ERDF Beneficiary User Guide – EPPM

Version 0.7

March 2026

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1.   Introduction:

Welcome to the user guide for ERDF Beneficiary users of EPPM, the Public Service Bodies (PSB) wide project management solution and the designated IT system for ERDF. EPPM will be used to manage and monitor progress in the implementation of ERDF projects co-funded under the 2021-2027 programme in compliance with the Common Provision Regulations (CPR) (Regulation (EU) 2121/1060).

In addition to ERDF modules, while you may have access to project management functionality via this application, please note these are out of scope for this document which will focus solely on ERDF functionality.

The purpose of this guide is to support you in your role as a Beneficiary organisation in receipt of ERDF funding, to use this system and fulfil ERDF funding requirements including financial and progress reporting.

For the purposes of ERDF, a 2-step approval process is adopted at each stage in the ERDF cascade. A minimum of 2 users at the project beneficiary level will be required to complete and submit reports both financial and performance progress.

2.   User Access:

To gain access to the system you will need a valid user account. Currently there are two environments, the live environment which is used to manage projects in real time and the test environment, which is used for training and testing purposes, the same user account will give you access to both. In order to ensure tight control is maintained over the security of the data stored on this system, please do not share your log in details with anyone and ensure you follow best practice when using your login.

To request an ERDF user licence, please contact your IB or MA as appropriate providing the email address and name of the user.

Once your account is set up you can access both the Live and Test environments with the same login ID, however best practice suggests that you should not use the same password for both. If in the process of using EPPM, you no longer require access to ERDF functionality please inform your respective IB/ MA so that your license/ user account can be closed to help to maintain a secure system.

Glossary:

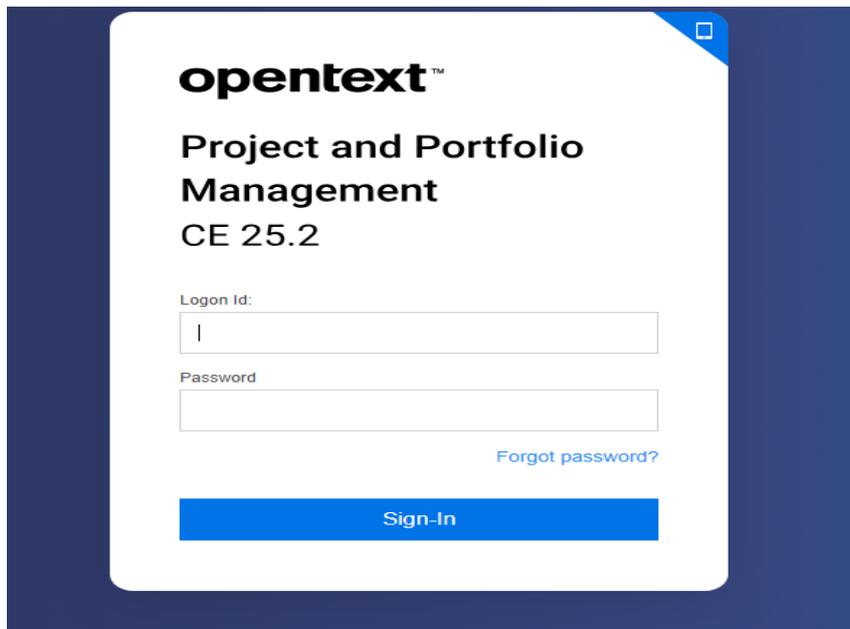|	
AF	**Accounting Function (AF)** is responsible for drawing up and submitting payment applications to the Commission and drawing up and submitting the accounts confirming completeness, accuracy and veracity of the accounts and keeping electronic records of all the elements of the accounts.
Beneficiary	**Beneficiary** refers to the body in receipt of ERDF funding and responsible for the implementation of an operation/project (the responsibilities of which are set out in Article 50 of the CPR and Grant Agreement).
CPR	**Common Provisions Regulation (CPR)** means the Common Provisions Regulation (EU) 2021/1060, which sets out a range of requirements with which ERDF Regional Programmes must be in compliance.
ERDF CPR Payment Declaration	**CPR Payment Declaration** refers to the reporting of incurred expenditure against project activity as outlined in the Grant Agreement.
ERDF CPR Project Performance Report	**CPR Project Performance Report** refers to the reporting of progress against set indicators to ensures targets are delivered over the lifetime of the project in line with the Grant Agreement.
ERDF	**The European Regional Development Fund (ERDF)** is one of the European Cohesion Policy Funds allocated by the European Union. ERDF is designed to strengthen economic, social and territorial cohesion across the regions in the European Union.
Dashboard	The EPPM **Dashboard** is the part of the landing page derived from the search and report functionality of EPPM through collation of all data relating to the projects. It displays information on your landing page, giving you an "at a glance" view of your project progress, highlighting items which may require your attention and allows you easy access to these pages.
IB	Where relevant, the **Intermediate Body (IB)** has overall responsibility for the management of activities co-funded by ERDF monies, management of beneficiary bodies and performance of checks on expenditure.
MA	**Managing Authority (MA)** means the body with overall responsibility for the implementation of a Regional Programme i.e. Southern Regional Assembly (SRA) for the Southern, Eastern and Midland Regional Programme or the Northern and Western Regional Assembly (NWRA) for the Northern and Western Regional Programme.
EPPM	**EPPM** means the Enterprise Project Portfolio Management system that has been selected as the core electronic data exchange system between ERDF programme authorities and beneficiaries.
Project	**Project** the activities to be undertaken by the Beneficiary in receipt of ERDF funding as detailed in the Beneficiary Grant Agreement. Each project will have its own unique project page on EPPM.
Project Manager	Access to projects on EPPM is determined by your role on the project. A **project manager** role in EPPM has a high level of functionalities in creating, viewing and editing projects and project details with which they are associated.
Scheme	The overall work programme which your project is assigned to i.e. Technology Gateways/ KT Boost/Innovators Initiative/Smart Regions/TU RISE/ARC HUBS/Warmer Homes/THRIVE.

SCO	Simplified Cost Option - these refer to any simplified cost options being utilised on the scheme. Simplified cost options can take the form of lump sums, flat rates, or unit costs.
Stakeholder	Access to projects on EPPM is determined by your role on the project. A **stakeholder** has particular rights in EPPM in terms of reporting activity against associated projects only. In the case of a beneficiary, your role will be assigned as stakeholder to your associated project(s).

Logging in:

2.1 To Log in to EPPM navigate to:

- Live System https://ppm-dper.saas.microfocus.com/itg/dashboard/app/portal/PageView.jsp
- Test System https://dper-preprod.ppm.saas.microfocus.com/itg/web/knta/global/Logon.jsp
- Once there you should be presented with the log-in screen.

Enter your username (this is always your email address) and password and click sign-in button.

Please note on first entry you may be prompted to change your password. Please follow the instructions given at that time.

Dashboard/Homepage:

*For example only, may vary depending on user role assigned.

EPPM functionality can be accessed by clicking on the links on the homepage or by selecting an option from the drop-down menu-bar. Both of these will be addressed throughout the manual.

2.2 Forgotten Password:

If you have forgotten your password, click on the forgot password button and you will be presented with the screen below which will allow you to create a new password linked to the email address you provided when registering.
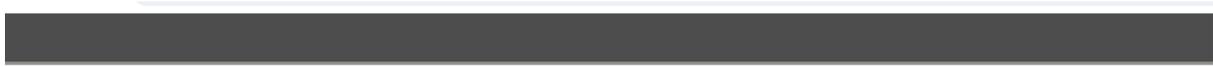
Forgot Password

Enter your Logon Id: and Email Address. A reset password link will be sent to your email address.

