



# GUIDANCE ON THE CONTROL WORK SECTION IN JEMS

For National Controllers; Jems version 7

Version 3

09 2023

## A. General information

This guidance is based on the Interact Jems User Manual.

In addition to the guidance, a video tutorial on the partner report will be available.

### 1. Prerequisites

- In order to have access to the reporting and control work section, the user needs to have
  - control access rights in Jems
  - be linked to a control institution
  - be assigned to a project partner
- A controller can have view or edit access rights. The access rights are managed by the national controller assigning body.
- The control work can only be started once the partner report is submitted by the project partner (Partner report in status “Submitted”). Partner reports for which the control work is in progress are in status “Control ongoing”.
- In order to receive notifications as an email click on the user name and active the notification sending.

The screenshot shows the JEMS user interface. At the top, there are logos for Interreg Central Europe and the European Union. The page title is 'Users' with a sub-header 'Detail: Controller DE Tester'. The 'User data' section contains fields for First name (Controller DE), Last name (Tester), and Email (control\_DE@jems.eu). The 'Notifications' section has a checkbox labeled 'Send notifications automatically to my email'. The 'Password' section has a field for the password and a 'Set new password' button. In the top right corner, there is a user profile dropdown menu showing the user name 'control\_DE@jems.eu (Controller)' and a 'Logout' button. Red boxes highlight the user name in the dropdown and the notification checkbox.



## 2. Access to the Partner Report Section

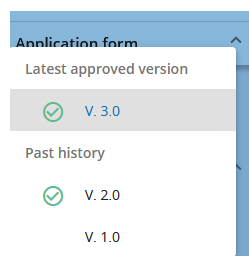
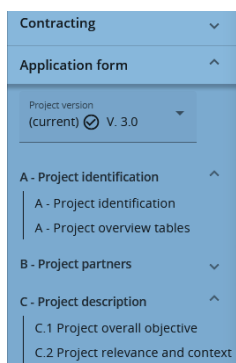
- From the “Dashboard/My application” select the project for which you would like to do the control work. Then, go to “Partner report” in the left menu and select the dedicated partner to get to the partner report overview.
- If a notification on the submission of a partner report was received, the report can also be directly opened from the message.
- In case a project modification took place and the partner report is linked to an earlier application form than the current valid one, a warning appears in the partner report overview table.

The screenshot shows the 'Dashboard' page. Under 'Notifications', there is a table with one entry: '23.08.2023 06:30', 'CE Call 1', 'CE0100161', 'TEST project', 'PP3', and 'CE0100161 TEST project 3 DREI - Partner report 2 submitted'. The 'PP3' partner is highlighted with a red box. Under 'My applications', there is a table with one entry: 'CE0100161', 'TEST project', '22.02.2022 08:15', '21.08.2023 07:01', 'P2', 'SO2.5', 'Contracted', and 'CE Call 1'. This entire row is highlighted with a red box.

The screenshot shows the 'Reporting Partner reports' section. The left menu has 'PP3 DREI' highlighted with a red box. The main area shows a table for 'PP3 DREI' with two rows: 'R.2' (Submitted) and 'R.1' (Draft). The 'R.1' row has a '2.0' version number with a warning icon, highlighted with a red box. The 'Start control' button is also visible.

