How to apply for guarantee funding for Marie Skłodowska-Curie Actions (MSCA) COFUND 2022

Successful MSCA COFUND grantees at UK-based organisations can now submit their project as submitted to the 2022 call to UKRI to request guarantee funding. Please register through the 'Horizon Europe Guarantee MSCA COFUND 2022 invite only)' call in the Joint electronic System (Je-S).

Please note that all grants funded through this submission process will appear as Engineering and Physical Sciences Research Council (EPSRC) grants in Je-S and on the offer document, however they will be treated as UKRI grants.

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Background

In an extension to the initial Horizon Europe guarantee, the UK government has guaranteed to fund successful MSCA COFUND 2022 applicants who had indicated a UK host in their proposal.

MSCA grants may not be hosted by entities in countries that are neither Member States nor associated to the Horizon Europe programme. Whilst the UK is not formally associated to the programme, MSCA COFUND grant agreements cannot be signed if they have a listed organisation from the UK.

Grant administration

UK MSCA COFUND guarantee awards will be administered and funded by UKRI as part of the guarantee. No further assessment of the grant proposal will be carried out by UKRI.

Please note that MSCA COFUND grants funded by UKRI will be administered according to UKRI standard research grant terms and conditions except where specifically noted in the additional grant conditions below.

Who is eligible and how to submit your details

Anyone who has confirmation of a successful evaluation for an MSCA COFUND grant which is covered by the guarantee as noted in <u>the guarantee guidance on UKRI's website</u> may submit their project details via the <u>UKRI Je-S portal</u> to receive funding from UKRI for their project.

To submit your details to UKRI, the host institution must be based at a Je-S-registered organisation. You can check whether your organisation is Je-S registered by selecting 'Je-S Registered Organisations' on the <u>Je-S home page</u>. If your host institution is **not** Je-S registered and it is a higher education institute or research organisation, please liaise with your organisation's administration office in the first instance. If your host institution is an industry-based organisation that is **not** Je-S registered, then please follow the steps given in <u>Annex 3</u>. Please note this process can take up to 6 weeks, so we will aim to prioritise these cases where possible and email further instructions to help reduce this.

For any technical queries relating to Je-S, you can contact the helpdesk via email:JeSHelp@je-s.ukri.org

Before you start

To create and submit your details in Je-S:

- You must have a personal registered level Je-S account. To create a registered level Je-S account, please follow our guidance in <u>Annex 1</u>.
- The Je-S form can be created by a nominated member of staff at the applicant's research organisation and transferred to the applicant (Principal Investigator) to submit. Further guidance can be found in Annex 2.



Joint proposals:

For this call, each UK-based partner will hold a UKRI grant and receive their funds directly, but if there is more than one UK partner in the consortium each will be part of a Joint Proposal with the other UK partners. This requires each partner in the consortium to submit their own proposal in Je-S, but one must be identified as the lead proposal in the 'Joint Proposals' section in the Je-S form. The chosen lead will need to apply first so that the non-lead proposals can then link up to the lead application using the appropriate Joint Proposal reference in their own Joint Proposals section in Je-S.

Funding will be awarded to each organisation based on the resources entered on each Je-S form. Therefore, each grant must include its own currency conversion tool (see below) to reflect the funds they require.

Only the lead proposal can submit a copy of the full original MSCA COFUND proposal under the 'Case for Support' attachment type. Please note we will only start processing the proposal once all project components are received.

Implementing Partners:

For UK-based organisations included in a successful COFUND project as an implementing partner, the Horizon Europe guarantee will cover the EU contribution. Implementing partners are clearly listed in Part B Section 5 Partner Organisations of the original proposal. When completing the UKRI conversion tool, please multiply the number of recruited researchers by the corresponding COFUND allowance. The letter of commitment as well as the original proposal and grant agreement should be included in your submission through Je-S. More details on the other required attachments can be found below. If required, additional attachments can be submitted on Je-S.

Start Date:

The start date of your guarantee grant does not need to match the start date in the original MSCA COFUND proposal. System constraints will require you to submit a future start date at time of Je-S submission. However, when you submit the starting certificate for the grant you may enter an actual start date before the date given on the grant offer letter if desired.

Please note that the duration of the grant must match what was in your original MSCA proposal.