Logon Id::

Email Address:

Submit

Enter your ID (in this case your email address) and email address (in other words the same email address is entered twice) and click submit. You should then receive an email with a link to reset your password.

Hi Cian O'Carroll,

Click the following link to reset your PPM password:
https://ppmtest-dper.saas.microfocus.com/itg/web/knta/global/ResetPass.jsp?ottoken=8HKfT%26%60Y%60f%60%3C%3CPwF%7DuMpW3%24B+P%29bPF%7D7pKtl.x.F%3A76ieRanz9F7 24%40_V%29jsETQX%3Cr_-_%7C%60%3CJ%3C%3E_+70O%2BwwtNA16O%2C6D%28RAcI%29Z%7ByJ.S%26w3zYl.J5jxH+94F%28XlxbloN%3E_AC%7D%2B-V.Qq%26RBopQ*` 3AbIc4BIrW4%2B%7BjMUMW+yqDkTX9cv%7BH%3DEegA%2Foz&nls_language=AMERICAN

If the link does not work, copy and paste it into your web browser. For security purposes, this link will expire in 5 minutes.

Select your new password and return to the login page to proceed as normal. Once you have successfully logged in, you will be presented with your home page which will be appropriate to your user role i.e. Beneficiary User.

3 Creating an ERDF CPR Payment Declaration:

The purpose of this section is to provide guidance to you in your role as ERDF Beneficiary in creating and submitting a Financial Declaration of expenditure – referred to as an ERDF CPR Payment Declaration on the system. As noted in your Grant Agreement, Payment Declarations refer to the declarations of expenditure related to the project activity and will include submission of incurred and paid eligible expenditure items for the purposes of recouping ERDF. This will be done on a regular basis in agreement with your Scheme Manager.

3.1 Go to main dropdown menu and select - Create > Request > Other Types:

Select ERDF CPR Payment Declaration:

Once you have done this once you will see it as an option when you go to main dropdown menu and select - Create > Request > ERDF CPR Payment Declaration.
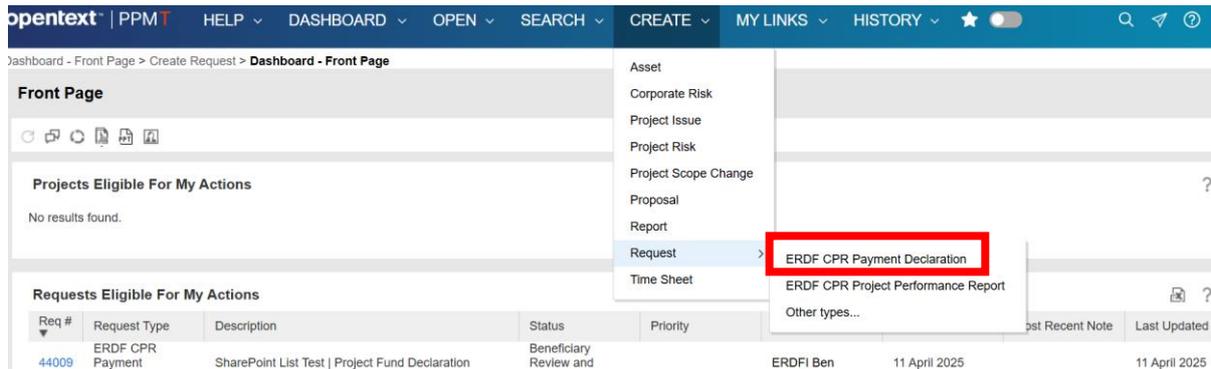
3.2 A new page will open to complete your Payment Declaration once selected. Select your project from the dropdown box by clicking on the text button to the right of the field.

Menu Selector – click to select from drop-down menu

3.3 On selecting your project, a number of fields will be pre-populated. Please check that all pre-populated fields are correct.

3.4 Detailed description. This is a free text field to allow users to provide a short narrative description of the expenditure included in the declaration. Your Scheme Manager will advise on what is expected here.

3.5 Date of Declaration is the date up to which you are claiming expenditure – all costs must have been incurred and paid by this date to be eligible for inclusion.

3.6 Enter the financial details of the amount of incurred eligible expenditure [1] being declared.

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[1] Total Eligible Expenditure TEE (real costs) refer to the Total Eligible Cost incurred and paid under ERDF eligibility rules that is included in this declaration period. It includes expenditure funded through public contribution plus private matching contribution (if any).
Total Public Eligible TPE (real costs) refer to the portion of the total eligible cost above that is funded through public contribution.

Total Eligible Expenditure – the total amount of the claim.
Total Eligible Expenditure (unit cost SCOs)
Total Eligible expenditure (lump sum SCOs)
Total Eligible Expenditure (flat rate SCOs) – these refer to any simplified cost options being utilised on the scheme. Simplified cost options can take the form of lump sums, flat rates, or unit costs. Submit the total figure being declared for SCOs in this declaration.

Total Public Eligible Expenditure – same figure as Total Eligible Expenditure.
Total Public Eligible Expenditure (unit cost SCOs)
Total Public Eligible Expenditure (lump sum SCOs)
Total Public Eligible Expenditure (flat rate SCOs) – same figure as Total Eligible Expenditure.

3.7 You will be required to upload relevant documentation in support of your incurred eligible expenditure; this is done on the Document Repository (SharePoint) system that is created when you create your Payment Declaration. Your Scheme Manager will advise you of appropriate documentation to be uploaded.

3.8 Upload the completed Declaration of Compliance that is required with each declaration by clicking on the add button and upload as normal. Please see appendix 1 for Template.

3.9 If you would like to add any additional comment to the declaration you can do so in the 'Notes' section at the bottom of the page. Please note that this can be viewed by all users with access to the project and in the ERDF cascade. Any notes are also subject to audit.

Total Eligible Expenditure TEE (flat rate SCO) and Total Public Eligible Expenditure TPE (flat rate SCO) refers to any expenditure based not on real costs but based on a flat rate or unit cost agreed for the scheme, e.g., overheads. (See your grant letter or check with your programme manager for confirmation).

3.10 All supporting documentation for the payment declaration will be uploaded to the Document Repository folders (steps below) however you can upload any additional supplementary documents/links/pictures etc. in the reference section if required. Only documents uploaded to the Document Repository folders will be considered as valid supporting documentation in respect of the expenditure declared. Anything included in the references section in EPPM will also be subject to audit.

3.11 Once all information has been added click the submit button on the top right of the screen. You have now created the ERDF CPR Payment Declaration to be submitted for approval.

3.12 Once submitted you will be presented with the confirmation screen that confirms the payment declaration has been created and is ready to review by the First Approver. In most cases this will be the same person that created the declaration but does not have to be.

3.13 The First Approver can access the declaration to review directly from the confirmation screen by clicking on the request number (top left corner). If the Creator is not the First Approver the form creator must advise the First Approver once the payment declaration is ready for review.

Request Creation Confirmed

The following request has been created and submitted:

Request #: 51690   Description: ARC Hub for The

3.14 If clicking straight back into the Payment Declaration after submitting, please note there will be a slight delay due to Document Repository folder specific to this Payment Declaration being created. Wait a few moments and if the page times out click refresh.

