



Participant register

User guide

08/09/2022

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Document history

Version	Date	Comment
1	20-08-2021	New document
2	08-09-2022	Screenshots update in various sections

Participant register

Participant register refers to the IT service within the Funding & Tenders Portal allowing users to register their organisation and perform data updates in order to participate in EU-funded calls for funding and calls for tenders.

The Participant register consists of two differentiated parts:

1. Organisation registration
2. Organisation data update

This user manual provides IT guidance about the Participant register.

For additional information about the Participant register, please consult the [Online Manual](#) and the [FAQs](#).

Organisation registration

The Participant register page in the Funding & Tenders Portal

Participant register is also the name of the page within the Funding & Tenders Portal where users can start the process.

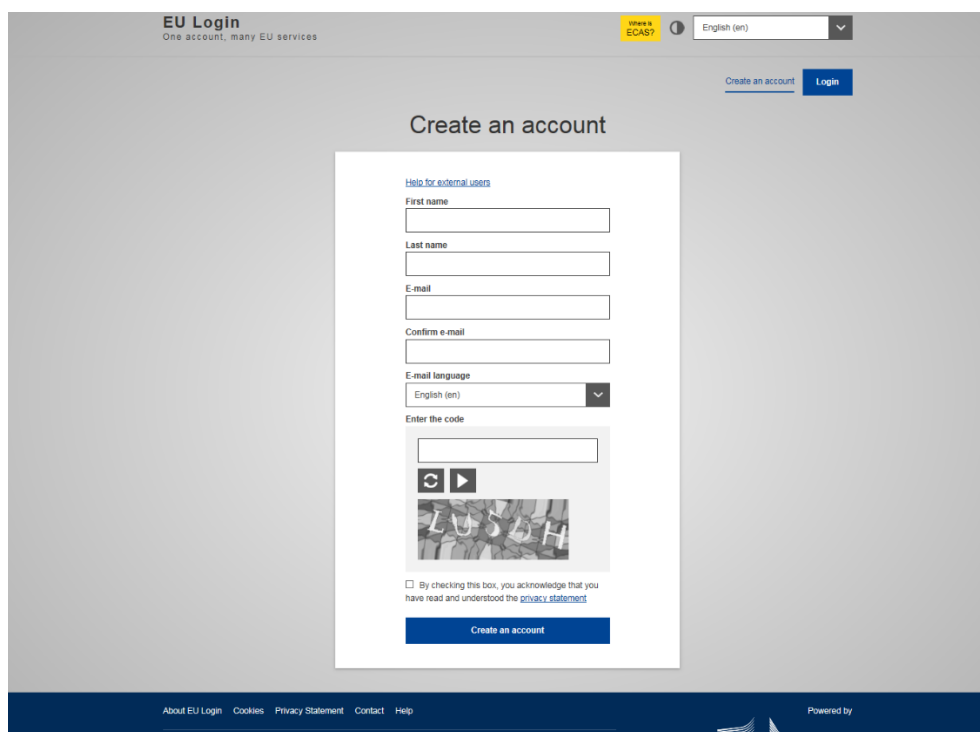
After having provided the required information in the Participant register, you obtain a Participant Identification Code (PIC), necessary to apply for funding and tender opportunities.

To go through the Participant register, you first need to have an **EU Login account**, to access the Portal.

To create your EU Login account, go to the [Funding & Tenders Portal](#) and click on the **Register** button at the top right corner of the screen:



It will redirect you to the EU Login page, where you can create your account:



EU Login
One account, many EU services

English (en)

[Create an account](#) [Login](#)

Create an account

[Help for external users](#)

First name

Last name

E-mail

Confirm e-mail

E-mail language
English (en)

Enter the code

☐ By checking this box, you acknowledge that you have read and understood the [privacy statement](#)

[Create an account](#)

About EU Login Cookies Privacy Statement Contact Help

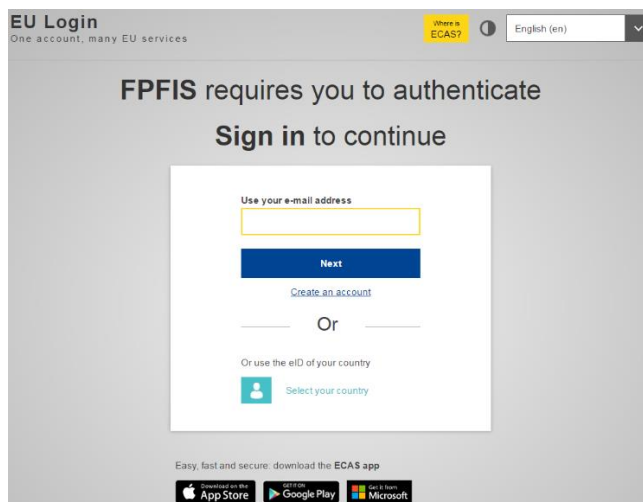
Powered by

Once you have your EU Login account, to access the Participant register page, go to the Funding & Tenders Portal and follow these steps:

1. Click on the **Login** button, at the top right corner of the screen:



2. Authenticate through the **EU Login** screen:



EU Login
One account, many EU services

English (en)

FPFIS requires you to authenticate

Sign in to continue

Use your e-mail address

[Next](#)

[Create an account](#)

Or

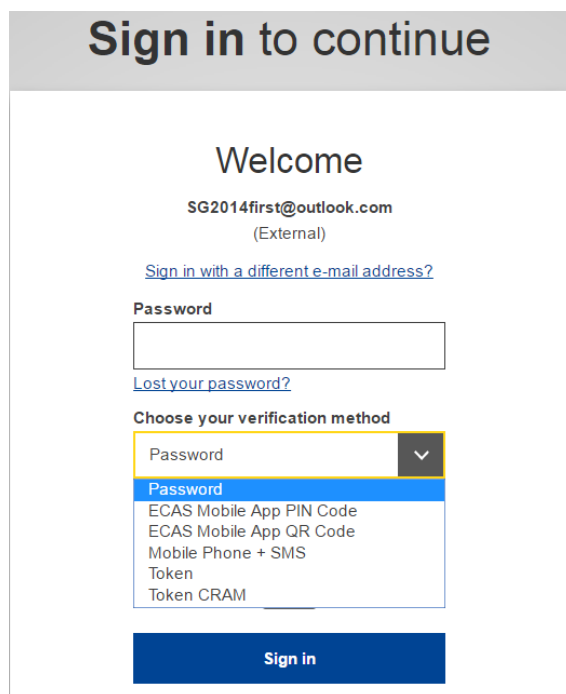
Or use the eID of your country
[Select your country](#)

Easy, fast and secure: download the ECAS app

Available on the App Store | GET IT ON Google Play | See it first on Microsoft

3. Enter your email address in the field provided, and then click the **Next** button.

You will be prompted for an authentication method:



Sign in to continue

Welcome

SG2014first@outlook.com
(External)

[Sign in with a different e-mail address?](#)

Password

[Lost your password?](#)

Choose your verification method

Password

ECAS Mobile App PIN Code

ECAS Mobile App QR Code

Mobile Phone + SMS

Token

Token CRAM

Sign in

- Click the arrow beside the **Password** field and select the authentication method you prefer from the drop-down menu. In the example above, we use the Password option.
- Click the **Sign in** button. Once logged in, click on **Participant register** under the **How to participate** section of the Funding & Tenders Portal menu bar.

Once you are in the **Participant register** page, you have the possibility to see it translated in the EU official languages. To do so, click on the language bar button at the top right side of the screen:

By doing this, a pop-up window appears, where you can select the language:



European
Commission

Funding & tender opportunities

Single Electronic Data Interchange Area (SEDIA)

The screenshot shows the top of the portal with the European Commission logo and the title 'Funding & tender opportunities'. A navigation bar includes links for 'SEARCH FUNDING & TENDERS', 'HOW TO PARTICIPATE', 'PROJECTS & RESULTS', 'WORK AS AN EXPERT', and 'SUPPORT'. A modal window titled 'Select language' is open, displaying a list of 24 languages. 'English (en)' is highlighted in blue. The background shows a sidebar with 'EU Programmes' and a main content area with various news items.

After clicking on a language option, the page will display in this language.

Please note that, for the time being, only the pages related to the Participant register process are available in the EU official languages in the Funding & Tenders Portal.

In the Participant register page, you have the possibility to perform 2 actions: Search a PIC or Register your organisation.

The screenshot shows the 'Participant Register' page. It has a header with the European Commission logo and the title 'Funding & tender opportunities'. The main content area is divided into two columns. The left column is titled 'Is your organisation already registered? PIC search' and contains a 'Search a PIC' button. The right column is titled 'Register your organisation' and contains a 'register your organisation' button. Both buttons are highlighted with red rectangles.

To make sure that your organisation has not already been registered in the Participant register, search for organisations by clicking the **Search a PIC** button. Then, search for organisations, enter the name or a part of the name. You may restrict results by selecting a specific country or expanding the advanced search and applying further filters to the search criteria. Then, click on **Search organisation** to display the matches:

Find a registered organisation

You may enter a (complete or partial) organisation name (e.g. "Oxford" or "University of Oxford") and optionally select a country.
You cannot search by country only. Organisation names are in English or in the national language.

Name*: Country:

Advanced search

City: Registration Number:

PIC: VAT:

Erasmus Code:

[Search organisation](#) [Clear filters](#)

Results are displayed at the bottom of the page. To restart your search with different search criteria, click the **Clear filters** button.

Results: 3

STATUS	COUNTRY	CITY	LEGAL NAME	BUSINESS NAME	PIC	VAT	ERASMUS CODE	REG NUMBER	ACTIONS
SLEEPING	BE	Melise	[Legal Name]	[Business Name]	[PIC]	[VAT]	[Erasmus Code]	[Reg Number]	Actions
DECLARED	ES	Madrid	[Legal Name]	[Business Name]	[PIC]	[VAT]	[Erasmus Code]	[Reg Number]	Actions
VALIDATED	ES	Barcelona	[Legal Name]	[Business Name]	[PIC]	E012345678J		12345678J	Actions

1 10

If you do not find your organisation, go back to the Participant register page and click on the **Register your organisation** button.

If you need support anytime during the process, select the [Helpdesk & Support Services](#) menu in the Funding & Tenders Portal:

SEARCH FUNDING & TENDERS HOW TO PARTICIPATE PROJECTS & RESULTS WORK AS AN EXPERT **SUPPORT**

GRANTS TENDERS

Programming period: 2021-2027

Filter by programme: Select a Programme...

Helpdesk & Support Services

- Support overview
- Guidance & Manuals
- FAQ
- Helpdesk & Support Services**

IT Helpdesk
The IT Helpdesk answers your questions about the Funding & Tenders Portal tools and processes.

Europe Direct
Questions about the EU? Europe Direct can help.

Research Enquiry Service
The service deals with enquiries about the validation process of legal entities for all the EU programmes. However, you are requested to contact the Validation Services via the Participant Register first. If you do not have access to the Participant Register, you can submit here your enquiry.

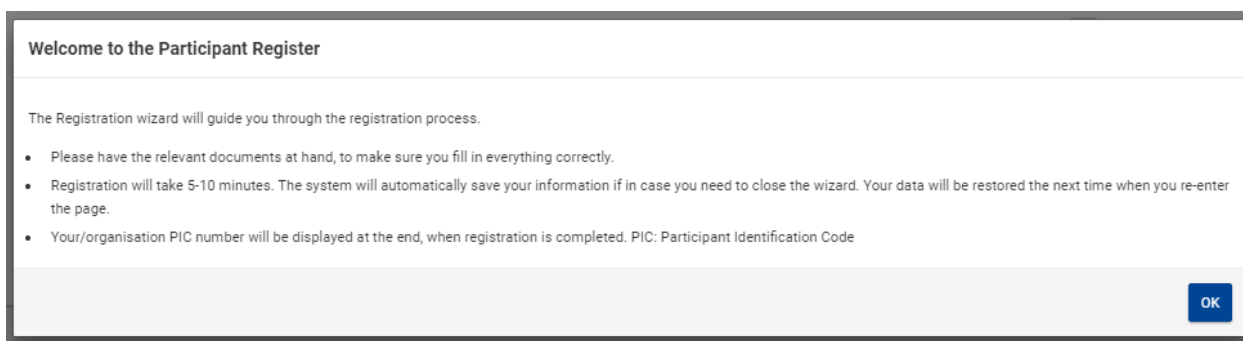
Registration process overview

The registration process enables you to enter the required data in order to obtain a PIC for your organisation. It consists in 6 steps, as indicated in the progress bar at the top of the screen:



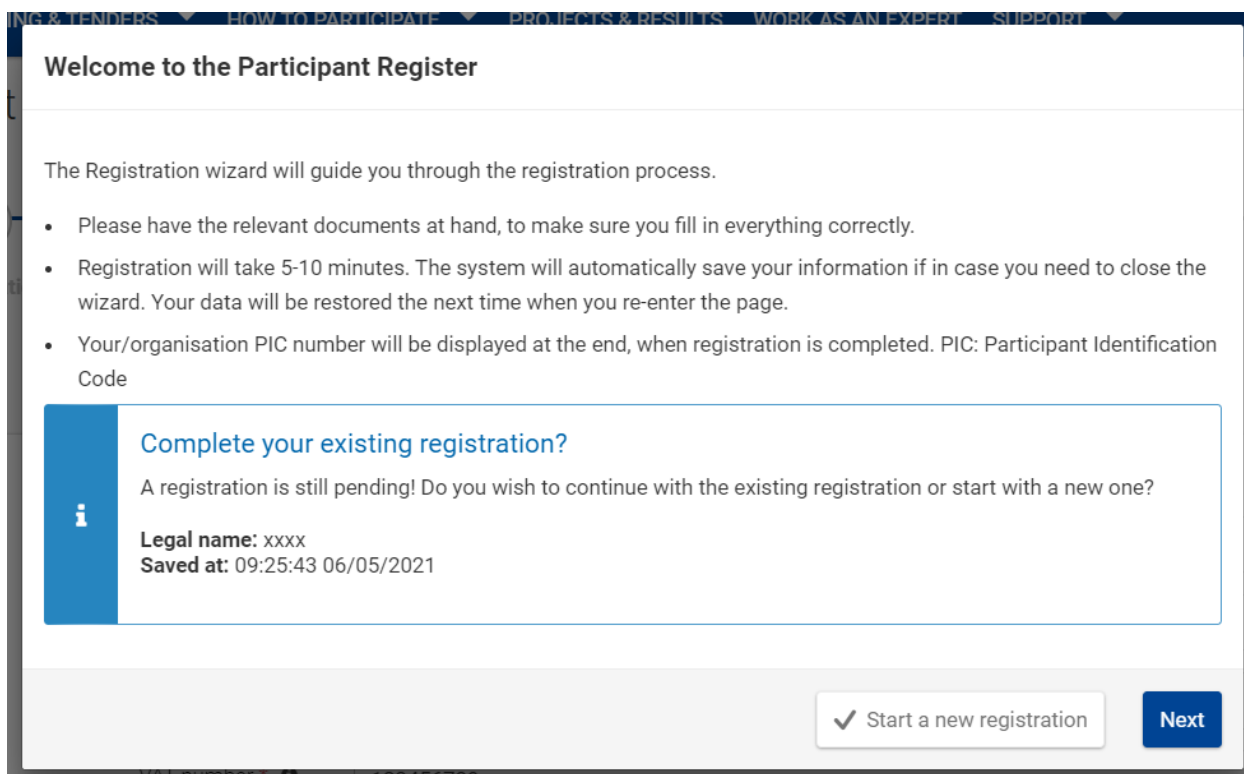
A small red pointer appears above the step that you are currently in, as well as a crayon drawing in the circle icon.

Before starting to go through the steps of the progress bar, you are prompted with a welcome pop-up message:



Click **OK** to close the pop-up message and start the registration.

If you had started a registration previously, the following pop-up message appears:



Welcome to the Participant Register

The Registration wizard will guide you through the registration process.

- Please have the relevant documents at hand, to make sure you fill in everything correctly.
- Registration will take 5-10 minutes. The system will automatically save your information if in case you need to close the wizard. Your data will be restored the next time when you re-enter the page.
- Your/organisation PIC number will be displayed at the end, when registration is completed. PIC: Participant Identification Code

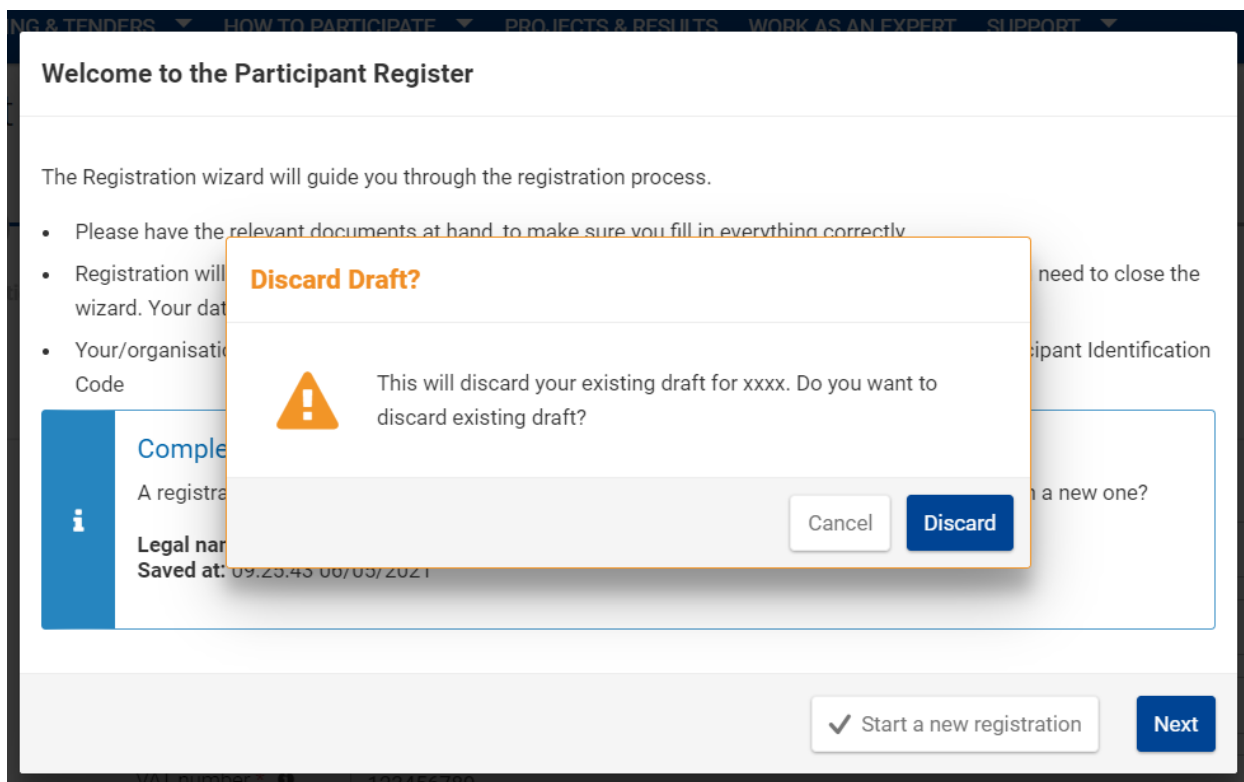
Complete your existing registration?

A registration is still pending! Do you wish to continue with the existing registration or start with a new one?

Legal name: xxxx
Saved at: 09:25:43 06/05/2021

✓ Start a new registration **Next**

Click **Next** to continue this previous registration or **Start a new registration** to discard the existing one and start a new one. If you select this last option, this pop-up message appears:



Welcome to the Participant Register

The Registration wizard will guide you through the registration process.

- Please have the relevant documents at hand, to make sure you fill in everything correctly.
- Registration will take 5-10 minutes. The system will automatically save your information if in case you need to close the wizard. Your data will be restored the next time when you re-enter the page.
- Your/organisation PIC number will be displayed at the end, when registration is completed. PIC: Participant Identification Code

Discard Draft?

This will discard your existing draft for xxxx. Do you want to discard existing draft?

Cancel **Discard**

Complete your existing registration?

A registration is still pending! Do you wish to continue with the existing registration or start with a new one?

Legal name: xxxx
Saved at: 09:25:43 06/05/2021

✓ Start a new registration **Next**

Click **Discard** to eliminate the draft permanently or **Cancel** to keep it.

Coming back to the 6 steps screens, you see ⓘ tooltips with additional information that you can consult for the different fields.

Also, note that there is a limitation in the number of characters that you can enter per field. The character counter is visible at the top right corner of each field and will subtract the entered characters amount from the maximum characters amount allowed:



After you have filled in all the mandatory fields of a step (marked with a red asterisk), click on the **Next** button at the bottom of the screen. By doing this, the data that you have entered will be automatically saved and you will move to the following step of the process.

