



European
Commission

User's Guide of the Unique Registration Facility (URF) and Participant Portal

2017

EUROPEAN COMMISSION

Directorate-General for Education and Culture
Directorate B - Youth, Education and Erasmus+
Unit B.4 - Erasmus+ Coordination

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B-1049 Brussels*

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User's Guide of the Unique Registration Facility (URF) and Participant Portal

2017

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What is organisation registration?

To participate in proposals and projects, you must register your organisation first. After registration, a unique identifier is assigned to your organisation. This is the 9-digit PIC (Participant Identification Code) number that will be used as a reference by the Commission in any future interactions.

A single registration is required for each organisation in the system. The use of a PIC for each organisation helps to avoid misuse of funds by non-reliable parties and facilitates the effort to keep participant-related information up-to-date.

Please keep the legal data of the organisation and programme related information at hand. You can check the information you will need for the registration in the documentation of the call for proposals. Please note that you have to register your organisation before submitting a project application.

You can pause the registration process at any time and continue it later. The system automatically saves your draft registration and will keep it until you complete it or for up to one year after its last edit.

Access to URF is found here -
<http://ec.europa.eu/education/participants/portal/desktop/en/home.html>

If you are a new user, you must create an **EU Login** account before registering. You will find details on the **URF** website.

How to register an organisation

The registration procedure is performed in the URF Registration Wizard – a step-by-step, user-friendly tool for entry of all the information required for an organisation to be registered. The URF Registration Wizard is invoked from the Participant Portal page when a new registration is started or when a draft (partially completed and saved) registration is resumed. The URF Registration Wizard displays any possible duplicate organisations during the registration process.

How will the organisation be validated - Centralised or Decentralised?

All organisations for Creative Europe, Erasmus+, Europe for Citizens and EU Aid Volunteers, once they register their organisations, may use the PIC to submit their application. Depending on which agency is handing their application request,

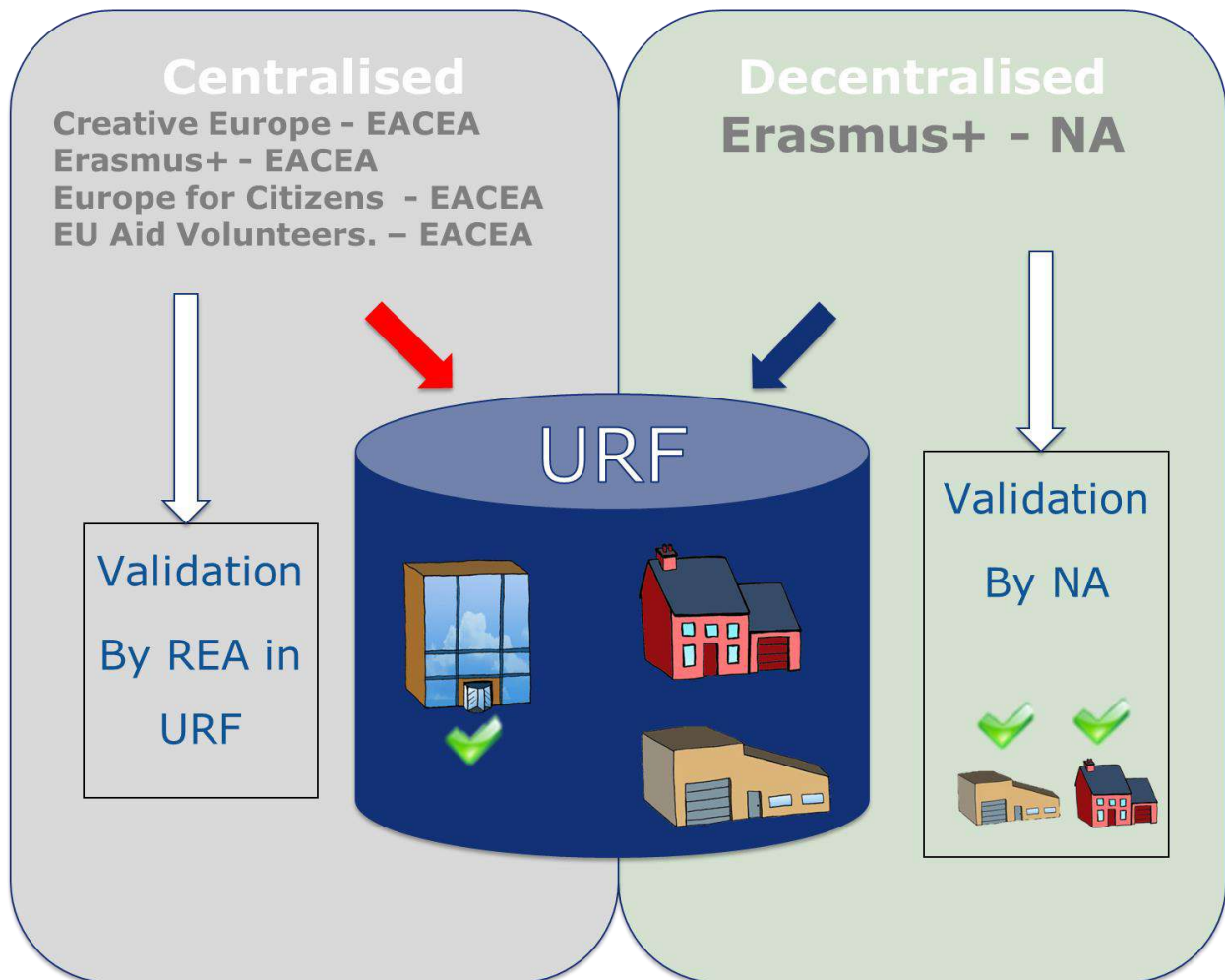
- Centralised: the organisation may be validated in URF (validation by REA (Research Executive Agency), in Brussels).