3.15 Uploading supporting documents for audit trail:

All expenditure declared will be subject to audit and will require a certain amount of supporting documentation to validate expenditure reported. Please see Appendix 2 for further details on this.

Each ERDF CPR Payment Declaration will have a unique Document Repository (SharePoint) folder created to facilitate upload and storing of supporting documentation in a secure manner. The creator of the Payment Declaration will have Read/Write access to the Document Repository (SharePoint) which means they can add documents, create folders etc.

3.16 To access the Document Repository folder, navigate to the Document Upload section:

Click on the Access 'Read & Write Doc Repository'

On first time accessing Document Repository and at other intervals you will be directed to the multi-factor authentication (MFA).

You will be asked to enter your email address and to enter a code that will be sent to your email address.

If you do not receive a code within a couple of minutes, please check your junk email in the first instance and if not there please contact your IT administrator to ensure no firewall is in place.

Please note that only those that are nominated authorised users will be granted access.

You will then be brought into the Payment Declaration Document Repository (SharePoint) folder where you can continue to upload documents until you submit to the next level in the cascade i.e. IB/MA.

Please note – You are required to upload all documents using the Folder Structure outlined below.

Unfortunately, there is no option for Beneficiaries to rename sub-folders. This is due to the unique design of SharePoint for ePPM, as once folders have been created (which beneficiaries are permitted to do) SharePoint will only permit initial naming to take place. Once a name is saved, it's no longer possible to rename it.

However, when payment declarations are in appropriate phase (e.g. beneficiary review, approval) Beneficiaries can create new sub-folders, copy or move contents of other folders to a new folder and if they wish, delete older folders.

- Rename folder 1 to **Declaration** – Save the payment claim excel or ledger into this folder.

- Rename folder 2 to **Audit Trail** – Open sub folders within this folder and name as below:
  - Sample No. 1 Audit Trail
  - Sample No. 2 Audit Trail
  - Continue as above for each audit trail
  - Staff Costs
  - WHT Audit Trail
  - Queries (Date)

- Rename folder 3 to **Procurement** - Open sub folders within this folder and name as below: (this data may also be stored in the Sharepoint folder linked to your project file on ePPM).
  - 1. Regulation 84 Report
  - 2. PIN, Contract Notice, RFT
  - 3. Clarification Questions and Answers
  - 4. Report on Opening of Tenders
  - 5. Qualification Reports on Candidates meeting Selection Criteria
  - 6. Evaluation of Tenders Report
  - 7. Acceptance by Senior Management of the Evaluation Team's Report
  - 8. Winning tender and SAQ
  - 9. Contract Award Notice
  - 10. Award and Regret Letters

- o 11. The Signed Contract
- o 12. Post-implementation review reports by third parties
- o 13. Record with supporting documentation for all Contract modifications
- o 14. Framework Agreements, all correspondence, including orders, relating to individual contracts drawdowns

3.17 The First Approver once satisfied the details entered are correct and the required supporting docs have been uploaded can click on the 'Approved' button on the top left of the page. Once the declaration has been submitted for approval you can no longer make any changes to the payment declaration. You will however retain your Read/Write access to the SharePoint folder.

3.18 As part of the two-step verification process, you must select a Second Approver with appropriate sign-off from within your organisation.

3.19 Once you have selected the Second Approver, click on the continue workflow action button (see image above). This will trigger a direct notification to the Approver's inbox that the declaration is ready for their review and approval.

3.20 The Second Approver now has the option to approve (approved button) or reject (Sent Back button) the payment declaration, both buttons can be found in the top left of the pages.

If approved, the payment declaration moves to the next level in the cascade (either IB or MA) for review. If rejected, it will be sent back to the initial approver to make necessary amendments. Once a rejected declaration has been amended and is ready for second approval, please follow the same steps outlined above.

3.21 Finding your Payment Declaration:

All payment declarations submitted against a project can be found summarised on the Project Details page. You will find them under the Summary tab and scroll down to the bottom of the page.

Payment Declarations

Preferences:
Project: ENTITY_INFO

Request No ▲	Declaration Name	Funding Source	Request Status	Doc Repository (R...	D
51273	ARC Hub for Therapeutics - TEST 20/11/25 | Project Fund Declaration	ERDF	Beneficiary Approval	Access Read Only Doc Repository	
51277	ARC Hub for Therapeutics - TEST 20/11/25 | Project Fund Declaration	ERDF	Review by IB	Access Read Only Doc Repository	
51278	ARC Hub for Therapeutics - TEST 20/11/25 | Project Fund Declaration	ERDF	Beneficiary Approval	Access Read Only Doc Repository	
51690	ARC Hub for Therapeutics - TEST 20/11/25 | Project Fund Declaration	ERDF	Beneficiary Approval	Access Read Only Doc Repository	

|< < Showing **1** to **4** > >|

Click on the appropriate request number.

3.22 Alternatively, you can navigate from the dropdown menu at the top of the page. Click Search > Request and click the menu box beside request type.

In the request type box type in ERDF and hit enter.

Select ERDF CPR Payment declaration from the dropdown menu as below.

You will then be presented with the list of payment declarations relevant to projects you are working on.

Request Search Results

Export to Excel

Save this search as: [_____] [Save]

Request Search Results

Req # ▼	Request Type	Description	Status	Assigned To
51690	ERDF CPR Payment Declaration	ARC Hub for Therapeutics - TEST 20/11/25 | Project Fund Declaration	Beneficiary Approval	Test BNF Research Ire 2
51493	ERDF CPR Payment Declaration	Ballaghaderreen Smartest Hub | Project Fund Declaration	Approve by MA	TEST MA_NWRA_1
51477	ERDF CPR Payment Declaration	ARC Hub for HealthTech | Project Fund Declaration	Beneficiary Review and Approval	

Click on the appropriate request number to select and access.

3.23 Check on the Status of your ERDF CPR Payment Declaration:

You can view the progress of the Payment Declaration at any time in the '**Status**' section at the very bottom of the page.

Seq	Workflow Step Name	Step Status	Completed By	Date
1	Beneficiary Review	Approved	El B erdf User 16	23 November 2023 15:18:06 GMT+01:00
▷ 2	Beneficiary Approval	Beneficiary Approval		23 November 2023 15:18:06 GMT+01:00
3	Review by IB			
4	Approval by IB			
5	Review by MA			
6	Approval by MA			
7	Ready for SFC			
8	Closed			

Graphical View | Approval Details | Transaction Details

33.1	Counter Reset
33.2	Counter Operations

Expand Steps   Collapse Steps   Graphical View   Approval Details   Transaction Details   Current

∨ References

To view **Approval Details**, click on the 'Approval Details' button. This will provide a summary of all approval actions up and down the cascade and list the user that actioned.

Approval Details - ERDF CPR Payment Declaration #51690

Request Status: Beneficiary Approval
Description: ARC Hub for Therapeutics - TEST 20/11/25 | Project Fund Declaration

Active Workflow Steps

3 - Beneficiary Approval Eligible since January 21, 2026; Only one user must decide (no deadline)

Decision Results	Approvers	Decision Date
[No Decision]	Test BNF Research Ire 2	
[No Decision]	Security Group: PPM Administrator	

Completed Workflow Steps

1 - CPR - PD - Doc Repository Operations SUCCESS; Only One user needed to decide

Decision Results	Approvers	Decision Date
SUCCESS	Test BNF Research Ire 1	January 21, 2026 03:13:37 PM GMT

2 - Beneficiary Review Approved; Only One user needed to decide

Decision Results	Approvers	Decision Date
Approved	Test BNF Research Ire 1	January 21, 2026 04:12:49 PM GMT

Additionally, the **graphical view** button can give you an overview of your payment declaration and its stage in the cascade.