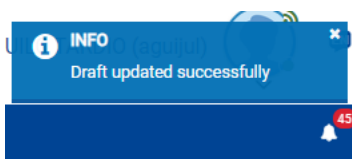
Click on the **Save** button to keep the entered data without having to move to the next step. Click on the **Previous** button to move backwards in the progress bar:



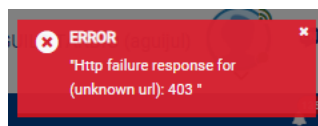
If you don't fill in a mandatory field, the field becomes red and a message appears under it:



Each time that you move within the progress bar, an informative pop-up message appears at the top right corner of the screen:



If there is an error during the process, this type of pop-up message appears:



You can close these pop-up messages by clicking on the small cross at the top right side of them.

The **Self-registrant** is the person who registers an organisation in the Participant Register of the Funding & Tenders Portal. Before the LEAR is validated, Self-registrants can provide the EU with requested information and documents about their organisation. Once the LEAR has been formally validated (normally after the organisation has been validated by the Central Validation Service), the role of Self-registrant is revoked and replaced by the LEAR.



Registration process steps

1. Identification

In this step, you must provide the basic legal information of your organisation:

Identification

Legal name * 240

Registration country * 8

Registration number * 80

VAT number * 20 ☐ not applicable

Website * 500

If you provide a **Legal name** that is similar to another already registered by another user, the following pop-up window appears:

Existing organisation(s)

The following organisations have already registered in the Participant Register.
If any of the organisations below is yours, please click on the 'Use this PIC' button to proceed


Existing organisation(s)		
5.7.1.C deployment test1 PIC 943615613 VAT number Registration number asd	Address asdsa Austria	Status Declared Use this PIC
PDM-URF AUTOMATED TEST TEST1 PIC 922311212 VAT number BE0525550750 Registration number 525550790	Address Rue de Genève, 1 1140 Belgium	Status Validated Use this PIC
AD PP TEST 5.8.2.B TEST1 PIC 924024814 VAT number Registration number not applicable	Address rue montoyer, 34 1000 Luxembourg	Status Validated Use this PIC
160108 AD PP TEST1 PIC 923191875 VAT number Registration number not applicable	Address rue du trône, 21 1820 Belgium	Status Declared Use this PIC
Geppy Financial Test1 PIC 923183436 VAT number Registration number 123456	Address street 81150	Status Validated Use this PIC

[Previous](#) [Continue registration](#)


If any organisation in the list was registered by you, click on the **Use this PIC** button related to it.


2. Organisation data


In this step, you must specify the main contact details and the official language of your organisation:





Organisation Data


Legal name 


Business name  Business name 240


Address  Address 239


Postal code  NNNN (1234) 39
Please enter the postal code in the following format: NNNN (1234)


P. O. box  P. O. box 30


City  City 119

Registration country 

Phone  Phone 30


Fax  Fax 30

Website 


Official language  -- Select One -- 3


3. Legal information


In this step, you must select the **Legal form** of your organisation from the corresponding drop-down menu. Additionally, you can provide other data:





Legal Information


Legal entity status  ☐ a natural person ☒ a legal person


Legal form  3


VAT number  87654321 39


Legal register  Legal register 39


Registration number 


Registration date  dd/mm/yyyy 3


Legal entity type  ☒ private entity ☐ public body


Legal entity qualification  ☐ nonprofit ☒ for profit


SME Self-Declaration  ☐ Yes ☒ No


Is it a civil society organisation  ☐ Yes ☒ No


International organisation  ☐ Yes ☒ No


International Organisation of European Interest for H2020 (OEI H2020)  ☐ Yes ☒ No

International Organisation of European Interest for Digital Europe (OEI Digital Europe)  ☐ Yes ☒ No

International European Research Organisation for Horizon Europe (ERO Horizon Europe)  ☐ Yes ☒ No

Research organisation  ☐ Yes ☒ No

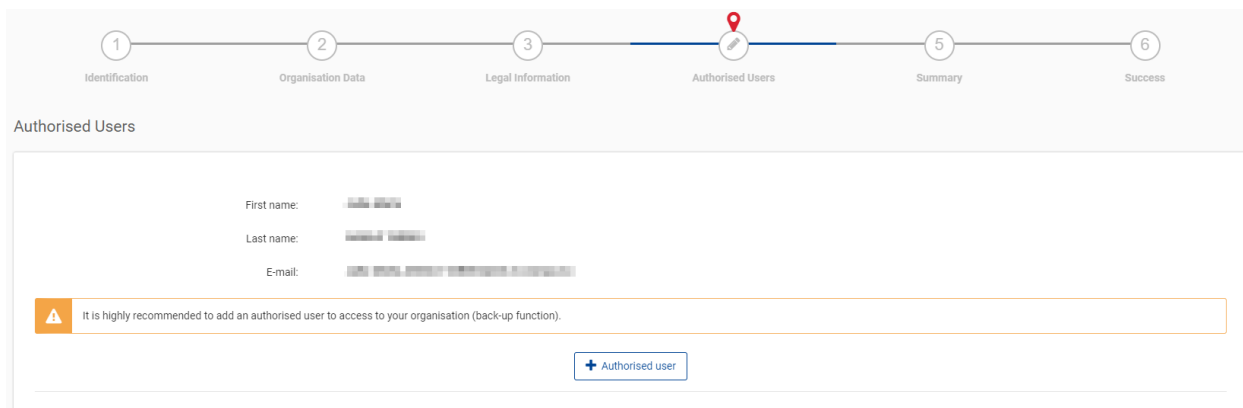
Secondary/higher education establishment  ☐ Yes ☒ No

Gender equality plan  ☐ Yes ☒ No 3

[Change ERP](#)

4. Authorised users

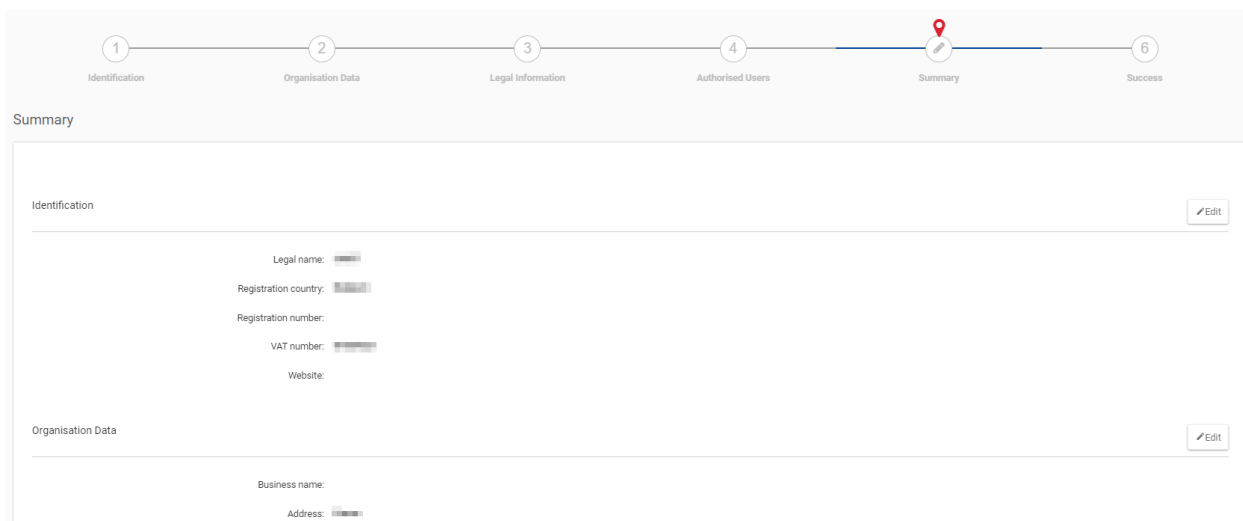
In this step, you have the possibility to add another authorised user as a back-up. This person receives the Self-registrant role, the same as you, and is able to make updates or provide documents after the registration (see [Organisation data update](#)).



The screenshot shows a progress bar at the top with six steps: 1. Identification, 2. Organisation Data, 3. Legal Information, 4. Authorised Users (current step, marked with a red pin), 5. Summary, and 6. Success. Below the progress bar, the title 'Authorised Users' is displayed. The main content area contains three input fields: 'First name:', 'Last name:', and 'E-mail:'. Below these fields is an orange warning box with a triangle icon and the text: 'It is highly recommended to add an authorised user to access to your organisation (back-up function)'. At the bottom right of the form is a button labeled '+ Authorised user'.

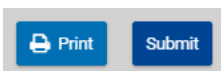
5. Summary

In this step, you can review all the data that you have entered in the previous steps. If you need to make a modification, click on the **Edit** button at the top right corner of each of the steps summarized in this screen:




The screenshot shows a progress bar at the top with six steps: 1. Identification, 2. Organisation Data, 3. Legal Information, 4. Authorised Users, 5. Summary (current step, marked with a red pin), and 6. Success. Below the progress bar, the title 'Summary' is displayed. The main content area is divided into two sections: 'Identification' and 'Organisation Data'. The 'Identification' section includes fields for 'Legal name:', 'Registration country:', 'Registration number:', 'VAT number:', and 'Website:'. The 'Organisation Data' section includes fields for 'Business name:' and 'Address:'. Each section has an 'Edit' button at the top right corner.

When you have reviewed the data, click on the **Submit** button at the bottom right corner of the screen. Click on the **Print** button if you wish to print the data:



6. Success

This is the final step of the registration process. In this step, there is a confirmation that you have successfully completed the process and you can see the PIC that has been created for you:



The progress bar shows six steps: 1. Identification, 2. Organisation Data, 3. Legal Information, 4. Authorised Users, 5. Summary, and 6. Success. Step 6 is the current step, indicated by a red location pin icon and a blue line.

Success

✓ Registration completed

You have successfully registered in the Participant Register. Your PIC number is:

922091216

Please note that registration in the Participant Register only covers the basic legal entity data. You may be asked for further information if you apply for EU funding or tenders with specific eligibility conditions (e.g. SME validation, control of ownership, etc). Please consult the Funding & Tenders Portal Online Manual for information on data updates, document upload, and contacting the Validation Service.

- ✓ Update your organisation data
- ✓ Upload the documents needed to validate your organisation when indicated /required
- ✓ Read/send messages from/to the Validation Services

To update your data please click on 'Continue to update' or log-in into Funding and Tenders Portal (My Area/My Organisation/Modify organisation).

[Continue to update](#)

Click on the **Continue to update** button if you wish to update the data of your organisation.

With your PIC number, you can apply already for calls for funding or tenders.



Organisation data update

The My Organisation(s) page in the Funding & Tenders Portal

After registering your organisation using the Participant register page of the Funding & Tenders Portal, you can view, and update the entered data, upload supporting documents and follow up the validation of your organisation, when applicable, via the **My Organisation(s)** tab of the **Manage my area** menu.

Your organisation has the Declared status after the registration.

Once you have logged in the Funding & Tenders Portal, you see at the left side of your screen the **Manage my area** menu:

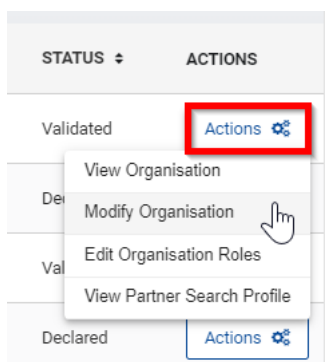
The screenshot displays the 'My Organisation(s)' page. On the left, the 'Manage my area' menu is visible, with 'My Organisation(s)' selected. The main content area shows a table with 10 results. The table has columns for 'LEGAL NAME', 'PIC', 'VAT', 'STATUS', and 'ACTIONS'. All organisations listed have a 'Declared' status. The 'ACTIONS' column contains a button labeled 'Actions' with a dropdown arrow.

LEGAL NAME	PIC	VAT	STATUS	ACTIONS
[Link]	[Value]	[Value]	Validated	Actions
[Link]	[Value]	[Value]	Declared	Actions
[Link]	[Value]	[Value]	Validated	Actions
[Link]	[Value]	[Value]	Declared	Actions
[Link]	[Value]	[Value]	Declared	Actions
[Link]	[Value]	[Value]	Declared	Actions
[Link]	[Value]	[Value]	Declared	Actions
[Link]	[Value]	[Value]	Declared	Actions
[Link]	[Value]	[Value]	Declared	Actions
[Link]	[Value]	[Value]	Declared	Actions

When clicking on the **My Organisation(s)** tab, a list with all your registered organisations appears in the central part of your screen. This list also includes the organisations for which you have been appointed as contact in a proposal.

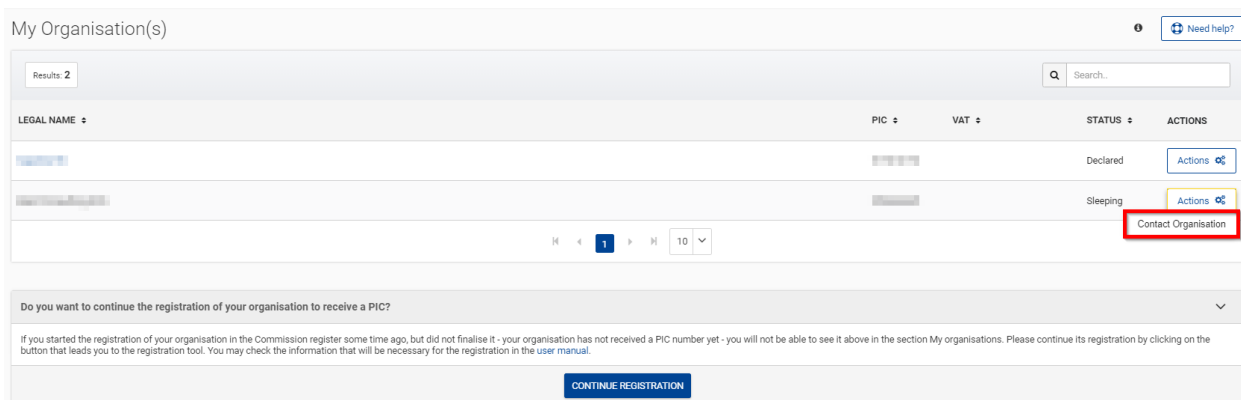
In the **Legal name** column, your registered organisations are displayed with hyperlinks. If you click on any of these hyperlinks, an overview with the main data of the corresponding organisation is shown (only if you have registered the organisation, otherwise there is no a hyperlink to the organisation page).

The **Actions** button allows you to modify the data of your registered organisation. Click on the Actions button and, then, select the **Modify organisation** option from the drop-down menu:



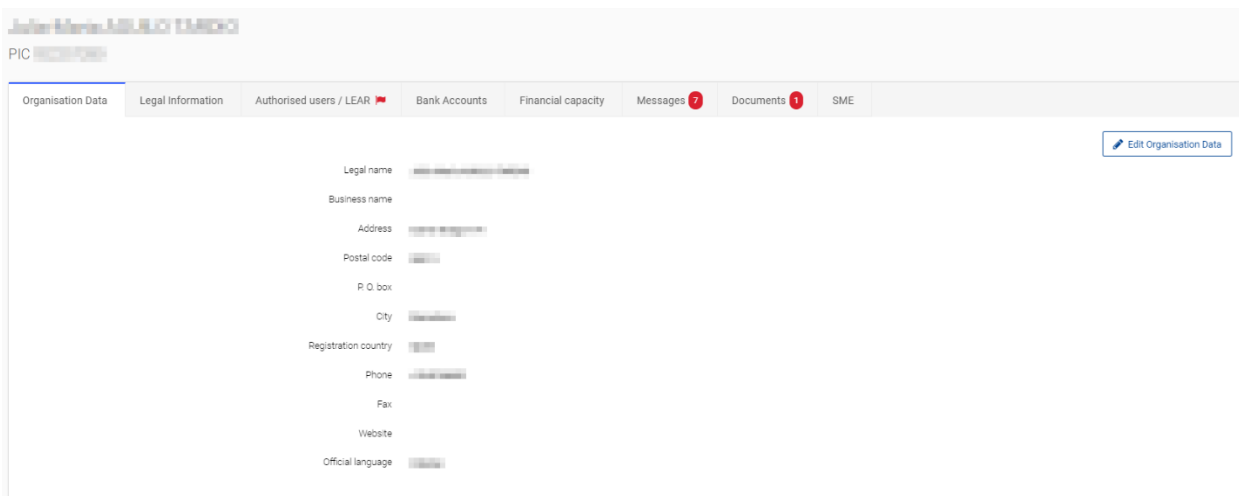
For organisations that you registered, or in which you have a role to update the organisation data, you can use the **Edit Organisation roles** option to manage the different roles, later on, after the organisation has been validated by the Central Validation Service. For information about roles, please see [Roles and Access Rights](#).

Note that for organisations for which you have been acting as contact but that were not registered by you, you do not have the option to view or modify the organisation data, nor to update the roles. In this case, you only have the option to contact the organisation:



The default status for your organisation, after registering it, will be Declared. Your organisation does not need to be Validated if you are not participating in any project already, so a Declared organisation can be used in a proposal. Only when a proposal has been selected, this automatically triggers a request for validation of your organisation by the Central Validation Service. You will receive an email informing that your organisation will go through the process of validation and the list of supporting documents that you need to provide. You can upload the documents and follow up any messages from the Central Validation Service via the **Modify organisation** option.

When you click on **Modify organisation**, the organisation data update screen appears:



The outcome of the registration process is the validation of your organisation (a validated PIC). The Central Validation Service will send a confirmation message once the process is completed and the PIC is validated.

The organisation data update screen

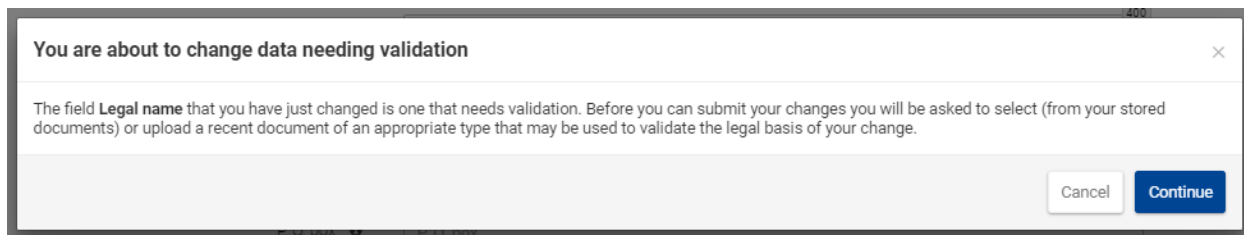
The organisation data update screen, as you can see in the image above, shows your registered organisation name and PIC at the top left corner and, under it, 8 tabs containing the rest of the data.

Click on the name of a tab to display its content, the tab that you have clicked becomes white and a blue line appears on top of the tab name to mark in which tab you are. The rest of the tabs remain grey.

Some red icons may be visible next to the names of certain tabs: a **number icon** indicates the amount of items pending your action in that tab and a **flag** indicates a pending action from your side.

To make any modification to your registered organisation data, click on the **Edit** button that you see at the right of the screen for each open tab. Once you have clicked on this button, the information becomes editable.

In organisations with the Validated status, a **green checkmark** at the right side of each field confirms that the value has been previously validated. Some of the fields require that you upload a document confirming the change that you have made. This is indicated by an informative pop-up message followed by a red upload icon, appearing at the right side of the specific field:





Organisation Data | Legal Information | Authorised users / LEAR | Bank Accounts | Financial capacity | Messages 7 | Documents 1 | SME

Legal name * 216

Business name 240

Address * 223 ✓

Postal code * 34 ✓

P.O. box 30

City * 110 ✓

Registration country * ✓

Phone * 30

Fax 30

Website 300

Official language *

Click on the **Submit** button at the bottom right corner of the screen to save the changes. If you click on the **Cancel** button, a pop-up message asks you to confirm your choice:

Cancel?

By pressing 'yes', you will lose your changes.

In organisations with the Declared status, you are able to modify the data in all fields without having to provide the supporting documents immediately after, although it is announced in the informative pop-up message:

You are about to submit your changes ×

The changes you are making must be validated by the Central Validation Service.

Please note that the changes listed below require supporting documents if there is a document icon next to them. You cannot submit the changes without supporting documents.

Document(s) submitted in a non-official language of the European Union must be accompanied by a certified/official/legal translation by an accredited body or translator.

Registration or VAT extract must have been issued recently, no more than 6 months ago.

You modified the following information:

- CORE
 - Legal name

Cancel Submit changes

Click on **Submit changes** at the bottom right corner of the pop-up message to save the changes. If you click on the **Cancel** button, your change appears on the screen but is not submitted.

Please note that, after registration, you must maintain the data provided for your organisation up to date, via the screens explained in the current section of this manual. It is also important to know that it is not possible to provide all the information for your organisation during registration. The LEAR information, for example, cannot be provided by you until the Central Validation Service starts validating your organisation after registration. In these cases, you will be notified via the Funding & Tenders Portal and by email when you can provide this information.