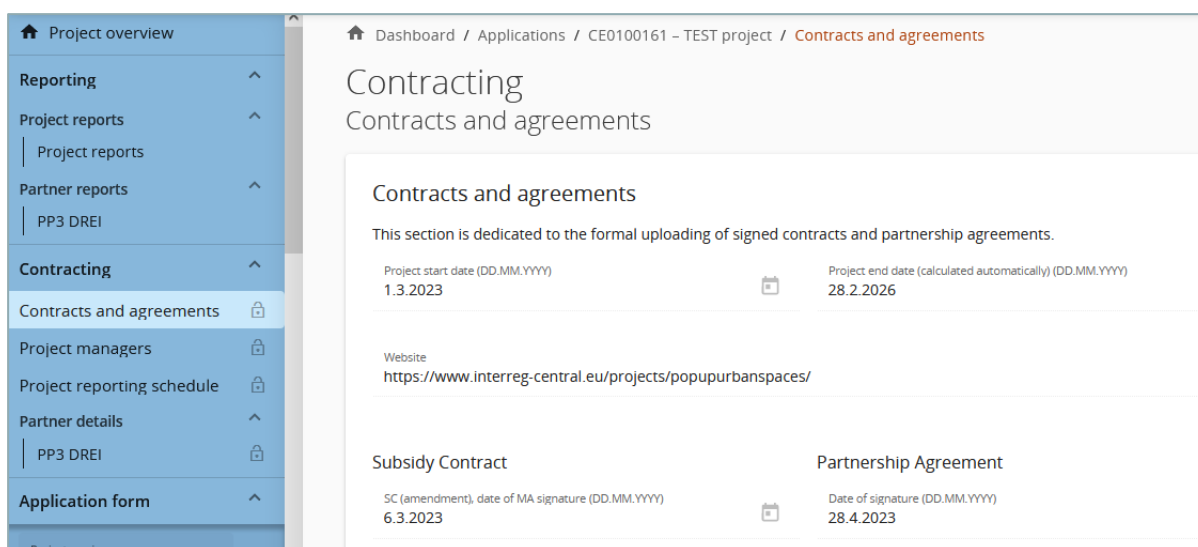
## 3. Access to the Application Form

- Go to the left menu “Application form” to access the different sections of the application form
- The different versions of the application form are accessible from the left menu (Project version). Current and past valid versions (i.e. versions that were approved and linked to the project subsidy contract) are marked with an icon.



## 4. Access to the Contracting section

- Controllers have view access to the contracting section. The subsidy contract and its amendments as well as the partnership agreement are available in this section. Furthermore, there is information on the project managers, partner details (e.g., location of documents) and the project reporting schedule.




## B. Partner Report

- Select a submitted partner report from the overview table and click to open it.




interreg


CENTRAL EUROPE





Co-funded by  
the European Union

 Dashboard

English





 Project overview

Reporting


Partner reports

PP3 DREI


Contracting

Application form

Export

 Jems





A harmonised tool  
by Interact

 Dashboard / Applications / CE0100161 – TEST project / PP3 DREI

Reporting


Partner reports


PP3 DREI

ID	Status	Include d in...	AF versio...	Reporting period	Date of report...	Date of first...	Last submission	Amount submitted	Total eligible after control for current...	Control
R.2	 Submitted		3.0	Period 1, month 1 - 6	23.08.2023 06:12	23.08.2023 06:30		69 820,68		 Start control
R.1	 Draft		2.0 	Period 1, month 1 - 6	03.08.2023 15:05					

Items per page: 25

1 - 2 of 2





- To go to the different sections of the partner report use the tabs in the top navigation bar.
- The partner report is divided in different sections accessible through tabs at the top:
  - Report identification
  - Work plan progress
  - Public procurements
  - List of expenditures
  - Contributions
  - Report annexes
  - Report export
  - Financial overview

<p>interreg CENTRAL EUROPE</p> <p>Co-funded by the European Union</p> <p>Dashboard</p> <p>English</p>		<p>Dashboard / Applications / CE0100161 – TEST project / PP3 DREI / Partner report R.2</p>									
<p>Project overview</p> <p>Reporting</p> <p>Partner reports</p> <p>PP3 DREI</p> <p>Contracting</p> <p>Application form</p> <p>Export</p> <p>Jems A harmonised tool by Interact</p>		<p>Partner report R.2</p> <p>PP3 DREI</p> <p>Status: Submitted Start control</p> <p>Report identification Work plan progress Public procurements List of expenditures Contributions Report annexes Report export Financial overview</p> <p>A.1 Partner progress report identification</p> <p>Project ID and acronym: CE0100161 - TEST project</p> <p>Partner report ID: R.2</p> <p>Partner report status: Draft Submitted Control ongoing Certified</p> <p>Partner number: PP3</p> <p>Name of the organisation in original language: Instytut</p> <p>Name of the organisation in English: Institute of AAA</p>									

## C. Control work section

- There are two options to access the control work section.
- Click the button “Start control” at the very right of the partner report in the overview table. Once the control work is started, the button is renamed to “Go to controller work”.



Dashboard / Applications / CE0100161 - TEST project / PP3 DREI

### Reporting

#### Partner reports

PP3 DREI

ID	Status	Included in...	AF version...	Reporting period	Date of report...	Date of first...	Last submission	Amount submitted	Total eligible after control for current	Control
R.2	Submitted		3.0	Period 1, month 1 - 6	23.08.2023 08:12	23.08.2023 08:30		69.820,68		<a href="#">Start control</a>
R.1	Draft		2.0	Period 1, month 1 - 6	03.08.2023 15:05					

Items per page: 25 1 - 2 of 2

- Open the partner report first and then click “Start control” in the top menu. Once the control work is started the button is renamed to “Go to controller work”

Dashboard / Applications / CE0100161 - TEST project / PP3 DREI / Partner report R.2

### Partner report R.2

PP3 DREI

Status: Submitted [Start control](#)

Report identification Work plan progress Public procurements List of expenditures Contributions Report annexes Report export Financial overview

A.1 Partner progress report identification

Project ID and acronym: CE0100161 - TEST project

Partner report ID: R.2

Partner report status: Draft → Submitted → [Control ongoing](#) → [Certified](#)

Partner number: PP3

Name of the organisation in original language: Instytut

Name of the organisation in English: Institute of AAA

- Upon starting the control work, the partner report status changes to “Control ongoing” and a notification on the start of the control work is automatically generated by Jems and appears in the Dashboard.