4 Creating an ERDF CPR Project Performance Report:

Beneficiaries are required to routinely report on the progress of their project against pre-agreed output and performance indicators as outlined in the Grant Agreement/Letter of Offer. This is done via the project performance report on EPPM.

4.1 Go to main dropdown menu and select - Create > Request > Other Types:

To note once you have completed this action once you will be presented with this as a direct option to select under the create dropdown menu as outlined below:

Select ERDF CPR Project Performance Report from the menu:

20

Once you have done this once you will see it as an option when you go to main dropdown menu and select - Create > Request > ERDF CPR Project Performance Report.

You will then be presented with the Project Performance Report form to complete.

Rialtas na hÉireann
Government of Ireland

Arna chomhchistiú ag
an Aontas Eorpach

Co-funded by the
European Union

Tionól Réigiúnach
An Tuaiscirt & An Iarthair
Northern & Western
Regional Assembly

Tionól Réigiúnach
an Deiscirt
Southern Regional
Assembly

4.2 Select the project you are submitting the performance report against. Only projects you are working directly on will be available to select.

Once the project has been selected certain data fields associated with that project are automatically populated. Please check to make sure they are correct.

4.3 Once the project has been selected certain data fields associated with that project are automatically populated. Please check to make sure they are correct.

4.4 Select the reporting period to which this performance report relates. This is the point in time up to which you are reporting progress against.

4.5 Select the Intermediate Body. If there is no Intermediate Body, select None.

4.6 Click Submit on the top right-hand corner of the page to create the request and take you into the preparation stage.

4.7 Click the request number to be taken back into the performance report to complete.

Please be aware there will be a slight delay in this form being submitted as the Document Repository folders are being created to facilitate upload of supporting documentation. If the page times out, click refresh.

4.8 Complete the free text boxes in as much detail as possible to update on project progress for this reporting period. Your scheme manager will advise on what level of detail is expected here.

NB To ensure no loss of data hit save after completing the free text fields once completed and before moving on to selecting indicators to report against.

4.9 To report progress against the project targets as detailed in your Grant Agreement, select the relevant output and result indicators. You can select an **output indicator** by turning on the 'Edit Mode' button.

Click on the **"+ Add Row"** button to add a row.

Select the relvant output indicator ID from the dropdown box which appears. Please refer to your Grant Agreeement/Letter of Offer for further detail on indicators and targets.

4.10 Enter the total cumulative figure being reported against the selected output indicator. Please note that the output indicator figure being reported is the total cumulative figure since the start of the project i.e. the total progress against the target at that point in time.

You have the option to add a comment if applicable.

To add **results indicators** follow the same steps as outlined above.

4.11 Enterprise Data Reporting:

If you are reporting progress against output indicators RCO01, RCO04, RCO05 and/or results indicator RCR03 you must enter the validated details of the enterprises supported in the Enterprise Data section. To facilitate the volume of data required here the information can be imported/uploaded directly to PPM via an excel spreadsheet in a prescribed format. Please speak to your Scheme manager for further detail on this if unsure.

This structured template can be downloaded directly from EPPM. Go to the Enterprise Data section on the report, click edit mode "ON" and export to excel.

You can enter all the relevant data in this excel template. You will continue to update this spreadsheet over the lifetime of the project.

To report activity against an enterprise/SME in the enterprise data template the indicator's column should be populated with values of 0 or 1.

A value of 1 signifies that an engagement/support is being reported for that enterprise, whereas 0 indicates they have not.

Each engagement reported against an enterprise/SME must be unique i.e. they cannot be reported more than once against a particular indicator for the duration of the project. To ensure no duplication is reported the Company Registration Number (or equivalent) must be provided as the unique identifier. If for example the same Company Registration Number is entered in two or more rows reporting a value of "1", the total value will count as only 1. This ensures accurate reporting.

Please note that the enterprise data being reported is the total cumulative data since the start of the project i.e. the total list of engagements against the target at that point in time.

4.12   Uploading supporting documents for audit trail:

Progress reported will be subject to audit and will require a certain amount of supporting documentation to validate progress reported.

Each ERDF CPR Progress Performance Report will have a unique Document Repository folder created to facilitate upload and storing of supporting documentation.

The creator of the Performance Report will have Read/Write access to the Document Repository (SharePoint) which means they can add documents, create folders etc.

4.13   To access the Document Repository folder, navigate to the Document Upload section:

Click on the Access 'Read & Write Doc Repository'

On first time accessing Document Repository and at other intervals you will be directed to the 2-factor authentication.

You will be asked to enter your email address and to enter a code that will be sent to your email address.

If you do not receive a code within a couple of minutes, please check your junk email in the first instance and if not there please contact your IT administrator to ensure no firewall is in place.

Please note that only those that are nominated authorised users will be granted access.

You will then be brought into the Performance Report Document Repository (SharePoint) folder where you can continue to upload documents until you submit to the next level in the cascade i.e. IB/MA.

4.14 if you wish to add any additional notes to the progress performance report you can do so in the 'Notes' section at the bottom of the page. Please note this will be visible to all users associated with the project and in the ERDF cascade.

4.15 All supporting documentation for the performance report will be uploaded to the Document Repository folders. However, you can upload any additional supplementary documents in the reference section of EPPM if required. These will also be subject to audit.

4.16 Once all data has been entered click on the complete button at the top left of the screen. A new page will appear with the options Approved or Cancelled.

4.17 The First Approver, once satisfied the details entered are correct, can click on the approved button on the top left of the page. Once the performance report has been submitted for approval you can no longer make any changes to the report.

4.18 As part of the two-step approval process, you will now need to select the nominated Second Approver with relevant sign-off from within your organisation.

4.19 Select the nominated Second Approver from the list.

4.20 Click on the continue workflow action button. This will trigger a notification direct to the approver's inbox to action this report.

4.21 The Second Approver has the option to approve (approved button) or reject (sent back button) the project performance report. Both buttons found in the top left of the page.

If approved it will move to the next step in the cascade for review, IB level or MA where no IB exists. If rejected it will be sent back to the initial approver to make necessary amendments. The initial approver will receive an alert advising them the report has been rejected.

Once a rejected report has been amended and is ready for second approval, please follow the same steps outlined above.

4.22 Once the second approver has approved the report this will move to the Intermediate Body (or MA in the absence of an IB) for review and approval.

To check the status of your CPR Performance Report at any point you can access them from the Summary tab of the main Project Details page.

Alternatively, you can navigate from the dropdown menu at the top of the page.

Click Search > Request and click the menu box beside request type.

In the request type box select ERDF CPR Project Performance Report as below.

You will then be presented with the list of project performance reports relevant to your project.