The roles that can update the data of their registered organisations once they are validated are:

- LEAR: the Legal Entity Appointed Representative (LEAR) is the formally nominated main responsible for an organisation use of the Funding & Tenders Portal and thus bears the final responsibility for all the organisation actions in the Funding & Tenders Portal. LEARs have system rights to update their organisation data, nominate/revoke representatives of their organisation to electronically sign grant/contracts, nominate/revoke representatives of their organisation to electronically sign cost claims/invoices and nominate/revoke Account Administrators within their organisation to help them with their work.
- Account administrator: the LEAR may delegate tasks to one or more Account Administrators. Though the LEAR keeps the full responsibility, Account Administrators can fulfil tasks for their LEAR. An organisation can have an unlimited number of Account Administrators. If the organisation nominates a new person as their LEAR, the existing Account Administrators remain, but can be revoked by the new LEAR.

Organisation data

This first tab contains the basic information of your registered organisation, such as its legal name and its contact details:

John - M... J... T...

PIC **RECEIVED**

Organisation Data	Legal Information	Authorised users / LEAR	Bank Accounts	Financial capacity	Messages 7	Documents 1	SME
<div> <div>Legal name</div> <div>Business name</div> <div>Address</div> <div>Postal code</div> <div>P.O. box</div> <div>City</div> <div>Registration country</div> <div>Phone</div> <div>Fax</div> <div>Website</div> <div>Official language</div> </div> <div>Edit Organisation Data</div>							

Legal information

In the second tab, there is the legal data of your registered organisation:

Organisation Data	Legal Information	Authorised users / LEAR	Bank Accounts	Financial capacity	Messages 7	Documents 1	SME
<div> <div>Legal entity status</div> <div>Legal form</div> <div>VAT number</div> <div>Legal register</div> <div>Registration number</div> <div>Registration date</div> <div>Legal entity type</div> <div>Legal entity qualification</div> <div>Is it a civil society organisation</div> <div>International organisation</div> <div>International Organisation of European Interest for H2020 (IOEI H2020)</div> <div>International Organisation of European Interest for Digital Europe (IOEI Digital Europe)</div> <div>International European Research Organisation for Horizon Europe (IERO Horizon Europe)</div> <div>Research organisation</div> <div>Secondary/Higher education establishment</div> <div>Gender equality plan</div> </div> <div>Edit Legal Information</div>							
<div>Erasmus Charter</div> <div>Erasmus Code</div>							

There are two types of data in this page: compulsory data, such as the Legal form and VAT number fields, as well as additional legal information; and information relevant to programmes (Horizon Europe, Digital Europe, etc.).

General legal information:

- Legal entity status
- Legal form
- VAT number
- Legal register
- Registration number
- Registration date
- Legal entity type
- Legal entity qualification
- Is it a civil society organisation
- International organisation

Information relevant to programmes:

- International Organisation of European Interest for H2020 (IOEI H2020)
- International Organisation of European Interest for Digital Europe (IOEI Digital Europe)
- International European Research Organisation for Horizon Europe (IERO Horizon Europe)
- Research organisation
- Secondary/Higher education establishment
- Gender equality plan
- Erasmus Charter
- FP7 Indirect Cost Method (ICM)
- Certification data

Authorised users / LEAR

In this tab, you can see the authorised users for your registered organisation, as well as the Legal Appointed Representative (LEAR) section:

Organisation Data
Legal Information
Authorised users / LEAR
Bank Accounts
Financial capacity
Messages
Documents
SME

Manage roles

Authorised Users

First name	Last name	Role	E-mail

LEAR

Once validation of the declared data for your organisation has started (but not before) your organisation must nominate a **Legal Entity Appointed Representative (Legal Entity Appointed Representative, LEAR)**. At that time an 'Add LEAR' button will become available and you will be able to provide the LEAR data, create the documents to be printed, signed and scanned and to electronically submit them, together with other supporting documents, for verification. You will need to keep the original signed documents at your premises in case of future audits or controls.

Click on the **Manage roles** button at the right of the screen if you need to add authorised users. Then, click on the **Add roles** button at the bottom of the screen:

Roles for the organisation:

Results: 1

Search..

ROLE	NAME	EMAIL	USERNAME	TEAM	ACTIONS
Self Registrant					

Go back
Add roles

Organisation:
PIC:

A new screen appears where you can provide the required information:

Roles for the organisation:

Please enter the contact name and details

Role *

Please choose

First Name *

Last Name *

Email *

* required field

Ok

Cancel

Click **OK** to save the information or **Cancel** to discard it.

The Self-registrant can add an unlimited number of other so-called Self-registrants, which are basically additional contacts with the same role.

Back in the Authorised users / LEAR initial screen, in the LEAR section, you will still not be able to nominate a LEAR. This will be possible once the validation of the data that you provided for your organisation starts, then you will receive an email notification to let you know that you can perform the action, and the **Add LEAR** button will appear on your screen, as well as a small red flag next to the Authorised users / LEAR tab title:



Organisation Data | Legal Information | **Authorised users / LEAR** | Bank Accounts | Financial capacity | Messages **10** | Documents **1** | SME

[Manage roles](#)

Authorised Users

First name	Last name	Role	E-mail
Self Registrant		Self Registrant	

LEAR

Your organisation must now nominate a Legal Entity Appointed Representative (Legal Entity Appointed Representative, LEAR). Click the 'Add LEAR' button to provide the LEAR data and generate the documents to be printed and signed. Once signed, scan them and upload them along with the rest of supporting documents (copies of IDs for the LEAR and the organisation's legal representative appointing it, and the documents substantiating the empowerment of the latter). Once all necessary documents are uploaded, you will be able to 'Send LEAR for validation'. You will need to keep the original signed documents at your premises, in case of future audits or controls.

[Add LEAR](#)

Click on the **Add LEAR** button if you have not allocated the LEAR role yet. The following wizard opens:

LEAR EU login

1 LEAR EU login | 2 LEAR Data | 3 Legal Representative data | 4 Documents

The values to be entered must correspond to the LEAR's EU Login. An automatic check will be made to verify if the LEAR has an EU Login based on the declared values. If the EU Login is not recognised, you will be unable to enter the remaining LEAR data. However, the LEAR will be invited to create his/her account upon your confirmation. If the EU Login exists, you will be able to enter the remaining data required. Please enter the first name and last name exactly as written in the identification document you will provide for validation.

Professional email *

First name *

Last name *

[Close](#) [Next](#)

Complete the wizard steps by filling in the required fields and clicking on the **Next** button until the end of the process. You can quit the wizard anytime by clicking on the **Close** button but your changes will be lost.

Alternatively, click on **Save** to keep the entered data as a draft. A line of information appears in the LEAR section. To continue working on the draft, click on **Edit**, or to delete it, on **Discard draft**:

LEAR

In parallel to its validation in the Participant Register, your organisation must nominate a Legal Entity Appointed Representative (LEAR). For this, three originally signed paper documents must be sent to the Commission. By clicking the button 'Replace LEAR' you can provide the LEAR data and create the documents to be printed and signed as explained in the IT How To.

First name	Last name	E-mail	Status	Actions
Self Registrant			Draft	Edit Discard draft

Once you have completed the wizard, a new line of information appears in the LEAR section, with the indication **Data provided**. To modify the data provided in the wizard, click on the **Edit** button:



Organisation Data

Legal Information

Authorised users / LEAR

Bank Accounts

Financial capacity

Messages 6

Documents 1

SME

Manage roles

Authorised Users

First name	Last name	Role	E-mail
		Self Registrant	

LEAR

In parallel to its validation in the Participant Register, your organisation must nominate a [Legal Entity Appointed Representative \(LEAR\)](#). For this, three originally signed paper documents must be sent to the Commission. By clicking the button 'Replace LEAR' you can provide the LEAR data and create the documents to be printed and signed as explained in the [IT How To](#).

First name	Last name	E-mail	Status	Actions
			Data Provided	Edit

The LEAR wizard allows you to add or update the required information of the Legal Entity Representative (LEAR) of your organisation and consists of the following steps:

1) LEAR EU Login

LEAR EU login

1

2

3

4

LEAR EU login

LEAR Data

Legal Representative data

Documents

The values to be entered must correspond to the LEAR's [EU Login](#). An automatic check will be made to verify if the LEAR has an EU Login based on the declared values. If the EU Login is not recognised, you will be unable to enter the remaining LEAR data. However, the LEAR will be invited to create his/her account upon your confirmation. If the EU Login exists, you will be able to enter the remaining data required. Please enter the first name and last name exactly as written in the identification document you will provide for validation.

Professional email *

Professional email

139

First name *

First name

139

Last name *

Last name

139

Close

Next

This step must be filled with the basic data of the future LEAR. This information will also be used to create an EU Login account for the LEAR, should the entered information not be registered in EU Login yet. If the email address of the future LEAR has not been registered yet, you have the option of inviting them to register:

LEAR EU login

1 2 3 4

LEAR email does not correspond to EU Login

The email provided is not a valid EU Login, which is a prerequisite in the LEAR identification process.
If you so wish, click the 'Continue' button. By doing so an email will be sent to the LEAR at [redacted] inviting [redacted] to register in EU Login. You will be notified as soon as this person will have taken action on this request.
For the security of your organisation the LEAR is not permitted to log in using a social media account and any social media account associated with their EU Login will be removed once the LEAR is validated.

Cancel Continue

Last name * [redacted] 125

Close Next

By clicking **Continue**, an invitation to register is sent to the provided email address.
You must wait for the LEAR to accept the invitation before you can continue providing LEAR data.

If the entered email address exists in the EU Login database but either the first or the last name being provided does not match what has been registered in the database, you need to correct the details. It is not possible to use a registered email address with mismatching naming details:

LEAR EU login

1 2 3 4

Check the data you entered

The email you provided is recognised as a valid EU Login but the name you gave does not match the data we hold for the EU Login account. Please check the spelling, and check the details with the person you intend to identify as the LEAR.
If the nominated LEAR wants to change the name registered with EU Login they should do that through the EU Login service. In the meantime you can use the LEAR's first/last name as originally entered in the account, wait for the LEAR to change their details or ask the LEAR to create a new EU Login with a different email address and use that. Please note that for the security of your organisation LEAR EU Logins are not permitted to use social media accounts.

OK

Last name * [redacted] 125

Close Next

In this case, you have 2 options: ask the future LEAR to modify their first name and/or last name accordingly directly in their EU Login account, or enter a different email address.
If no problems are found, you may click on **Next** to continue.

2) LEAR data

The LEAR data screen displays, fill it in accordingly:

LEAR Data

LEAR EU login

LEAR Data

Legal Representative data


Documents

In order to reduce the chance of error and speed the validation process, the LEAR appointment documents will be created using the data input. The activation of the LEAR account requires a PIN code that will be sent to the LEAR upon completion of the validation process. If you provide the LEAR's mobile phone number this PIN code will be sent by SMS, avoiding delays and other problems of postal delivery. It is therefore recommended to provide a mobile phone number, which will be used exclusively for this purpose.

Professional email

First name

Last name

Mobile phone  Expected format: +CCNNNNNNNNNNNNNNxBBBBB

☐ I do not want to give a mobile phone number to receive the PIN

[Copy the organisation's contact details](#)

Title



Position in the organisation

Department in the organisation

Gender

Country *

Street name and number *

 Close  Save Previous [Next](#)

Click **Copy the organisation's contact details** if you want to reuse details of the organisation previously provided in the registration process.

Make sure to enter a mobile phone number for the LEAR, so that the activation PIN for the LEAR account is sent by SMS.

When the data has been provided in the LEAR data screen, click **Next** to move to the following screen. Use **Save** instead to exit the LEAR wizard saving your changes.

3) Legal representative data



Legal Representative data

LEAR EU login LEAR Data **Legal Representative data** Documents

The LEAR must be appointed by the legal representative of the organisation (this could be, for example, the CEO of the company, the [vice]rector of the university..., always in accordance with the statutes of your organisation). Below you can enter his/her name and role and in the documents section (next step) you will be asked to also upload the documents confirming their identity and legal empowerment. Please enter the first name and last name **exactly** as written in the identification document you will provide for validation.

Legal Representative same as the LEAR ☒ Yes ☐ No

Title 40

First name * 128

Last name * 126

Position in the organisation * 117

Enter the first and last names, and the position of the person who can represent your organisation in the Legal representative data step. They will have to sign the original documents required for appointing a LEAR. This can be the CEO of the company, the rector of the university, the Director-General of the institute, etc.

Click **Next** again to go to the following screen.

4) Documents

In this step, you are prompted to submit electronically both the LEAR Appointment Documents, and the Legal Representative and LEAR proof of identities:

Documents

LEAR EU login LEAR Data Legal Representative data **Documents**

Document Type	Document generated	Description	Scanned and uploaded documents	Status
LEAR Appointment Documents		Official "LEAR appointment letter" to be signed by Legal Representative and "Roles and Duties of LEARs" to be signed by both Legal Representative and LEAR.		
Legal Representative identity document		Official valid proof of identity (ID-card, Passport) carrying a photo and signature of the Legal Representative		
Declaration of consent to the terms of use of the F&T EES		Declaration of consent to the terms of use of the Participant Portal electronic exchange system, signed by the legal representative.		
Legal Representative authorisation		Document(s) proving that the legal representative(s) appointing the LEAR is/are empowered as such, which must clearly indicate the role/function within the organisation as legal representative(s) and identify and appoint a specific person (by indicating his/her personal data) as the person covering that specific role/function	(1).pdf 25/04/2021, 08:13	
LEAR identity document		Official valid proof of identity (ID-card, Passport) carrying a photo and signature of the proposed LEAR	25/04/2021, 08:13	

Other documents **Date** **Status**

Personal data: Your personal data will be processed in accordance with the Regulation (EU) 2018/1725. Please refer to this [link](#) for detailed information.

Legal Representative changes

Field name	Previous value	New value
<input type="text" value="Field name"/>	<input type="text" value="Previous value"/>	<input type="text" value="New value"/>

The changes listed above will change the document(s) generated so the system will generate a new version of document(s) to be signed and uploaded. The document type(s) uploaded will automatically be removed as [it is | they are] no longer valid.

When applicable, you are provided with a pre-filled PDF document where the data you entered in the LEAR registration wizard has been used. Click on the PDF icon to download it, then print it, get it signed and upload it again using the **arrow** button. A red arrow means that the document is still to be uploaded. When the document has been provided, the arrow turns yellow.

Also, when a document has been provided, the time and date of the upload appears, together with the name of the file, next to its status. Click on it to display the content, except for the identity documents, which cannot be previewed due to privacy reasons.

Note: The templates are prefilled with the information entered in the Participant register, where only one Legal Representative can be specified. If more than one signature as Legal Representative is needed, the second signatory should write their name and sign below the first one. In such a case, the ID documents of all signatories should be combined in a single PDF, DOC or JPG file (please note that the ZIP format is not supported) and uploaded as document type Legal Representative Identity.

The Submit button is not available until all documents have been provided. If you make changes to the previously saved LEAR data and Legal Representative data, the changes will be listed when coming back to the Documents step and the previously uploaded documents, except the ID related files, will be removed. This is so because new templates will have been generated at this point, containing the updated data, and you need to sign and upload the new ones.



When finished uploading the documents, click on **Submit**. Only after clicking this, the data will be transferred to the Central Validation Service. Otherwise, any changes remain at the level of your PIC and the Central Validation Service will not be aware of any changes on the LEAR information of your PIC.

LEAR replacement

The process to change the current LEAR is the same as the one to appoint a LEAR. However, you need to meet the following condition for you to replace the LEAR in the Participant register:

- You are the current (validated) LEAR of the organisation, or you have been appointed as Account administrator for that specific PIC. Otherwise, you will not be able to edit the data.

To replace the LEAR, click on the **Replace LEAR** button in the LEAR section. You can see that the status of the current LEAR is Validated. After editing the LEAR details and sending for validation, the status will change into Data provided again:

PIC 123456789 Need help?

Organisation Data | Legal Information | **Authorised users / LEAR** | Bank Accounts | Financial capacity | Messages | Documents 1 | SME

Manage roles

Authorised Users

First name	Last name	Role	E-mail
John	Doe	LEAR	john.doe@company.com

LEAR

In parallel to its validation in the Participant Register, your organisation must nominate a Legal Entity Appointed Representative (LEAR). For this, three originally signed paper documents must be sent to the Commission. By clicking the button 'Replace LEAR' you can provide the LEAR data and create the documents to be printed and signed as explained in the IT How To.

First name	Last name	E-mail	Status	Actions
John	Doe	john.doe@company.com	Validated	Edit Replace LEAR

Follow the same steps as you do when you appoint the LEAR for the first time. The appointed LEAR needs to have an existing EU Login account linked to their email address, otherwise this person will need to create their account first, and you will be able to resume the replacement afterwards.

Note: You need to maintain the data of your organisation up to date, and to ensure that there is always at least one person able to manage your organisation details in the Participant register. However, if you perform changes in your organisation data, including the LEAR, but your organisation is not currently involved in any project, validation will probably not occur. As explained previously in this documentation, this is not a problem at all; validation is done only as long as involvement in grants or procurement requires so.

Nevertheless:

- If you are the current LEAR, you are strongly advised to appoint the replacement LEAR as an Account administrator as well. This ensures that they will be able to access the organisation data immediately and not need to wait for validation to be completed.
- Please remember that, if the replacement LEAR is not an Account administrator, they will not have access to the organisation data until they have been validated: as noted, this may not happen immediately. It is possible to appoint more than one Account administrator, ensuring this way that your organisation data can be updated when needed.

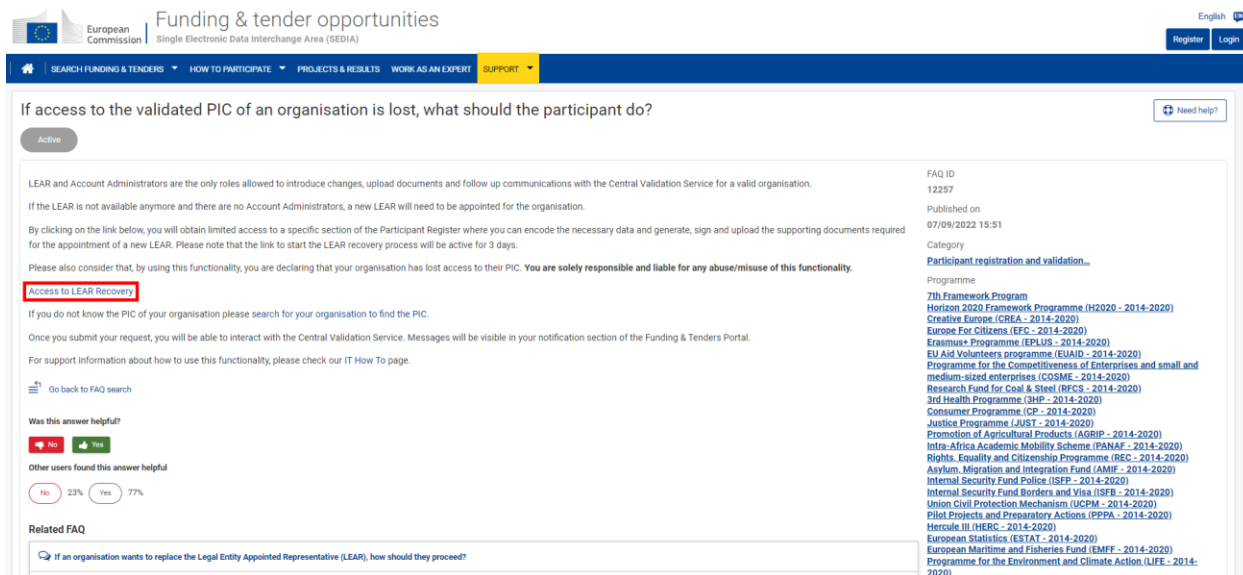
LEAR recovery

LEAR and Account Administrators are the only roles which are able to make changes, upload documents and follow up communications with the Central Validation Service for a valid organisation.

In situations where the existing LEAR is not available anymore and there are no Account Administrators to be able to access the update page of an organisation, the organisation could be blocked to perform the required actions within the context of a Grant Agreement or Procurement Contract.

