be carried out through the Beneficiary portal, in case a Lead partner decides not to create such accounts for the remaining partner/s, the Lead partner should enter all requested information for other partner/s.

**How to create sub-users - Step by Step guide:**

1. Log in the Beneficiary portal.
2. Select “**Project beneficiaries**” form the main menu.

Add beneficiary

Username	Name	E-mail	Organization	Last login	Is active	Actions	
1_0025_so_berovo	lead	0025 SO Berovo	so.berovo@t-home.mk	PP1: Municipality of Sofia	15.02.2016 16:36:36	<div><div></div></div>	
1_0025_nevena_kostova		nevena.kostova@gateway.bg	PP2: Municipality of Piro	02.02.2016 13:48:14	<div><div></div></div>	<div><div></div></div>	

3. Select **Add beneficiary**.

CB005.1..006 | Shopsko beer vs Serbian quince brandy TET: Add beneficiary

Username

1\_006\_lomsko

E-mail

lomsko@lomsko.bg

Password

yH@2hP%7vA@0

Generate pwd

Partner

PP3: Lomskopivo

Save

4. **Fill in the form and Save.** The username is created from the email preceded by the call number and project number. In the creation process, you should use the official e-mail, included in the Application form and part of the Subsidy contract.

**Note:** Only one **active** partner account per partner is allowed. If you need to add a new sub-user for a given partner **block** the existing one (**do not delete**) and then add the new one.

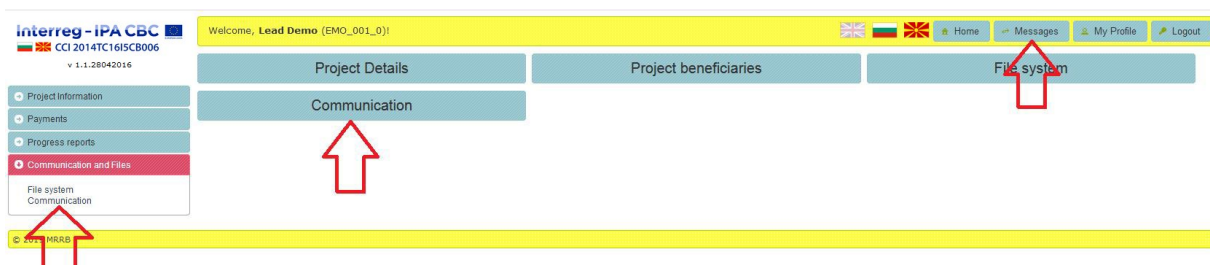
### III Communication

Messages are used as a main communication tool for sending of general information to the Programme authorities, such as: notifications and official letters, invitations for project events, communication with experts, requests for publication of the Programme website, etc.

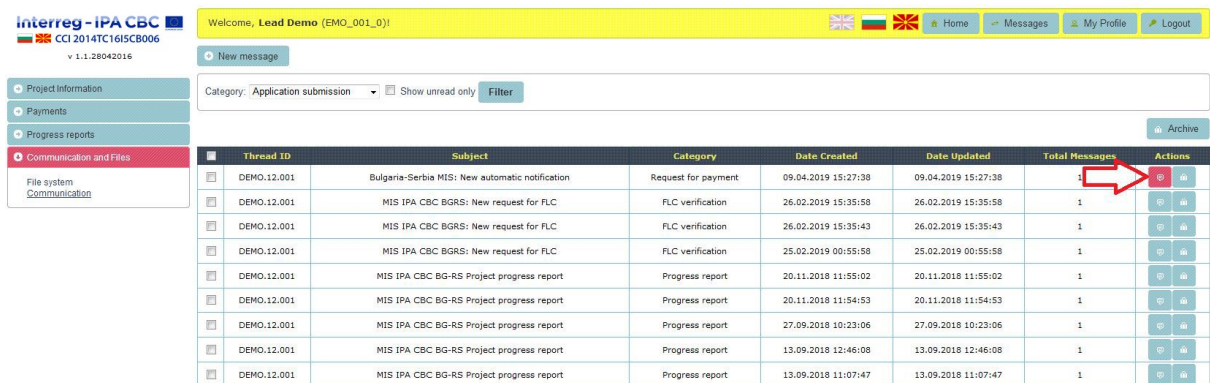
#### 1. Reading messages

Step by Step guide:

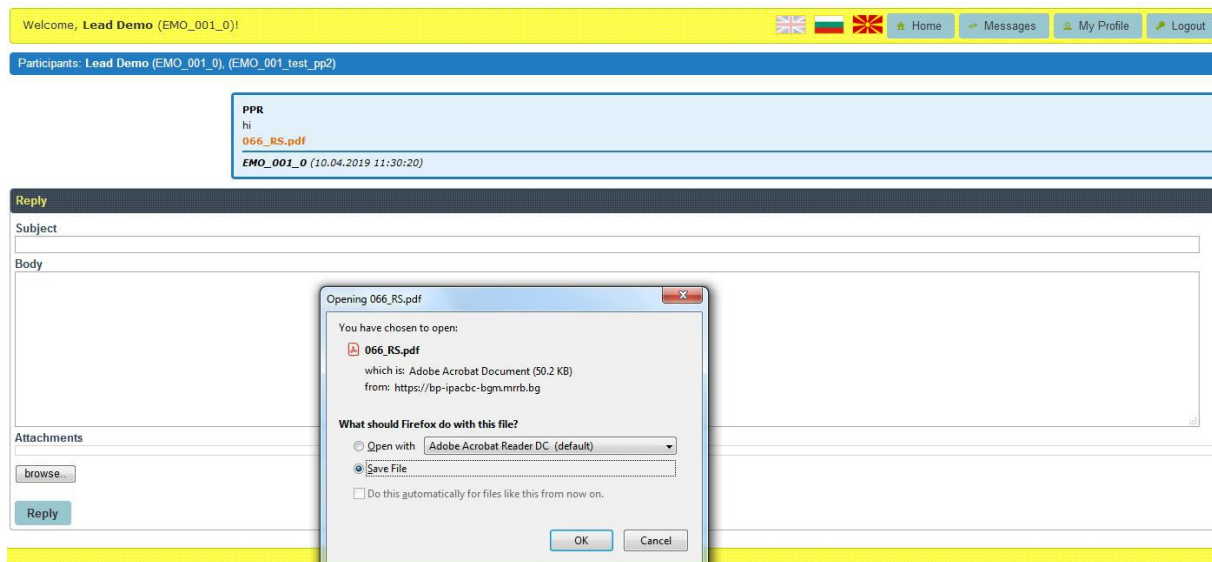
1. From the main menu select the button “**Communication**” or “**Messages**” at the upper right corner of the working area. You can access the section, as well from the menu on the left – press the button “**Communication and Files**” and then select “**Communication**”.



2. Select a message to read and from the icons in the right column select the “**View**” button.



3. Read the message.



## 2. Sending messages

### Step by Step guide:

1. Enter the Communication section as described above
2. Select “New message”.
3. From the provided user groups, select recipient/s.
4. Prepare the message by filling in each of the fields “Category”, “Subject” and “Body”. Note that if one of these fields remains empty, the message will not be sent.

File may be attached from the File system folders, by selecting the “Browse” button at the bottom of the message window.

**Note:** Answers to already received messages could be sent by using the “Reply” and “Forward” buttons at the bottom of each message.

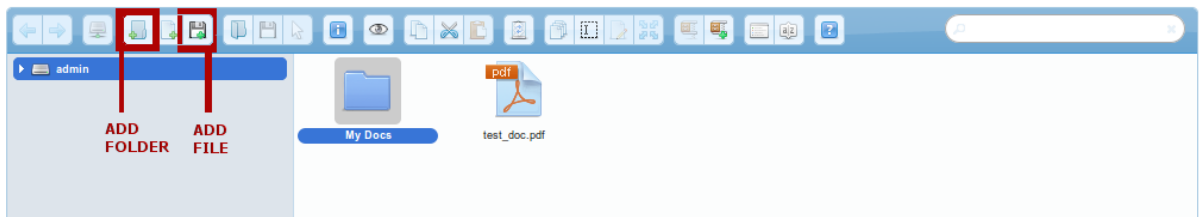
## 3. Uploading files

Electronic files, with limitations of 500 MB, could be attached to messages and sent via the Beneficiary Portal. Before sending them, they should be uploaded in the File manager section. Once sent the files must not be moved or renamed as the system is attaching the link and not the files to the message.

### Step by Step guide:

1. Select submenu “File System”. A File manager opens.
2. Select a file from the previously uploaded in the File system or add new files from your computer. New folders can be created in order to be systematized all the documents.





### 3. Upload a file and send the message.

**New Message**

Send to

Project beneficiaries	Admin	JS	FLC	Beneficiaries	<b>MA - External Borders Expert</b>	MA - Financial Department	JMC Admin	JS head	MA-Financial experts	JS communication officer	FLC head
MA - Head External Borders	MA- head of FMC	MA-ExtB-UM	CBC ExtB. FLC for TA								

☒ (JSH1)

MA - External Borders Expert (JSH1)

Category

- ☐ Invoices
- ☐ FLC verification
- ☒ Request for payment
- ☐ Procurement plan

Contract and changes

- ☐ Contracting negotiations
- ☐ Requests for changes

Reporting

- ☐ FLC Visit
- ☐ Project Evaluation
- ☐ Progress report

Other

- ☐ General Discussions
- ☐ Project team declaration

Application

- ☐ Application submission

Subject

Request for payment

Body

Request for interim payment

Attachments

MIS - Mozilla Firefox

https://bp-ipabc-bgrs.mrb.bg/beneficiary/browse\_files/#elf\_J1\_RU1PXzAwMV8w

90%

Project File System

- EMO\_001\_0
  - asdasdsad
  - NewFolder
  - public

asdasdsad

NewFolder

066\_8 Dec 01, 2016 01:05 PM (50 KB)

rfp.pdf

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## IV Preparation and submission of Project Procurement Plan

The Lead partner (with assistance from all project partners) has an obligation to prepare Project Procurement plan. The plan for all partners (aggregated) should be submitted to the JS only by the Lead partner.