Exchange rate:

We will not accept any increase of budget from that originally applied for in your MSCA application. As payments will be paid in British pounds (GBP) rather than Euros all costings will need to be entered into the Je-S form as GBP. The maximum exchange rate is listed in the <u>guarantee guidance here</u>.2022



Currency conversion tool:

To convert the costs to GBP using simplified UKRI cost headings, the UKRI conversion tool template provided must be used and uploaded as a PDF attachment. This can be found on the relevant MSCA tab on the Horizon Europe guarantee notice and guidance page.

To use the conversion tool, please ensure you have completed the green cells with the total grant amount accepted by REA in Euros. The spreadsheet will automatically calculate the costs in GBP and under UKRI's Je-S headings on the second table, ready to be entered into Je-S.

Please ensure you save a copy of your completed conversion tool template as a PDF. This can be done whilst saving the document in Excel by choosing 'PDF (*.pdf)' in the drop-down list instead of 'Excel Workbook (*.xlsx).

Attachments:

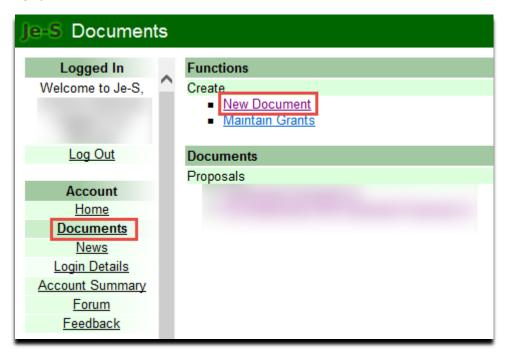
Please prepare the following required attachments prior to completing the Je-S form, noting that no further assessment of the grant proposal will be carried out by UKRI. **These must be saved as PDF files before uploading to Je-S**:

- Evaluation result letter from European Commission stating your success in the 2022 MSCA COFUND call
- Full copy of the original proposal (parts A and B) This can be downloaded from the submission system. Please note if the size of the proposal is over 10 MB you will need to reduce the size of the document before submitting it through Je-S. UKRI will need a full copy of the original proposal, so do not delete any pages, but you can reduce the size of the PDF on Adobe or it can be submitted in parts as multiple attachments if necessary.
- MSCA evaluation summary report
- Completed UKRI currency conversion tool
- Horizon Europe grant agreement digitally signed by the European Commission



Completing the submission

Log in to the <u>Je-S portal</u> using your username and password and select **documents** from the left-hand menu. To create the Je-S form, select **new document** from the 'functions' menu.



Select the following options from the drop-down menus:

- Council: EPSRC*
- Document type: Standard Proposal
- Scheme: ERC and MSCA Other Guarantee Calls
- Call: Horizon Europe Guarantee MSCA COFUND 2022 (invite only)
- Select create document

*EPSRC are hosting these awards on behalf of UKRI.

All sections marked with are mandatory and must be completed. Our guidance below should assist you with how to complete the sections.

Note on costs: Please be aware that this grant will be issued according to UKRI standard research grant terms and conditions except where noted below.

Project Details	How do I complete it?		
8			
Submitting	Select your organisation and department from the search menu.		
Organisation	Please note only Je-S registered organisations and their departments will be included in the list.		
Your Reference	Enter your original MSCA COFUND proposal number.		
	You will be able to view this reference in Je-S. This must not exceed 20 characters.		



Project Title	Enter the proposal title as shown on the original proposal. This must not exceed 150 characters. If the title is over this limit, please abbreviate the text ensuring the project acronym is included at the beginning.
Proposal Call or Mode	This displays the Call that you have applied to. Please check that this is 'Horizon Europe Guarantee MSCA COFUND 2022 (invite only)'.
	Please note if the incorrect call is displayed, changing this field will cause system problems. Instead, the document should be deleted, and a new Je-S form created to the correct call.
Start Date	A future start date must be added to avoid a validation error in Je-S when the Je-S form is submitted. Once submitted, you will be able to state your actual start date, which can be before the date issued on the grant offer letter, when submitting the start confirmation document back to UKRI.
	Please note the start date you enter here does not need to match what was in the original proposal. UKRI systems operate on a quarterly pay run basis and pre-financing will not be available in the same manner as Horizon Europe grants.
	If you have further questions, please contact EUGrantsFunding @ukri.org
Duration	Enter the duration of the grant.
	Please note this should match your original proposal duration.

Principal Investigator	How do I complete it?		
8			
Principal	Please add the main contact person for your organisation here.		
Investigator	Select 'add new principal investigator item', search for the applicant of the grant and select the name from the menu.		
	Please note only staff with registered level Je-S accounts will be included in the search list. See Annex 1 for further guidance on creating Je-S accounts.		