Request Search Results

	Req # ▼	Request Type	Description	Status
☐	51695	ERDF CPR Project Performance Report	ARC Hub for Therapeutics - TEST 20/11/25 | Project Performance Report form December 2025	Beneficiary Approval
☐	51286	ERDF CPR Project Performance Report	ARC Hub for HealthTech | Project Performance Report form August 2025	Not Submitted
☐	51285	ERDF CPR Project Performance Report	ARC Hub for ICT - TEST 20-11-25 | Project Performance Report form December 2025	Beneficiary Review and Approval
☐	51284	ERDF CPR Project Performance Report	ARC Hub for ICT - TEST 20-11-25 | Project Performance Report form January 2026	Preparation
☐	51283	ERDF CPR Project Performance Report	ARC Hub for HealthTech | Project Performance Report form October 2025	Beneficiary Review and Approval
☐	51203	ERDF CPR Project Performance Report	ARC Hub for ICT - TEST 20-11-25 | Project Performance Report form October 2025	Review by IB

Check All   Clear All   Edit ▼

After selecting the ERDF CPR Project Performance Report, you can view progress at any time in the 'Status' section at the very bottom of the page.

Notes			
Status	∨ Status		
References	**Seq**	**Workflow Step Name**	**Step Status**	**Completed By**
	1	▬ CPR - PPR - Doc Repository Operations	Succeeded	Test BNF Resear
	1.1	Counter Reset	Succeeded (log)	Test BNF Resear
	1.2	Site Operation	Succeeded (log)	Test BNF Resear
	1.3	Counter Operations		
	1.4	Return from Subworkflow	Succeeded	Test BNF Resear
	2	Preparation	Complete	Test BNF Resear
	3	Beneficiary Review	Approved	Test BNF Resear
	▷ 4	Beneficiary Approval	Beneficiary Approval	
	5	Review by IB		
	6	Approval by IB		

To view Approval Details, click on the 'Approval Details' button.

Additionally, the graphical view button can give you an overview of your report and its approval stage in the cascade.
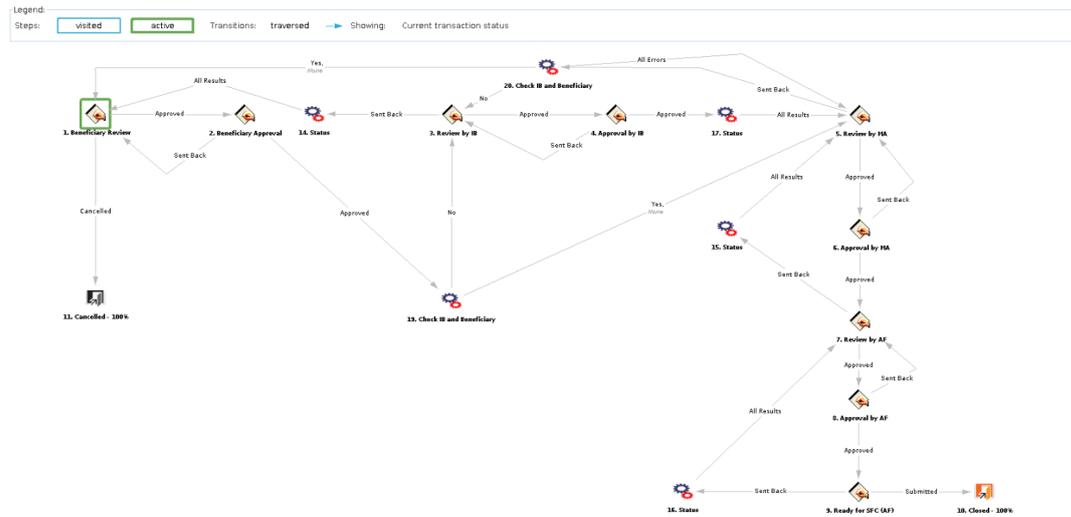
5 APPENDIX 1 Template Declaration of Compliance

Southern, Eastern & Midland Regional Programme 21-27

Beneficiary Declaration of Compliance

Project Name:	
Project No:	
Expenditure Period:	
Declaration Amount:	

We hereby declare that we have carried out the following checks on the expenditure in this declaration prior to its submission to the Intermediate Body/Managing Authority:

1. The expenditure relates fully to the eligible activities set out in the Grant Agreement for this project.
2. The expenditure has been incurred and paid within the eligibility period set out in the Grant Agreement.
3. The expenditure has not been and will not be presented for co-funding from any other European funding programme.
4. The expenditure has not been presented in a previous declaration of expenditure against this project.
5. The expenditure has been checked for duplication of invoices or salaries.
6. The expenditure can be supported with documentation to provide a full audit trail.

Signed by:

Signature:	
Name:	
Title:	
Date:	

Co-signed by:

Signature:	
Name:	
Title:	
Date:	

Southern, Eastern and Midland Regional Programme 2021-2027

Guidance Document

Submitting an ERDF Payment Declaration

Version Log:

Version:	Changes:	Date:	Changed By:	Summary
1.0	Draft only version.	21/03/2025	MEH	

Contents

1. List of Abbreviations:

AA	Audit Authority
AB	Approbation Body
AF	Accounting Function
Beneficiary	Recipient of the Funding
EPPM	Enterprise Project Portfolio Management system - core electronic data exchange system between ERDF Programme authorities
ERDF	European Regional Development Fund
EU	European Union
GBER	General Block Exemption Regulation
MA	Managing Authority
IB	Intermediate Body
MS	Member State
SCO	Simplified Cost Option

2. Legal Basis:

CPR Article 74 1. (a) states that *"the managing authority shall carry out management verifications to verify that the co-financed products and services have been delivered, that the operation complies with applicable law, the programme, and the conditions for support of the operation and:*

    (i)   Where costs are to be reimbursed pursuant to point (a) of Article 53 (1) that the amount of expenditure claimed by the beneficiaries in relation to these costs has been paid and that beneficiaries maintain separate accounting records or use appropriate accounting codes for all transactions relating to the operation:

    (ii)   Where costs are to be reimbursed pursuant to points (b), (c) and (d) of Article 52 (1) that the conditions for reimbursement of the expenditure to the beneficiary have been met."

Article 74.2. adds that the "*Management verification referred to in point (a) of the first subparagraph of paragraph 1 shall be risk-based and proportionate to the risks identified ex ante and in writing.*"

Recital 62 of the CPR states: "*To ensure an appropriate balance between the effective and efficient implementation of the Funds and the related administrative costs and burdens, the frequency, scope and coverage of management verifications should be based on a risk assessment that takes into account factors such as the number, type, size and content of operations implemented, the beneficiaries as well as the level of the risk identified by previous management verifications and audits. Management verifications should be proportionate to the risks resulting from that risk assessment and audits should be proportionate to the level of risk to the budget of the Union*".

3. Submitting a Claim on ePPM:

Please refer to ERDF ePPM User Guide.

4. Eligibility of Expenditure:

Beneficiaries should note that expenditure is only considered eligible if it is outlined within the Beneficiary Grant Agreement/Letter of Offer.

Beneficiaries should also be aware that this guidance is circulated to all beneficiaries funded under the various schemes in the Southern, Eastern and Midlands Regional Programme. Therefore, only some categories of expenditure, as outlined below, will be relevant to each beneficiary/scheme.

a) **General Principles:**

There is a hierarchy of eligibility rules applicable to expenditure made by Beneficiaries:

- ➢ The European level: EU regulations.

- ➢ The national level: national rules applicable the Member State.

- ➢ The programme level: specific rules decided for the SEM Regional Programme.

- ➢ The partner institutional level: internal rules applicable to each Beneficiary organisation.

This means that beneficiaries should first consider EU regulations when incurring expenditure. Where EU rules do not stipulate provisions then national/regional legislation applies. If neither the EU nor the national eligibility rules are relevant, then programme rules apply. Finally, the beneficiaries' internal rules should be followed if specific issues have not been covered by previous levels.