### 1. Preparation of Project Procurement Plan

Most of the expenditures, envisaged under budget lines 4 and 5 could be grouped in tender procedures (according to PRAG). Expenditures under BL 1, 2, budget sublines 3.1 and 3.2, and all expenditures below the minimal threshold for single tender, could be done without procurement procedures.

The expenditures part of procurement procedures should be included in the Procurement plan. There is no need to include the rest of the expenditures, which will be treated as expenses not to be procured (others).

#### Step by Step guide:

1. Login in BP and select menu “Payments”, submenu “Procurement”.

**Interreg - IPA CBC**  
CCI 2014TC1615CB006  
v 1.1.28042016

Welcome, **Dragan Draganov** (1\_038\_so\_berovo)!

EDIT PROCUREMENT PLAN FILE (72a79-3188\_actual-2015-yuni.doc) SEND NOTIFICATION

PROCUREMENT PLAN FILE: 72a79-3188\_actual-2015-yuni.doc  
PROCUREMENT PLAN CREATED: 2016-11-29 14:13:26

Procurement Plan Export

Add Record

Responsible partner	Name	Provisional date	Ty
PP1	Test Procurement	2016-11-29	SE

Search:  Search all

Show 50 entries Page 1 of 1 Displaying 1 to 1 of 1 items

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CCI 2014TC1615CB006  
v 1.1.28042016

Welcome, **Lead Demo** (EMO\_001\_0)!

**PROCUREMENT PLAN**  
PROCUREMENT PLAN FILE:  
PPP (569.00B) 2019-04-10 15:15:39  
PROCUREMENT PLAN CREATED: 2017-04-04 16:57:38  
PROCUREMENT PLAN SUBMITTED: 2019-04-10 15:15:39

Procurement Plan Export

Add Record

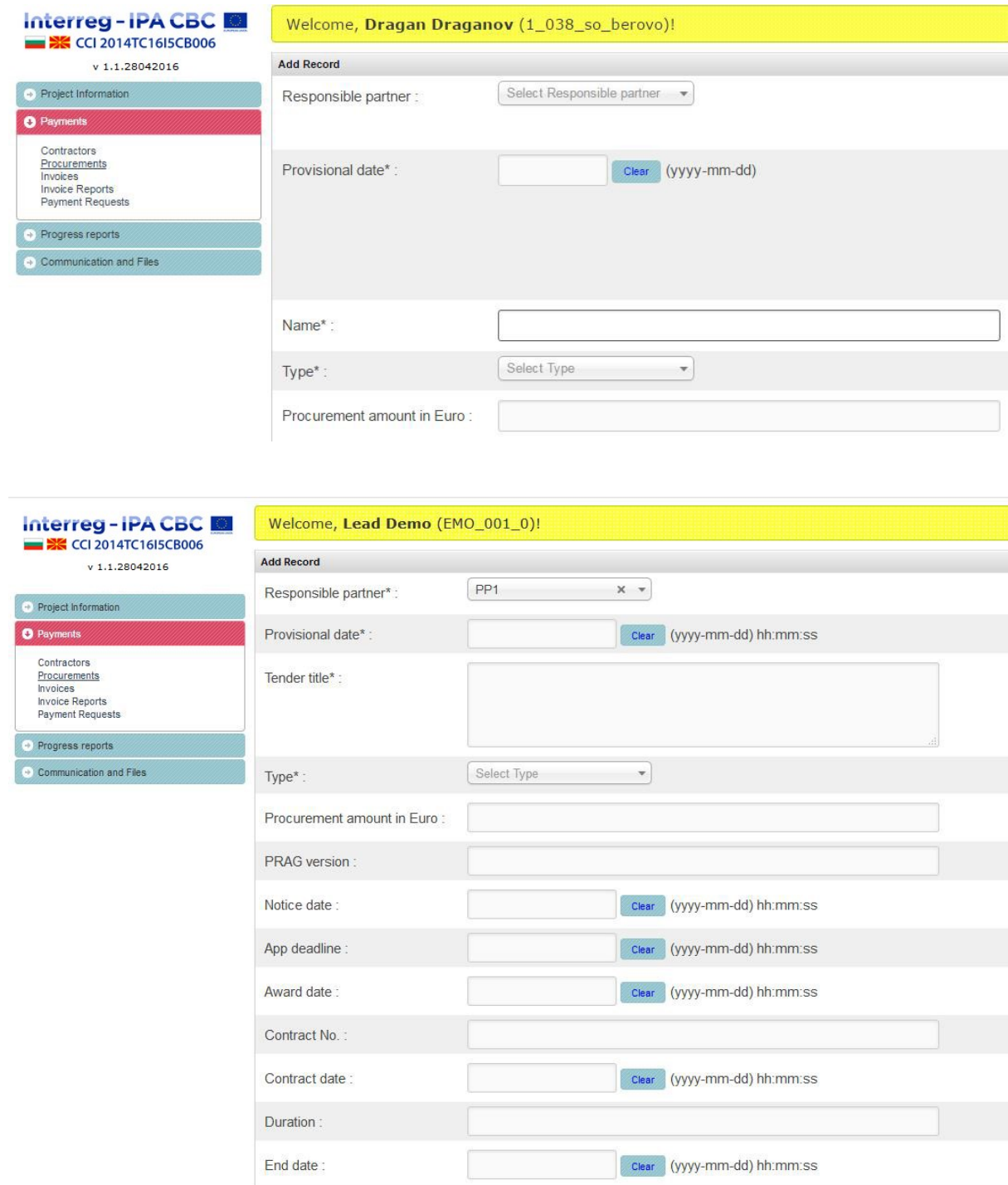
Responsible partner	Tender title	Provisional date	Type	Procurement amount in Euro	Notes	Procurement status
PP1	Процедура за доставка	2016-06-01 - 00:00	SERVICES (A2)	20000.00		Submitted
PP2	Процедура за доставка на оборудване	2016-11-30 - 00:00	SUPPLY (B1)	10000.00		Submitted

2. Press “Add Record” button in the upper left side of the working area



Take into consideration that the respective tender procedure is assigned to its creator, i.e. if the Lead partner fills in all the data at the beginning of the creation of PPP, the LP will have to also fill the data for the implementation.

## 2. Start filling the form



The screenshot shows the Interreg-IPA CBC Beneficiary portal interface. On the left is a sidebar with navigation links: Project Information, Payments (highlighted), Progress reports, and Communication and Files. The Payments section includes links for Contractors, Procurements, Invoices, Invoice Reports, and Payment Requests. The main content area has a yellow header bar with the text "Welcome, Dragan Draganov (1\_038\_so\_berovo)!" and a button labeled "Add Record". Below this is the "Add Record" form. The form includes fields for: Responsible partner (a dropdown menu), Provisional date\* (a date input field with a "Clear" button and a "(yyyy-mm-dd)" placeholder), Name\* (a text input field), Type\* (a dropdown menu), Procurement amount in Euro (a text input field), Tender title\* (a large text area), Type\* (a dropdown menu), Procurement amount in Euro (a text input field), PRAG version (a text input field), Notice date (a date input field with a "Clear" button and a "(yyyy-mm-dd) hh:mm:ss" placeholder), App deadline (a date input field with a "Clear" button and a "(yyyy-mm-dd) hh:mm:ss" placeholder), Award date (a date input field with a "Clear" button and a "(yyyy-mm-dd) hh:mm:ss" placeholder), Contract No. (a text input field), Contract date (a date input field with a "Clear" button and a "(yyyy-mm-dd) hh:mm:ss" placeholder), Duration (a text input field), and End date (a date input field with a "Clear" button and a "(yyyy-mm-dd) hh:mm:ss" placeholder).

4. Choose responsible partner from the drop-down list and proceed with entering information for the first envisaged tender procedure (or expense not to be procured).
5. Select the appropriate date when you expect to announce the tender/ make the expenditure:

**Add Record**

Responsible partner\* : PP1

Provisional date\* :  Clear (yyyy-mm-dd) hh:mm:ss

Tender title\* :

Type\* :

Procurement amount in Euro :

PRAG version :

Notice date :  Now Done Clear (yyyy-mm-dd) hh:mm:ss

6. Fill in the Tender title (Name of the procedure)
7. Select the type of the procedure.
8. Fill in the Procurement amount in EUR. For the Bulgarian partners the amount of the respective procedure should be listed with included VAT.
9. Obligatory in the filed “Notes” at the end of the form fill in the following data: the number/name of the budget (sub) line/s included in the relevant procedure names and amounts of lots (if applicable), etc.
10. Fill in the field “Procurement amount without VAT”, in EUR– only for Bulgarian partners;

At this stage, do not fill in the rest of the fields.

11. Save the initial version of the Procurement item (tender procedure or expense not to be procured) and go back to list to add more items, until you plan all expenditures under budget lines 3, 4, 5 and 6.



Save Save and go back to list

## 2. Creating a draft of Project procurement plan

The Lead partner has the obligation to review the procurement plans of all partners and to prepare an aggregated draft for submission to the JS.

**Step by Step guide:**

1. Change the status of each inserted record in the section (tender procedure or expense not to be procured) from “Draft” to “Approved Draft” by pressing the button “View record” located in column “Actions” at the right end of each row.