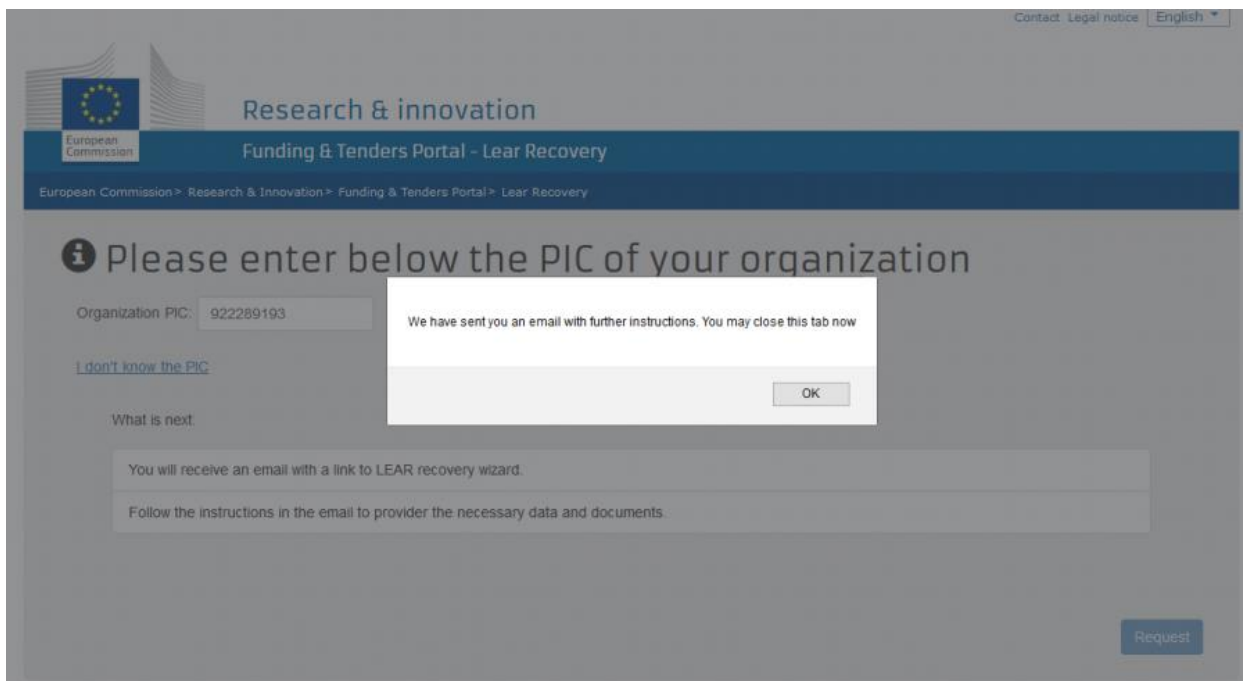
In those situations, you will be able to nominate a LEAR without accessing the update page of the organisation in the Participant register by following these steps:

1. Access the [FAQ](#) in the portal and launch the LEAR recovery wizard screen:



The screenshot shows the 'Funding & tender opportunities' portal. The top navigation bar includes 'SEARCH FUNDING & TENDERS', 'HOW TO PARTICIPATE', 'PROJECTS & RESULTS', 'WORK AS AN EXPERT', and 'SUPPORT'. The main content area is titled 'If access to the validated PIC of an organisation is lost, what should the participant do?'. It contains an 'Active' tab and a list of FAQs. The first FAQ, 'Access to LEAR Recovery', is highlighted with a red box. It explains that LEAR and Account Administrators are the only roles allowed to introduce changes, and if the LEAR is not available, a new LEAR will need to be appointed. It also provides instructions on how to search for the PIC of your organisation and how to use the functionality. A 'Go back to FAQ search' link is provided. Below the FAQ, there is a 'Was this answer helpful?' section with 'No' and 'Yes' buttons, and a 'Related FAQ' section with a link to 'If an organisation wants to replace the Legal Entity Appointed Representative (LEAR), how should they proceed?'. On the right side, there is a list of programmatic areas including the 7th Framework Program, Horizon 2020 Framework Programme, Creative Europe, Europe for Citizens, Erasmus+, EU Aid Volunteers, Programme for the Competitiveness of Enterprises and small and medium-sized enterprises, Research Fund for Coal & Steel, 3rd Health Programme, Consumer Programme, Justice Programme, Promotion of Agricultural Products, Intra-Africa Academic Mobility Scheme, Rights, Equality and Citizenship Programme, Asylum, Migration and Integration Fund, Internal Security Fund Police, Internal Security Fund Borders and Visa, Union Civil Protection Mechanism, Pilot Projects and Preparatory Actions, Horizon H2020, European Statistics, European Maritime and Fisheries Fund, and Programme for the Environment and Climate Action.

2. Enter the PIC number of your organisation. Then click on the **Request** button.
If you do not know the PIC, make a search for the organisation [here](#).



The screenshot shows the 'Research & innovation Funding & Tenders Portal - Lear Recovery' screen. The top navigation bar includes 'Contact', 'Legal notice', and 'English'. The main content area is titled 'Please enter below the PIC of your organization'. It contains a form with a label 'Organization PIC:' and a text input field containing '922289193'. Below the input field, there is a link 'I don't know the PIC'. A 'What is next' section contains two paragraphs: 'You will receive an email with a link to LEAR recovery wizard.' and 'Follow the instructions in the email to provide the necessary data and documents.' A 'Request' button is located at the bottom right. A modal dialog box is open in the center, displaying the message 'We have sent you an email with further instructions. You may close this tab now' and an 'OK' button.

This functionality is available only if:

- The organisation has the Validated status. For any other status, you need to follow the [standard procedure](#) and you will not be able to use this functionality.
- No LEAR recovery request exists for your organisation already.

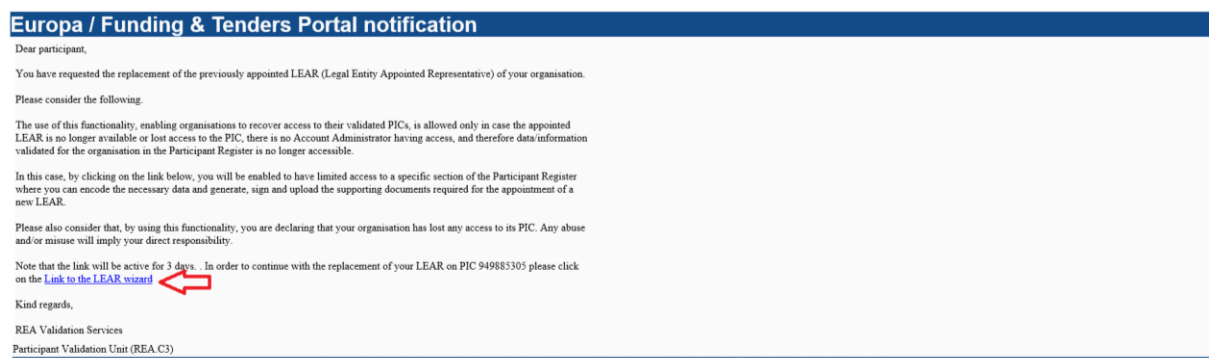
If the criteria is met, you will receive further instructions via email. Once you receive the email, see [LEAR Recovery](#) for further instructions.

Note: If there is a LEAR recovery action already for that organisation, only the person who initiated the LEAR recovery action will be able to follow up the request. If you are that person, when trying to launch a LEAR recovery action again for the same organisation, you will be taken to the [LEAR recovery wizard](#).

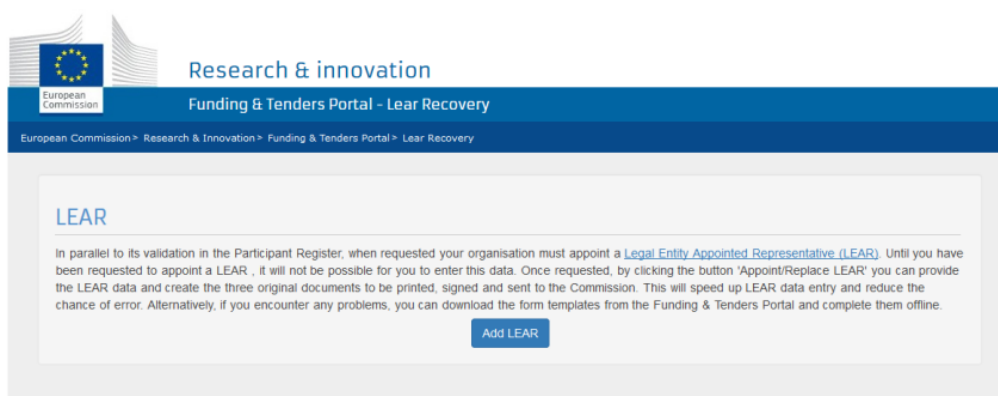
After requesting the LEAR recovery, you will receive an email with further instructions. Please, use the link from the received email within 3 days, or the request will expire and you will need to make a new request.

Undertake the following actions to complete your request:

1. In the email you receive, click the link to access the wizard:



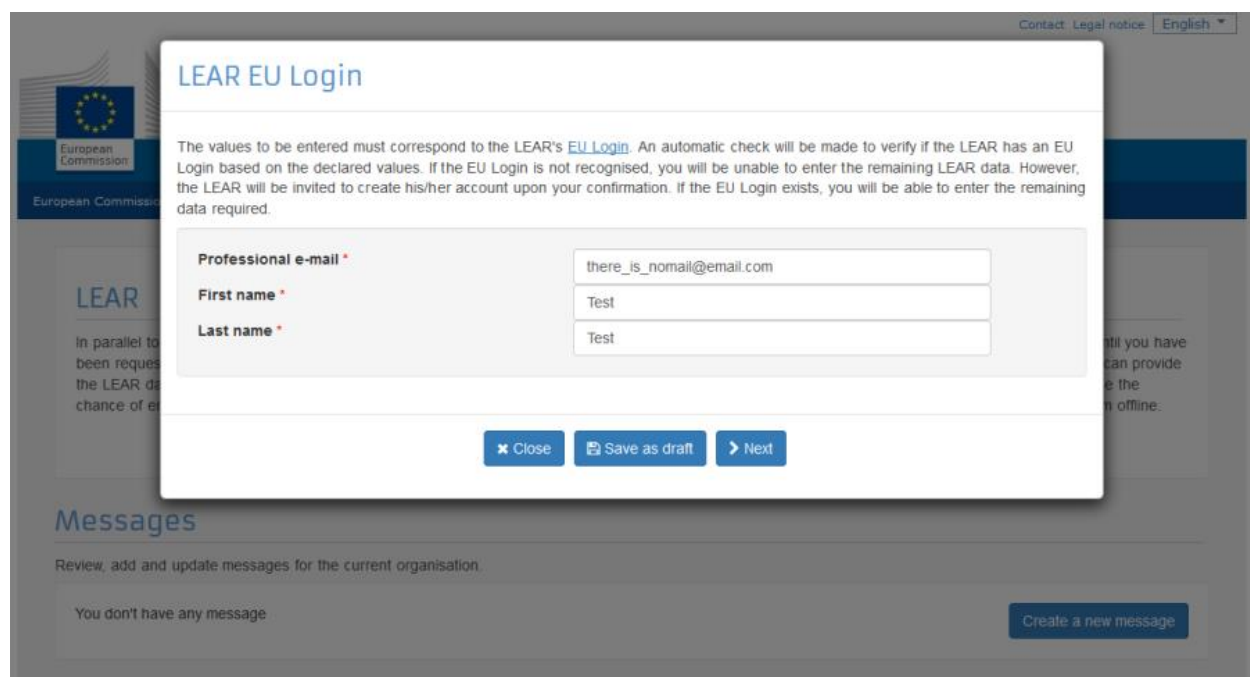
2. Click **Add LEAR** to access the wizard:



3. In the following screen, provide the details of the LEAR as registered in EU Login. It could be your own EU Login details, or someone else's.

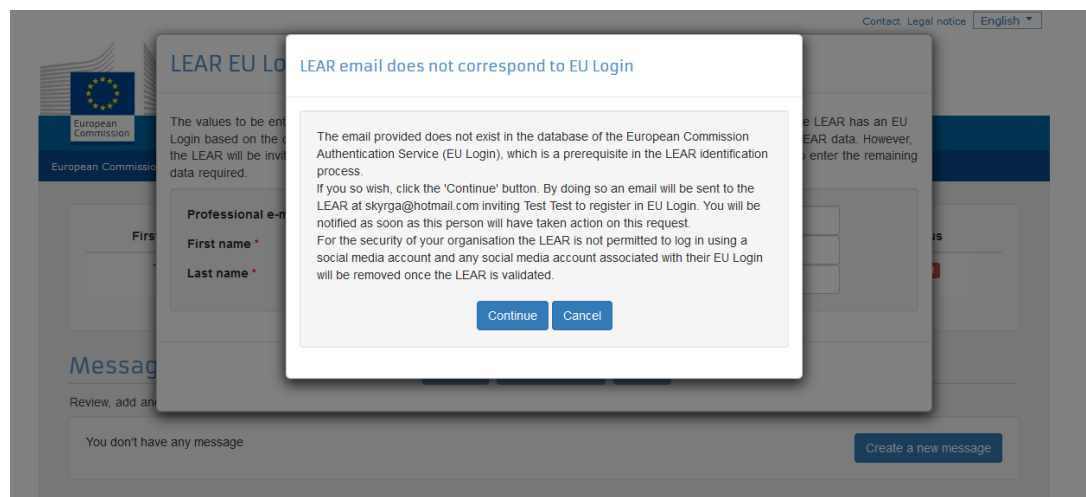
If the email address is not registered yet with EU Login, you will have the possibility to send an invitation email to the future LEAR to register first (the system will send it automatically after clicking **Next**). You cannot finish the LEAR appointment until the person registers.

If the provided email address and name combination exists in EU Login but there are differences between your input and the EU Login data, you will be invited to correct the details.



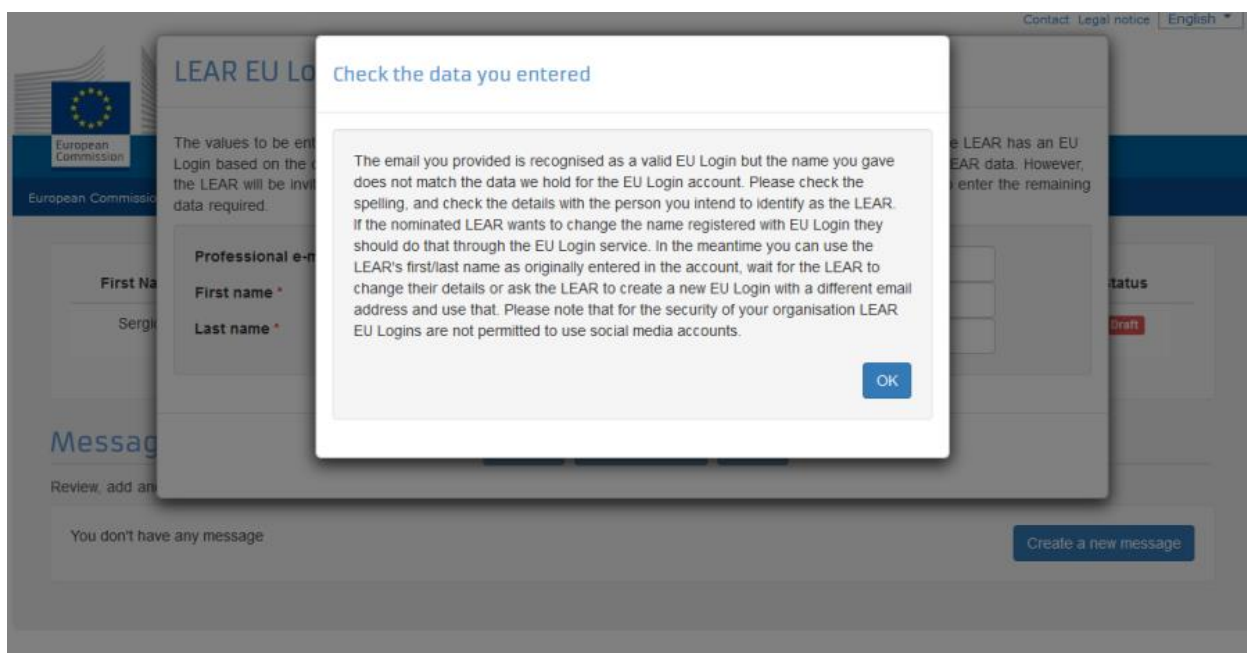
The screenshot shows the 'LEAR EU Login' form. The form title is 'LEAR EU Login'. Below the title, there is a paragraph explaining the process: 'The values to be entered must correspond to the LEAR's EU Login. An automatic check will be made to verify if the LEAR has an EU Login based on the declared values. If the EU Login is not recognised, you will be unable to enter the remaining LEAR data. However, the LEAR will be invited to create his/her account upon your confirmation. If the EU Login exists, you will be able to enter the remaining data required.'

The form contains three input fields: 'Professional e-mail *' with the value 'there_is_nomail@email.com', 'First name *' with the value 'Test', and 'Last name *' with the value 'Test'. At the bottom of the form, there are three buttons: 'Close', 'Save as draft', and 'Next'.



The screenshot shows a dialog box titled 'LEAR email does not correspond to EU Login'. The dialog contains the following text: 'The email provided does not exist in the database of the European Commission Authentication Service (EU Login), which is a prerequisite in the LEAR identification process. If you so wish, click the 'Continue' button. By doing so an email will be sent to the LEAR at skyrga@hotmail.com inviting Test Test to register in EU Login. You will be notified as soon as this person will have taken action on this request. For the security of your organisation the LEAR is not permitted to log in using a social media account and any social media account associated with their EU Login will be removed once the LEAR is validated.'

At the bottom of the dialog, there are two buttons: 'Continue' and 'Cancel'.



4. In the following screen, enter the LEAR data and click **Next**:

LEAR data

In order to reduce the chance of error and speed the validation process, the LEAR appointment documents will be created using the data input. The activation of the LEAR account requires a PIN code that will be sent to the LEAR upon completion of the validation process. If you provide the LEAR's mobile phone number this PIN code will be sent by SMS, avoiding delays and other problems of postal delivery. It is therefore recommended to provide a mobile phone number, which will be used exclusively for this purpose.

Title	Other
Position in the organisation	Position
Department in the organisation	Test
Gender	Not declared
Country *	Belgium (BE)
Region/country	Extra-Regio NUTS 2
Street name and number *	Naamstraat 1
P.O. Box	P.O. Box
Postal code	1234
City *	Brussel
Main phone *	+323232323232
Fax	Expected format: +CCCNXXXXXXXXXXXXNxBBBBB
Secondary phone	Expected format: +CCCNXXXXXXXXXXXXNxBBBBB
Mobile phone	+3249911112

[< Back](#)
[< Close](#)
[Save as draft](#)
[Next >](#)

Pay attention to the mobile phone (last field). When being nominated as LEAR of an organisation, your account as LEAR needs to be activated. For such an aim, you will receive an activation PIN code. Providing a mobile phone number allows you to receive the PIN code via SMS.

For more information about LEAR activation, please click [here](#).

5. Enter the details of the Legal Representative data and click on **Next**:

Legal Representative data

The LEAR must be appointed by the legal representative of the organisation (this could be, for example, the CEO of the company, the [vice]rector of the university..., always in accordance with the statutes of your organisation). Below you can enter his/her name and role and in the documents section (next step) you will be asked to also upload the documents demonstrating the legal empowerment of this person.

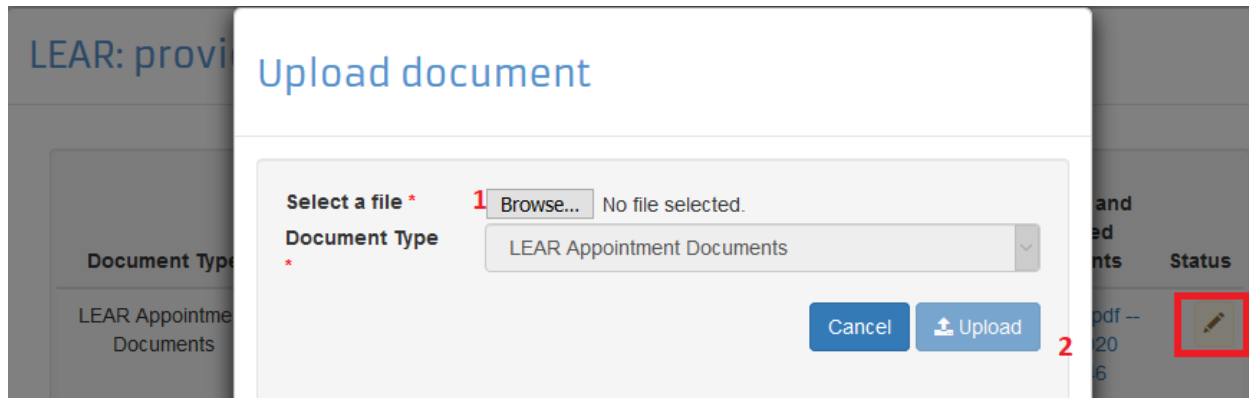
Legal Representative same as the LEAR	<input checked="" type="radio"/> Yes <input type="radio"/> No
Title	Other
First name *	Test
Last name *	Test
Position *	Position

[< Back](#)[✕ Close](#)[📄 Save as draft](#)[➤ Next](#)

6. In the final screen, provide the LEAR documents. You click on the pencil on the right to upload each document, and then, browse to select a document from your computer (1), and confirm the selection by clicking on **Upload** (2). These are the different documents you need to provide:

- The **LEAR appointment** document. Download the template, sign it, and then, scan the signed copy and upload it via the red pencil button on the right.
- The **LEAR identity document**. If the Legal Representative is not the same as the LEAR, you will need to upload the identity of each one separately.
- Download the **Declaration of Consent** to the Terms and Conditions of the Funding & Tender Portal, sign it, scan it and upload the signed copy.
- Finally, upload a **Legal Representative authorisation**.