In the absence of rules established at EU or programme level or in areas that are not subject to precise regulation, national, or internal rules apply. To be eligible at beneficiary level, costs must:

- ➢ relate to activities planned in the grant agreement, be necessary for carrying out these activities as well as for achieving the project's objectives and be included in the estimated budget.

- ➢ be in accordance with the principles of sound financial management i.e., be reasonable, and justified.

- ➢ consistent with the usual internal rules of the partner, the EU, the programme, and national rules.

- ➢ be identifiable, verifiable, plausible, and determined in accordance with the applicable accounting principles.

➢ be incurred and paid by the beneficiary organisation, debited from its bank account within the claim period and/or no later than the project end date, be substantiated by proper evidence allowing identification and checking.

Should expenditure be reimbursed based on a lump sum or flat rate, the latter two principles do not apply.

b) Real Costs vs Simplified Cost Options:
- **Real Costs:**

To be eligible, real costs must:

➢ Relate to activities set out in the grant agreement, be necessary for carrying out these activities and for achieving the project's objectives and be included in the approved budget.

➢ be reasonable, justified, consistent with the partner's internal rules, the EU, the Programme, and national rules and be in accordance with the principles of sound financial management.

➢ not be financed by other EU funds.

➢ follow relevant competition and procurement rules.

➢ be identifiable, verifiable, plausible, and determined in accordance with relevant accounting principles.

➢ be incurred and paid by the beneficiary organisation, debited from its bank account after entry in force of the grant agreement and no later than the project end date.

➢ be substantiated by proper evidence allowing identification and checking.

- **Simplified Cost Options (SCO):**

Simplified cost options can take the form of lump sums, flat rates, or unit costs.

The key principles of simplified cost options are:

➢ beneficiaries do not need to provide justification of expenditure; they do not need to document that the expenditure has been incurred, or that the lump sum, or flat rates correspond to real costs.

➢ the flat rates are calculated on budgeted or reported on real cost expenditure.

➢ any correction on reported real cost expenditure will result in a corresponding correction of the flat rate.

➢ control checks focus on the correct reporting of real costs and verify that no expenditure related to the flat rates or lump sum is included in any other budget line.

- **Costs Categories/Budget Lines:**

The following section provides an overview of the eligibility principles for the different cost categories:

➢ Staff Costs.

➢ Travel and Subsistence.

➢ External Expertise.

➢ Equipment.

➢ Materials and Consumables.

➢ Capital Works. (to include Preliminaries, abnormal costs, capital contributions, investigation works, building works and other approved direct costs).

For each cost category/budget line, a definition is provided as well as guidance for reporting. Beneficiaries are invited to review this information carefully when preparing their ERDF claims.

5. Staff Costs:

Staff costs consist of costs for staff members employed directly by the beneficiary organisation and working on the implementation of the project. Staff costs relate to the costs of activities that the relevant partner would not carry out if the project was not undertaken. Staff costs can only be claimed for employees of the beneficiary organisation.

- **Key principles:**

Staff costs must be calculated individually for each employee. Staff costs are taken from the payroll accounts and cover the beneficiary's organisation's gross employment costs, which usually comprise the following:

➢ Salary payments (fixed in an employment/work contract).
➢ Other costs directly linked to salary payments (e.g., employment taxes or social security, including health coverage and pension contributions) that are set in an employment document or by law.

Where specified in the employment document, national or internal regulations and in accordance with the beneficiary organisation's personnel policy other costs e.g., bonuses, fuel, rental cars, relocation benefits, lunch vouchers can be fully or partly claimed after calculating the eligible share for the project. They must be directly linked to the salary payments and indicated on the payslip.

There are two cases for staff costs:

➢ A member of staff is employed by the beneficiary organisation and works full-time on the project.
➢ A member of staff is employed by the beneficiary organisation and works part time for the project.

It may occur that different people within the same beneficiary organisation work with varying time involvement in the same project. In both cases, timesheets are not needed and are replaced by a single document specifying the percentage of time to be worked on the project:

- ➢ For employees working full-time on the project, a work contract or other document specifying that 100% of their time is to be worked on the project.
- ➢ For employees assigned part-time to the project, it will be necessary to quantify this time assignment and determine a fixed percentage of the time worked on the project. A 'task assignment document' will be necessary, specifying this percentage.

It is possible to modify the amount of time spent on the project. Employees might shift from full-time to part-time, from part-time to full-time, or change part-time percentage. Such changes should only occur after the end of the reporting period in case roles and tasks change. The contract or task assignment document will need to be amended.

- • **Supporting documents for the expenditure declaration:**

The following documents must be uploaded on ePPM in line with the **selected sample** to justify the eligibility of the costs:

- ➢ an employment contract or any other equivalent legal agreement that identifies the employment relationship with the beneficiary's organisation.
- ➢ a document clearly showing the percentage of time worked on the project (it may be the employment contract and/or a task assignment document).
- ➢ a document identifying the real salary costs (gross salary and employer's social charges) for the employee, such as P35 report, pay slips or other accounting documents where the employment costs are clearly detectable.
- ➢ proof of payment.

Rialtas na hÉireann
Government of Ireland

Arna chomhchistiú ag
an Aontas Eorpach

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Tionól Réigiúnach
An Tuaiscirt & An Iarthair
Northern & Western
Regional Assembly

Tionól Réigiúnach
an Deiscirt
Southern Regional
Assembly

6. Travel and Subsistence:

This cost category concerns the travel and accommodation costs of staff employed by the beneficiary organisation only. Travel and accommodation expenses related to consultants, experts etc should be included under the 'external expertise' cost category. Beneficiaries are encouraged to consider their environmental impact when choosing the mode of transport.

- **Key principles:**

Expenditure on travel and, accommodation costs is limited to the following items:

- ➢ travel (such as tickets, travel and car insurance, fuel, car mileage in line with standard public sector rates, toll, parking fees).
- ➢ the cost of meals.
- ➢ accommodation costs.
- ➢ daily allowances.

Any item listed above and already covered by a daily allowance cannot be reported in addition to the daily allowance. Travel and accommodation costs must be borne by the beneficiary. Direct payments by an employee must be supported by proof of reimbursement from the employer. Beneficiaries must comply with the applicable national and/or internal rules.

Real costs and daily allowances must be in line with the specific national or internal rules applicable to the beneficiary.

- **Supporting documents for the list of expenditure:**

The following documents must be available for management verification purposes:

- ➢ Agendas (or similar) of meetings/ seminars/ conferences.
- ➢ Documents proving that the journey took place (boarding passes or participant lists etc.)
- ➢ Paid invoices (including hotel bills, transport tickets, etc.) and, if applicable, the employee's expense report with proof of reimbursement by the employer to the employee.
- ➢ Daily allowance claims (if applicable), including proof of reimbursement by the employer to the employee.

7. External Expertise:

External expertise and services costs include expenditure paid based on contracts or written agreements. These are paid against invoices or requests for reimbursement to external service providers who are subcontracted to carry out certain tasks/activities linked to the delivery of the project (e.g., studies and surveys).