PP1	Development of tourism in the border region of Bulgaria and Serbia by creating tourist attractions and exhibition of representative...	2017-02-28 - 00:00	SERVICES (A2)	120.00	100	Approved Draft	<a href="#">Add File</a>	
PP1	Organisation of events	2019-02-05 - 00:00	SERVICES (A2)	24000.00	20000 EUR, VAT excl. Lot 1 - Round table (10 000 EUR VAT excluded) Lot 2 - Transport for events in RS (10 000 EUR VAT...)	Draft	<a href="#">Add File</a>	

2. A new window will appear with all the inserted information insofar. To change the status of the record, press the button “Approved Draft” at the left corner of the working area. This action will lock all procurement for further editing for project partners and only the Lead partner could add some changes.

[BACK TO LIST](#)

**ACTIONS:** [Draft](#) [Approved Draft](#)

<b>Responsible partner</b>	PP1
<b>Provisional date</b>	2019-02-05 00:00:00
<b>Name of procedure</b>	Organisation of events
<b>Type</b>	SERVICES (A2)
<b>Procurement amount in Euro</b>	24000.00
<b>Notes</b>	20000 EUR, VAT excl. Lot 1 - Round table (10 000 EUR VAT excluded) Lot 2 - Transport for events in RS (10 000 EUR VAT excluded)
<b>JS Remarks</b>	

3. When all records are with status “Approved Draft”, press the button [CREATE PROCUREMENT PLAN](#) at the upper left corner of the working area. The procurement status of all records will be changed to “Submitted”.

4. Generate a Project Procurement Plan by pressing [Procurement Plan Export](#). A file containing all tender procedures will be created.

3. Print, sign and stamp the document.

Please NOTE that the first page of the printed Project procurement plan does not contain “No.” and “Date of the document” - this must be inserted manually.

4. Upload the document into the system by using the “Add File” button in the top left side of the working area.

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Welcome, **Dragan Draganov (1\_038\_so\_berovo)!**

EDIT PROCUREMENT PLAN FILE (72a79-3188\_actual-2015-yuni.doc) SEND NOTIFICATION

PROCUREMENT PLAN FILE: 72a79-3188\_actual-2015-yuni.doc  
PROCUREMENT PLAN CREATED: 2016-11-29 14:13:26

Procurement Plan Export

Add Record

Responsible partner	Name	Provisional date
PP1	Test Procurement	2016-11-29

Search: Search all Search

Show 50 entries Page 1 of 1 Displaying 1 to 1 of 1 items

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### 3. Submission of the Project procurement plan draft to JS

All procedures described above are preparatory. When the Lead partner completes them, it should proceed with the official submission of the plan to JS.

#### Step by Step guide:

1. Once all details are cleared and the Lead partner is satisfied with the draft of Project procurement plan, you can go back to submenu "Procurement".
2. Check one last time if all information is correct and the appropriate file is uploaded, and press the button: **SEND NOTIFICATION**.

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CCI 2014TC1615CB006  
v 1.1.28042016

Welcome, **Lead Demo (EMO\_001\_0)!**

PROCUREMENT PLAN

PPP (569.00B) Edit Delete

SEND NOTIFICATION

PROCUREMENT PLAN CREATED: 2017-04-04 16:57:38

Procurement Plan Export

Add Record

Responsible partner	Tender title	Provisional date	Type	Procurement amount in Euro	Notes	Procurement status
PP1	Процедура за доставка	2016-06-01 - 00:00	SERVICES (A2)	20000.00		Submitted
PP2	Процедура за доставка на оборудване	2016-11-30 - 00:00	SUPPLY (B1)	10000.00		Submitted

**Note:** This operation will lock the plan for further editing. Changes could be done only after it has been unlocked by the JS.



## V Entering information for contractors and payments

### 1. Entering data for contractors

1. Login in BP and select menu “Payments”, submenu “Contractors”.

The screenshot shows the Interreg-IPA CBC Beneficiary Portal interface. On the left, there is a sidebar menu with the following items: Project Information, Payments (highlighted), Contractors, Procurements, Invoices, Invoice Reports, and Payment Requests. Below the menu, there are buttons for Progress reports and Communication and Files. The main area displays a table of contractors with the following data:

Name	UIC	Native name
Sub contractor_1	10011222001	Подизпълн

Below the table, there is a search bar and a pagination control showing 'Show 50 entries' and 'Page 1'.

2. Press the “Add Record” button in the upper left side of the working area .

3. Start filling the form. The first 2 fields are mandatory: Name\* (Name of the contractor in English) and UIC\* (Unique Identification Code, registration number of the Contractor).

The screenshot shows the 'Add Record' form for contractors. The form has the following fields:

- Name\* :
- UIC\* :
- Native name :
- Rep name :
- NUTS3 address :
- Rep position :
- City :
- Street address :
- Phone :
- Fax :
- E-mail :
- GPS :

At the bottom of the form, there are three buttons: Save, Save and go back to list, and Cancel.

The rest of the fields are optional:

- Native name: Enter the name of the Contractor in the native language;

- Rep name: Enter the name of the Contractor's representative;
  - NUTS3 address: Enter the NUTS III (or respective equivalent) region of the contractor;
- Rep position: Enter the representative position as per the drop-down menu.
- Contact information: city, address, phone, fax, e-mail, GPS.

4. In case of physical person, DO NOT use personal identification code but the name again instead:

Welcome, **TEST Lead Beneficiary** (EMO\_001\_0)!


**Add Record**


Name\* :

UIC\* :

5. Save the contractor data (for company or physical person) and go back to list to add more items, until you include all contractors/physical person, which were paid under budget lines 3, 4, 5 and 6 of the project (including expenditures for business trips of project team members).

## 2. Entering data for tenders

1. Login in BP and select menu "Payments", submenu "Procurement".
  2. Press  "Edit record" to enter the procedure under which a contract was signed.
- Take into consideration that the respective tender procedure is assigned to its creator, i.e. if the Lead partner fills in all the data at the beginning he/she will have to also fill the data for the implementation.

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v 1.1.28042016

Welcome, **Dragan Draganov** (1\_038\_so\_berovo)!

PROCUREMENT PLAN FILE: 72a79-3188\_actual-2015-yuni.doc  
PROCUREMENT PLAN CREATED: 2016-11-29 14:13:26

Responsible partner	Name	Provisional date	Ty
PP1	Test Procurement	2016-11-29	SE

Search:  Search all

Show  entries   Page  of 1   Displaying 1 to 1 of 1 items

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### 3. Start filling the respective fields.

The screenshot displays the 'Interreg-IPA CBC' portal interface. On the left is a sidebar menu with options: Project Information, Payments (highlighted), Contractors, Procurements, Invoices, Invoice Reports, Payment Requests, Progress reports, and Communication and Files. The main content area shows a 'Welcome, Lead Demo (EMO\_001\_0)!' message. Below this, there's a table with fields for 'Responsible partner', 'Provisional date', 'Tender title', 'Type', and 'Procurement amount in Euro'. To the right of this table is a table with fields for 'PP1', '2019-04-10 00:00:00', 'Organisation of events', 'SERVICES (A2)', and '24000.00'. The 'Edit Record' section contains various input fields for procurement details: PRAG version (2019), Notice date (2019-03-01 00:00:00), App deadline (2019-04-01 00:00:00), Award date (2019-04-15 00:00:00), Contract No. (1), Contract date (2019-04-16 00:00:00), Duration (12), End date (2020-04-10 00:00:00), Contract amount (18000.00), Contract amount in Euro (9000.00), Procurement amount without vat (20000.00), Currency (BGN), and Contractor (Subcontractor\_1 (10011222001)). Each date field has a 'Clear' button and a placeholder '(yyyy-mm-dd) hh:mm:ss'.

### 4. Choose respective Contractor from the drop-down list.

### 5. Update the changes of the Procurement item and go back to the Procurement Plan

Update changes

Update and go back to list

If the procedure has several lots and different contractors respectively it is required to add additional procurement items for every contractor:

1. Press Add record button;
2. Copy the information from the original procedure – when entering the name please use lot 1, lot 2 or other respective remark to show it's the respective lot;
3. In the file attachment you can upload only the contract with the respective tenderer as the whole procedure is already attached to the original procurement item;
3. Save the procurement item, edit it in View mode and change its status to “Approved draft”.

6. Press [Add File](#) to upload an archive file (zip/rar format) in the same row for the respective tender procedure

Welcome, **Lead Demo** (EMO\_001\_0)!

**PROCUREMENT PLAN**  
PROCUREMENT PLAN FILE:  
ppp (26.22K) 2019-04-10 15:55:16  
PROCUREMENT PLAN CREATED: 2019-04-10 15:52:50  
PROCUREMENT PLAN SUBMITTED: 2019-04-10 15:55:16  
[Procurement Plan Export](#)

✓ Your data has been successfully stored into the database. [Edit Record](#)

[Add Record](#) [Export](#) [Print](#)

Responsible partner	Tender title	Provisional date	Type	Procurement amount in Euro	Notes	Procurement status	Files	Actions
PP1	Organisation of events	2019-04-10 - 00:00	SERVICES (A2)	24000.00	20000 EUR, VAT excl. Lot 1 - Round table (10 000 EUR VAT excluded Lot 2 - Transport for events in RS (10 000 EUR VAT...	Submitted	<a href="#">Add File</a>	<a href="#">Edit</a>

Search:  Search all

Show 50 entries Page 1 of 1    Displaying 1 to 1 of 1 items

The mentioned zip/rar archive should contain the following elements:

- Tender dossier;
- Award procedure (Evaluation/Negotiation reports, etc.);
- Contract, together with all its annexes.