When you upload a document, the pencil will turn yellowish instead of reddish. You can download the document to check if it is the correct one by clicking on the hyperlink on the left of the pencil button, except for the ID documents, which cannot be previewed.










The category **Other documents** is used only if the Central Validation Service requests you to provide more documentation, you do not need to upload any document under this category when submitting your request for the first time.

When all documents have been uploaded, click on **Submit** and then on **Yes** when being asked if they are uploaded under the correct document type.

You can save as draft, but a draft will expire if not submitted within 10 days after saving it, and you will have to initiate a new request.

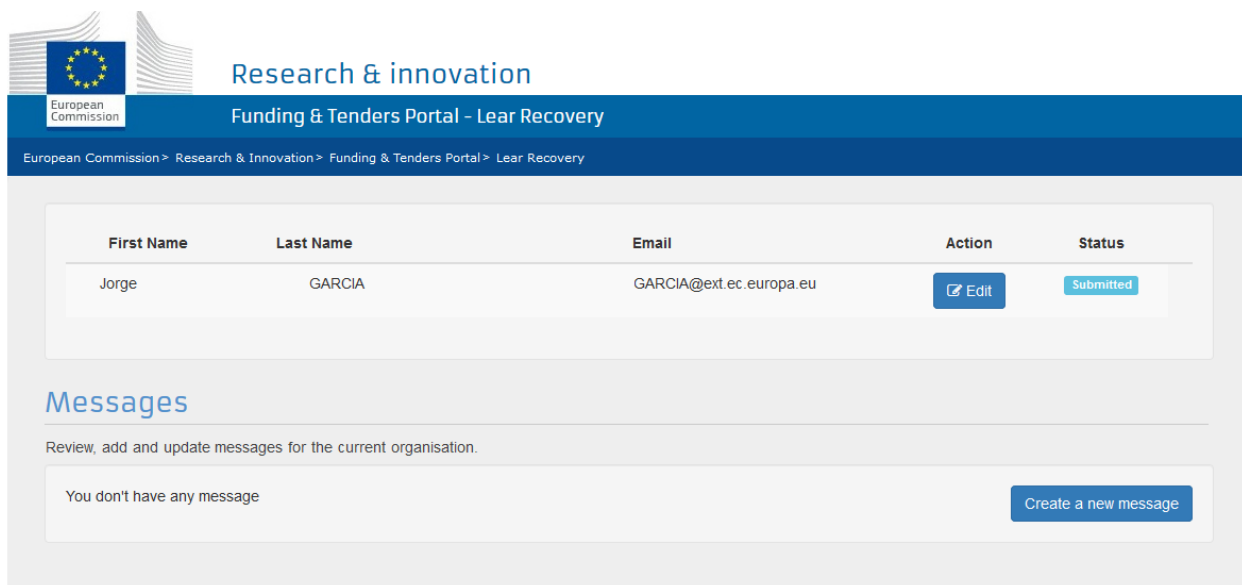
LEAR: provide documents

Document Type	Document generated	Description	Scanned and uploaded documents	Status
LEAR Appointment Documents		Official "LEAR appointment letter" to be signed by Legal Representative and "Roles and Duties of LEARs" to be signed by both Legal Representative and LEAR.	appointmentLetteroid.pdf -- 21/10/2019 16:39:55	
Declaration of consent to the terms of use of the F&T EES		Declaration of consent to the terms of use of the Funding & Tenders Portal electronic exchange system, signed by the legal representative.	declarationOfConsent.pdf -- 21/10/2019 16:39:55	
Legal Representative authorisation	-	Document(s) proving that the legal representative(s) appointing the LEAR is/are empowered as such, which must clearly indicate the role/function within the organisation as legal representative(s) and identify and appoint a specific person (by indicating his/her personal data) as the person covering that specific role/function	LegalRepresentativeAuthorisation.pdf -- 21/10/2019 16:39:55	
LEAR identity document	-	Official valid proof of identity (ID-card, Passport) carrying a photo and signature of the proposed LEAR	DocumentID_LEAR.pdf -- 21/10/2019 16:39:55	
Other documents			Date	Status 

Identity documents: In order to validate the LEAR, copies of ID documents of the LEAR and Legal Representative are required. These will be stored in accordance with Regulation (EU) 2018/1725, and will be accessible only by the actors directly involved in validating the LEAR (or auditing our validation procedures) and only while the validation takes place. For this reason, once uploaded, you will not be able to access the identity documents. If you believe you uploaded a wrong document, or in case of doubt, simply re-upload the right one.

If you have changed any of the LEAR or legal representative personal data please make sure to download, sign and re-upload the updated versions of the "LEAR Appointment Letter" and/or "Declaration of Consent to the Terms and Conditions of the Funding & Tenders Portal". Please also ensure correctness of any uploaded identity documents.

- Back in the wizard, you will see that the status of your request is **Submitted**. You can modify the details by clicking on the **Edit** button.



First Name	Last Name	Email	Action	Status
Jorge	GARCIA	GARCIA@ext.ec.europa.eu	Edit	Submitted

Messages

Review, add and update messages for the current organisation.

You don't have any message

[Create a new message](#)

Please note, try to avoid editing unless there is an error to correct or if you are requested by the Central Validation Service to do so, since each time you edit and submit, the validation of the LEAR will be triggered from the start point.

Once the request is sent to validation, you can access the wizard through the link you received via email. To get in contact with the Central Validation Service:

- Click on the **Create a new message** button.
- Specify your subject and write the message.
- Click on **Send**. After sending, you can always follow the answers by going back to the recovery wizard (use the link in the email you received or via **My Notification(s)** in the Funding and Tenders Portal).

The Central Validation Service can also get in contact with you. Access the wizard by clicking the link you received by email, and click on the arrow to open the message. Use **Reply** within the message to send your answer.

If you need to upload additional documents or substitute one of the submitted documents, you need to do it using the wizard. Close the message and then click the **Edit** button to open the wizard.

Follow the wizard again, and upload the documents by clicking the pencil icon. To replace a document, click the yellow icon, browse for the new document (1) and click on **Upload** (2), this will replace the previous document. Do not forget to click on **Submit** again when you are done, otherwise the change will be saved only as a draft but Validations Services will not be notified that the document has been replaced. For an additional document, use the category **Other documents**.



Research & innovation

Funding & Tenders Portal - Lear Recovery

European Commission > Research & Innovation > Funding & Tenders Portal > Lear Recovery

First Name	Last Name	Email	Action	Status
Jorge Lorenzo	CRUZ GARCIA	Jorge-Lorenzo.CRUIZ-GARCIA@ext.ec.europa.eu	Edit	Submitted

Messages 1

Review, add and update messages for the current organisation.

Subject	Message	Date	Open message
Lear recovery process - PIC 986369042	Dear Participant, Lear Recovery test. REA Valida...	21-10-2019 17:13:12	Open

LEAR: provide documents

Document Type	Document generated	Description	Scanned and uploaded documents	Status
LEAR Appointment Documents		Official "LEAR appointment letter" to be signed by Legal Representative and "Roles and Duties of LEARs" to be signed by both Legal Representative and LEAR.	appointmentLetterold.pdf -- 21/10/2019 16:39:55	
Declaration of consent to the terms of use of the F&T EES		Declaration of consent to the terms of use of the Funding & Tenders Portal electronic exchange system, signed by the legal representative.	declarationOfConsent.pdf -- 21/10/2019 16:39:55	
Legal Representative authorisation	-	Document(s) proving that the legal representative(s) appointing the LEAR is/are empowered as such, which must clearly indicate the role/function within the organisation as legal representative(s) and identify and appoint a specific person (by indicating his/her personal data) as the person covering that specific role/function	LegalRepresentativeAuthorisation.pdf -- 21/10/2019 16:39:55	
LEAR identity document	-	Official valid proof of identity (ID-card, Passport) carrying a photo and signature of the proposed LEAR	DocumentID_LEAR.pdf -- 21/10/2019 16:39:55	
Other documents				

Identity documents: In order to validate the LEAR, copies of ID documents of the LEAR and Legal Representative are required. These will be stored in accordance with Regulation (EU) 2018/1725, and will be accessible only by the actors directly involved in validating the LEAR (or auditing our validation procedures) and only while the validation takes place. For this reason, once uploaded, you will not be able to access the identity documents. If you believe you uploaded a wrong document, or in case of doubt, simply re-upload the right one.

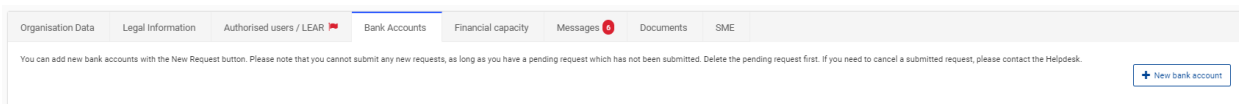
If you have changed any of the LEAR or legal representative personal data please make sure to download, sign and re-upload the updated versions of the "LEAR Appointment Letter" and/or "Declaration of Consent to the Terms and Conditions of the Funding & Tenders Portal". Please also ensure correctness of any uploaded identity documents.

When the new LEAR has been appointed, please see [Access management of your organisation](#) to read the information about how to manage the access to your organisation. Ensuring that you keep an Account Administrators for your organisation will prevent that you end up in a situation where nobody can maintain the organisation data again.

Bank accounts

The organisations will need to register a bank account in the EU system in order to receive the payments when they are involved in a funding procedure. Please note that you do NOT need to provide a bank account when registering your organisation, it becomes necessary only when the organisation is participating in a project.

In the Bank accounts tab, you can add the bank account of your registered organisation. Click on **New bank account** to register the bank account:

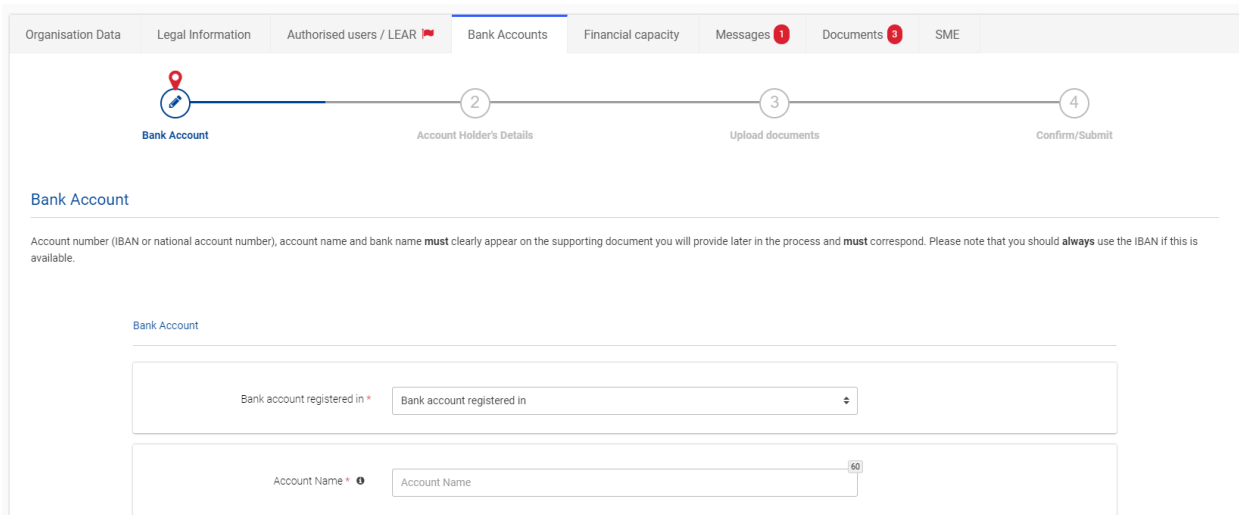


Organisation Data | Legal Information | Authorised users / LEAR | **Bank Accounts** | Financial capacity | Messages | Documents | SME

You can add new bank accounts with the New Request button. Please note that you cannot submit any new requests, as long as you have a pending request which has not been submitted. Delete the pending request first. If you need to cancel a submitted request, please contact the Helpdesk.

[+ New bank account](#)

You will be presented with 4 steps, where you have to provide different input regarding the bank account data. After you provide the required supporting documents, you submit the bank account for validation. Once validated, you will be able to select the bank account in other systems where you need to provide a bank account (for example, in SyGMA):



Organisation Data | Legal Information | Authorised users / LEAR | **Bank Accounts** | Financial capacity | Messages | Documents | SME

1 Bank Account | 2 Account Holder's Details | 3 Upload documents | 4 Confirm/Submit

Bank Account

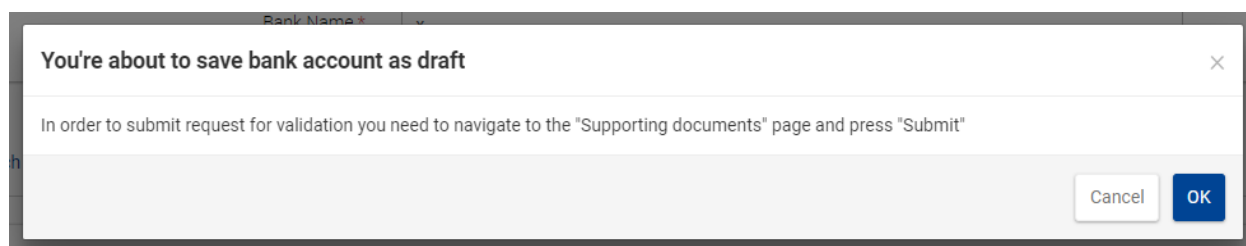
Account number (IBAN or national account number), account name and bank name **must** clearly appear on the supporting document you will provide later in the process and **must** correspond. Please note that you should **always** use the IBAN if this is available.

Bank account registered in *

Account Name *

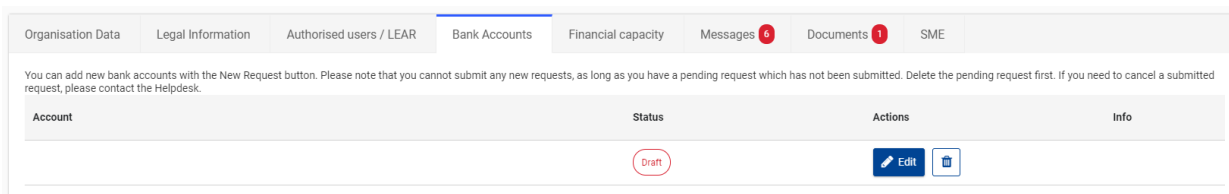
Complete the wizard steps by filling in the required fields and clicking on **Next** until the end of the process. Clicking on **Next** automatically saves the entered data and allows you to move to the following step. If you cannot finish completing a step at that moment, click on **Save as draft**, at the bottom central part of the screen, or on the **Cancel** button, at the left, if you wish to close the wizard without saving the changes.

You can save your Bank account validation request in any of the wizard steps by clicking on **Save as draft**. A pop-up message will open up informing that the data will be saved as draft, but the data will not be sent to the Central Validation Service until you click on **Submit** in the last step of the wizard:



If you have clicked **Save as draft**, a new line of data with the Draft status appears in your Bank accounts main page.

Click on **Edit** to continue working on your draft or on the **Bin** button to delete it:



Note: The **New bank account** button is not available if there is an existing bank account in the Draft status. If you do not wish to submit the existing draft, please delete it using the **Bin** button. Then proceed to encode a new request.

The Bank accounts wizard guides you to fill in the bank account details. At the end of the process, you are requested to upload 1 supporting document and submit it for validation. Please note, some of the details (account holder name, bank name, account number, etc.) need to appear in the supporting document for it to act as evidence for validation.

After submitting your request for validation, the LEAR is informed via email of the 3 possible scenarios. Please note that no notification is sent to the LEAR until the request is actually undergoing a validation process:

- The entered bank account has been approved.
- The entered bank account has been rejected.
- A corrective action is needed, which can consist of updating data or uploading a new supporting document. The LEAR is informed in the email of what the required actions are.

Tip: You can submit more than 1 record. However, only a draft can exist at a time.

The Bank accounts wizard consists of the following steps:

1) Bank account details

The first step asks you to fill the Bank account information:



Organisation Data	Legal Information	Authorised users / LEAR	Bank Accounts	Financial capacity	Messages 1	Documents 3	SME
-------------------	-------------------	-------------------------	----------------------	--------------------	------------	-------------	-----

Bank Account

2

Account Holder's Details

3

Upload documents

4

Confirm/Submit

Bank Account

Account number (IBAN or national account number), account name and bank name **must** clearly appear on the supporting document you will provide later in the process and **must** correspond. Please note that you should **always** use the IBAN if this is available.

Bank account registered in *

Canada

BIC/Swift Code *

BIC/Swift Code

This field is required

Routing number *

Routing number

Account Number *

Account Number

Account Name *

Account Name

The **Account name** is usually the one of the account holder, but the account holder may have been registered differently at the bank. Populate this field to reflect what is visible in the provided supporting document(s).

If the entered country is non-EU, the system will ask you to provide the **Account number** and the **BIC/SWIFT code**. The SWIFT code that you need to enter has to have up to 8 numbers, so if your SWIFT code is 11 characters long, for instance, you need to enter just the first 8 characters.

Only if the entered country is Canada, Australia/New Zealand or the United States, you will need to fill in an additional field, which corresponds to the CA transit code, AU/NZ BSB code or the United States ABA code.

2) Account holder's details

In this step, provide the Account holder's details:



Organisation Data

Legal Information

Authorised users / LEAR

Bank Accounts

Financial capacity

Messages 6

Documents 1

SME

1

2

3

4

Bank Account

Account Holder's Details

Upload documents

Confirm/Submit

Account Holder's Details

The information entered below must correspond exactly to the bank statement or other supporting document you will provide later in the process.

Country *

Country

50

Account Holder *

Account Holder

50

Street Name and Number *

Street Name and Number

40

City *

City

39

Postal Code

Postal Code

Cancel

✓ Save as draft

Previous

Next

3) Upload documents

In this step, you upload the supporting document for the provided account:

Organisation Data

Legal Information

Authorised users / LEAR

Bank Accounts

Financial capacity

Messages 6

Documents 1

SME

1

2

3

4

Bank Account

Account Holder's Details

Upload documents

Confirm/Submit

Upload documents

Bank statement or equivalent supporting document

Please upload your bank statement or other official bank document showing

- Account name
- Either
 - IBAN
 - or
 - account number and routing code, BSB or ABA if used
- Bank name
- Date of issue or transaction showing that the document is not older than 6 months.

+ Add new document

Amounts and details of financial transactions on your bank statement may be hidden for privacy reasons.

Important: a copy of a bank card or an empty cheque are not eligible supporting documents.
If you do not have a suitable bank statement or equivalent document please click [here](#) to download a Financial Identification Form.

A recent bank statement, not older than 6 months, can be used as evidence for validation. Please make sure to hide any private information, such as amounts or movements, but ensure that the date of one of the transactions is not older than 6 months, or that there is proof in the document, which accounts for the document not being older than 6 months.

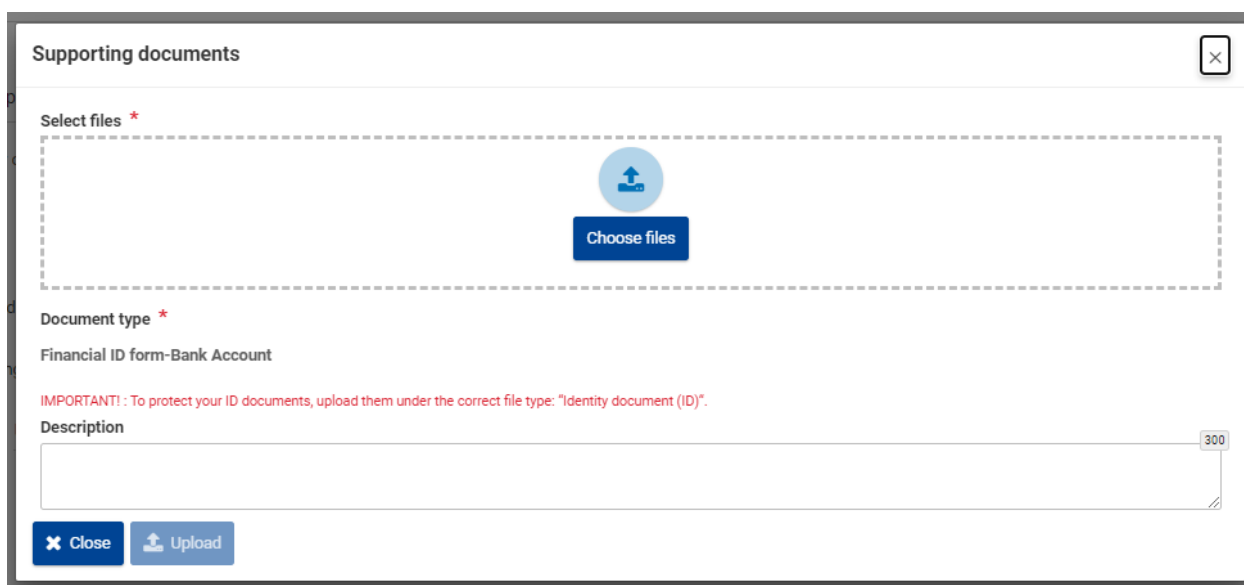
Also, please ensure that the following details are clearly visible in the provided document:

- Name of the bank
- Account Name
- IBAN/Account number and additional codes, if applicable

In the unlikely situation in which you do not happen to have a bank statement as document proof, you have as an alternative the possibility to upload a financial identification form that the Participant Register will generate using the provided data. You will need to have it stamped by your financial institution, then scan it and upload it into the system. Financial identification forms that are not stamped by the bank will be rejected. Click the link at the bottom of the screen to download the form.