Expenditure on external expertise and services, is limited to the following services and expertise provided by another organisation/service provider:

- studies or surveys or investigation works (e.g., evaluations, strategies, concept notes, design plans, handbooks).
- Training and capacity building.
- IT systems and website development, modifications, and updates.
- promotional items and activities.
- services related to the organisation and implementation of events or meetings (including rent, catering, or interpretation).
- participation in events (e.g., registration fees).
- legal consultancy and notaries' services, technical and financial expertise, other consultancy, and accountancy services.
- travel and accommodation for external experts, speakers, chairpersons of meetings and service providers.
- other specific expertise and services needed for operations (e.g., project management, architectural, quantity surveying, engineering, archaeological, conservation, safety and accessibility services).

- **Key principles:**

External expertise and services costs are connected to certain project tasks that cannot be carried out by the beneficiary themselves (mainly to bring in more expertise or capacity) and are therefore outsourced to external service providers. External service providers' work must be necessary for the project and should be linked to activities foreseen in the grant agreement.

All applicable EU, national/regional and internal competition rules must be respected. Even below EU thresholds, contracts with external providers must comply with the principles of transparency, non-discrimination, equal treatment, and effective competition.

- **Supporting documents for the list of expenditure:**

The following documents must be made available for control purposes:

- evidence of the selection process, in compliance with the applicable EU, national/regional and internal public procurement rules. Any modifications to the contract must comply with public procurement rules and must be documented.
- a contract or other written agreement of equivalent probative value laying down the services to be provided with a clear link to the project.
- an invoice or a request for reimbursement providing all relevant information in line with the applicable accountancy rules.
- proof of payment.
- outputs of the work of external experts or service deliverables.

- **Points of attention:**

- In-house work must be recorded on a real cost basis and reported in each relevant cost category, according to the nature of the service provided, as long as the reporting requirements applicable to the cost categories are fulfilled.
- In some cases, a service could be considered 'in-house' if the organisation providing the service is affiliated with the beneficiary (i.e., a different legal entity but in a specific context

as defined by the Court of Auditors). The external expertise and services cost category should then be used.

➤ Non-compliance with EU visibility rules and failure to acknowledge financial support from the Southern Eastern & Midlands Regional Programme can lead to payments being temporarily withheld until compliance is considered satisfactory. Continued failure to comply with EU visibility rules will eventually lead to a cut of up to 3% of the financial support provided by the Programme to the project.

8. Equipment: (same principles will apply for Materials and Consumables):

Equipment includes expenditure on equipment purchased, rented, or leased by a beneficiary, and necessary to achieving the project's objectives. This includes the costs of equipment already owned by the partner organisation and used to carry out project activities.

Expenditure on equipment, is limited to the following items:

➤ office equipment.
➤ IT hardware and software.
➤ furniture and fittings.
➤ laboratory equipment.
➤ machines and instruments.
➤ tools or devices.
➤ other specific equipment needed for operations.

- **Key principles:**

Equipment items can only be funded by the Programme if no other EU funds have contributed towards their financing. All equipment must be purchased in line with procurement rules.

When reporting expenditure on equipment, the following points should be considered:

➤ If the equipment is used solely for the purpose of the project, will be fully depreciated before the end date of the project, and was purchased and paid for within the eligible period, the full purchase cost should be reported.
➤ If the equipment was purchased before the project was approved, a pro-rata depreciation will be applied. Only the value of the depreciation incurred during the project timeframe is eligible.
➤ If the equipment is purchased during the project lifetime but the depreciation plan is longer than the project duration, a pro-rata depreciation will be applied.
➤ Only the value of the depreciation incurred during the project timeframe is eligible. For example, a project buys a machine that has a depreciation period of 5 years. The machine is bought when the project will run for another 24 months. Therefore, only 2/5 of the purchase price of the machine is eligible. This is assuming that the machine is used 100% for the project.
➤ If non-depreciable equipment (e.g., low-value asset) is purchased, the full purchase cost of the equipment should be reported where the equipment is used 100% on the project.
➤ If the equipment is rented or leased, depreciation does not apply, i.e., full cost is reported where the equipment is used 100% on the project.

- If the equipment is purchased by the partner organisation, but is only partially used for the project, only the share related to use for the project may be reported. This share must be calculated according to a justified and equitable method in line with legislation or the beneficiaries' general accounting policy.
- If the equipment represents a core component of and is essential to the project investment e.g., the purchase of a laboratory machine for the purpose of research activities in the project, or the purchase of fixed assets necessary for infrastructure), then the full cost of the item can be reported (in the equipment cost category). Durability requirements after the project end may apply.

- **Supporting documents for the list of expenditure:**

- evidence of compliance with the applicable EU, national and internal procurement rules.
- invoices (or a supporting document with equivalent probative value in the case of depreciation) providing all relevant information in line with the applicable accountancy rules
- documents presenting depreciation calculations in compliance with the applicable national schemes
- proof of payment.

- **Points of attention:**

- Beneficiaries are encouraged to also consider the environmental impact when it comes to purchasing equipment (e.g., purchase of recycled or recyclable equipment or lease of equipment).
- Equipment rental: any equipment necessary for the implementation of project activities needs to be budgeted and reported in this cost category. Rental costs for equipment do not fall under the cost category 'external expertise'.
- Second-hand equipment: the costs may be eligible under the following conditions:
  - no other assistance has been received for it from EU subsidies;
  - the price does not exceed the generally accepted market price;
  - the technical characteristics are in line with project needs and comply with applicable norms and standards.

9. Capital and Infrastructure:

The 'infrastructure and works' cost category, covers costs limited to the following:

- Building Permits.
- Building Material.
- Labour.
- Specialised interventions (such as soil remediation, mine-clearing).
- Preliminaries.
- Abnormal costs.
- Capital Contributions.

- ➢ Investigation Works.
- ➢ Building works.
- ➢ Other approved direct costs.

A project including an investment in infrastructure will have to comply with the durability requirements after the project end.

- • **Key principles:**
- ➢ The full cost of infrastructure and construction works can be reported under this cost category insofar as it is fully justified as part of the project's activities (no depreciation will be applied).
- ➢ Costs of feasibility studies, environmental impact assessments, architectural or engineering activities and any other expertise needed for the realisation of the infrastructure, shall be allocated under the cost categories 'Staff costs' or 'External expertise and services' (depending on whether carried out internally by the beneficiary with the support of external suppliers).

- • **Supporting documents for the list of expenditure:**

- ➢ Evidence of compliance with the applicable EU, national/regional and internal procurement rules.
- ➢ Documents pertaining to the work may be required. This may include feasibility studies, environmental impact assessment reports and planning permission documents.
- ➢ Documents specifying the ownership of land and/or real estate where the works are carried out, as well as proof of commitment to establish and maintain an inventory of all fixed assets acquired, built, or improved with the support of the ERDF grant.
- ➢ Invoices (or a supporting document with equivalent probative value) providing all relevant information in line with the applicable accountancy rules.
- ➢ Proof of payment
- ➢ Proof of existence of the infrastructure and/or works carried out.

7 APPENDIX 3– ePPM and Communications:

Dissemination, communications, and public engagement are important means of demonstrating the value of publicly funded investment in research and can be key enablers for generating awareness, stakeholder engagement, collaboration, and impact. As all schemes are co-funded by the ERDF under the Southern, Eastern & Midland Regional Programme 2021–27, all communication materials and activities must adhere to ERDF Communications Compliance Guidelines and Operational Regulations.

All beneficiaries across schemes should upload evidence that clearly demonstrates how they have undertaken communications activity to promote their project and disseminate information to a wider audience, in line with ERDF communications guidance. The key principle is that the evidence should be sufficient to show *what activity took place, when it took place, and how ERDF support was acknowledged.*

To help with organisation and audit readiness, beneficiaries may find it useful to create a folder per type of communications activity. This also allows easier cross-referencing in progress claims or reports where required. The folder structure is at the beneficiary's discretion, but the following suggestions may act as a guide. Items marked with an * indicate evidence we know auditors will routinely look for.