### 3. Entering data for invoices

Each partner has the responsibility to record invoice data in the Beneficiary Portal. It is best that the information is entered timely (right after the respecting documents are received).

#### Step by Step guide:

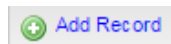
1. Preparation of invoices for upload: prepare zip/rar archive with the scanned invoice and any proof documents required in Part 7.9. Financial and accounting documentation of the project of PIM.

**Note:** For invoices under tender procedure only add the respective Acceptance protocols/Participants Lists/etc. not the whole tender procedure documentation.

2. Login in BP and select menu “Payments” and submenu “Invoices”:

Contractor	Procurement	Project partner	Invoice No.	Issued
Subcontractor_1	Процедура за доставка	PP1	PP1-001	201
Subcontractor_1	Процедура за доставка	PP1	1	201
Subcontractor_1		PP1	00015	201

3. Press the “Add Record” button in the upper left side of the working area



4. Choose respective Contractor from the drop-down list:


**Note:** Procurement field will become active if the selected contractor was contracted under specific Tender procedure.

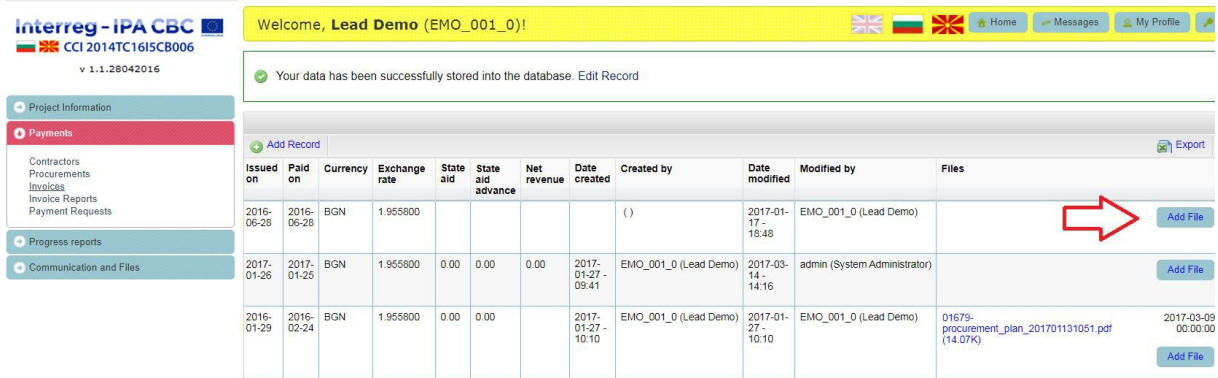
5. Select the partner (if a Lead partner is filling the report).

6. Fill in fields: Invoice No.\*; Issued on; Paid on\* (this is the date of the actual payment), Currency\*.

7. Fields “State aid”, “State aid advance” shall be filled according to Part 5 of PIM. Field “Net revenue” shall be completed in regards to Part 7.6. Eligibility of expenditure in PIM. If any of the 3 fields is NOT applicable please fill in 0.

8. Save the invoice and go back to list.

9. Press  and upload the prepared archive.



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Welcome, Lead Demo (EMO\_001\_0)!




Your data has been successfully stored into the database. Edit Record

**Payments**

Contractors  
Procurements  
Invoices  
Invoice Reports  
Payment Requests

Progress reports  
Communication and Files

**Payments Table:**

Issued on	Paid on	Currency	Exchange rate	State aid	State aid advance	Net revenue	Date created	Created by	Date modified	Modified by	Files
2016-06-28	2016-06-28	BGN	1.955800					( )	2017-01-17 - 16:48	EMO_001_0 (Lead Demo)	
2017-01-26	2017-01-25	BGN	1.955800	0.00	0.00	0.00	2017-01-27 - 09:41	EMO_001_0 (Lead Demo)	2017-03-14 - 14:16	admin (System Administrator)	
2016-01-29	2016-02-24	BGN	1.955800	0.00	0.00		2017-01-27 - 10:10	EMO_001_0 (Lead Demo)	2017-01-27 - 10:10	EMO_001_0 (Lead Demo)	01679-procurement_plan_201701131051.pdf (14.07K) 

10. Enter the invoice in View mode by pressing .

11. Start adding invoice items by pressing  button.



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Welcome, Lead Demo (EMO\_001\_0)!

**Payments**

Contractors  
Procurements  
Invoices  
Invoice Reports  
Payment Requests

Progress reports  
Communication and Files

**Payment Details:**

No. PP1-001

CLIENT

Company: Municipality of Sofia

UIC: 133552360

Address: BG, Sofia, София, 1 First st, 1000

Name: The Manager, The boss of it all

Paid on: 2016-06-28

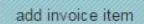
State aid:

State aid advance:

Net revenue:

Project: Demo project BGRS

Procurement procedure: Процедура за доставка

**Buttons:** edit contractor, edit procurement, edit invoice, 

**Table:**

BL	Subline	Description of the expenditure	Location of expenditure	Amount original current VAT exclusiv
BL4 - EXTERNAL				

**Edit Record**

Invoice report :

Budget line\* :

Budget line sub\* :

Invoice items budget item :

Invoice items budget item units :

Description\* :

Source

**B I U** abc x<sub>2</sub> x<sup>2</sup>

Styles Format Font Size

Travel cost

Amount\* :

Eligible VAT\* :

NUTS3\* :

12. Select the respective budget line for the expenditure from the drop down list - THIS field is mandatory.
13. Select the respective subline - THIS field is mandatory.
14. Select the respective budget row – THIS field is mandatory.
15. Fill in the budget items and budget item units (in case of advance payment please fill in the whole amount as per the budget).
16. Fill in the description as per the invoice- THIS field is mandatory.
17. Fill in the amount in the respective currency.
18. Fill in field Eligible VAT\* in regards to Part 7.6. Eligibility of expenditure in PIM. If this is not applicable fill in 0.00.
- .
19. Update changes or Update and go back to list.

## VI First level control – request and reporting


### 1. Preparation of Invoice reports

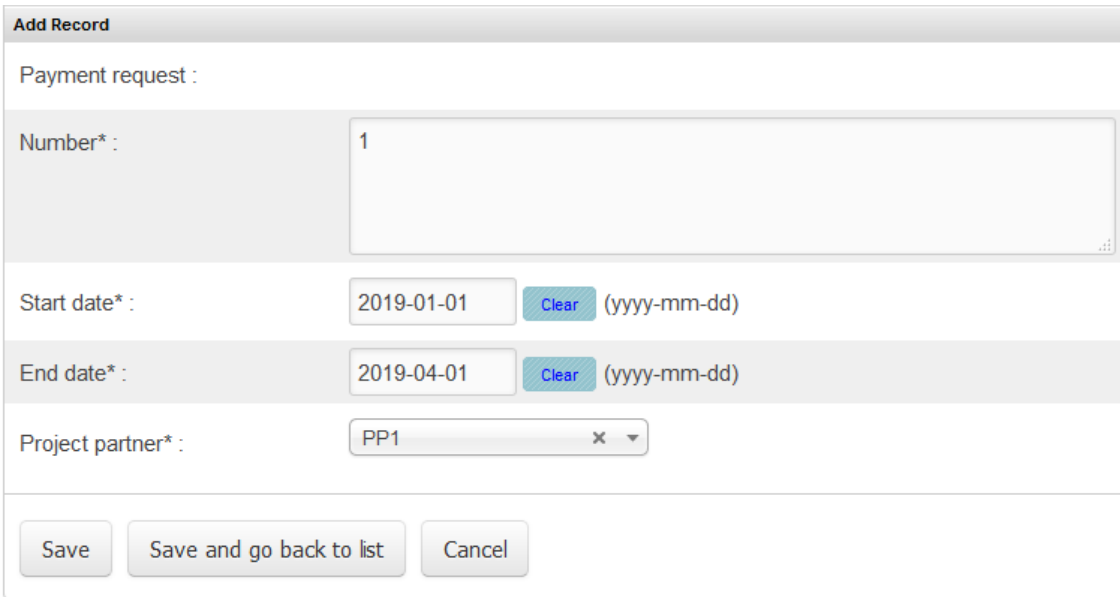
Invoice reports serve for providing information to the FLC, and should be generated by each partner, willing to request verification of expenditures.


If the project partner has entered the information for its expenditures and invoices timely, the preparation of the Invoice report could take only several minutes.

**Note:** A partner, which does not want to claim any expenditure for the respective reporting period, does not have to prepare an Invoice report.

#### Step by Step guide:

1. Enter the “Invoice Reports” section in “Payments” menu.
2. Press the “Add Record” button in the upper left side of the working area .
3. Fill in the number of the Invoice report.
4. Fill in the starting date of the reporting period.
5. Fill in the end date of the reporting period.
6. Select the respective project partner (only if you are Lead partner).
7. Save the record and go back to the list. The status of the respective record will be “Draft”.



8. Enter again in the record in editing mode by pressing .

Left mouse click in field Invoice items to get a drop down menu from all available Invoices and invoice items which can be included into the report:

Project partner : 1

Invoice items :

- Travel cost (item id:8164) x
- Наем на запа (item id:1346) x

PP1-001

дневни (item id:1342)

дневни (item id:1343)

123456

Update changes Update a

8. Start adding invoice items by pressing left mouse button.
9. Update the changes in the report.

## 2. Preparation and submission of a Request for FLC

The Request for FLC, together with Invoice Report, Financial report, List of contracts (scanned originals, signed by the legal representative of the PP/LP) should be sent to the respective FLC unit within the deadline specified in the subsidy contract.