Dashboard / Applications / CE0100161 - TEST project / PP3 DREI / Partner report R.2

### Partner report R.2

PP3 DREI

Status: [Control ongoing](#) [Go to controller work](#) [Reopen partner report](#)

Report identification Work plan progress Public procurements List of expenditures Contributions Report annexes Report export Financial overview

A.1 Partner progress report identification

Project ID and acronym: CE0100161 - TEST project

Partner report ID: R.2

Partner report status: Draft → Submitted → [Control ongoing](#) → [Certified](#)

Partner number: PP3

Dashboard

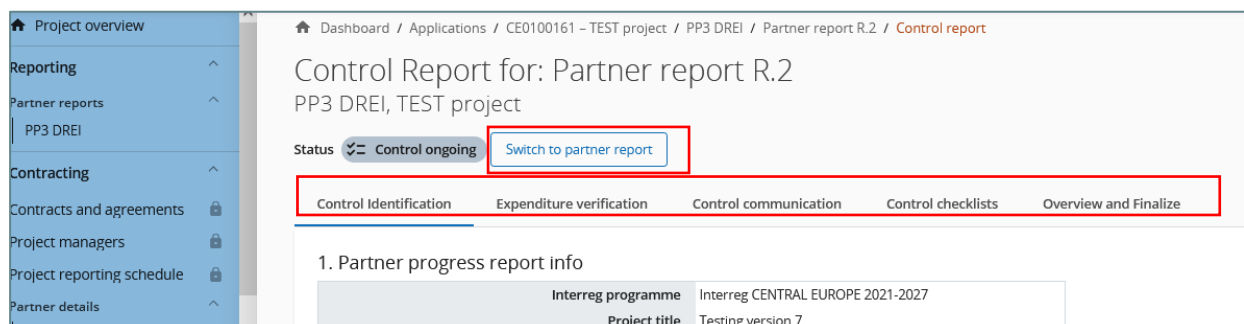
Welcome Controller PL TESTER to Jems Interreg CENTRAL EUROPE!

### Notifications

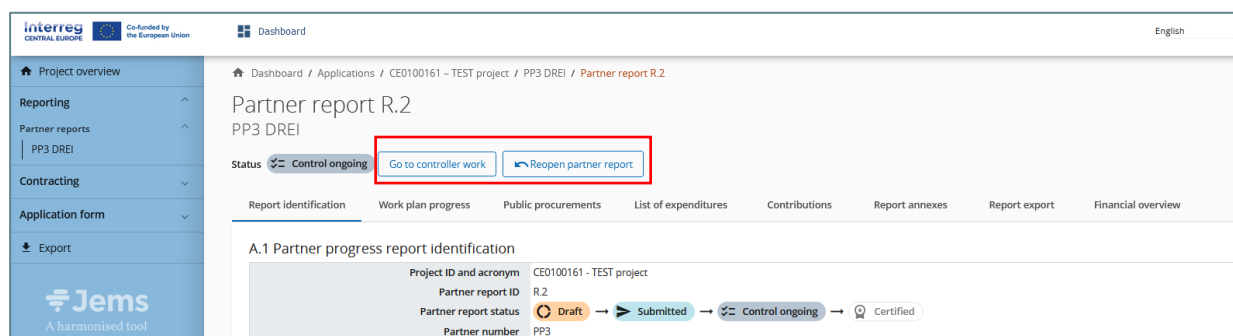
Time	Related call	Project	Acronym	Partner	Subject
23.08.2023 11:44	CE Call 1	CE0100161	TEST project	PP3	CE0100161 TEST project 3 DREI - Partner report 2 control ongoing
23.08.2023 08:30	CE Call 1	CE0100161	TEST project	PP3	CE0100161 TEST project 3 DREI - Partner report 2 submitted



- Once control work is started, the controller has access to the following section of the control work:
  - Control Identification
  - Expenditure verification
  - Control communication
  - Control checklists
  - Overview and Finalize
- To go to partner report, click “Switch to partner report”.



- To go back to the control work section click “Go to controller work”.
- To reopen the partner report for amendments, click on “Reopen partner report”.



## 1. Report identification

- In the control identification section, controllers can see pre-filled partner report info and can fill in basic identification information about the control work for the control report.
- Format of documents - multiple selection is possible
- Type of partner report - Please select whether it is a standard partner report or the last partner report.



**1.2 Format of documents**  
Documents were made available to the controller in the following format (multiple ticks possible)

☐ Originals  
☐ Copy  
☐ Electronic

Type of partner report

- **Designated Controller** - the information on the control body is automatically filled in. The name of the controller and, if applicable, the name of the controller reviewer (4-eyes principle) needs to be selected from the drop-down menu. Information filled in here will be automatically imported in the “Control certificate and control report” PDF (generated in section “Overview and Finalize”).