To upload the documentation:

1. Click on **Add new document**: a new window pops up. Use the **Choose files** button to locate and select your document (the maximum size per document is 6 megabytes), then click the **Upload** button:



Once the document is provided, the name of the file displays under the **Uploaded documents** section and the **Upload document** button disappears. Click on the name of the document to review it and make sure that the content is clearly visible:



Organisation Data

Legal Information

Authorised users / LEAR

Bank Accounts

Financial capacity

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Documents 1

SME

1

2

3

4

Bank Account

Account Holder's Details

Upload documents

Confirm/Submit

Upload documents

Bank statement or equivalent supporting document

Please upload your bank statement or other official bank document showing

- Account name
- Either
 - IBAN
 - or
 - account number and routing code, BSB or ABA if used
- Bank name
- Date of issue or transaction showing that the document is not older than 6 months.

Uploaded documents

[Untitled]_20...012420119.pdf

Amounts and details of financial transactions on your bank statement may be hidden for privacy reasons.

Important: a copy of a bank card or an empty cheque are not eligible supporting documents.
If you do not have a suitable bank statement or equivalent document please click [here](#) to download a Financial Identification Form.

Cancel

✓ Save as draft

Previous

Next

Only one document is allowed per request. If you wish to upload several documents, you need to combine them in a single PDF, DOC or JPG file (please note that the ZIP format is not supported).

Use the **Bin** button to delete a provided document. The **Upload document** button becomes visible again, once the previously uploaded document is removed.

Finally, click on the **Next** button.

4) Confirm and submit

In this step, you see a summary of the data previously entered in the wizard:

Organisation Data

Legal Information

Authorised users / LEAR

Bank Accounts

Financial capacity

Messages 6

Documents 1

SME

1

2

3

4

Bank Account

Account Holder's Details

Upload documents

Confirm/Submit

Confirm/Submit

Bank Account

Edit

Bank account registered in: Belgium

IBAN: BE94112233445566

Account Name: x

Bank details

If you need to modify any of this data, click on the corresponding **Edit** button.

At the bottom of the screen, tick the checkbox to confirm that the document is readable and meets the requirements explained above. If the checkbox is not ticked, the **Submit** button will not be available:

Upload documents

[\[Untitled\].20...012420119.pdf 20/08/2021, 06:44](#)

☒ I confirm that the scan is readable, the document is not older than 6 months and that the document shows the account number, bank name, account name and all other required details.

Cancel

✓ Save as draft

Previous

Submit

Click the **Submit** button and then on **OK** in the pop-up window to confirm the submission of the data:

You're about to submit your bank account

BE*****5566

Cancel

OK

The record will be displayed in the Bank accounts section, with the status Data provided. You can **View** the content by clicking on the related button, but you cannot edit it anymore nor cancel it until the Central Validation Service has reviewed the request:

Organisation Data	Legal Information	Authorised users / LEAR	Bank Accounts	Financial capacity	Messages 6	Documents 1	SME								
<p>You can add new bank accounts with the New Request button. Please note that you cannot submit any new requests, as long as you have a pending request which has not been submitted. Delete the pending request first. If you need to cancel a submitted request, please contact the Helpdesk.</p> <p>+ New bank account</p> <table border="1"> <thead> <tr> <th>Account</th> <th>Status</th> <th>Actions</th> <th>Info</th> </tr> </thead> <tbody> <tr> <td>BE*****5566</td> <td>Data provided</td> <td>View</td> <td></td> </tr> </tbody> </table>								Account	Status	Actions	Info	BE*****5566	Data provided	View	
Account	Status	Actions	Info												
BE*****5566	Data provided	View													


In the Documents tab, you are able to see the document that you uploaded in the wizard:

Organisation Data | Legal Information | Authorised users / LEAR | Bank Accounts | Financial capacity | **Messages 1** | Documents | SME


Documents (1)

Read and upload documents of your organisation. Please ensure their quality. Maximum allowed document size is 6Mb. Updates take immediate effect after you have clicked on "Submit for processing"

[+ Add new document](#)

Document type	Upload date	Status	Actions
 FINANCIAL ID FORM-BANK ACCOUNT	07/11/2021	RECEIVED	View


Once the Central Validation Service has reviewed your request, if they need additional information about it, you will see the corresponding message in the **Messages** tab. Click on **View** to open the message:

Organisation Data | Legal Information | Authorised users / LEAR | Bank Accounts  | Financial capacity | **Messages 1** | Documents | SME

[+ New message](#)


Messages

Read messages of your organisation and send messages to the EC ValidationServices.

Subject	Message	Context	Date	Actions
 Bank account registration requires additional information	Dear Participant, Thank you for register...	Other	05/11/2021	View


You receive an email with the same message too, informing that a follow-up is needed and the reason for it.

Also, you see a red flag icon on the Bank accounts tab and your record line with the Follow up status:

Organisation Data | Legal Information | Authorised users / LEAR | **Bank Accounts ** | Financial capacity | Messages | Documents | SME

You can add new bank accounts with the New Request button. Please note that you cannot submit any new requests, as long as you have a pending request which has not been submitted. Delete the pending request first. If you need to cancel a submitted request, please contact the Helpdesk.

[+ New bank account](#)

Account	Status	Actions	Info
BE*****5566	Follow up	Edit	

Instead of the View button, an **Edit** button is available, and there is an **envelope** button in the Info column. Click on the **envelope** button to see the details of what is being requested to be modified:

Bank Account

Your request to register bank account number BE*****5566 cannot be completed.

Please note that in order to accept the bank account, Unfortunately the IBAN iban you have provided is not visible on the document you sent. Please provide a new scan of a bank statement or other acceptable supporting document through the bank account wizard.

For more information please refer to the message sent to the 'Messages' tab of Participant Register:

[Messages](#)

Click on **Edit** to perform the requested action and submit again in the last step of the wizard. The Central Validation Service is notified by the system that the modifications are done and they will resume the validation of your request.

If the request is rejected, you are also notified via email of the reason of rejection. In the Bank accounts tab, the rejected requests are listed. Click on the corresponding **envelope** button in order to check the reason of the rejection:

BE*****7950	Data provided	 View	
*****6327	Data provided	 View	
BE*****6327	Validated	 Edit	
BE*****8828	Validated	 Edit	
BE*****5674	Validated	 Edit	
BE*****6327	Validated	 Edit	
AT*****8347	Validated	 Edit	
BE*****8828	Validated	 Edit	
BE*****2676	Validated	 Edit	
BE*****5674	Rejected	 View	
HU*****8226	Follow up	 Edit 	
*****67SQ	Follow up	 Edit 	

If the request is approved, you see the Validated status next to the related bank account record.

You also see a message in the **Messages** tab confirming that your bank account registration is completed. Click on **View** to open the message:



Organisation Data	Legal Information	Authorised users / LEAR	Bank Accounts	Financial capacity	Messages 35	Documents	SME
<div>New message</div>							
Messages							
Exchange messages with the Central Validation Service.							
Subject	Message	Context	Date	Actions			
Documents submitted	Dear Participant, Thank you for submitti...	Other	10/05/2022	View 35			
* Financial capacity assessment - Request for documents	Dear Participant, Following your recent a...	Financial capacity assessment	25/03/2022	View 35			
* Financial capacity assessment - Request for documents PIC : 904653623	Dear Participant,Following your recent application...	Financial capacity assessment	25/03/2022	View 35			
* Financial capacity assessment - Request for documents PIC : 904653623	Dear Participant,Following your recent application...	Financial capacity assessment	25/03/2022	View 35			
Bank account registration completed	Dear Participant, We are pleased to inform you t...	Other	18/02/2022	View 35			
Bank account registration completed	Dear Participant, We are pleased to inform you t...	Other	17/02/2022	View 35			

Subject : Bank account registration completed

From

Central Validation Service

To

Date

11/02/2022

Attachments

Dear Participant,

We are pleased to inform you that the bank account recently requested for your organisation has been activated.

This bank account will from now on be visible in the Participant Register.

Kind regards,

Central Validation Service
European Research Executive Agency

Disclaimer:

⚠ Please, note that this message does NOT constitute a commitment for the award of any funding or tender.

You can access the Portal with your **EU Login** account to read the latest notifications and upload the requested documents. Please use [this link](#) to upload documents (or take other action): Participant Register > Actions > Modify organisation.

In order to **contact** us, please use the Messages function in your Organisation page in the Participant Register .

If you would like to consult other language versions, please refer to templates & forms section of the [Portal Reference Documents page](#)

Reply

Close

You can modify some information after the bank account has been validated. To do so, click on Edit. Once you have resubmitted the bank account with the modified information, the Central Validation Service will assess it again.

BE*****7950	Data provided	View	
*****6327	Data provided	View	
BE*****6327	Validated	Edit	
BE*****8828	Validated	Edit	
BE*****5674	Validated	Edit	
BE*****6327	Validated	Edit	
AT*****8347	Validated	Edit	
BE*****8828	Validated	Edit	
BE*****2676	Validated	Edit	
BE*****5674	Rejected	View	✉
HU*****8226	Follow up	Edit	✉
*****67SQ	Follow up	Edit	✉

Financial capacity

In this tab, you can manage the financial data of your registered organisation:

Organisation Data	Legal Information	Authorised users / LEAR	Bank Accounts	Financial capacity	Messages	Documents	SME						
<p>You might be requested to provide additional financial information. In this case you are asked to upload your financial statements containing the balance sheet, the profit & loss account, the corresponding explanatory notes and, under certain conditions, an audit report issued by a certified external auditor or a self-declaration on the validity of the accounts, signed by your legal representative, the template for which is available here.</p> <p>The financial statements must cover the last two most recent closed years. Note that, once uploaded, the financial statements for an accounting year with a closure date on or before 30 June will be displayed by the IT systems as related to the prior calendar year. Find out more.</p>													
<table border="1"> <thead> <tr> <th>Closing date</th> <th>Status</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td colspan="3"> </td> </tr> </tbody> </table>								Closing date	Status	Actions			
Closing date	Status	Actions											

You need to wait until the Central Validation Service requests you to provide this data. At that moment, you are notified via the usual communication channels: you receive an email and a message in the Messages tab of your organisation data screen in the Funding & Tenders Portal:

Organisation Data	Legal Information	Authorised users / LEAR	Bank Accounts	Financial capacity	Messages	Documents	SME										
<p>Exchange messages with the Central Validation Service.</p> <table border="1"> <thead> <tr> <th>Subject</th> <th>Message</th> <th>Context</th> <th>Date</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>* Financial capacity assessment - Request for documents</td> <td>Dear Participant, Following your recent a...</td> <td>Financial capacity assessment</td> <td>08/09/2022</td> <td>View</td> </tr> </tbody> </table>								Subject	Message	Context	Date	Actions	* Financial capacity assessment - Request for documents	Dear Participant, Following your recent a...	Financial capacity assessment	08/09/2022	View
Subject	Message	Context	Date	Actions													
* Financial capacity assessment - Request for documents	Dear Participant, Following your recent a...	Financial capacity assessment	08/09/2022	View													

Then, in the Financial capacity tab (marked with a red flag), you can access the Financial Capacity Assessment (FCA) wizard. Click on **Edit**:

Organisation Data	Legal Information	Authorised users / LEAR	Bank Accounts	Financial capacity	Messages	Documents	SME						
<p>Financial capacity</p> <p>1. Financial capacity</p> <p>2. Closing date</p> <p>3. Upload documents</p> <p>4. Confirm/Submit</p> <p>You might be requested to provide additional financial information. In this case you are asked to upload your financial statements containing the balance sheet, the profit & loss account, the corresponding explanatory notes and, under certain conditions, an audit report issued by a certified external auditor or a self-declaration on the validity of the accounts, signed by your legal representative, the template for which is available here.</p> <p>The financial statements must cover the last two most recent closed years. Note that, once uploaded, the financial statements for an accounting year with a closure date on or before 30 June will be displayed by the IT systems as related to the prior calendar year. Find out more.</p> <table border="1"> <thead> <tr> <th>Closing date</th> <th>Status</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td colspan="3">Data Required</td> </tr> </tbody> </table>								Closing date	Status	Actions	Data Required		
Closing date	Status	Actions											
Data Required													

This will redirect you to the step 2 of the wizard, **Closing date**:

Organisation Data	Legal Information	Authorised users / LEAR	Bank Accounts	Financial capacity	Messages 1	Documents	SME
-------------------	-------------------	-------------------------	---------------	--------------------	---	-----------	-----

1
Financial capacity

2
Closing date

3
Upload documents

4
Confirm/Submit

i Following your recent application for an EU grant or tender, we are contacting you to proceed with assessment of your financial capacity.

Closing date

Please enter the closing date of your most recent financial statements *

📅

☐ this organisation does not have any closed financial statements yet

Previous

Next

Submit

Select a date in the calendar functionality or, optionally, mark the checkbox. Then, click on **Next**.

Specific case: If your organisation has no approved financial statements (i.e, it concerns a recently created entity) you must select “This organisation does not have any closed financial statements yet”. You will then obtain guidance on the documents to be provided and you must follow the steps described above for the upload of the financial information. In this case, the final checklist will be disabled and you will be requested to provide a justification about why the full set of document requested by the Central Validation Service cannot be provided.

In the following step, **Upload documents**, click on **+ Add new document**:

Organisation Data	Legal Information	Authorised users / LEAR	Bank Accounts	Financial capacity	Messages 1	Documents	SME
-------------------	-------------------	-------------------------	---------------	--------------------	---	-----------	-----

1
Financial capacity

2
Closing date

3
Upload documents

4
Confirm/Submit

i You have been asked to provide your most recent financial statements. For the exact content of the financial statements, please refer to the message sent by the Central Validation Service.

Documents (0) + Add new document

The full set of documents requested by the Central Validation Service are not available at this time.

+ Reasons

Previous

Next


Submit

A pop-up window appears, where you can upload the requested documents:

Supporting documents

Supporting documents

Select files *



Document type *

-- Select One --

IMPORTANT! : To protect your ID documents, upload them under the correct file type: "Identity document (ID)".

Closing date

add closing date +

add closing date +

Description

Close

Upload

Cancel

Add document

Click on **Choose files** to locate and select the documents that you need to upload (the maximum size per document is 6 megabytes). Then, select a **Document type** from the drop-down menu and, optionally, add closing dates for these documents and a description.

If you upload a declaration on the validity of the accounts, you can use the document type "External Auditor's report".


Click on **Upload**:

Supporting documents

Supporting documents

Document name	Upload date	Status	Actions
Doc_2022_FP_1...4-09-2022.pdf	08/09/2022	Draft	<input checked="" type="checkbox"/>

Select files *



Choose files

Document type *

-- Select One --

IMPORTANT! : To protect your ID documents, upload them under the correct file type: "Identity document (ID)".

Closing date

add closing date +

add closing date +

Description

300

Close

Upload

Cancel

Add document

The document that you have uploaded appears at the top of the window, with the Draft status. This means that it has been correctly uploaded, click on **Add document** to finalise this task. If you need to add more documents, upload them one by one following the steps just described.

Once you have finished uploading the requested documents, you see this screen in the wizard:

Organisation Data
Legal Information
Authorised users / LEAR
Bank Accounts
Financial capacity
Messages
Documents
SME

1 Financial capacity
2 Closing date
3 Upload documents
4 Confirm/Submit

You have been asked to provide your most recent financial statements. For the exact content of the financial statements, please refer to the message sent by the Central Validation Service.

Documents (1)

+ Add new document

Document name	Upload date	Status	Actions
Doc_2022_FP_1_4-09-2022.pdf	08/09/2022	Draft	

The full set of documents requested by the Central Validation Service are not available at this time.

+ Reasons

Previous
Next
Submit

Here, you have an overview of the documents that you have uploaded.

If you need to delete any of them, click on the corresponding **Bin** button, and to add documents, click on **+ Add new document**.

If you don't have the requested documents, click on **+ Reasons** to provide an explanation.

Specific case: If your organisation has already closed annual accounts that were provided to the Central Validation Service, but the annual accounts for the most recent year are still not finalised (i.e. data for 2018 is already provided, but on 30/09/2020 your annual accounts for the financial year ending on 31/12/2019 are still not approved). In such case, you are requested to select the closing date (i.e. 31/12/2019 from the foregoing example) and provide justification why these accounts are still not available by using the **+ Reasons** button. Equally, in your justification, you are requested to provide an estimation by when these accounts are expected to be available.

Then, click on **Next**.



Organisation Data | Legal Information | Authorised users / LEAR | Bank Accounts | **Financial capacity** | Messages | Documents | SME

1 Financial capacity | 2 Closing date | 3 Upload documents | **Confirm/Submit**

Closing date: 31/12/2020 [Edit closing date](#)

Documents (1) [Edit documents](#)

Document name	Upload date	Status
v4.pdf	14/11/2021	Received

☐ I confirm my financial statements are dated, approved and signed
☐ I confirm that I've uploaded the most recent available financial statements
☐ I confirm that I've uploaded the full set of documents requested by the Central Validation Service, and if not, provided an explanation here below.

[Reasons](#)

[Previous](#) [Next](#) [Submit](#)

In the final step of the wizard, **Confirm/Submit**, you have an overview of all the provided data. You can still change the data by clicking on **Edit closing date**, **Edit documents** and, optionally, **Reasons**.

Then, click on the 3 declarations checkboxes and, finally, click on **Submit**.

Back in the Financial capacity main screen, you see the record line for the data that you have just provided, with the Data provided status, and the red flag has disappeared next to the tab name:

Organisation Data	Legal Information	Authorised users / LEAR	Bank Accounts	Financial capacity	Messages	Documents	SME
<p>You might be requested to provide additional financial information. In this case you are asked to upload your financial statements containing the balance sheet, the profit & loss account, the corresponding explanatory notes and, under certain conditions, an audit report issued by a certified external auditor or a self-declaration on the validity of the accounts, signed by your legal representative, the template for which is available here.</p> <p>The financial statements must cover the last two most recent closed years. Note that, once uploaded, the financial statements for an accounting year with a closure date on or before 30 June will be displayed by the IT systems as related to the prior calendar year. Find out more.</p>							
Closing date	Status	Actions					
31/12/2019	Data provided	View					

Click on **View** if you want to check the already provided data.

Once the Central Validation Service has reviewed your request, they may require additional information or documents. In this case, you will receive the corresponding message in the Messages tab and, in the Financial capacity tab (marked with a red flag), the **View** button will change into **Edit**:



Organisation Data

Legal Information

Authorised users / LEAR

Bank Accounts

Financial capacity

Messages 1

Documents

SME

1

Financial capacity

2

Closing date

3

Upload documents

4

Confirm/Submit

You might be requested to provide additional financial information. In this case you are asked to upload your financial statements containing the balance sheet, the profit & loss account, the corresponding explanatory notes and, under certain conditions, an audit report issued by a certified external auditor or a self-declaration on the validity of the accounts, signed by your legal representative, the template for which is available [here](#).

The financial statements must cover the last two most recent closed years. Note that, once uploaded, the financial statements for an accounting year with a closure date on or before 30 June will be displayed by the IT systems as related to the prior calendar year. [Find out more](#).

Closing date	Status	Actions
31/12/2020	Data requested	Edit

Click **Edit** and repeat the steps to upload the required documents.