During the preparation of the request, each partner should check if all supporting documents (scanned hardcopies) are attached to the respective invoice items (payment documents).

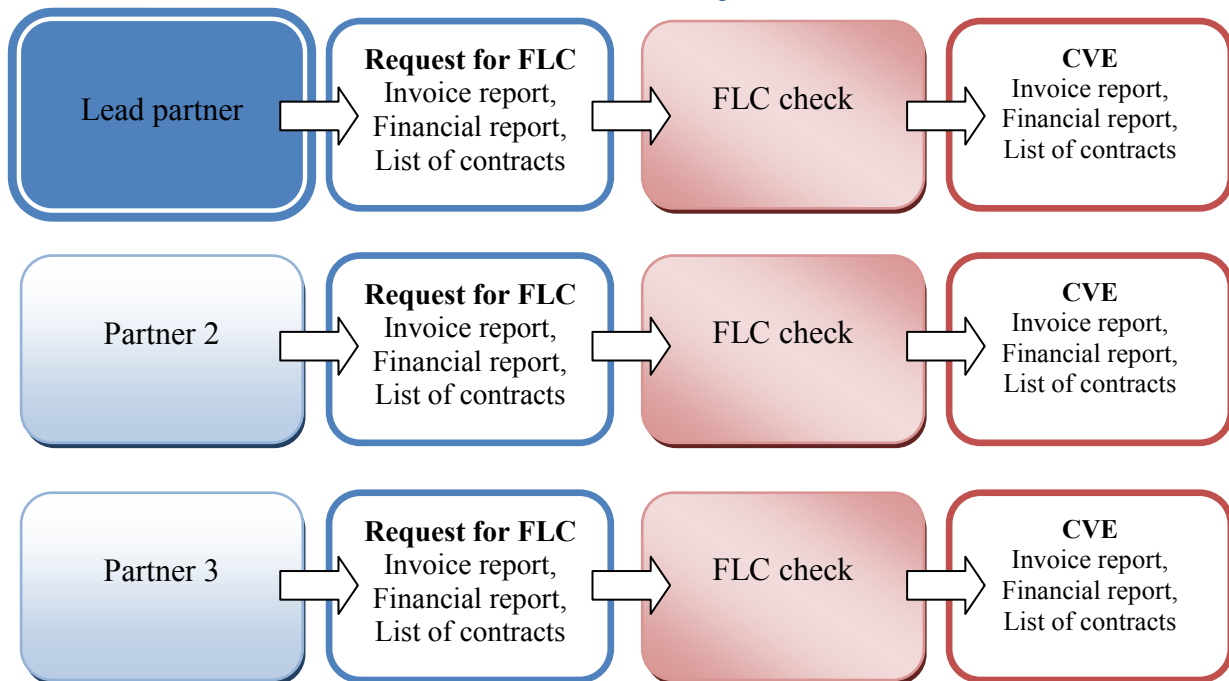
First level controller performs a complete check of the reported expenditures on the basis of the invoices and accounting documents and verifies them. The controller also verifies the delivery of the products and services (if applicable).

If in the process of validation there is shortage in the documents submitted or necessity of presenting additional documents, the controller sends a request to the beneficiary to present the necessary documents within a period of 5 days. The requests for additional information and the relevant answers should be submitted via the Beneficiary portal.

The work of the controller is completed with the submission of Certificate for Validation of Expenditures (CVE) to the project partner (via BP), accompanied by completed Invoice Report (FLC section), with attached Financial report and the List of contracts (Annex 5 to PIM), issued by the project partner.


The process of First level control is carried out for each partner separately, and can be summarized as follows:






**Note:** A partner, which does not want to claim any expenditure for the respective reporting period, does not have to prepare an Invoice report and should not request verification.

#### Step by Step guide:

1. Enter the Invoice Report in View mode by pressing .
2. Change the status of the Invoice report to Approved draft:

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[BACK TO LIST](#)

**ACTIONS:** [Draft](#) [Approved draft](#)

<b>IR Number</b>	015/1/1
<b>IR status</b>	
<b>Flat rate %</b>	<b>Total amount in EUR</b>
<b>BL 1 STAFF COSTS</b>	
12 %	0
<b>BL 2 OFFICE AND ADMINISTRATIVE COSTS</b>	
10 %	0

**Left sidebar menu:**

- Project Information
- Payments**
  - Contractors
  - Procurements
  - Invoices
  - Invoice Reports
  - Payment Requests
- Progress reports
- Communication and Files

3. If the Invoice report contains expenditures in other currencies than EURO please press [Recalculate XR](#). This will change the amount of the invoice report if there are exchange rates from previous months.

4. Download the information from invoice report by pressing [PDF EXPORT](#) after each table.



5. Print out, sign and stamp the Invoice report, financial report and Contractors list.
6. Prepare an archive file with the signed and scanned Annex 4 Request for FLC (doc file taken from PIM) and the documents from p.5 into one zip/rar file.
7. Go back to the List of Invoice reports and in the respective Invoice report press the “Add file” button and upload the archive file.

IR-02	2017-03-01	2017-06-01	2	2017-06-29 - 10:29	EMO_001_0 (Lead Demo)	2017-06-29 - 10:46	EMO_001_0 (Lead Demo)		2019-02-25	Approved draft	039a1-revision_june-2017-interreg-ipa-cbc-pm-ver3.rar (5.46M)	<a href="#">Edit</a> <a href="#">Delete</a>	
5	2019-01-01	2019-02-26	1	2019-02-26 - 15:31	EMO_001_0 (Lead Demo)	2019-02-26 - 15:31	EMO_001_0 (Lead Demo)		2019-02-26	Submitted			
1	2019-06-03	2019-04-01	1	2019-04-11 - 11:06	EMO_001_0 (Lead Demo)	2019-04-11 - 11:29	EMO_001_0 (Lead Demo)		2019-04-11	Approved draft		<a href="#">Add File</a>	

8. Enter the respective invoice Report in View mode, again by pressing .

9. Submit the report by pressing button .

Additionally you can also send notification to the Head of FLC units (in the respective country) by an in-system message. Take into consideration that if the Invoice report is not submitted as described above, the message alone is not considered as FLC request.

1. In section “Messages” press button.
2. Select group “FLC Head” and select recipient
3. Select category “FLC verification” by clicking the checkbox.
4. Fill in subject of the message, i.e. “FLC verification”, etc.
5. Fill in body of the message, i.e. “FLC request under project xxxxx”.
6. Select the archive file uploaded previously by pressing button.
7. Press Send button.

**IMPORTANT:** When finalizing with step 9. “Submitting the FLC request” and when all of the above mentioned steps are correctly completed – the invoice report should be with status “locked”. The date of sending the FLC request is considered an initiation of the FLC procedure, but only if all of the above is correctly submitted.

**Note:** DO NOT delete the files already sent, because this will remove them as attachments to all previous messages.

## VII Preparation and submission of Requests for payment

### 1. Preparation of Requests for advance payment

The Lead Partner has the obligation to prepare and submit to the Managing Authority a Request for advance payment. The amount of advance payment is up to 20% of the EU and the Bulgarian national co-financing, as part of the Subsidy Contract. For soft projects, the MA transfers it in one instalment and for investment projects, MA transfers advance payment in two instalments, i.e. 10% of the total amount of the Contract after it enters into force and the rest 10% of the total amount of the Subsidy Contract after one of the project partners awarded a sub-contract for investment activity.

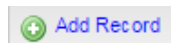
The LP must send a request for advance payment to the MA no later than 45 days after the Subsidy contract enters into force.

#### Step by Step guide:

1. Login in BP and select menu “Payments”, submenu “Payment Request”:

The screenshot shows the Interreg-IPA CBC Beneficiary portal interface. The top navigation bar includes the logo, version (v 1.1.28042016), and a welcome message for 'Lead Demo (EMO\_001\_0)'. The left sidebar contains a menu with 'Payments' selected. The main area displays a table of payment requests with columns: Type, Request No., Request date, Request comment, Requested for verification, Requested for payment, Status, Date submitted, Files, and Actions. The table contains six rows of data, including 'Advance' and 'Final' payment types. At the bottom, there are search filters and a footer indicating '© 2019 MRRB'.

2. Press the “Add Record” button in the upper left side of the working area



3. Start filling the form.

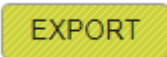
4. Choose type of the payment: Advance.

The screenshot shows the 'Add Record' form. The 'Type\*' field is highlighted, and a dropdown menu is open showing the options: 'Advance', 'Final', and 'Interim'. The 'Request No.\*' field is also visible below the dropdown.

5. Fill in the Request No. Type 1 in the respective field.

6. Select the appropriate date (same date as mentioned in the printed document Annex 6 Request for payment.doc):

The screenshot shows a web form with two main sections: 'Request date\*' and 'Request comment:'. The 'Request date\*' section has a date picker set to December 2016, with the 1st of December highlighted. Below the date picker is a time selection interface with fields for Hour, Minute, and Second, all set to 00. The 'Request comment:' section is a large text area. To the right of the date picker, there is a 'Clear' button and a placeholder '(yyyy-mm-dd) hh:mm:ss'. Below the date picker, there are 'Now' and 'Done' buttons. The background shows a blurred view of the portal's main interface with various icons and a sidebar.

7. Fill in the comments section, i.e. “Request for advance payment for project No xxxxxx”.
8. Fill 0.00 in the field Request for verification.
9. Fill the appropriate amount in the field ”Requested for payment” (same amount as mentioned in the printed document Annex 6 Request for payment.doc).
10. Save the initial version of the Request by pressing the button “Save and go back to list”
11. Go to “View Record” of the respective Request for Advance Payment
12. Export the RfP in PDF format  .
13. Print, sign and stamp the RfP. Additionally, please insert the date and the number of the RfP manually.