**3. Designated Controller**

Control body responsible for the verification (filled automatically)  
PL Control Institution

Name of the controller  
Controller PL TESTER - control\_PL@jems.eu

Controller PL TESTER - control\_PL@jems.eu

PL Controller Reviewer TESTER - control\_PL\_rev@jems.eu

Division/Unit/Department

- **Verification** - In case “On-the-spot verification” is selected, click the button “Add on-the-spot verification” to open the additional input field.

**4. Verification**

General methodology (multiple ticks possible):

☐ Desk-based verification verification  
☒ On-the-spot verification

List of on-the-spot verifications:

Date	Location (multiple selection possible)	Focus of on-the-spot verification
From: <input type="text"/> To: <input type="text"/>	<input type="checkbox"/> Premises of project partner <input type="checkbox"/> Project event/meeting <input type="checkbox"/> Place of physical project output <input type="checkbox"/> Virtual	Enter text here

Risk-based verification was applied (only if it has been set on national level)

If (yes), Please describe:

Enter text here



## 2. Expenditure Verification

- In the expenditure verification section, all expenditure items from the Partner report “List of expenditure” are listed (including attachments)
- As long as the partner report is in status “Control ongoing”, this section is visible only to controllers assigned to the partner. Once the control is finalized (report is set to status “Certified”), the section becomes accessible (in read-only mode) to all users that have access to the partner report, including the users of the project partner.
- For expenditure verification, the controller has to fill in the results of the control work per expenditure item.
- Scroll to the right to get to the input fields for the controller.
- For each expenditure item, the controller can:
  - Add the item to the sample
  - Deduct an amount and select a typology of error for the deduction
  - Park an expenditure item
  - Add a comment

Expenditure verification

Controllers can verify expenditure in this section and justify corrections. Corrections are always in Euro, the conversion happened upon submission of the partner report.

ID	Cost category	Declared amount	Currency	Conversion rate	Declared amount in EUR	Attachments	Part of sample	Deducted amount in EUR	Certified amount in EUR	Typology of error	Park item	Comment
R1.1	<input checked="" type="checkbox"/> Staff costs	43.000,00	EUR	1	43.000,00	testfile1.docx	<input checked="" type="checkbox"/>	500,00	42.500,00	Accounting/...	<input type="checkbox"/>	calculation error
R1.2	<input type="checkbox"/> External expertise ...	3.000,00	EUR	1	3.000,00	testfile2.docx	<input type="checkbox"/>	0,00	3.000,00	N/A	<input type="checkbox"/>	
R1.3	<input type="checkbox"/> Equipment	0,00	EUR	1	0,00	testfile3.docx	<input type="checkbox"/>	0,00	0,00	N/A	<input type="checkbox"/>	
R1.4	<input checked="" type="checkbox"/> Infrastructure and ...	0,00	EUR	1	0,00		<input checked="" type="checkbox"/>	0,00	0,00	N/A	<input checked="" type="checkbox"/>	documentation missing

### 2.1. Add expenditure item to sample

- There are 2 ways an expenditure item can be added to a control sample:
  - manually - by switching the toggle button in the part of sample column
  - automatically - by Jems (in case of deduction or parking of an expenditure item)

### 2.2. Deduct an amount and select a typology of error

- For each expenditure item, the “Deducted amount” field is 0,00 by default and the controller can insert the amount to be deducted. In case the controller verifies an amount higher than the declared amount, the controller has to first include the figure and then add a minus (“-“) in the field “Deducted amount in Euro”. Deductions are always in Euro, as the conversion happened upon submission of the partner report.





Expenditure verification

Controllers can verify expenditure in this section and justify corrections. Corrections are always in Euro, the conversion happened upon submission of the partner report.

ID	Cost category	Conversion rate	Declared amount in EUR	Currency	Conversion rate	Declared amount in EUR	Attachments	Part of sample	Deducted amount in EUR	Certified amount in EUR	Typology of error
R1.1	<input checked="" type="checkbox"/> Staff costs	0,00	43.000,00	EUR	1	43.000,00	testfile1.docx	<input checked="" type="checkbox"/>	-500,00	43.500,00	Accounting/...
R1.2	<input type="checkbox"/> External expertise ...	0,00	3.000,00	EUR	1	3.000,00	testfile2.docx	<input type="checkbox"/>	0,00	3.000,00	N/A

- The certified amount is automatically calculated as the difference between declared amount in Euro and the deducted amount.
- Once a deduction is filled in, it is mandatory to also select a typology of error (drop-down menu) for the respective deduction.

Control Identification   Expenditure verification   Control communication   Control checklists   Overview and Finalize

Expenditure verification

Controllers can verify expenditure in this section and justify corrections. Corrections are always in Euro, the conversion happened upon submission of the partner report.