When the Central Validation Service has validated the data, in the Financial capacity tab you see the record line for the data that you have provided, with the Validated status:

Organisation Data

Legal Information

Authorised users / LEAR

Bank Accounts

Financial capacity

Messages 12

Documents

SME

1

Financial capacity

2

Closing date

3

Upload documents

4

Confirm/Submit

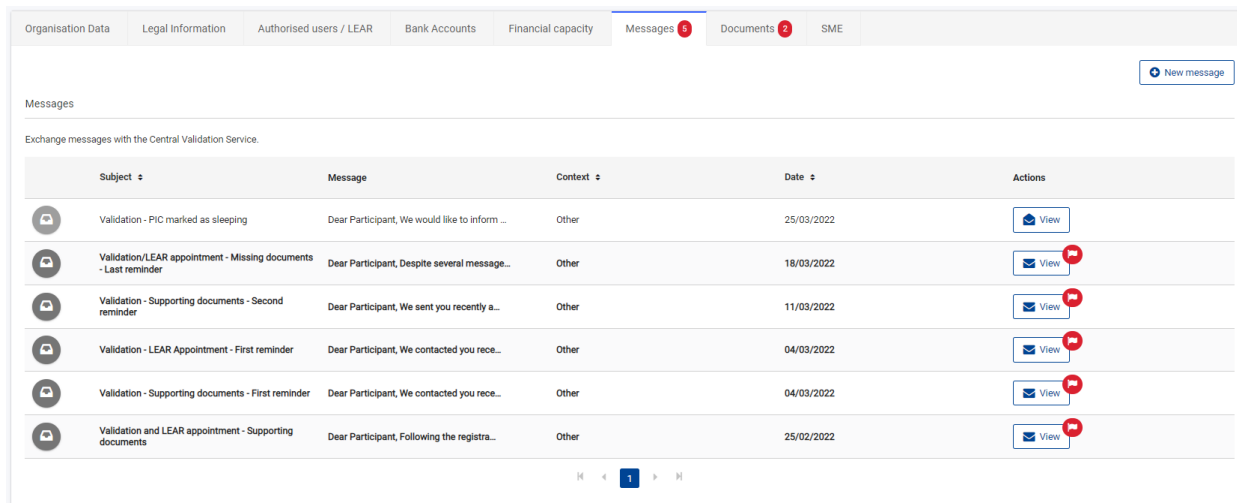
You might be requested to provide additional financial information. In this case you are asked to upload your financial statements containing the balance sheet, the profit & loss account, the corresponding explanatory notes and, under certain conditions, an audit report issued by a certified external auditor or a self-declaration on the validity of the accounts, signed by your legal representative, the template for which is available [here](#).

The financial statements must cover the last two most recent closed years. Note that, once uploaded, the financial statements for an accounting year with a closure date on or before 30 June will be displayed by the IT systems as related to the prior calendar year. [Find out more](#).

Closing date	Status	Actions
31/12/2021	Requested	Edit
31/12/2020	Validated	
31/12/2021	Validated	

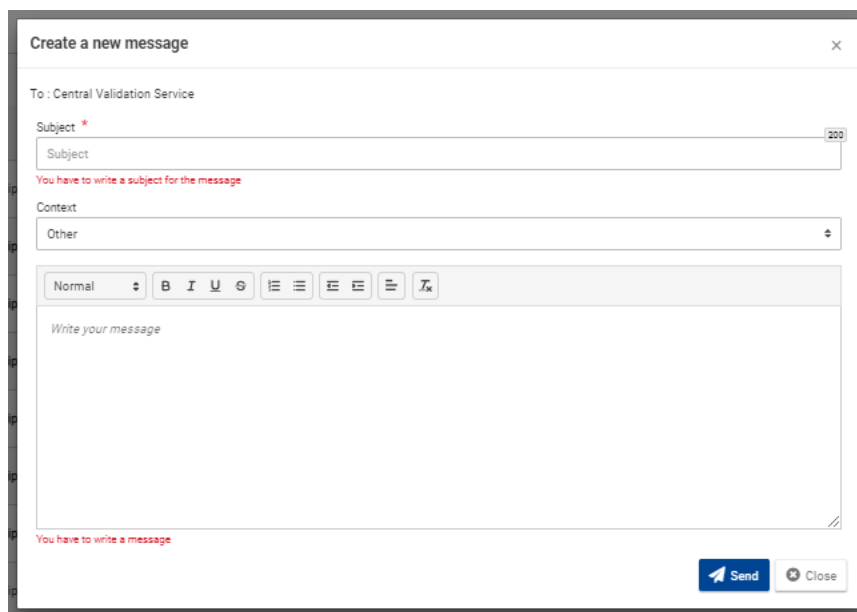
Messages

This tab is dedicated to the communication between your registered organisation and the Central Validation Service:





The screenshot shows the 'Messages' tab selected in the top navigation bar. Below the navigation bar, there is a 'New message' button. The main area displays a table of messages with columns: Subject, Message, Context, Date, and Actions. The table lists several messages related to validation and LEAR appointments, with dates ranging from 02/25 to 03/25. Each message has a 'View' button in the Actions column. At the bottom of the table, there are navigation icons for previous and next pages.

Click on the **New message** button at the upper right part of the screen to create a new one:



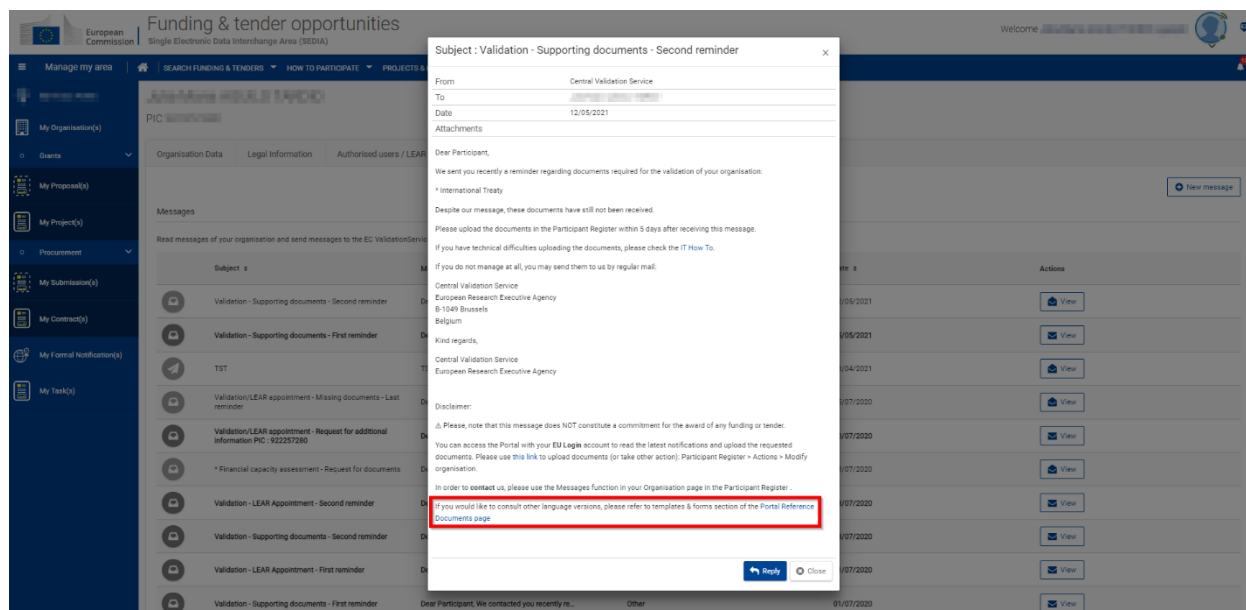
The 'Create a new message' dialog box is shown. It has a title bar with a close button. The 'To' field is pre-filled with 'Central Validation Service'. The 'Subject' field is required and currently empty, with a red error message 'You have to write a subject for the message'. The 'Context' field is set to 'Other'. Below these fields is a rich text editor with a toolbar containing icons for bold, italic, underline, strikethrough, bulleted list, numbered list, link, and unlink. The text area is empty, with a red error message 'You have to write a message'. At the bottom right, there are 'Send' and 'Close' buttons.

Fill in the required fields and click on the **Send** button, at the bottom right side of the window. Click on the **Close** button to quit the window without saving the changes.

Back on the Messages landing page, the tray icon  is the indicator for the received messages, while the paper airplane icon  is the indicator for the sent messages.

Click on the **View** button of the Actions column to read a message. The messages that have been already opened by you will have an open envelope icon on the right and a light grey tray icon on the left, whereas the messages that have not been opened yet will have a closed envelope with a red flag icon and a dark grey tray icon, respectively, and the overview text will be in bold.

When viewing a received message, you also have the possibility to read it in another EU official language by clicking on the link **Portal Reference Documents page**:



By clicking on this link, you are redirected to the **Reference documents** page of the Funding & Tenders Portal.

In this page, select the programming period and the programme that you are interested in from the filters dropdown menus at the left of the screen. Then, select the document that you wish to see in another EU official language and click on the arrow button to open the translated document:

Horizon Europe (HORIZON) ✕

Clear filter

Grants

This page includes reference documents of the programmes managed on the EU Funding & Tenders portal starting with legal documents and the Commission work programmes up to model grant agreements and guides for specific actions.

Please select the programme to see the reference documents.

Procurement

Reference Documents related to tendering opportunities are published on TED eTendering in the calls for tenders.

1 Expand all

- Legislation
- Work programme & call documents
- Grant agreements and contracts
- Guidance
- Templates & forms
 - Application forms
 - Evaluation forms
 - Validation and LEAR appointment forms
 - LEAR appointment letter & LEAR role and duties >
 - Declaration of consent to the Funding and Tenders Portal Terms and Conditions >
 - Declaration on the validity of the accounts >
 - Legal entity validation and LEAR appointment messages ▼

Published:

2021-04-12

Translations:

BG CS DA DE EL EN ES ET FI FR HR HU IT LT LV MT NL PL PT RO SK SL SV
 - Financial capacity assessment messages >
 - Bank account validation messages >
 - SME validation messages >
- Grant agreement preparation templates
- Project reporting templates
- Funding & Tenders Portal

Documents

In this tab, you can see the uploaded documents for your registered organisation and upload new ones, if necessary:

Organisation Data

Legal Information

Authorised users / LEAR

Bank Accounts

Financial capacity

Messages











Documents

SME

Documents (6)

IMPORTANT! : To protect your ID documents, upload them under the correct file type: "Identity document (ID)". The maximum allowed size per file is 6Mb. The documents are uploaded immediately after you have clicked the "Submit for processing" button.

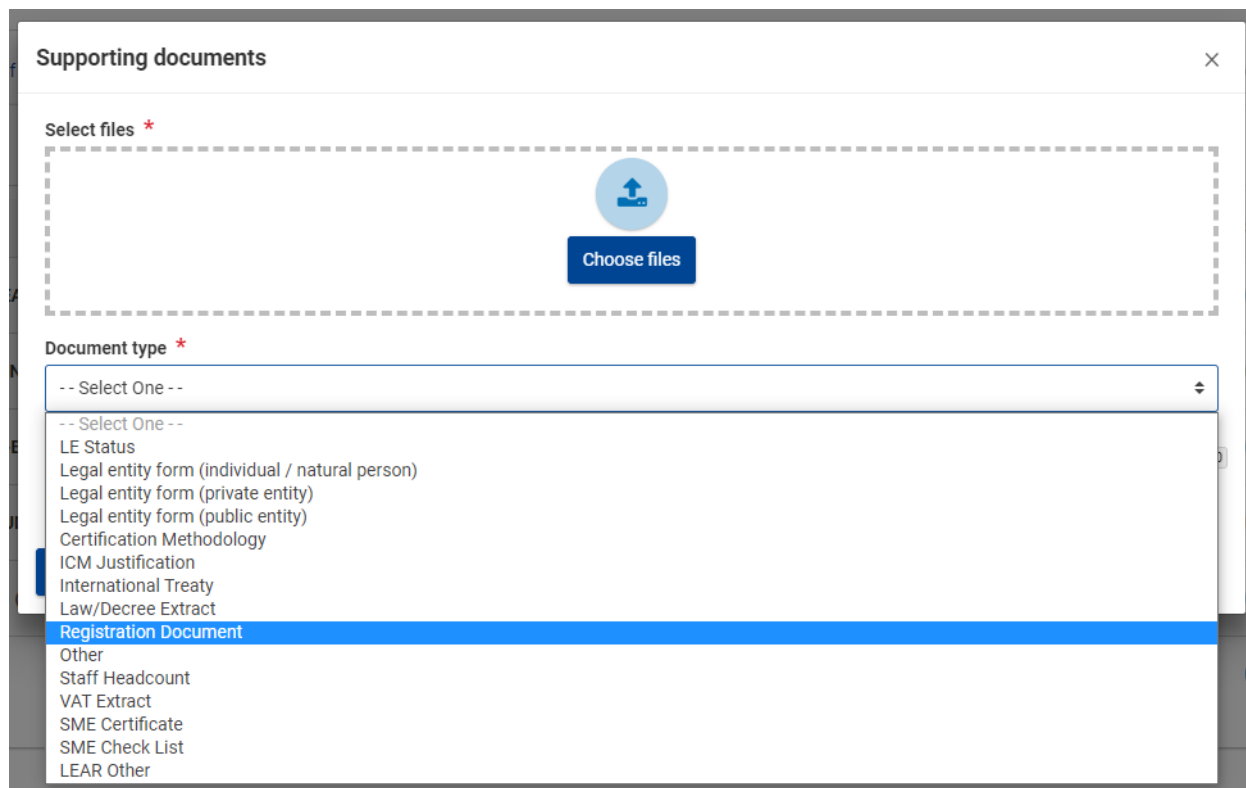
+ Add new document

Document type	Upload date	Status	Actions
 INTERNATIONAL TREATY	08/10/2021	RECEIVED	 Edit
 OWNERSHIP AND CONTROL SUPPORTING DOCUMENTS	04/10/2021	ACCEPTED	 View
 FINANCIAL ID FORM-BANK ACCOUNT	20/08/2021	RECEIVED	 View
 REGISTRATION DOCUMENT	28/04/2021	REPLACED	 Edit
 LEGAL ENTITY FORM (PRIVATE ENTITY)	25/04/2021	RECEIVED	 Edit

You can see the status of each document in the Status column. The different status:

- Requested: it means that the Central Validation Service has asked you to provide a document via the usual communication channels, in order to perform the validation of specific data.
- Replaced: it means that you have replaced a previously provided document.
- Received: it means that the Central Validation Service has received the document that you have provided to them.
- Accepted: it means that the Central Validation Service has accepted the document that you have provided to them.

If you wish to upload a document that has not been requested yet, you can do so by clicking on **+ Add new document**. A pop-up window appears, where you can add your file and select its type from a drop-down list:



You can upload as many documents as you want but a single file cannot exceed 6 megabytes. For each document you upload, you can provide a description, a type indication and other details when available.

The Self Registrant / Contact person (and later, the LEAR, once appointed) can read and download existing documents for the respective organisation. Existing documents cannot be deleted once uploaded to the system.

Multiple documents must be uploaded one at a time, taking into account the appropriate document type.

Please note that uploading a document in the Participant register will trigger the generation of an AL ID code. This code is included in the top right corner of the document and will be used by the Central Validation Service as a reference for the requested data to be provided.

Under the Actions column, click on the **Upload** button to provide a requested document. A pop-up window will appear, click on **Choose files** and select your file from its location:

Organisation Data
Legal Information
Authorised users / LEAR
Bank Accounts
Financial capacity
Messages 1
Documents 2
SME

Documents (2)

IMPORTANT!: To protect your ID documents, upload them under the correct file type: "Identity document (ID)". The maximum allowed size per file is 6Mb. The documents are uploaded immediately after you have clicked the 'Submit for processing' button.

+ Add new document

Document type	Upload date	Status	Actions
REGISTRATION DOCUMENT		REQUESTED	Upload
LEGAL ENTITY FORM (PRIVATE ENTITY)		REQUESTED	Upload

International Treaty
REQUESTED

Select files *

Choose files

Document type *

International Treaty

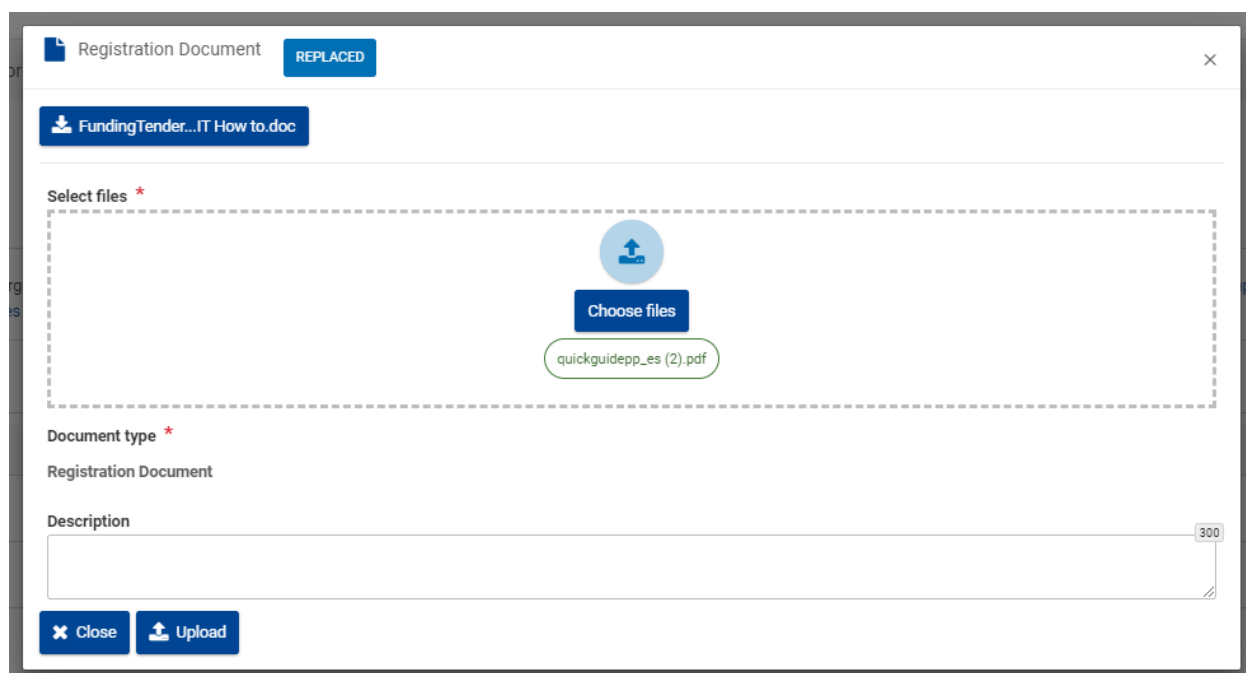
Description

300

Close
Upload

Alternatively, drag your file from its location and drop it into the **Select files** area. Click on the **Upload** button to complete the action. Otherwise, click on the **Close** button to quit the window without saving the changes.

Back in the Documents overview tab, under the Actions column, click on the **Edit** button if you need to replace an already provided document. A pop-up window will appear. In it, you see the currently provided document name at the upper left side of the window, in dark blue. To replace this document with a new one, click on **Choose files** and select your file from its location. Alternatively, drag your file from its location and drop it into the **Select files** area. The new uploaded document name will appear in green, in the centre of the window:



Click on the **Upload** button to complete the action. Otherwise, click on the **Close** button to quit the window without saving the changes.

Important: documents that cannot be uploaded via this tab

The following document types cannot be uploaded via this section, and they need to be uploaded using the appropriate tab / task in each case:

- **LEAR documents:** LEAR Appointment documents, LEAR/Legal representative identity documents, Declaration of consent to the terms of use of the Portal, Legal Representative authorisation document types can only be uploaded via the LEAR tab. Please note, this section is available only if applicable. For any issues regarding LEAR documentation, please contact Validation Services using the messages section on the left.
- **Financial documents:** balance sheet, profit loss accounts, Balance sheet - Profit loss accounts combined, Business plan document, Income Tax, List of Debts, External Auditor Report and State Guarantee document types are to be preferably uploaded in the Financial capacity tab when requested (some of the document types are only available when uploading them via the Financial capacity tab). Please note, this section is available only if applicable.
- **Bank statements:** bank statements can be provided only via the Bank accounts tab using the specific wizard to register the bank account.
- **Ownership/Control assessment documents:** some calls require that the organisations in receipt of grants or other contracts are NOT controlled from outside the European Union. If requested, you will need to provide a set of documents through a specific task, which will appear in the My Task(s) section of the Portal.

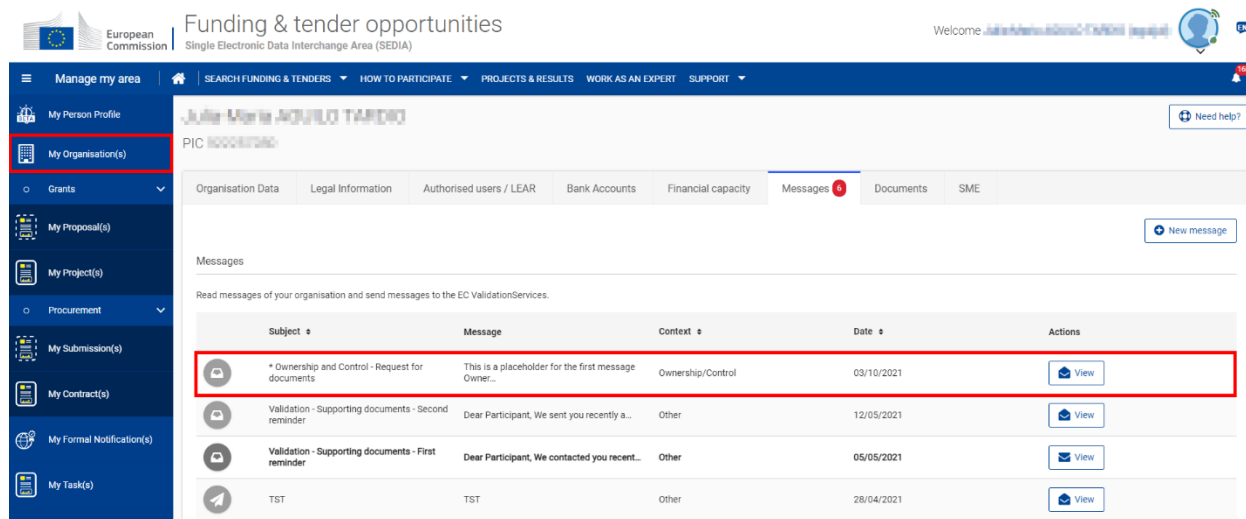
Please note: some tasks require you to upload personal identity documents both via this tab and other tabs or wizards. In order to ensure that this data is secure and handled according to the regulations on personal data in force, please make sure that any such documents are uploaded after selecting the correct file type: "Identity Document (ID)".