Objectives 8	Please copy a summary of the proposal objectives from Part B: Section 1 – Excellence of your original MSCA COFUND proposal.		
	Please summarise your objectives if they exceed the 4000-character limit in Je-S. Please note that the project will not be reassessed by UKRI, this is required for administrative purposes.		
Summary	Please enter the abstract section of the original MSCA COFUND proposal.		



Joint Proposals [where applicable]	Please note that once funded this section will be externally facing on Gateway to Research. This should not exceed 4000 characters. Each organisation should submit separate proposal forms. Applicants should identify a lead organisation for the purposes of submitting the joint proposals. The lead organisation: Select Edit Joint Proposals. Select yes to "is this a Joint Proposal" Select yes to "are you the lead RO" The Joint reference number is generated. The following information will appear under the heading of Joint documents:			
Joint Proposals				
Joint Proposais				
	The lead organisation:			
	•			
	the lead RO" The Joint reference number is generated. The			
	The non-lead applicants do not need to fill in all the sections which are available in the Lead, e.g., Objectives, Summary etc. as they are pre-populated from the Lead Proposal.			

Resources	How do I complete it?		
8			
Please use your completed UKRI conversion tool to ensure that you enter the costs under the correct UKRI cost headings. More information can be found in the 'before you start section' above.			
Other Directly Incurred Costs	Enter the figure under 'other directly incurred costs' as displayed in table 2 of the UKRI cost conversion tool.		
	Select the 'Add New Other Directly Incurred Costs Item' button, the following fields should be completed:		
	Description: 'all other directly incurred costs'		
	Amount: enter the costs in GBP as displayed in the cost conversion tool.		

Project Partners



(optional)

This section should only be completed if there are any organisations contributing in-kind contributions to your project without requesting payment. The project partners will not need to be Je-S registered.

An organisation should only be named as a project partner if it is providing specific contributions to the research project.

Please note that Project Partners will be shown externally on the <u>Gateway to Research</u> <u>Portal</u>.

Project Organisation Details	Select the 'Add New Project Partners Item' and select the Organisation and Department from the search menu.	
Contact Details	Select the Contact name from the Contact search menu. If the contact cannot be found, select 'Add New Person' to add their details.	
Direct Contribution to Research	Complete the appropriate sections for either Direct Contribution to Research Project or Indirect Contribution to Research Project.	
Project Indirect Contribution to Research Project	All contributions added in this section should be entered as 1; this is purely to enable to the form to validate.	

Ethical Information	How do I complete it?		
(optional)			
Human Participation			
Animal Research			
Animal Species	Any relevant sections here can be completed with evidence provided in Part A section 4: 'Ethics and Security' of the original		
Genetic and Biological Risk	proposal.		
Implications			
Approvals			

Proposal Classification (Mandatory)	How do I complete it?
Research Area Qualifier Free Text Keywords	These will be the research areas that are most like your 'Free keywords' in section one of your MSCA COFUND proposal. Select the 'add new research area' link and from the drop down select the most relevant research areas for your project. Once you have made



	your selection, you will then need to tick the 'Primary Area' and th save by clicking the 'Set Primary Area' button.		
	Qualifiers and Free Text Keywords do not need to be completed in this section.		
Notes and Comments	Does not require completion.		

Attachments

The following attachments must be attached to the submission as PDF documents. Individual attachments are restricted to 10MB for case for support and 5MB for other types of attachment. Further guidance on how to upload an Attachment can be found on our <u>Je-S Help text page</u>.

Please ensure you select the correct UKRI attachment type to correspond with the relative part of the original MSCA application, as shown below:

UKRI Attachment Type	Maximum Page length	Mandatory/Optional	Extra Guidance
Case for Support	No page limit	Mandatory (exactly 1)	The lead will need to upload a copy of the full original MSCA COFUND proposal under this attachment type.
			If this is over 10MB, please refer to the 'before you start' section above.
			The non-lead proposals will not need to upload a Case for Support document.
Other Attachment	No page limit	Mandatory (minimum 4)	Please submit PDF copies of the following: 1) the Horizon Europe grant agreement listing your organisation and digitally signed by the European Commission.
			2) the MSCA evaluation result letter confirming that the MSCA COFUND application was



	successfully invited to start grant preparation.
	MSCA evaluation summary report
	4) Completed UKRI conversion tool spreadsheet

Submitting your project details

If the Je-S form has been completed by the grant holder, it can be submitted by following the instructions found on our Je-S help text page.