---

## 2. Submission of Requests for advance payment

---

- Step by Step guide**
1. Once all details are cleared you can go back submenu “Payment Request”.
  2. On your desktop or respective working folder make archive file (zip or rar) consisting of Request for payment (generated from the BP and scanned and stamped Annex 6 Request for payment) and Annex 1 Financial Identification Form.
  3. Upload the archive in the “File” section by pressing “Add File”.

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Interreg - IPA CBC  
CCI 2014TC1615CB006  
v 1.1.28042016

Welcome, Lead Demo (EMO\_001\_0)

Your data has been successfully stored into the database. Edit Record

Project Information  
Payments  
Contractors  
Procurements  
Invoices  
Invoice Reports  
Payment Requests  
Progress reports  
Communication and Files

Add Record

Show 50 entries

Type	Request No.	Request date	Request comment	Requested for verification	Requested for payment	Status	Date submitted	Files	Actions
Advance	PR-01			0.00	10000.00	Draft	2016-11-29 14:13	e3f39-rfp1.pdf (38.39K)	View Record Edit Delete
Advance	1	2019-02-26 00:00	sfsfs	0.00	10000.00	Draft			View Record Edit Delete
Advance	1	2019-04-09 00:00	Prvi zahtev za advance payment	0.00	10000.00	Draft			View Record Edit Delete
Advance	1	2019-03-03 00:00		0.00	10000.00	Draft			View Record Edit Delete
Advance	1	2019-04-11 00:00	advance payment	0.00	10000.00	Draft		advance payment (112.33K)	View Record Edit Delete
Final	5	2019-02-26 00:00	finalni izvestja	45000.00	40000.00	Draft		final (132.53K)	View Record Edit Delete
Final	4/66	2019-04-09 00:00	Final request for payment for project 555	10000.00	90000.00	Submitted	2019-04-09 15:27	final payment (2.81M) 2019-04-09 15:27:32	View Record Edit Delete
Interim	1	2016-11-30 00:00		0.00	1000000.00	Submitted	2018-09-13 11:01	7b279-negotiation-letter_066_en.doc (254.50K) 2017-04-05 13:44:13	View Record Edit Delete
Interim	3	2019-04-11 00:00	Request for interim payment	100000.00	98000.00	Draft			View Record Edit Delete

Displaying 1 to 9 of 9 items

- Choose “View Record” mode for the respective Request for advance payment
- OPTIONAL: Make additional changes in Edit mode, if needed before submission of the request.

6. Press the button

Submitted

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CCI 2014TC1615CB006  
v 1.1.28042016

Welcome, Lead Demo (EMO\_001\_0)

BACK TO LIST

EXPORT

ACTIONS: Draft Submitted

Project name: Demo project BGRS  
Project No.: DEMO.12.001  
Lead Partner: Municipality of Sofia  
Full address: BG, Sofia, Coфия, 1 First st, 1000  
Contact Person: The Manager  
Contact Information (tel./fax/e-mail): +359 2 111222, 7562, 0

Verification No.	Date	Comment	Attachment
Type: Advance; Status: Draft; Submitted on:			
Request	FLC	Verification	Certification
No.: 1			
Date: 2019-04-11 00:00:00			
Comment: advance payment			
Requested for verification: 0.00	Request total:	0 IRs verified expenditure:	0 IRs certified expenditure:
Requested for payment: 10000.00	Own financing:	0 Not verified expenditure:	0 Not certified expenditure:
Attachment: advance payment (112.33K)	Ineligible expenditure:	0 Correction:	0 Correction:
A file attachment is required in order to submit a Request for payment.	Eligible expenditure validated by the Controller:	0 Overall verification correction:	0 Overall certification correction:
		Verified total:	Certified total:

## 3. Preparation of Requests for interim/final payment

Only the Lead partner has the right to prepare requests for payment and to submit them to the MA. All partners are obliged to submit to the Lead partner information for the validated expenditures for each reporting period. These documents include: Certificate for Validation of expenditures, accompanied by completed Invoice Report, with attached Financial report and

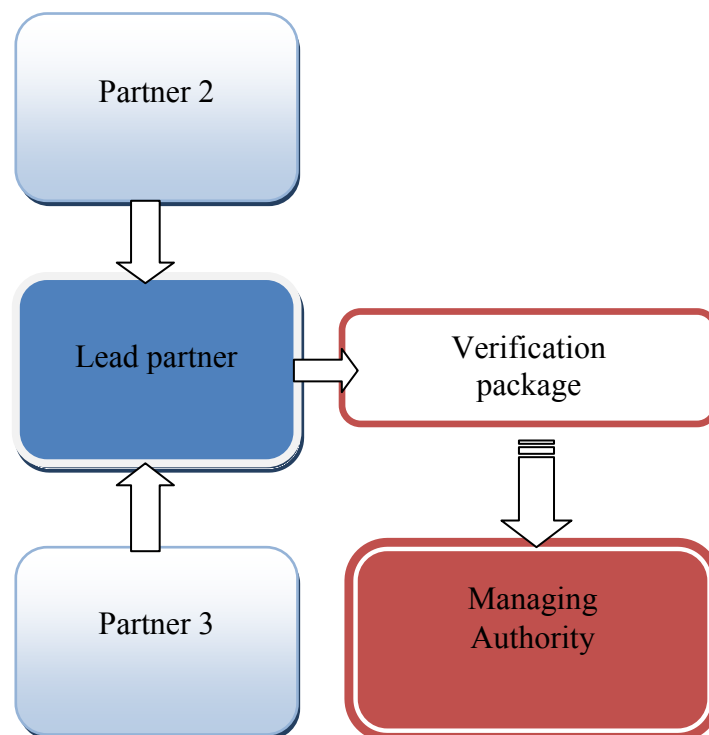
the List of contracts, as well as declarations for VAT status (only for Bulgarian partners) and lack of double financing and revenue.

The amount of the Request for payment is calculated automatically and is equal to the sum of the verified amounts of all Certificates for Validation of Expenditures, provided by all project partners, minus the own co-financing (if applicable).

In 5 working days of receiving the documents from the partners, the LP fills in the electronic fields of the Request for payment and sends the whole verification package via the BP to the MA- Financial Management and Control Department. The verification package includes:

- Certificate(s) for Validation of the Expenditure;
- Project partners' Invoice Reports with the attached financial report and list of contracts;
- Financial Identification Form for the LP (bank account details);
- Declaration VAT status – only for Bulgarian partners;
- Declarations for lack of double funding and revenue of the project by each of the partners who reports expenditures. The Declaration has to be included in the respective request for payment;
- Appeal Declaration (against the FLC validation certificate, if applicable).

The process can be summarized as follows:



#### Step by Step guide:

1. Login in BP and select menu “Payments”, submenu “Payment Request”:

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Second Call, Version 3.0, August 2020

2. Press the “Add Record” button in the upper left side of the working area



3. Start filling the form.

4. Choose type of the payment: Interim or Final.

5. Fill in the Request No. in the respective field.

6. Select the appropriate date (same date as mentioned in the printed document Annex 6 Request for payment.doc):

7. Fill in the comments section, i.e. “Request for interim/final payment for project No xxxxxx”.



8. Fill in the field “Requested for verification\*” with the sum the amounts of all partners, as per the Requests for FLC for the respective reporting period.

9. Fill in the appropriate amount in the field ”Requested for payment\*”. The total amount requested must include the sum of all verified costs as per CVEs of all partners minus 15% national co-financing for the Macedonian partners.

10. Chose all completed Invoice reports, that will be attached to the request

If the IRs are not shown in this field, it means that the FLC verification is not finished. Please contact your controller/Head of FLC to clear the issue as the Heads of FLC finish the process of the verification.

11. Save the initial version of the Request and go back to the list.

12. Go to “View Record” of the respective Request for Payment

**Note:** DO NOT PRESS SUBMIT BUTTON AT THIS STAGE!

13. Export the RfP in PDF format

A yellow rectangular button with the word "EXPORT" in black capital letters.

14. Print, sign and stamp the RfP. Additionally, please insert the date and the number of the RfP manually.

---

## 4. Submission of Requests for payment

---

### Step by Step guide:

1. Once all details are cleared you can go back submenu “Payment Request”.

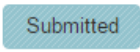
2. On your desktop or respective working folder make archive file (zip or rar) consisting of Request for payment (generated from the BP and scanned and stamped Annex 6 Request for payment)., altogether with all documents of the verification package, explicitly listed in p. Submission of Requests for payment of PIM and in p.3 Preparation of Requests for interim/final payment of the current documents as well.

3. Upload the archive in the File” section by pressing “Add File”.

4. Choose “View Record” mode for the respective Request for payment

5. OPTIONAL: Make additional changes in Edit mode, if needed before submission of the request.

6. Press the button

A light blue rectangular button with the word "Submitted" in black capital letters.