ID	Cost category	Conversion rate	Declared amount in EUR	Attachments	Part of sample	Deducted amount in EUR	Certified amount in EUR	Typology of error	Park item	Comment
R2.1	<input checked="" type="checkbox"/> Staff costs	4.4113	28.336,32	Test file.docx	<input checked="" type="checkbox"/>	532,00	27.804,32	* N/A	<input type="checkbox"/>	
R2.2	<input checked="" type="checkbox"/> Staff costs	4.4113	21.535,60	Test file 2.docx	<input checked="" type="checkbox"/>	0,00	21.535,60	N/A	<input type="checkbox"/>	

version happened upon submission of the partner report.

Part of sample	Deducted amount in EUR	Certified amount in EUR	Typology of error	Park item	Comment
<input checked="" type="checkbox"/>	532,00	27.804,32	N/A	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	0,00	21.535,60	Procurement rules breached	<input type="checkbox"/>	
<input type="checkbox"/>			Audit trail incomplete	<input type="checkbox"/>	
<input type="checkbox"/>			Simplified Cost Options wrongly appli...	<input type="checkbox"/>	
<input type="checkbox"/>			Ineligible expenditure	<input type="checkbox"/>	
<input type="checkbox"/>			Accounting/calculation errors	<input type="checkbox"/>	

- Flat rates are neither calculated, nor displayed in this section, but they are calculated and included in the financial overview tables in the “Overview and Finalize” section.

## 2.3. Park an expenditure item

- In case further clarification for an expenditure item is needed, the controller can park an expenditure item for later verification (i.e. in a later report) by switching on the toggle button in the park item column.
- Parked items are NOT deducted amounts!

Expenditure verification

Controllers can verify expenditure in this section and justify corrections. Corrections are always in Euro, the conversion happened upon submission of the partner report.

ID	Cost category	Conversion rate	Declared amount in EUR	Attachments	Part of sample	Deducted amount in EUR	Certified amount in EUR	Typology of error	Park item	Comment
R2.1	<input checked="" type="checkbox"/> Staff costs	4.4113	28.336,32	Test file.docx	<input checked="" type="checkbox"/>	0,00	0,00	N/A	<input checked="" type="checkbox"/>	
R2.2	<input checked="" type="checkbox"/> Staff costs	4.4113	21.535,60	Test file 2.docx	<input checked="" type="checkbox"/>	0,00	21.535,60	N/A	<input type="checkbox"/>	



- When parking, the expenditure item is locked and the deducted amount and certified amount are both automatically set to 0,00.

- Once the control work is finalized, the parked item will show up in next partner report, in the “Parked items list” of the “List of expenditure”. The project partner can then decide to either delete the parked expenditure item or to re-include it in a new partner report with or without modifications.

## 2.4. Add a comment

- The controller can add a comment in the text field under the comment column, either to justify a deduction or to provide other explanations.

Expenditure verification

Controllers can verify expenditure in this section and justify corrections. Corrections are always in Euro, the conversion happened upon submission of the partner report.

ID	Cost category	Inversion rate	Declared amount in EUR	Attachments	Part of sample	Deducted amount in EUR	Certified amount in EUR	Typology of error	Park item	Comment
R2.1	Staff costs	4.4113	28.336,32	Test file.docx	<input checked="" type="checkbox"/>	0,00	0,00	N/A	<input checked="" type="checkbox"/>	
R2.2	Staff costs	4.4113	21.535,60	Test file 2.docx	<input checked="" type="checkbox"/>	0,00	21.535,60	N/A	<input type="checkbox"/>	

## 3. Control communication

- This section is accessible to both controller(s) belonging to the control institutions assigned to a partner and also the partner user(s).
- This section can be used for clarification rounds during control since it allows to upload and download documents related to the control work.
- When a report is in status “Control ongoing”, both controller(s) and partner user(s) can:
  - Up and download any document
  - edit the description of own uploads
  - delete own uploaded files

Control Identification   Expenditure verification   **Control communication**   Control checklists   Overview and Finalize

Control communication

In this section both controller and partner user(s) can upload and download documents.  
This can be used for clarification rounds during control, if programme rules allow.  
Attention: Once control work is finished deletion or editing won't be possible anymore!

File name	Location	Upload date ↓	User	File size	Description	Actions
Test file.docx	Control document	24.08.2023 07:04	control_PL@jems.eu	12.1 kB		

Upload file

- Once a report is in status “Certified”, deletion of documents is disabled.