For Je-S forms completed on behalf of the grant holder, it must be transferred for them to submit as per the instructions in Annex 2.

Next steps

UKRI will acknowledge the submission and conduct checks on the documents you have submitted. If the cost totals do not match the MSCA COFUND proposal, or any mandatory attachments are missing, your submission will be returned in Je-S to correct these and resubmit.

Once UKRI has processed the submission, a grant offer letter will be issued containing UKRI terms and conditions relevant to the financial and reporting aspects of the programme of work within the project. These will include the additional grant conditions, as explained below.

Grant holders will be expected to report research outcomes through <u>Researchfish</u>. Grants will probably fall under the regular programme of assurance checks carried out on Research Council grants; however, we reserve the right to carry out additional monitoring as required.

Additional grant conditions

Grants will be subject to the <u>standard UK Research and Innovation fEC grant terms and</u> conditions; however, the following additional grant conditions will be added to this call:

Call condition 1: Rate of funding

100% of the EU-eligible costs applied for through the European Research Executive Agency ("REA") on this grant will be paid for in GBP (£), subject to the maximum exchange rate as given in the guidance.

Call condition 2: Exchange rate

UKRI shall be permitted to change the GBP (£) value of the grant where in UKRI's opinion there is a significant fluctuation in the GBP: EUR exchange rate from the exchange rate



previously used to calculate the GBP (£) value of the outstanding grant sum provided always that:

i. the GBP value of the grant shall not change more than once in any 12-month period; and ii. the revaluation process shall not affect payments which have already been made to the Recipient.

Call condition 3: Acknowledgment, naming, branding and communications
It is recognised that this grant has passed the European Research Executive Agency's
("REA") assessment process successfully, but this is a UKRI grant and UKRI must be
acknowledged as the funder of this award in any publicity and communications activities.

Call condition 4: Additional reporting requirements

Investigators must assist UKRI with any additional monitoring and reporting requirements on this funding activity, including those requested by the Department of Business, Energy and Industrial Strategy (BEIS).

Call condition 5: Mobility

Students or Fellows recruited to UKRI COFUND guarantee studentships or fellowships must not have spent more than 1 year (365 days) out of the last 3 years in the UK at the point when they are recruited to the network.

Call condition 6: Start date

Notwithstanding RGC 5.2 (as stated in the Standard UKRI T&C's), the start date of the Grant may precede the start date shown in the Offer Letter, and can also be earlier than the issue date of the Offer Letter itself.

Call condition 7: Student costs

Notwithstanding RGC 4.5 (as stated in the Standard UKRI T&C's), student costs may be charged to these grants

Call condition 8: Additional allowances

If you wish to claim special needs allowances, you will need to provide a host organisation letter of support from the Head of Department or equivalent to verify that the Fellow(s) meets the eligibility criteria as defined by the European Research Executive Agency ("REA").

Call condition 9: Employment contract

The total value of the contributions for the recruited researchers in the original MSCA application should match the total amount paid to the researchers minus taxes and pension contributions and accounting for exchange rates.

Contacts

For queries on eligibility or policy: EUGrantsFunding@ukri.org

For any technical queries on Je-S: <u>JeSHelp@je-s.ukri.org</u> or Phone 01793 444164 (Mon – Thurs 08:30 to 17:00 and Fri 08:30 to 16:30 excluding UK public holidays).

Annex 1: Je-S account set-up

Upgrading a Je-S account

If you currently have a basic level Je-S account, you will be able to upgrade to a registered level by logging into your account, navigating to 'account summary' and selecting 'upgrade'. The upgrade will then be verified by your research organisation.

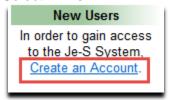
Forgotten your login details?

If you have forgotten your login details, you will be able to retrieve these by selecting the 'retrieve username/password' link on the <u>Je-S Home page</u>.

