



Horizon Europe Checklist – Administration routines

Post Award - Start up

This checklist is intended for project leaders and for administrative staff within a Horizon Europe project. Routines for projects within MSCA and ERC can differ. This checklist is in chronological order.

Horizon Europe project is granted

Task	Responsible	Support	Comments	
Set up a contact between project leader and functions within the EU Support Team.	GIO		Information letter regarding support, F&T Portal and start up meeting. Copy to Financial Officer and EU Support Team.	
Contact the financial officer of the institution.	PL	Financial Officer	Financial department specific routine for new projects.	
Contact the Communications Officer of the faculty.	PL	Com. Officer	Support, according to allocation of the external funds.	
Contact Research Ethics Advisor	PL	Research Ethics Advisor GIO	Sensitive personal data etc.	
<i>Applicable ONLY when Kau is coordinating</i>				
Choose the bank account for Kau in the Founding and Tenders Portal (F&T).	Financial Officer	PL	As a coordinator the EURO-account shall be used.	
Set up a contact list for the consortium and send it to Financial Officer.	PL		Include all beneficiaries PLs and Financial Officers.	



Financial Identification Form (FIF).	Financial Officer	GIO	Send out FIF to the beneficiaries and compile them.	
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Before Grant Agreement (GA) Signature and during the process

Task	Responsible	Support	Comments	
Add required roles to the project in the F&T Portal. Choose between: Participant Contact Task Manager Team Member PLSIGN PFSIGN More information about the roles is available.	PL	GIO	<i>Add at least:</i> <i>Participant contact:</i> GIO (Lotta Utterberg) PLSIGN: GIO (Lotta Utterberg) <i>PFSIGN:</i> Financial Officer (institution)	
PLSIGN ensures internal formal requirements are in place. Contact with PL.	GIO	Financial Officer	SUHF-budget. Form for external funding.	
PLSIGN signs the <i>Declaration of Honour</i> (F&T Portal)	GIO			
PLSIGN signs the <i>Accession Form to the GA</i> (F&T Portal).	GIO	PL	Notification through email from EC. GIO take a contact with PL who needs to confirm signing.	
<i>Applicable ONLY when Kau is coordinating</i>				
Add required roles to the project in the F&T Portal. Choose between: Primary Coordinator Contact Coordinator Contact			<i>Add at least:</i> <i>Coordinator contact:</i> GIO (Lotta Utterberg) PLSIGN:	



Task Manager Team Member PLSIGN PFSIGN			GIO (Lotta Utterberg) <i>PFSIGN:</i> Financial Officer at your institution	
Verify the <i>Grant Agreement Data Sheet</i> .	PL	GIO	Check for instance: - Budget model and figures - Beneficiaries - Reporting Periods - Audit - DoA (Annex 1) Specific conditions (Annex 5)	
As Coordinator Kau PLSIGN signs the <i>Grant Agreement</i> .	GIO	PL	Notification through email from EC. GIO take a contact with PL who needs to confirm signing.	
Other beneficiaries sign the <i>Accession Forms to the GA</i> (F&T Portal).	PL	GIO		
Transferring the EU-grant to beneficiaries after signature (PLSIGN) of <i>Accession Forms F&T Portal</i> .	Financial Officer	GIO	According to the GA.	

Consortium Agreement (CA) Process

This process can take place both before and in parallel with the Grant Agreement process.

Task	Responsible	Support	Comments	
Coordinator sends the draft of CA to the project leader.				



Project leader forwards the draft to the Legal Counsel, financial officer and to PLSIGN (GIO).	PL	GIO		
PLSIGN (GIO) sends to Innovation Adviser (within GIO) who replies the IPR to Legal Counsel.	GIO			
Financial Officer goes through the financial provisions and replies to Legal Counsel and PL.	Financial Officer	GIO		
Legal Counsel reviews the <i>draft</i> agreement.	Legal Counsel	PL	Communication and negotiation with the coordinator take place in consultation with the project leader.	
Legal Counsel reviews the <i>final</i> agreement (when needed) before it is signed by Kau.	PL			
Final version validated and signed by Vice Chancellor (or PLSIGN if requested).	PL	GIO		
Signed CA is sent back to coordinator.	PL			
<i>Applicable ONLY when Kau is coordinating</i>				
Take an early contact with the Legal Counsel regarding the CA.	PL	Legal Counsel	Determine the roles in the process regarding, draft, communication and negotiation within the consortium.	
When needed regarding the financial provisions, take a contact with the Financial Officer and GIO.	PL Legal Counsel	Financial Officer GIO		

Start-up meeting

Task	Responsible	Support	Comments	
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Invite to a start-up meeting for the project team. Ideally, the meeting take place after the GA has been signed.	GIO		Invite: Project leader Project participants Financial Officer GIO <i>Additional when needed:</i> HR (MSCA projects) Communication Officer Procurement Officer	
<i>Applicable ONLY when Kau is coordinating</i>				
Kick-off meeting within the consortium				