## 4. Control Checklist

- In this section, the checklists related to the control report can be created, filled in and finished. The following checklists are available:



- CONTROL CHECKLIST - part 1: obligatory
  - CONTROL CHECKLIST - part 2: obligatory
  - CONTROL CHECKLIST - part 3: obligatory
  - 5.b. Procurement Checklist (per contract): if more than one contract
  - 5.c. Procurement Checklist (per contract): if more than one contract
- When the report is in status “Control ongoing” or “Control reopened”, only controllers belonging to the control institution assigned to the partner have access to this section.
- The controller can:
  - edit only own checklist(s)
  - delete only own checklist(s) in status “Draft”
  - edit the description of any checklist
  - return any finished checklist to initiator (back to status “Draft” - only the controller who created the checklist can further edit it)
  - download any checklist
- Make sure that all required checklists are in place and finished when finalizing the control work.
- When the report is in status “Certified” (after control is finalized in section “Overview and Finalize”)
  - the entire section “Control Checklist” becomes visible in read-only mode to all users with access to the partner report (including project partner users)
  - checklists created before finalization of the control are locked for editing

#### 4.1. Create a new Checklist

- Select a checklist template form the drop-down menu and click the button “+ create new checklist”.

Control Report for: Partner report R.2

PP3 DREI, TEST project

Status Control ongoing

Switch to partner report

Control Identification

Expenditure verification

Control communication

Control checklists

Overview and Finalize

Control checklists

Controllers can start checklists in this section during ongoing control. Starting checklists after certification requires an additional privilege. All checklists will be visible read-only also to partners once control is Finalised.

CE - On-the-spot verification #TEMP\_ONTHESPOT#
 

CE - Compliance with info&publicity&other EU rules #TEMP\_COMPLIANCE#
 CE - Accounting system, VAT, Bank account and Audit trail #TEMP\_ACCOUNTING#
 CE - Eligibility along cost categories #TEMP\_ELIGIBILITY#
 CE - Procurement #TEMP\_PROCUREMENT#

+ create new checklist



- The checklist is in status “Draft” and can be filled in by the controller.
- REMEMBER to regularly SAVE filled-in information.

Dashboard / Applications / CE0100161 – TEST project / PP3 DREI / Partner report R.2 / Control report

### Control Report for: Partner report R.2

PP3 DREI, TEST project

Status: **Draft** [Switch to partner report](#)

Control Identification   Expenditure verification   Control communication   **Control checklists**   Overview and Finalize

CE - On-the-spot verification #TEMP\_ONTHESPOT#

- To go back to the control check list overview section, click on the tab “Control checklists”

Control Identification	Expenditure verification	Control communication	<b>Control checklists</b>	Overview and Finalize
<p>Control checklists</p> <p>Controllers can start checklists in this section during ongoing control. Starting checklists after certification requires an additional privilege. All checklists will be visible read-only also to partners once control is Finalised.</p> <p>Select checklist template <span>+ create new checklist</span></p>				
ID	Status	Name	User	Finished date   Description   Actions
1932	Draft	CE - On-the-spot verification #TEMP_ONTHESPOT#	control_PL@jems.eu	<a href="#">Edit</a> <a href="#">Download</a> <a href="#">Delete</a> <a href="#">Lock</a>

## 4.2. Finish checklist

- Once all information is filled in the checklist can be finished. To finish the checklist, click on “Finish checklist”

Control Identification   Expenditure verification   Control communication   **Control checklists**

Status: **Draft**

CE - On-the-spot verification #TEMP\_ONTHESPOT#

**Finish checklist**

2. On-the-spot verifications

- The information when and by whom a checklist was finalized is visible in the checklist overview table

<p>Control checklists</p> <p>Controllers can start checklists in this section during ongoing control. Starting checklists after certification requires an additional privilege. All checklists will be visible read-only also to partners once control is Finalised.</p> <p>Select checklist template <span>+ create new checklist</span></p>						
ID	Status	Name	User	Finished date	Description	Actions
1932	Finished	CE - On-the-spot verification #TEMP_ONTHESPOT#	control_PL@jems.eu	24.08.2023		<a href="#">Edit</a> <a href="#">Download</a> <a href="#">Delete</a> <a href="#">Lock</a>



### 4.3. Re-open a finished checklist

- A finished check list can be reopened by any controller of the assigned control institution. However, only the controller who created the checklist can amend information.
- Re-opening of a checklist is only possible as long as the control work was not yet finalized.

Control Identification   Expenditure verification   Control communication   Co

Status: **Finished** (since 24.08.2023)

CE - On-the-spot verification #TEMP\_ONTHESPOT#

[Return to checklist initiator control\\_PL@jems.eu](#)



2. On-the-spot verifications

## 5. Overview and Finalize

- This section refers to the control work done for the current partner report and provides the following overview tables:
  - Overview of control work
  - Overview of deductions
- The controller can fill-in further details about the control work
- The controller can generate PDFs of Control report and Control certificate
- The controller can finalize the control work

### 5.1. Overview of control work for the current report

- This overview table consists of amounts **only related to the current report** (there is no cumulative data in this table).