Creating a new Registered Je-S account

If you are a new user to Je-S and you wish to be named as a Principal Investigator on the Je-S form, you can create a Je-S account as follows. Please ensure you allow sufficient time for your account to be processed and verified by your organisation:

Select the 'Create an Account' link from the front page of the Je-S portal:



Review and Accept the user terms and conditions:

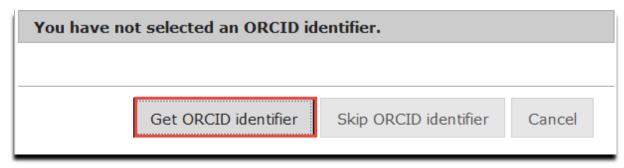
7. Acceptance		
To create an account on Je-S, you must accept the terms and conditions for use of the Je-S System.		
If you 'Accept' below, you will proceed to the account details input screen.		
If you choose to 'Not Accept' the terms and conditions at this time, you will be returned to the Je-S System home page.		
If you have any queries, contact the Je-S Helpdesk (tel: +44 (0) 1793 44 4164; e-mail: JeSHelp@je-s.ukri.org)		
Accept Not Accept		

Type in your email and select 'account check'. You will be able to retrieve your login details if you already have an account:

Existing Account Check In order to check that you do not already have a Je-S account, please enter your email address in the box below and click 'Account Check' If you have an ORCID identifier, you can also get that from the ORCID web site and we will check if you have an account linked to that ORCID	
ORCID identifier:	Create or connect your ORCID identifier from the ORCID web site
Email:	test@abc.com x Account Check
Cancel	

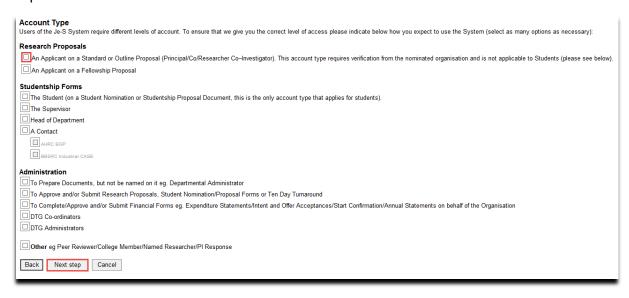


Select 'Get ORCID' identifier. You will be directed to the Open Researcher and Contributor (ORCID) website where you can either sign in or register for an ORCID identifier. ORCID provides a free registry to obtain a unique digital identifier for researchers and scholars. Further details can be found on our Je-S <u>help text page</u>.



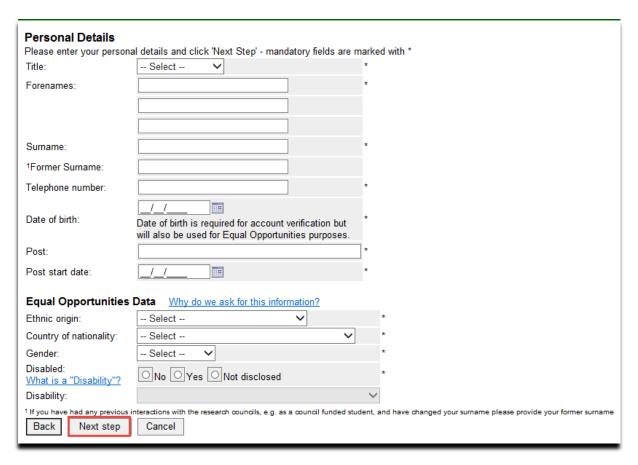
If your email address or ORCID identifier does **not** already exist on the Je-S system, you will be taken to the next stage (*step 6*). If your email address already exists or your ORCID Identifier is linked to an existing Je-S account, you will be requested to retrieve your login details (*step 3*).

Tick the check box for 'An applicant on a standard or outline proposal', then select 'next step':



Enter your details ensuring that the mandatory fields are completed, then select 'next step'





Select 'next step' at the qualifications screen

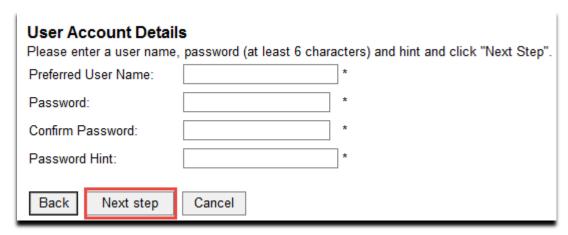


Click the 'select organisation' link and type in the name or your organisation:



Organisation Please select your organisation and department and click 'Next Step'. (this section is not mandatory for student or fellowship account types, for these account types you can bypass this page using the next step option).				
Note: organisation and department searches will appear in a new window				
Organisation:	* Select Organisation			
Department:	* <u>Select Department</u>			
If you cannot find your organisation or department please contact the <u>Je-S Help Desk</u> on +44 (0) 1793 444 164.				
Back Next step Cancel				