Or

- Decentralised: will be validated in the National Agency project management system, in the different participating countries of the programme (validation by National Agency).

If an organisation applies for a HE accreditation, the organisation will not go through centralised validation, unless it goes forwards and applies for a grant request managed by EACEA (Education, Audiovisual and Culture Executive Agency), in Brussels.

If an organisation applies for VET, EVS and HE mobility consortia accreditation, the organisation will go through validation in the National Agency project management system.



Differences between Centralised and Decentralised during registration process

If your organisation is selected for the projects managed by EACEA (centralised projects) then your organisation will need to pass a Legal Entity validation, nominate a LEAR and your organisation will have to provide supporting legal documents. In that case, the mandatory fields for the LEAR need to be filled.

The mandatory fields for the LEAR (Legal Entity Appointed Representative) contact details do not have to be completed if you are submitting your application for an Erasmus+ project to a National Agency (decentralised projects).

To know if the form specific to each project is to be submitted to the National Agencies (specific for decentralised Actions) or to the Executive Agency (specific for centralised

Actions), see in the Programme Guide – section **General Eligibility Criteria** – point **Where to Apply** for each **Action**.

How to register an organisation

This section explains how to register an organisation in URF.

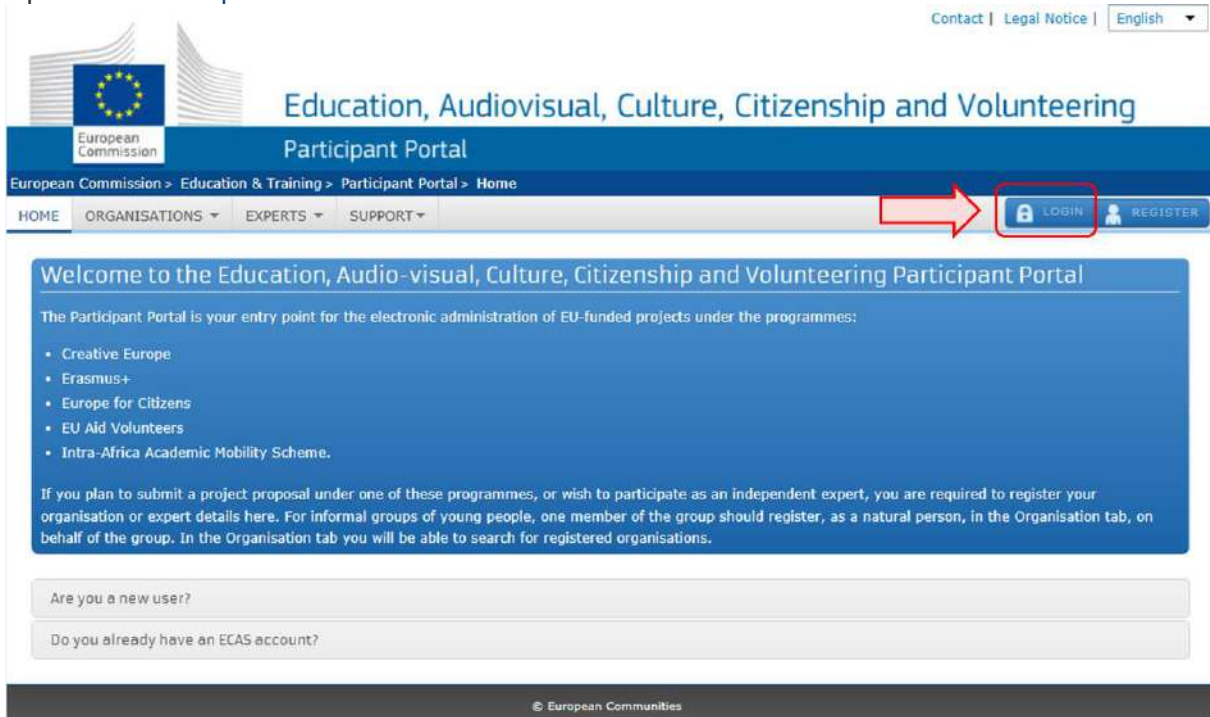
Quick steps

- 1 Login to URF using your EU Login (previously ECAS) account
- 2 Sign in to "EU Login" (previously ECAS) account
- 3 Register for an EU Login account if you don't have one
 - 3.1 Click the "Create an account" hyperlink
- 4 Register your organisation
 - 4.1 Go to "Organisations" and then select "Register".
 - 4.2 Click on "Register Organisation".
 - 4.3 Click on "Next".
 - 4.4 Fill in the organisation's "Identification" details and click on "Next".
 - 4.5 Complete the "Organisation" details.
 - 4.6 Fill in "Contact" details and click on "Next".
 - 4.7 Review the summary of details entered.
 - 4.8 The 9 digit Participant Identification Code (PIC) is displayed.

Detailed steps

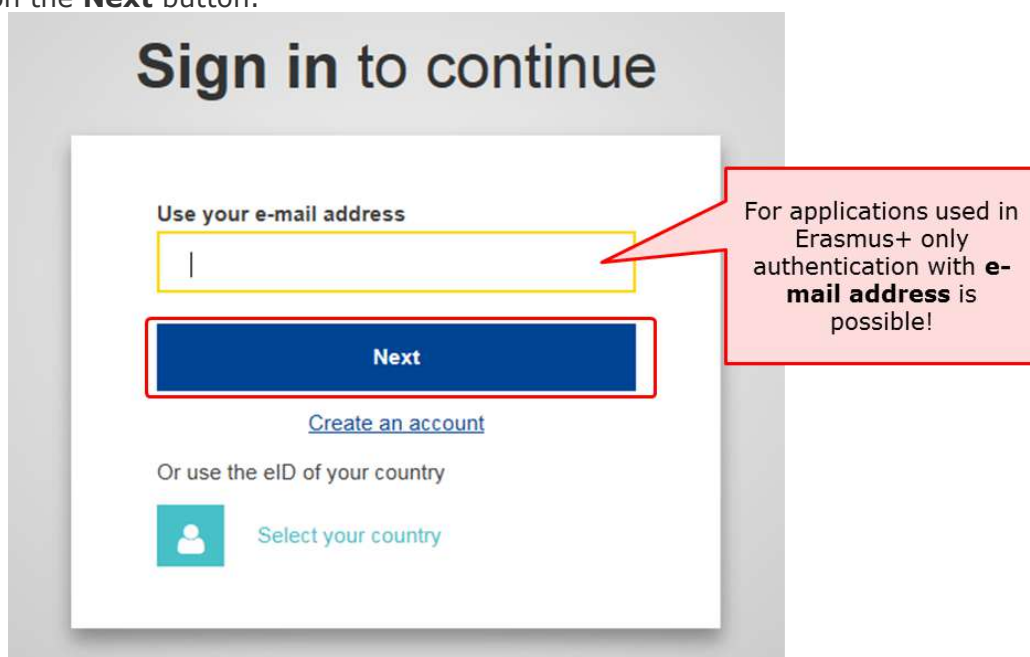
Login to URF using your EU Login (previously ECAS) account

Open the Participant Portal and click on **LOGIN**.