Control Identification	Expenditure verification	Control communication	Control checklists	Overview and Finalize		
Overview of control work for current report (In Euro)						
This is the summary of the control work only for current report. Flat rates are calculated on top of total eligible after control (with 2 decimals, rounded down) and Deducted amounts are calculated as difference of Total declared, Total eligible after control and Parked - thus any potential rounding differences will always go to Total deducted by control.						
Total declared by partner	Total included in control sample without flat rates added	% sampled from Total declared without flat rates	Total parked in current report 	Total deducted by control	Total eligible after control for current report	% Total eligible after control / Total declared by partner
69.820,68	49.871,92	100,00%	39.670,84	700,00	29.449,84	42,18%
 of which, flat rate: 19.948,76						

- **Total declared by partner** - is automatically transferred from the partner report and flat rates based on the settings in the AF are displayed in a separate row



- Total included in control sample - is summing up the declared amount in EUR of the expenditure items marked as part of sample in the “Expenditure verification” section. No flat rate is added on top!
- % sampled - displays percentage of sampled out of total declared (both without adding flat rates on top!)
- Total parked in current report - is summing up the declared amount in EUR of the expenditure items parked in the “Expenditure verification” section. Flat rates are added on top and calculated according to the partner budget rounding settings (2 decimals, rounded down)
- Total deducted by control - is calculated as difference of *Total declared by partner* minus *Total eligible after control* minus *Total parked in current report*. In this way, potential rounding differences (if any) will always go to *Total deducted by control* column.
- Total eligible after control - is summing up the certified amount in EUR of the expenditure items from the “Expenditure verification” section. Flat rates are added on top and calculated according to the partner budget rounding settings (2 decimals, rounded down)
- % total eligible after control - displays percentage of total eligible after control out of total declared (both including also flat rates).

## 5.2. Overview of control deduction for current report, by type of errors

- This table sums up deductions applied to this report from the Expenditure verification list and displays also related flat rates (in Flat rates row) calculated according to the partner budget rounding settings. Same calculation rules apply as used for deducted amounts in table above (chapter 5.1).

Overview of control deduction for current report, by type of errors (in Euro)

This is the summary of control deductions only for current report, broken down by type of errors. Flat rates are calculated only once on top of totals, as follows: Total declared - Total eligible after control - Parked.

Type of errors	Staff costs	Office and administrative	Travel and accommodation	External expertise and services	Equipment	Infrastructure and works	Lump sums	Unit costs	Other costs	Total
Procurement rules breached	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
Audit trail incomplete	500,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	500,00
Simplified Cost Options wrongly applied/calculated	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
Ineligible expenditure	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
Accounting/calculation errors	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
State aid rules breached	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
Non-compliance with sound financial management principle	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
Information and publicity measures breached	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
Environmental rules breached	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
Equal opportunities/non-discrimination rules breached	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
Other	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
Flat rates (if applicable)									200,00	200,00
<b>Total</b>	<b>500,00</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>	<b>200,00</b>	<b>700,00</b>

## 5.3. Timing

- The controller can fill in text in the input fields available in this section.
- The date for the end of control work is automatically filled in upon finalization of the control work.



#### 4.1 Timing

This is where you can insert clarifications which were sent during the control process

\* Start of control work  
23.8.2023



Date(s) of request(s) for clarifications, if applicable

Date of receipt of satisfactory answers, if applicable. In case of delay (time lapse between start and end date longer than 3 months), please provide a justification.

End of control work

### 5.4. Findings, Follow-up Measures and Conclusions

- In this section the controller can comment on findings and fill in recommendation and conclusion. Furthermore, the section displays follow-up measures from last certified report (on yellow background) and allows to define follow-up measures for the next partner report.

#### 5.a Description of findings, observations and limitations

A description of the types of errors found and a reasoning why it is an error. Also add: a clear specification of additional observations and reservations (if any), expressed about the eligibility of expenditure including the list of ineligible expenditure.

#### 5.b Follow-up measures from last certified report



There is nothing to be displayed from last certified report



Follow-up measures implemented in current report should be explained here.

#### 5.c Conclusions and recommendations

The conclusion takes into consideration the above-mentioned observations/reservations. It also describes the measures implemented to solve the errors detected and it eventually provides recommendations to avoid the repetition of the same types of errors in the future.

#### 5.d Follow-up measures for the next report

Follow-up measures to be implemented in the next report should be described in this section. If none, put n.a.



## 5.5. Generate Control Report and Control Certificate (pdf format)

- Before having finalized the control work, the controller can generate draft PDF exports by selecting the control export template.
- When the control work is finalized, the Control report & Certificate pdf is automatically generated by the system and can be downloaded. **Do not generate further pdf files once the control work was finalized!**

### Generate Control certificate & Report

The "Control report & Certificate" pdf can be generated by the controller as DRAFT version before the control work is finalized. Upon finalization of the control work, the FINAL "Control report & Certificate" pdf is automatically generated and can be downloaded. Please do not generate further pdf files once the control work was finalized.