Ownership / Control Assessment

As part of the 2021-2027 Multi annual Financial Framework (MFF), some calls require that the organisations in receipt of grants or other contracts are NOT controlled from outside the European Union. Through the ownership control assessment, the Central Validation Service will use the information (data and documents) provided by the participant organisations to conclude on the organisation ownership control situation. The outcome of the assessment will be then made available to the service in charge of the grant/tender awarded to your organisation.

Request of documents for the assessment

In the Participant Register, there is no reference to the ownership control data until it is requested by the Central Validation Service. You will receive an email, also visible under the **My Notification(s)** section of the Funding & Tenders Portal and under the **Messages** tab in the Participant Register:



The screenshot shows the Participant Register interface. The left sidebar contains a menu with options like 'My Person Profile', 'My Organisation(s)', 'Grants', 'My Proposal(s)', 'My Project(s)', 'Procurement', 'My Submission(s)', 'My Contract(s)', 'My Formal Notification(s)', and 'My Task(s)'. The 'My Organisation(s)' option is highlighted. The main content area shows the 'Messages' tab selected, displaying a list of messages. The first message is highlighted with a red box:

Subject	Message	Context	Date	Actions
* Ownership and Control - Request for documents	This is a placeholder for the first message Owner...	Ownership/Control	03/10/2021	View
Validation - Supporting documents - Second reminder	Dear Participant, We sent you recently a...	Other	12/05/2021	View
Validation - Supporting documents - First reminder	Dear Participant, We contacted you recent...	Other	05/05/2021	View
TST	TST	Other	28/04/2021	View

There will be also a corresponding new task under the **My Task(s)** section. You will upload the documents by clicking on the task:



Manage my area | SEARCH FUNDING & TENDERS | HOW TO PARTICIPATE | PROJECTS & RESULTS | WORK AS AN EXPERT | SUPPORT

My Person Profile
My Organisation(s)
Grants
My Proposal(s)
My Project(s)
Procurement
My Submission(s)
My Contract(s)
My Formal Notification(s)
My Task(s)

Task Centre

Filter results
1 tasks found

Create date desc | Refresh

Active filters
Dismiss all | Search: [redacted] | Participant

Request for "Ownership/Control" document
PIC: [redacted]

Created on: 05/10/2021, 2:21:49 PM | Assignee: Me | Actions

Loading completed

Step by step to provide the required documents

1. Access the task **Request for "Ownership/Control" document**.

Access the **My Task(s)** section in the Portal and click on the name of the **Request for "Ownership/Control" document** task.

Manage my area | SEARCH FUNDING & TENDERS | HOW TO PARTICIPATE | PROJECTS & RESULTS | WORK AS AN EXPERT | SUPPORT

My Person Profile
My Organisation(s)
Grants
My Proposal(s)
My Project(s)
Procurement
My Submission(s)
My Contract(s)
My Formal Notification(s)
My Task(s)

Task Centre

Filter results
1 tasks found

Create date desc | Refresh

Active filters
Dismiss all | Search: [redacted] | Participant

Request for "Ownership/Control" document
PIC: [redacted]

Created on: 05/10/2021, 2:21:49 PM | Assignee: Me | Actions

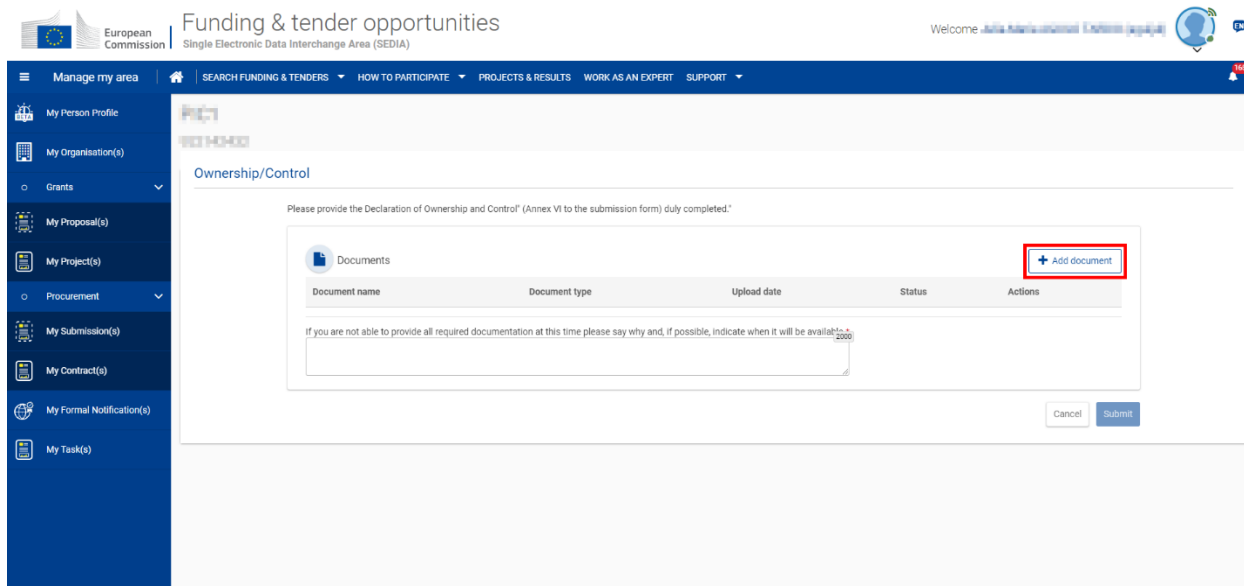
Loading completed

To access the task and upload your documents, click on the name of the task and disregard the **Actions** button.

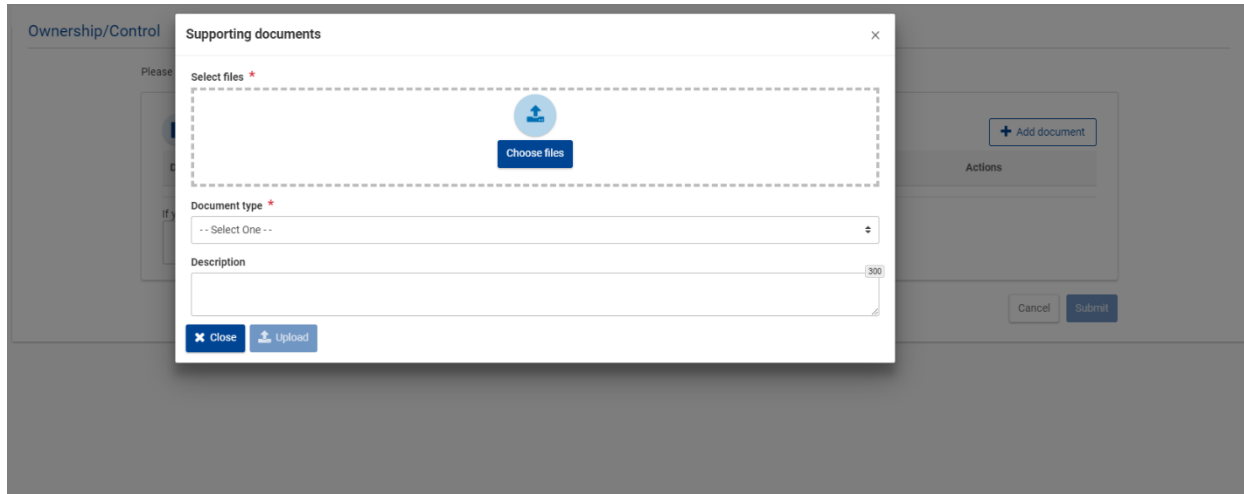


2. Upload the required documents.

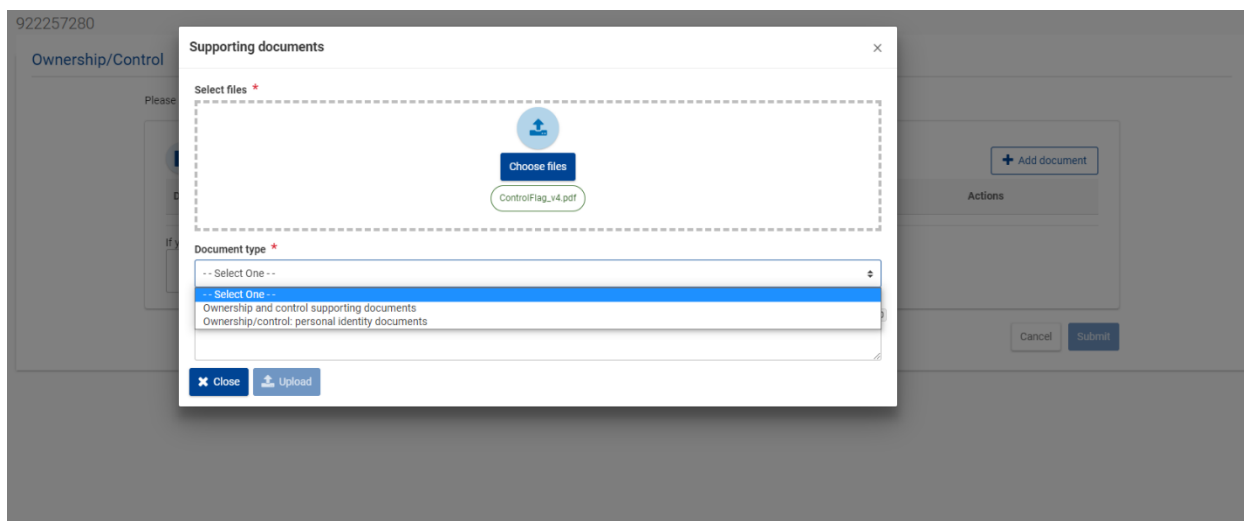
Click on the **+ Add document** button:



A pop-up window will appear:



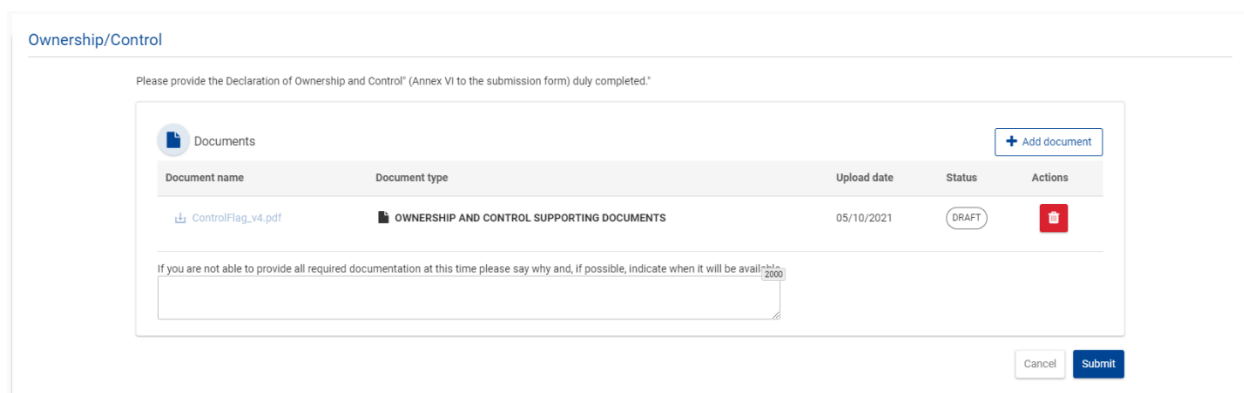
Click on the **Choose files** button or drag and drop the required document. Once done, the name of your document will appear in green under the Choose files button. You can only add one document at a time:



Select an option from the **Document type** drop-down menu. Additionally, you can provide a **Description** in the related field but this is not mandatory. Then, click **Upload**. At any time, you can click **Close** to get back to the previous screen.

3. Submit your documents.

Once you have uploaded the documents, you see the following screen:



In this screen, you can see the record of the document that you just uploaded. Click on **+ Add document** until you have uploaded all the required documents listed in the message that you have received. Use the comments field to justify if one or several of the requested documents are not available.

If you need to delete an uploaded document, click on the **Bin** button next to it. If you click **Cancel**, you will lose any uploaded document.

When you have uploaded all the required documents, click on the **Submit** button. If the submitting is successful, you will see the confirmation message on the screen:

 Success

If the Central Validation Service needs further supporting evidence, they will send you a new request to provide the documents following the same process as the one described above.

If the Central Validation Service does not contact you any more about this matter, this means that the assessment has been concluded for your organisation.

SME (Small and Medium-sized Enterprise)

In this tab, you can declare your organisation as SME. Please note that there are two ways to declare the status:

- 1 For funding opportunities where the SME status is NOT a requirement to participate:

In this case, a self-declaration is enough. You can declare the status when registering the organisation (see [Provide the Legal information](#)). You can change your status at any time.

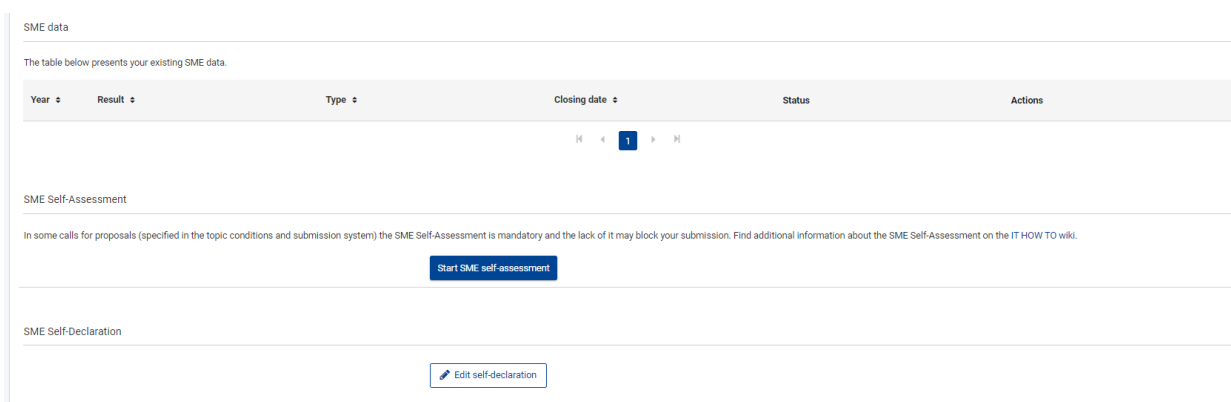
In the SME tab, scroll down in the page and click on **Edit self-declaration** to change the value. After selecting **Yes** or **No**, click on the **Submit** button to save your choice or on the **Cancel** button to discard it.



- 2 For funding opportunities where the SME status is a requirement to participate:

In this case, a self-declaration is not enough and you can be blocked in the Submission system if your organisation does not qualify as SME.

You need to run the SME self-assessment. Click on **Start SME self-assessment** to start the assessment, or if you already started and assessment, which has not been submitted yet, click on **Continue SME self-assessment** to resume.





SME data

The table below presents your existing SME data.

Year	Result	Type	Closing date	Status	Actions
2022	SME	Self-declared	04/08/2022	Submitted	

SME Self-Assessment

In some calls for proposals (specified in the topic conditions and submission system) the SME Self-Assessment is mandatory and the lack of it may block your submission. Find additional information about the SME Self-Assessment on the IT HOW TO wiki.

[Continue SME self-assessment](#)

SME Self-Declaration

[Edit self-declaration](#)

For full details on the assessment, see [SME wizard — Step by step](#).

The provided declarations display as rows in the SME data section:

Organisation Data

Legal Information

Authorised users / LEAR

Bank Accounts

Financial capacity

Messages

Documents

SME

SME data

The table below presents your existing SME data.

Year	Result	Type	Closing date	Status	Actions
2021	SME	Self-declared	15/11/2021	Submitted	
2020	SME	Self-assessed	11/05/2020	Submitted	

SME Self-Assessment

In some calls for proposals (specified in the topic conditions and submission system) the SME Self-Assessment is mandatory and the lack of it may block your submission. Find additional information about the SME Self-Assessment on the IT HOW TO wiki.

[Start SME self-assessment](#)

SME Self-Declaration

[Edit self-declaration](#)

SME Self-Declaration Yes



Click on the **Eye** button if you want to view the result of your SME self-assessment declaration:

SME data ✕

Date: 11/05/2021

The «SME» status assessment of [redacted] is now completed.

Result

Based on the information and financial figures related to the financial year 2020 taken into consideration under the terms of the SME Definition,

[redacted] qualifies as an SME

Reasons

Please find hereafter the 2020 results for [redacted] concerning the SME criteria relevant under the SME Definition.

SME Thresholds

STAFF HEADCOUNT: 111

AGGREGATED ANNUAL TURNOVER: 111 EUR

AGGREGATED ANNUAL BALANCE SHEET: 1,111 EUR

The [redacted] declared that it is engaged in an economic activity.

Relevant figures (in terms of staff headcount, annual turnover and/or annual balance sheet) for the following partner/linked entities (under Article 3 of the SME Definition) have been taken into consideration and consolidated

Name of the entity		%	Relationship	Turnover	Data provided from the company taken from their BALANCE SHEET	Staff Headcount	Public	Natural Person	Investments in R&D	Closing date	Consolidated Accounts
	AGGREGATED	100	Main entity	111 EUR	1,111 EUR	111	No	No	No	11/05/2021	No
	INDIVIDUAL	100		111 EUR	1,111 EUR	111	No	No	No	11/05/2021	No
Minor Shareholders			Minor Shareholder of [redacted]								

The [redacted] confirmed that, apart from the entities listed here above, there are no other entities which can be considered as partner or linked to [redacted] under the terms of Articles 3.2 and 3.3 of the SME Definition (including entities having other relevant relationships, such as the right to exercise a "dominant influence").

Special case: mid-cap enterprise

In some cases, organisations may self-declare as mid-cap. For this scenario, you will be required to complete the SME self-assessment first.

The first requirement is that your organisation does NOT qualify as SME. If this is the case, when submitting the results, you have the option to specify if it would fall under the mid-cap categorisation or not:

My Organisation(s)
Grants
My Proposal(s)
My Project(s)
My Audits
My Formal Notification(s)
My Task(s)

Aydın İuran İlikokulu
PIC 922566516

Organisation Data
Legal Information
Authorised users / LEAR
Bank Accounts
Financial capacity
Messages
Documents
SME

SME data

The table below presents your existing SME data.

Year	Result	Type	Closing date	Status	Actions
2020	Not SME	Self-assessed	17/06/2021	To Submit	<div>Submit</div> <div>Submit as not an SME</div> <div>Self-declare as Mid-cap</div>

The My Task(s) page in the Funding & Tenders Portal

When the Central Validation Service requests you, as Self-registrant and/or LEAR, to provide required documents, these requests are available here:

- In the organisation data update screen, indicated with a red number icon next to the Documents tab.
- In the **My Task(s)** page, from the Manage my area menu:

Task Centre

>

Filter results
6724 tasks found

Create date desc ▾ Refresh list

Filter

Validation Service - Additional Information Requested - ██████████

PIC: ██████████

Created on: 12/08/2022, 03:13:17 PM

Unclaimed

Actions ⋮

In the My Task(s) page, each request of a document is considered to be a task for the user. You have the possibility to filter these tasks using the filter on the left side of the page. To open the filter, click on the arrow close to Filter.

After clicking on the arrow, you see the different filtering options: you can make a search using the textbox or use the checkboxes **Claimed by me** and **Urgent**. When a filter is applied, it appears as a tag next to Selected criteria, at the top of the tasks list. To remove the applied filters, click on **Dismiss all** under Selected criteria, or click on the cross of each filter tag:

Task Centre

Filter

Save <

Filter results
1 tasks found

Create date desc ▾ Refresh list

Quick filter

Search
Type some text

☐ Claimed by me ☐ Unclaimed tasks ☐ Urgent

Tags
Select tags ▾

Selected criteria
Dismiss all

Validation Service - Follow-Up LEAR

☐ Select all 1 listed (out of 1)

Validation Service - Follow-Up LEAR - ██████████

PIC: ██████████

Created on: 12/04/2022, 09:38:52 AM

Unclaimed

Actions ⋮

Loading completed

You can sort the tasks in your list by date order with the **Create date desc** button and refresh the list with the **Refresh** button, at the right side of the screen.

To perform a task, you need to click on the task title. This brings you to the specific tab of the organisation data screen where you need to upload the required document.