Type in a username, password and hint and select 'next step':

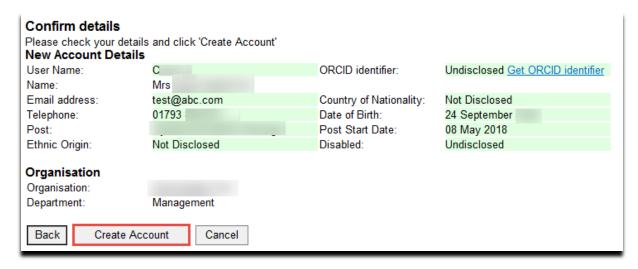


If you have already set up your ORCID identifier select 'skip ORCID identifier':



Check your details are correct and select 'create account'





You will receive an email requesting the activation of your Je-S account. A request will also be sent to your Research Organisation for verification of your account. Therefore, your account will not be fully active until this has happened.

You can check whether your account is verified by checking the text at the bottom of the screen in the 'Account Summary' section on the left-hand side when you log in to Je-S.

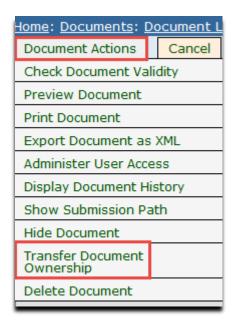
You have a full account - this means that you can be an Applicant on a Standard or Outline Proposal (Principal/Co/Researcher Co-Investigator) or an Applicant on a Fellowship Proposal.

Annex 2: Completing the Je-S form on behalf of the grant awardee

The Je-S form can be created and completed by a member of staff at the grant holder's Research Organisation on behalf of the grant holder (Principal Investigator) as long as they have a personal Je-S account. Our step-by-step guide below will guide you through this process:

- 1. To submit your details to UKRI in the Je-S system, log in to Je-S and follow our guidance on completing the submission.
- 2. Once the form has been completed, select **document actions** from the top of the screen and then **transfer document ownership** from the drop-down menu:

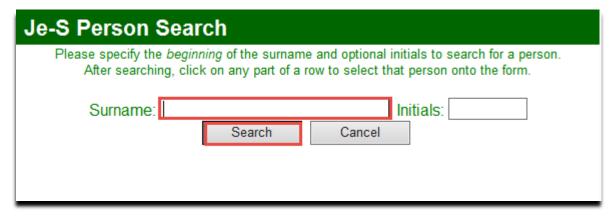




3. You will then be able to select the grant awardee by clicking the **select user** button:



4. Enter the Surname of the grant awardee and then click **search**:



5. The form will now be transferred to the grant awardee.

Annex 3: Registering a Host Institution onto Je-S

Many organisations will already be registered on Je-S, particularly if they are larger or if they have submitted applications to UKRI funding schemes previously. You can check to see if your organisation is already registered by clicking on the 'Je-S Registered Organisations' link on the Je-S Home page.

Those who have never applied to a UKRI funding scheme will need to register before they are able to submit their details to UKRI. This can be done by following the 'self-registration' process as detailed below. Please note that industry hosts should follow the steps below and do not need to complete the IRO (Independent Research Organisation) registration process in addition.

To self-register an Organisation that is not currently on Je-S:

- 1. Go to the Je-S login screen.
- 2. Select the link called 'self-registration for organisations' (as shown in the below screenshot)



- 3. Accept the Terms and Conditions. You will not be able to proceed without accepting.
- 4. Complete the 'Organisation' page. Please note that there is a restriction on the number of characters available in the Organisation Name field and words such as 'University' should be entered in English.
- 5. If a 'Potential Duplicates' page appears please check to see if your organisation is listed. Your organisation's name may be listed in a slightly different way (for example, it may be shortened or a word such as 'University' may be listed either at the start or end of the name). Please check this list carefully to avoid creating a duplicate organisation. If your organisation is on the list, please select 'cancel' as this means that it is already registered with Je-S and you do not need to create a new record. If it is not on the list, then please select 'Next Step'.
- 6. Check the details and select Create Organisation.
- 7. Organisation registration is now complete.



8. Once the Organisation has been approved the contact will receive an email with a link which they will need to click on to confirm their Organisation. The registration team will then process the Organisation and it will then be selectable as a host Organisation in Je-S. This process can take up to 24 hours.