Horizon Europe Checklist – Administration routines

Post Award - During the project

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 alphabetic order.

Communication

Any additional support within the Communication department of expertise may be offered provided it is financed by the project.

Task	Responsible	Support	Comments	✓
Communication plan	PL	Com. Officer		
Project webpage	PL	Com. Officer		
Poster	PL	Com. Officer		

Eligible & Ineligible Costs

Task	Responsible	Support	Comments	✓
Ensure costs are eligible.	PL	Financial Officer	According to GA. Incurred during project period. Avoid ineligible costs (eg. interest, provisions, VAT if deductible). Check exceptions (eg. kick-off travel, final review travel, audit).	

Follow Annex 1 (DoA) and national rules.	PL	Financial Officer		

Financial follow-up and reporting in the F&T Portal

Task	Responsible	Support	Comments	✓
Financial follow-up	PL	Financial Officer		
Financial reporting in F&T Portal.	Financial Officer	GIO	See documents: *Handbok för hantering av projekt inom Horisont Europa vid Karlstads universitet.* *Finansiell rapportering i The Funding and Tenders Portal*. *(Anm. Hänvisning/Länk)*	
Justify *Other Direct Costs* above 15% of personnel costs.	PL	Financial Officer	In the F&T Portal by financial reporting to EC.	
Signatures step 1/3 The Financial Officer (FSIGN in the F&T Portal) registers the financial report and clicks on the button *Revalidate* in the F&T Portal and informs PL to continue.	Financial Officer	GIO	A notification from F&T Portal is sent to the PL.	
Signatures step 2/3 PL reviews the financial report in the F&T Portal, and if all is correct, clicks on the button *Lock for review.*	PL	Financial Officer	A notification from the F&T Portal is sent to the Financial officer (FSIGN).	
Signatures step 3/3 When no changes are needed the Financial Officer (FSIGN) clicks on the button *Sign & Submit to CO*.	Financial Officer	GIO	If changes are needed the Financial Officer click on the button *Unlock to draft* and process starts from the beginning.	

Printed report from F&T Portal must be approved and signed in accordance with the delegation order and sent to the diary (Kau policy).	Financial Officer		Signed by PL and dean.	

Miscellaneous

Task	Responsible	Support	Comments	
Amendment strategy and process	PL	GIO	Inform Financial Officer	

Open science and Research Data Management

Any additional support within the library's scope of expertise may be offered provided it is financed by the project.

Task	Responsible	Support	Comments	
Open science compliance				
Get support establishing a publishing strategy ensuring compliance with EU open access requirements.	PL	Library		
Research Data Management				
a. The data management plan (DMP) requirement of the call.	PL	Library & Research data support group		
b. Get help creating a DMP and request feedback.	PL	Library & Research data support group		
c. Get support on FAIR data principles.	PL	Library & Research data support group		

d. Advice on storage, documentation and long-term preservation.	PL	Library & Research data support group		
Copyright & licensing				
a. Get guidance on copyright and publishing agreements	PL	Library		
b. Choose a proper license complying with EU requirements.	PL	Library		
Visibility & Impact				
a. Get support for setting up researcher profiles	PL	Library		
b. Guidance on dissemination strategies	PL	Library Com.dep.	Potential collaboration with communication department.	

Representation & Procurement

Task	Responsible	Support	Comments	
Follow representation policy.	PL	Financial Officer	Alcohol is not eligible in EU-projects (Kau-policy). Attach agenda and signed participant list.	
Follow *Lagen om offentlig upphandling* (LoU) and Kau procurement rules.	PL	Proc. Officer	Contact procurement office well in advance, *before* the purchase.	
Use framework agreements.	PL	Proc. Officer		
PL sends procurement documents to Financial Officer.	PL	Proc. Officer		
Financial Officer sends "analyslista" to Procurement Officer.	Financial Officer	Proc. Officer	Support from procurement office around documentation.	

Time Reporting

Task	Responsible	Support	Comments	✓
Submit timesheets to the financial officer. Monthly and manually signed.	PL	Project admin. Financial Officer	Report working time in hours. Note the distribution per WP. Include short description of the work. Include *working* time when traveling within the project. Report no time during absence.	
Monthly and manually signed by participant, project leader and prefect (head of department).	PL		Signatures in close connection to the applicable month.	
Annual leave in Primula	PL	HR (payroll) Financial Officer	Employees who are part of Horizon projects and where there is a requirement for time reporting, must themselves apply for leave in Primula (deviate from normal routine). See specific policy document. *Hantering av semester i Primula for Horisont och LIFE-projekt.*	

Travel Procedures

Task	Responsible	Support	Comments	✓
Work travel insurance	PL	HR (payroll)	https://inslaget.kau.se/medarbetare-	

To order in Primula: *"Tjänsteresefôrsäkringsintyg"*			chef/anstallning/forsakringar	
Follow Kau travel policy.	PL	HR		
Book via travel agency Lingmerths.	PL	Lednings-kansliet	It is important to book via Kaus contracted travel agency.	
Submitting the travel expenses claim the *following* month. Enter purpose, WP, accounting string in Primula. Motivate the choice of local travel at the travel expense in the comment field, (*Best value for money*).	PL	HR (Payroll) Financial Officer	Especially important in connection with reporting schedule to EC. Attach boarding passes, receipts, agendas, participant lists.	
Report time in timesheets.	PL	Financial Officer	Include *working* time when traveling within the project.	