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v 1.1.28042016

Welcome, **Lead Demo** (EMO\_001\_0)  
[Home](#) [Messages](#) [My Profile](#) [Logout](#)

[BACK TO LIST](#)  
[EXPORT](#)

**ACTIONS:** [Draft](#) [Submitted](#)

<b>Project name</b>	Demo project BGRS
<b>Project No.</b>	DEMO.12.001
<b>Lead Partner</b>	Municipality of Sofia
<b>Full address</b>	BG, Sofia, Coфyиe, 1 First st, 1000
<b>Contact Person</b> <b>Contact Information (tel./fax/e-mail)</b>	The Manager +359 2 111222, 7562, 0

Verification No.	Date	Comment	Attachment
<b>Type:</b> Advance; <b>Status:</b> Draft; <b>Submitted on:</b>			
Request	F.I.C	Verification	Certification
No.: 1			
Date: 2019-04-11 00:00:00			
Comment: advance payment			
Requested for verification: 0.00	Request total:	0 IRs verified expenditure:	0 IRs certified expenditure:
Requested for payment: 10000.00	Own financing:	0 Not verified expenditure:	0 Not certified expenditure:
Attachment: advance payment (112.33K)	Ineligible expenditure:	0 Correction:	0 Correction:
A file attachment is required in order to submit a Request for payment.	Eligible expenditure validated by the Controller:	0 Overall verification correction:	Overall certification correction:
		Verified total:	Certified total:



## VIII Reporting

### 1. Preparation of Project Progress Report

The Lead partner shall report electronically the progress of the project implementation on quarterly basis (three-month period) with the exception of the last reporting period, which may be shorter/longer. The report is filled in only for the progress within the respective quarter. Cumulative reports are stored for review by the JS experts.

The Lead partner has to submit the PPR to the JS through the Beneficiary portal within the deadline laid down in the subsidy contract.

**Note:** The MA will reimburse the requested funds only in case the PPR for the respective reporting period is approved by the JS.

#### Preparation of Project Progress Report in BP:

1. Select menu “Progress Reports”:
2. Select submenu “List Progress Reports”.

Start date	End date	Status	Submitted
23.01.2017	31.01.2017	Draft	06.03.2017 15:00

3. Press the “Add progress report” button in the upper left side of the working

area.

4. Start filling the form.

5. Fill in Start date and End date by selecting the date from the calendar:

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← Back

**Progress report**

Start date  
2017-01-23

End date  
2017-01-31


**January 2017**

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

#

Planned activities as per AF:  
ertyu;lkjhgfcv

6. Fill in all the respective fields.

7. Save the initial version of the PPR by pressing buttons.  and go back to the list of project reports.

## 2. Submission of Project Progress Report

1. Edit the prepared progress report in View mode:

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v 1.1.28042016

Welcome, **Lead Demo** (EMO\_001\_0)!

Home Messages My Profile Logout

**Add progress report**

Start date	End date	Status	Submitted	Submitted by	Created	Created by	Modified	Modified by	Actions
01.03.2018	13.09.2018	Confirmed	13.09.2018 11:07:47	Lead Demo (EMO_001_0)	13.09.2018 10:32:55	Lead Demo (EMO_001_0)	13.09.2018 11:08:48	Stefan Atanasov (stefanov)	
04.03.2018	13.09.2018	Confirmed	13.09.2018 12:46:07	Lead Demo (EMO_001_0)	13.09.2018 12:45:07	Lead Demo (EMO_001_0)	13.09.2018 12:46:51	Stanka Dimitrova (Stanka)	
01.09.2018	27.09.2018	Return for corrections	27.09.2018 10:23:06	Lead Demo (EMO_001_0)	27.09.2018 10:22:33	Lead Demo (EMO_001_0)	27.09.2018 10:23:16	Stanka Dimitrova (Stanka)	
20.11.2018	20.11.2018	Submitted	20.11.2018 11:55:02	Lead Demo (EMO_001_0)	20.11.2018 11:54:07	Lead Demo (EMO_001_0)	20.11.2018 11:55:02	Lead Demo (EMO_001_0)	
11.04.2019	10.07.2019	Draft			11.04.2019 15:05:22	Lead Demo (EMO_001_0)	11.04.2019 15:10:13	Lead Demo (EMO_001_0)	

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2. A Project Progress Report will be generated with all the inserted information. **DO NOT PRESS “SUBMIT” BUTTON AT THIS STAGE!**

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CCI 2014TC1615CB006  
v 1.1.28042016

Welcome, **Lead Demo (EMO\_001\_0)**

Home Messages My Profile Logout

Back EXPORT

**Demo project BGRS**

**1. MAIN DATA**

Project No	DEMO.12.001
Priority axis	Tourism
Specific objective	1.2 Cross-Border Touristic Product
Project title	Demo project BGRS
Starting date of the project	01.11.2016
End date of the project	01.09.2017

**Reporting Period**

From	11.04.2019	To	10.07.2019
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**Legal representative of the Lead partner**

First Name	Demo	Last Name	rep
Position	The boss of it all		
Phone	+123 456	Fax	+987 654

By submitting the present report, I, the undersigned, representing the Lead Partner hereby declare that the information in this progress report and its attachments give a correct description of the implementation and the present status of the above project.  
Attached to this report, I enclose:

1. Pictures of the progress of implementation of investment activities (outdoor and indoor, when applicable);
2. Pictures of equipment/supplies delivered (installed assets, when applicable);
3. Copies of studies/analyses/strategies, etc. intellectual deliverables (in electronic version).

3. Export the PPR in PDF format by pressing EXPORT button

EXPORT

4. Print, sign and scan back the PPR.

5. Prepare an archive file with all the required proofs for the implemented activities within the reporting period as per the requirements of PIM, together with the scanned and signed PPR.

6. Go back to the list of project reports and then edit the Project Progress Report which you want to submit by pressing the “Edit” button

**interreg-IPA CBC**  
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Add progress report

Start date	End date	Status	Submitted	Submitted by	Created	Created by	Modified	Modified by	Actions
01.03.2018	13.09.2018	Confirmed	13.09.2018 11:07:47	Lead Demo (EMO_001_0)	13.09.2018 10:32:55	Lead Demo (EMO_001_0)	13.09.2018 11:08:48	Stefan Atanasov (stefanov)	
04.03.2018	13.09.2018	Confirmed	13.09.2018 12:46:07	Lead Demo (EMO_001_0)	13.09.2018 12:45:07	Lead Demo (EMO_001_0)	13.09.2018 12:46:51	Stanka Dimitrova (Stanka)	
01.09.2018	27.09.2018	Return for corrections	27.09.2018 10:23:06	Lead Demo (EMO_001_0)	27.09.2018 10:22:33	Lead Demo (EMO_001_0)	27.09.2018 10:23:16	Stanka Dimitrova (Stanka)	
20.11.2018	20.11.2018	Submitted	20.11.2018 11:55:02	Lead Demo (EMO_001_0)	20.11.2018 11:54:07	Lead Demo (EMO_001_0)	20.11.2018 11:55:02	Lead Demo (EMO_001_0)	
11.04.2019	10.07.2019	Draft			11.04.2019 15:05:22	Lead Demo (EMO_001_0)	11.04.2019 15:10:13	Lead Demo (EMO_001_0)	

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7. Press **Add File** button at the bottom of the document.

**CROSS-BORDER IMPACT**  
As a result from the project, what kind of effects can be experienced and quantified? Please detail the further effects expected and compare to the ones described in your application.

**SUSTAINABILITY**  
Please report concrete steps and activities which will secure that the project results will be maintained and developed further after completion of the project. How the outcomes of the project could be used by other organizations?

Attachment

Add File

Save

8. Enter the name of the archive file in the box “Description”.

The screenshot shows the Interreg-IPA CBC Beneficiary portal interface. On the left, there is a sidebar with navigation links: 'Project Information' (selected), 'Project Details', 'Project beneficiaries', 'Payments', 'Progress reports', and 'Communication and Files'. The main content area has a yellow header with 'Welcome, Lead Demo (EMO\_001\_0)' and navigation buttons: 'Home', 'Messages', 'My Profile', and 'Logout'. Below the header, there is a 'Description:' text input field. To the right of the input field is a 'File:' section with a 'Choose File' button and the text 'No file chosen'. Below this are 'SAVE' and 'CANCEL' buttons. At the bottom of the page, there is a yellow footer with '© 2019 MRRB'.

9. Press ”Browse” to upload the prepared archive file with the signed PPR and respective proof documents.

10. Press “Save” and go back to the list of project reports in the BP

11. Enter the PPR in “View” mode and check if all is completed.

12. Press the button  .

The screenshot shows the PPR submission interface. It has a blue header with 'CROSS-BORDER IMPACT' and 'SUSTAINABILITY'. Below the header, there is a dark blue section titled 'ATTACHMENT'. Under 'ATTACHMENT', there is a text input field containing 'PPR (82.53K)'. Below the input field, there are two buttons: 'Draft' and 'Submitted'. A red arrow points to the 'Submitted' button. At the bottom of the page, there is a yellow footer with '© 2019 MRRB'.

If your Progress report has been returned for corrections and you need to change the file attachment please go to VIEW mode and press the DRAFT button to change the status of your report. You can remove/change file only if the status of the PPR is DRAFT.

## IX Contract modifications

Only the Lead Partner may initiate a change in the Subsidy contract by sending respective request for modification to the Managing Authority or notification to the Joint Secretariat.

In case of modifications of the approved project which will not affect the project's objectives and outputs and will not jeopardize the successful completion of the project, as well as for administrative changes, the Lead partner should prepare a **Notification letter** in free form, explaining the proposed modification and justification. The letter is to be sent via the BP as attached file to the respective subversion created by the procedure described below.

All other requests for changes require submission of Request for contract modification and its attachments as required in the Programme Implementation Manual to the MA, again via the BP.