Control export plugins  
Control report & Certificate - 1.0.3

Generate document

- Generated files are displayed in an overview list and can be downloaded anytime.
- A description of the file can be added (e.g., for marking a file as the final version)
- The date and user who generated the document is visible in the overview table.
- For the automatically generated file (upon finalizing the control work) add "FINAL" in the description field.
- No documents need to be uploaded as attachment.
- NOTE!** Generated pdf files cannot be deleted.

### Generate Control certificate & Report

Control certificate and Control report can be generated by controller both before and/or after control work is finalized. Generated certificate/report are listed in table below, can be downloaded, signed and uploaded.

Control export plugins

Generate document

File name	Location	Creation date ↓	User	File size	Description	Actions	Attachments
Control Report 4 - CE0100161 - LP1...	Control report	08.09.2023 09:09	Control_SI_HEAD@jems.eu	82.6 kB	FINAL		
Control Report 3 - CE0100161 - LP1...	Control report	07.09.2023 15:08	control_si@jems.eu	82.6 kB			
Control Report 2 - CE0100161 - LP1...	Control report	07.09.2023 14:50	Control_SI_HEAD@jems.eu	82.5 kB	Test A		

- In the PDFs generated, there is automatically displayed the status of control work when the document was generated (draft or finalized)

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Replace with your Programme Logo

### Control Certificate

Control Draft

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### Control Certificate

Control Finalised

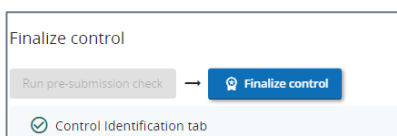
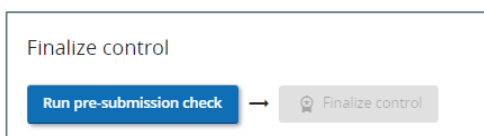




## 5.6. Finalize control work

- The finalization of the control work **must be done by the controller authorized to issue the control certificate**. The name of the controller who pressed the button “Finalize control” work will be displayed as **signatory** in the Control report and Certificate” pdf.

- To finalize the control work first run the pre-submission checks.
- Only once all pre-submission checks were successfully passed, the button “Finalize control” turns active and the control work can be finalized.



- Once control is finalized

- all sections of the control work become visible (in read-only mode) to all users who have access to the partner report.

- The control work as such is locked
- The end date of control is automatically filled in

4.1 Timing

This is where you can insert clarifications which were sent during the control process

Date of control work  
17.8.2023

Date(s) of request(s) for clarifications, if applicable  
01.08.2023  
TEST

Date of receipt of satisfactory answers, if applicable. In case of delay (time lapse between start and end date longer than 3 months), please provide a justification.  
10.08.2023  
new documents provided, TEST

End of control work  
24.8.2023

- The final control document (Control report & Certificate) is automatically generated (and should be marked as “FINAL” in the description field; see chapter 5.5)
- Control checklists can be downloaded as pdf in the control checklist section (see chapter 4)
- The status in the project report overview table updates and the date of finalization of the control work is displayed.

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Dashboard / Applications / CE0100161 - TEST project / LP1 EINS

Reporting Partner reports

LP1 EINS

ID	Status	Included in project...	AF version linked	Reporting period	Date of report...	Date of first submission	Last submission	Amount submitted	Control end date	Total eligible after control for current...	Control
R.1	Certified		2.0		05.05.2023 14:37	17.08.2023 05:58		6.210,00	24.08.2023 11:55	6.210,00	Go to controller work

Items per page: 25 1 - 1 of 1



## 5.7. Reopening of the control work

- Whenever control work is in status “Certified”, it can be reopened by the JS upon request.
- Upon reopening of a certified report, the report moves to status “Control reopened” and the controller is again allowed to edit the control work and to re-issue the control documents. However, the control checklist cannot be re-opened. If a checklist was wrongly filled in, a new checklist needs to be created and filled in by the controller.
- To amend information, go to the control work section.

The screenshot shows the Jems application interface. On the left is a sidebar with navigation options: Project overview, Reporting (selected), Partner reports, LP1 EINS, Contracting, Application form, and Export. The main content area is titled 'Reporting Partner reports' and shows a table for 'LP1 EINS'. The table has columns for ID, Status, Included in project report, AF version linked, Reporting period, Date of report creation, Date of first submission, Last submission, Amount submitted, Total eligible after control for current..., and Control. A single row is visible with ID 'R.1', Status 'Control reopened' (highlighted with a red box), and a 'Go to controller work' button (also highlighted with a red box) in the Control column.

ID	Status	Included in project report	AF version linked	Reporting period	Date of report creation	Date of first submission	Last submission	Amount submitted	Total eligible after control for current...	Control
R.1	Control reopened		2.0		05.05.2023 14:37	17.08.2023 05:58		6.210,00	6.210,00	Go to controller work