- Plaque/Signage* (*photos of permanent plaques or posters in place, records of approval/signoff*)
- Website* (*screenshots of relevant webpages that show EU co-funding acknowledgement and project description, screenshots at various dates to show ongoing compliance, URLs*)
- Social media* (*screenshots of sample of posts referencing the project with dates visible, evidence of reach or engagement if available*)
- Events (*photos showing EU co funding visibility, agendas, invites, programmes etc*)
- Press releases/Media coverage* (*press releases issued, links or screenshots to published articles, news items*)
- Videos
- Merchandise
- Case Studies/Success Stories
- Newsletters
- Presentations Slides
- Marketing Campaigns/Advertising

Overall, the aim is to provide a clear audit trail that demonstrates compliance with ERDF communications requirements and shows that appropriate steps have been taken to publicise the project and funding support.

Beneficiaries should upload this data to the Sharepoint linked to their project on ePPM. Your project page should appear as follows on ePPM:

Then click on the Details tab, which should bring you to the following page:

On the left-hand side, click on document upload:
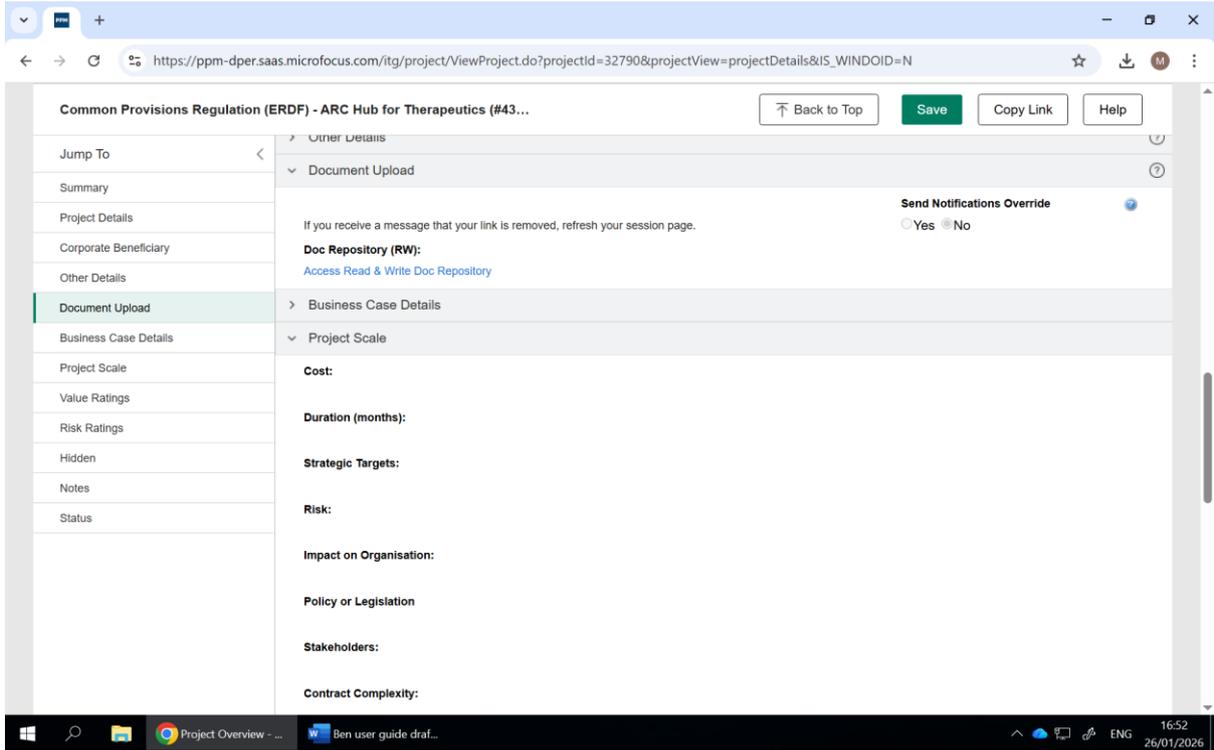
On this page, please click on the Access Read & Write Doc Repository. This will bring you to the Sharepoint for your project. You will have to enter your email when prompted to get your access code.
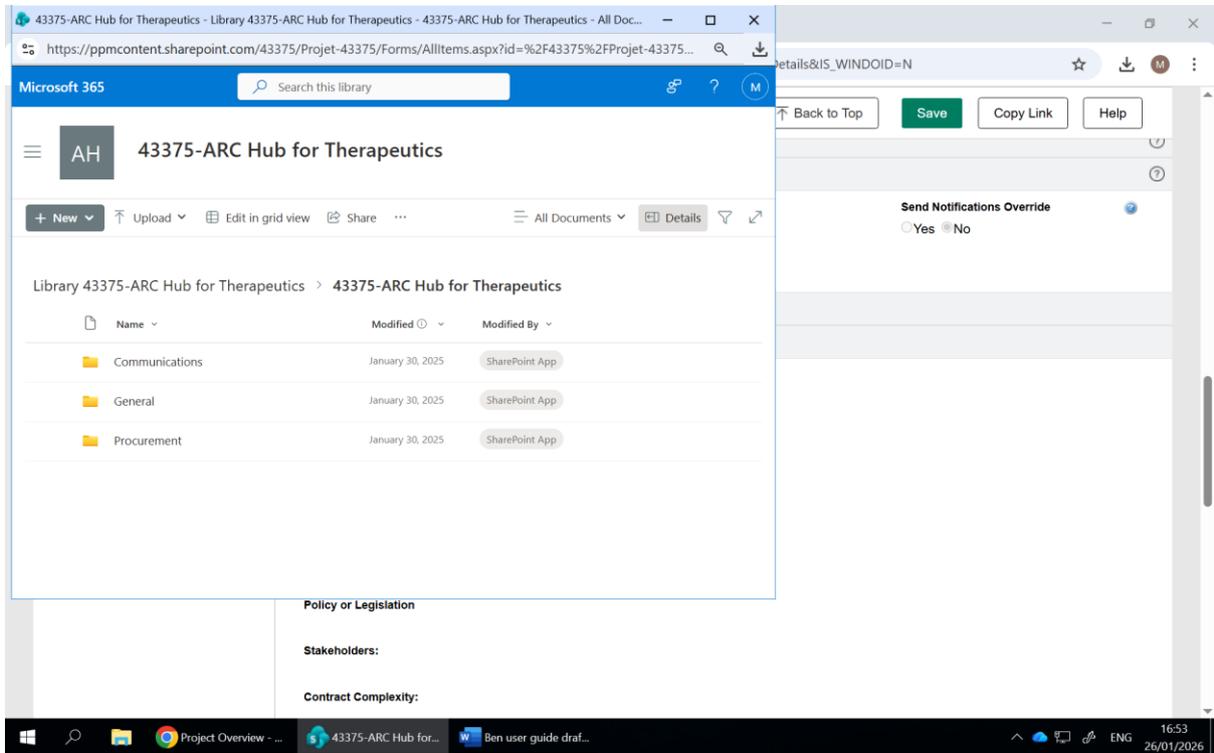
You can the upload your Communications supporting documentation to the Communications folder.