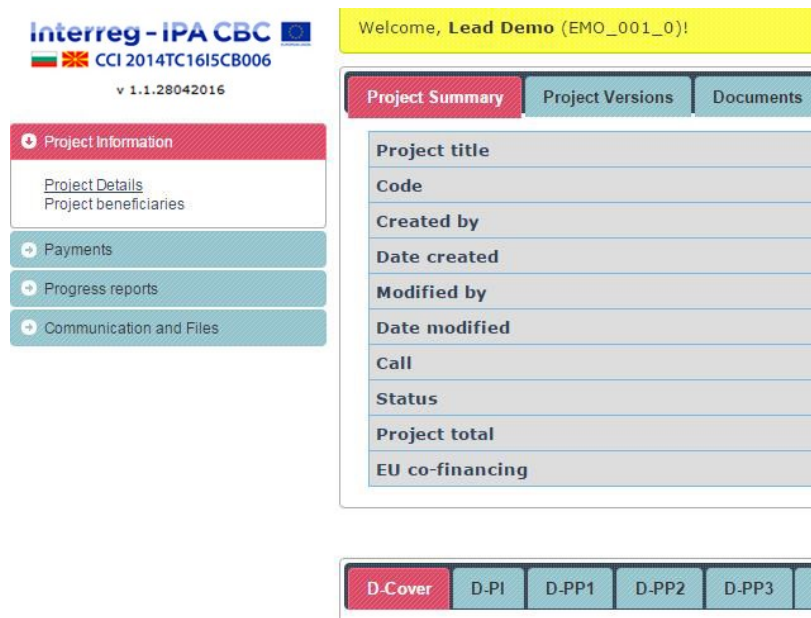
### 1. Preparation of Request for contract modification

#### Step by Step:

1. Enter the project version section of the portal. This section contains information about all changes in the application form, both approved and not approved. You access this section by selecting "Project details" from Home page:



or by choosing "Project details" from "Project information" in the left menu:





You need the application form to be saved as separate version/subversion in order to prepare the modification request.

2. Select “**Project Version**” tab, enter the latest **approved version** of the Application form and press the button “Create new subversion”. A new version of the Application form will be created.

0.2			2017-04-18 11:16:28	2017-04-25 11:09:41	<a href="#">View</a>		<a href="#">View</a> <a href="#">Create new subversion</a>	<a href="#">SV DIFF</a>	Submitted	
-----	--	--	------------------------	------------------------	----------------------	--	---	-------------------------	-----------	--

3. Press “Edit” in section “Modification description” of the respective version:

<div> <div> Interreg-IPA CBC CCI 2014TC1615CB006 v 1.1.28042016 </div> <div> Welcome, Lead Demo (EMO_001_0) </div> <div> Home Messages My Profile Logout </div> </div>										
<div> Project Summary Project Versions Documents Contracts and Changes </div>										
Version	Changes	Current	Date created	Date Submitted	Modification description	Modification File	Application form	Compare	Status	Actions
0.10			2019-04-11 15:48:57		<a href="#">View</a> <a href="#">Edit</a>	<a href="#">Add File</a>	<a href="#">View</a> <a href="#">Create new subversion</a> <a href="#">Delete</a>	<a href="#">SV DIFF</a>	Draft	<a href="#">Approve draft</a>

4. Start filling the form. The version of the form for which you are preparing the modification request is presented in the top field of the form.

Edit Record

Version : 0.2

Type of modification :

5. Select the type of the modification by pressing left mouse button in the field. You can select more than one type of modification.

Edit Record

Version : 1.0

Type of modification : 

Modification concerning partnership x
Modification concerning project content
Budget change
Extension of project implementation period

6. Fill in all required fields of the form:

- Description;
- Reasons;
- Improvement;
- Risk and benefit.

7. Save the modification request by pressing one of the buttons in the lower end of the form:


8. Upload one archive file with all required documents by pressing the “Add File” button and selecting the file from your computer:

Project Summary Project Versions Documents Contracts and Changes										
Version	Changes	Current	Date created	Date Submitted	Modification description	Modification File	Application form	Compare	Status	Actions
0.10			2019-04-11 15:48:57		View Edit	 Add File	View Edit Create new subversion Delete	SV DIFF	Draft	Approve draft

## 2. Changing the Application form/budget

**Step by Step guide:**

1. Select the **Project versions** tab for a chosen project (**view project**).
2. Select the “Edit” button in section “Application form” of the newly created subversion you want to modify:

Project Summary Project Versions Documents Contracts and Changes										
Version	Changes	Current	Date created	Date Submitted	Modification description	Modification File	Application form	Compare	Status	Actions
0.10	Budget change		2019-04-11 15:48:57		View Edit	Add File	View Edit Create new subversion Delete	 SV DIFF	Draft	Approve draft

3. The last approved version of the Application form will be generated. Propose changes to the application form by placing the mouse in a chosen field. All fields that are editable are marked with a **green triangle** in the upper right corner.

All fields that are computed or cannot be modified are marked with a **red triangle** in the upper right corner.

User manual for the Beneficiary portal – Interreg-IPA CBC Programme CCI No. 2014TC1615CB006  
Second Call, Version 3.0, August 2020

Welcome, **Lead Demo** (EMO\_001\_0)!

DEMO-001 v0.10

Save Create new subversion Create new version Back to the project

D-Cover D-PI D-PP1 D-PP2 **D-PP3** D-PP4 D-PP5 D-T1 D-T2B-PP1 D-T2B-PP2 D-T2B-PP3 D-T2B-PP4 D-T2B-PP5 D-T2 D-T3 D-T4 D-T5

**D-PP3**  
D-PP3

**1. Identity**

**1.1. Contact information**

Organization (in English):	Lomskopivo
Organization (in native language):	Пивоварна Ломско пиво
Type of organization:	Business support structure
Country:	BG
District / NUTS III:	Sofia
Town:	Sofia
Address:	3 Third St
Postal Code:	10002
Legal representative (Name):	Dimitar Dimitrov
Legal representative (Position in the organization):	Chief Brewer
Telephone:	11122233
Fax:	222333444
E-mail:	0
Website:	0
Public/ private:	public

BL3 - TRAVEL AND ACCOMMODATION	Unit	Expenditures in the eligible area			Expenditures outside the eligible area			TOTAL
		Units	Unit rate	Total	Units	Unit rate	Total	
<b>3.1 Travel costs</b>				<b>15521</b>			<b>360</b>	<b>15881</b>
djf	KM	200.00	1.80	360	200.00	1.80	360	720
sdf	1	20.00	6.00	120	0.00	0.00	0	120
erh	2	54.00	12.00	648	0.00	0.00	0	648
dggr	1	50.00	63.00	3150	0.00	0.00	0	3150
rte	4	52.00	23.00	1196	0.00	0.00	0	1196
dfhug	4	52.00	65.00	3380	0.00	0.00	0	3380
eriyu	2	15.00	17.00	255	0.00	0.00	0	255
euty	7	26.00	65.00	1690	0.00	0.00	0	1690

After changing a field press **Enter** in order to save the introduced modification.

4 Press the “Save” button at the upper left corner of the working area and then “Back to the project”.

interreg-IPA CBC

Welcome, **Lead Demo** (EMO\_001\_0)!

DEMO-001 v0.10

Save Create new subversion Create new version Back to the project

D-Cover D-PI D-PP1 D-PP2 D-PP3 D-PP4 D-PP5 D-T1 D-T2B-PP1 D-T2B-PP2 **D-T2B-PP3** D-T2B-PP4 D-T2B-PP5 D-T2 D-T3 D-T4 D-T5

**D-T2B-PP3**  
D-T2B-PP3

**BL1 - STAFF COSTS**

Soft			
TOTAL			47.92

**BL2 - OFFICE AND ADMINISTRATIVE COSTS**

			47.92

Application form updated

OK



Note: If the editing is done directly on the last approved version of the Application form the user can **Save subversion** (new), **Save version** (new) or return **Back to the project** without saving.

### 3. Submission of Request for modification to the MA

#### Step by Step guide:

1. Check out if the modification request is filled by pressing View button in section “Modification description” of the respective version:

I. Type of contract modification	
Modification concerning partnership, Extension of project implementation period	v1.2
II. Description and justification of request for project modification	
<b>Description of modification requested</b>	The Subsidy Contract determines the rights and obligations of the Lead Partner and the Managing Authority. The approved Application Form and the Partnership Agreement signed between the Project Partners are integral part of the Subsidy Contract. The Subsidy Contract explicitly provides information concerning project implementation period. During the project lifecycle, due to the certain reasons, some modifications/changes might be necessary concerning the project implementation bases and conditions, defined in the Subsidy Contract.
<b>What are the reasons for the modification request?</b>	Only the Lead Partner may initiate a change by sending respective request for modification to the Managing Authority or notification to the Joint Secretariat. The Request for contract modification must be accompanied by the required supporting documents listed below.
<b>How will the contract modification improve the current project status?</b>	The Request for modification of the Subsidy Contract can be submitted to the MA at least 30 days before the addendum is intended to enter into force. This will give the MA the sufficient time for launching the procedures for JMC approval of the Request for modification. Additionally, the LP should strive to submit the any Request for contract modification at least 60 days before expiration of the project implementation period. Otherwise the request may be rejected.
<b>What are the risks and benefits for the project of the proposed modification?</b>	Amendment of partnership by replacing the partner with another partner / taking over of the partner's activities by the other partners within the investment projects, in which the investment object is ownership / lease of the withdrawn partner, is not allowed.

2. Press **Approved draft** at the end of the row with the version in order to lock the application form and the request template from further changes. A new button will appear in the “Actions” section.

3. Press “Submit” button at the end of respective version of the application form.

Version	Changes	Current	Date created	Date Submitted	Modification description	Modification File	Application form	Compare	Status	Actions
0.10	Budget change		2019-04-11 15:48:57		View Edit	Add File	View Edit Create new subversion Delete	SV DIFF	approved draft	Submit