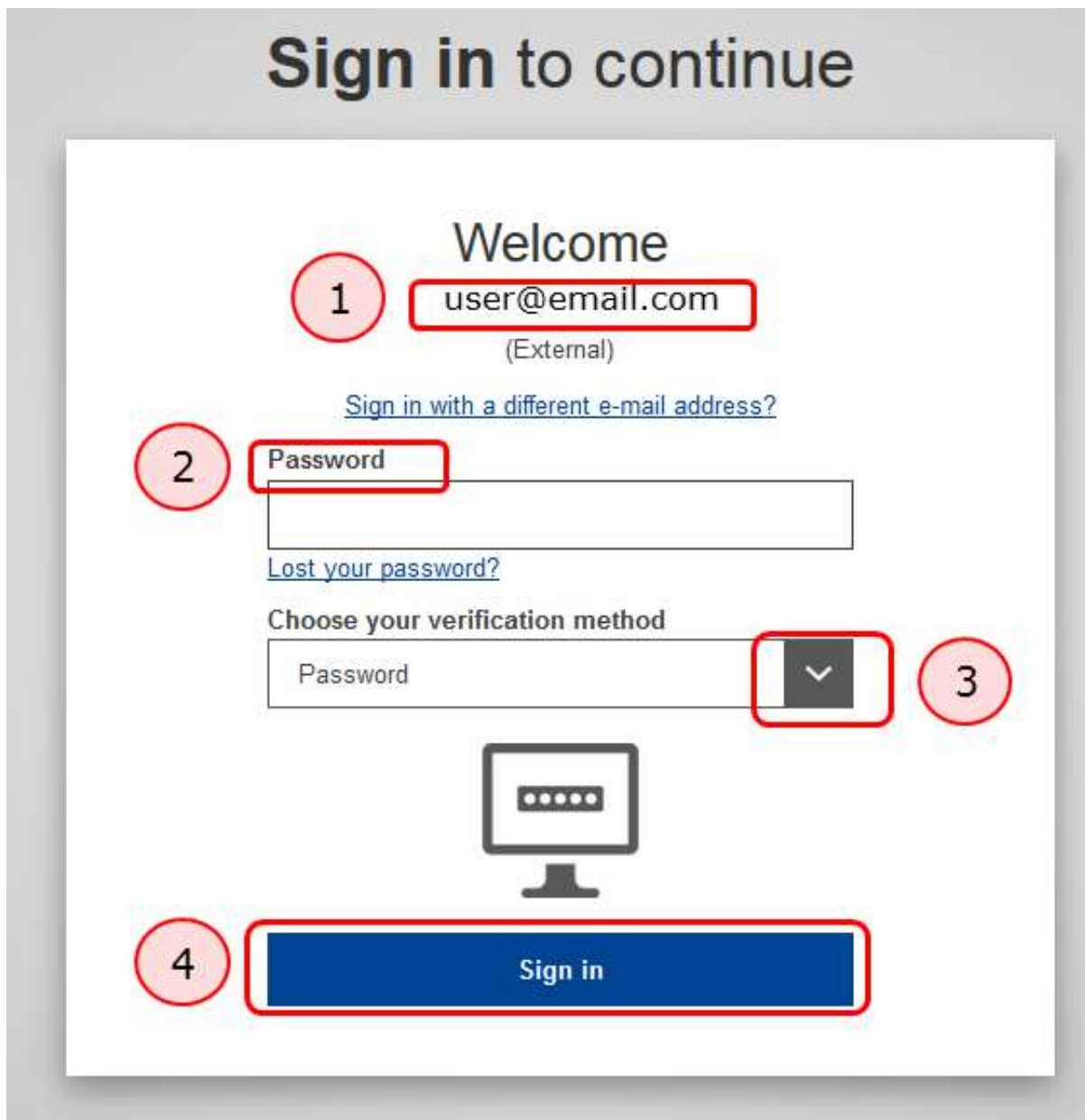
Sign in to "EU Login" (previously ECAS) account

Enter your institution's e-mail address in order to sign in. This must be the same e-mail address provided by you while creating your EU Login (previously ECAS) account. The message informing you of your access is sent to this address. After entering the e-mail, click on the **Next** button.



Once clicking on **Next**, a new screen will be displayed:

1. You will see your e-mail address displayed on the screen.
2. Enter your **password**.
3. You can choose a different **Verification method**. The EU Login allows a verification mechanism based on multi-factors (i.e. Mobile phone + SMS, Token, EU Login or ECAS Mobile App). Make sure you have added the devices to your account if you wish to use an alternative authentication than e-mail.
4. After entering your password, click on the **Sign in** button.



The screenshot shows a login interface titled "Sign in to continue". At the top, it says "Welcome" followed by the email address "user@email.com" (External), which is circled with a red "1". Below this is a link: "Sign in with a different e-mail address?". The password field is circled with a red "2". Below the password field is a link: "Lost your password?". The "Choose your verification method" section has a dropdown menu with "Password" selected, circled with a red "3". At the bottom, there is a blue "Sign in" button circled with a red "4". A computer monitor icon is centered below the verification method dropdown.

Register for an EU Login account if you don't have one

Click the "Create an account" hyperlink

In order to create a new account, click on the **Create an account** hyperlink. If you already have an ECAS account, you don't have to create a new EU Login account. In EU Login, your credentials and personal data remain unchanged. You can still access

the same services and applications as before. You just need to use your e-mail address for logging in.



This website uses cookies. Learn more about the [European Commission's cookie policy](#) Close this message

EU login - One account, many EU services Where is ECAS? English (en)

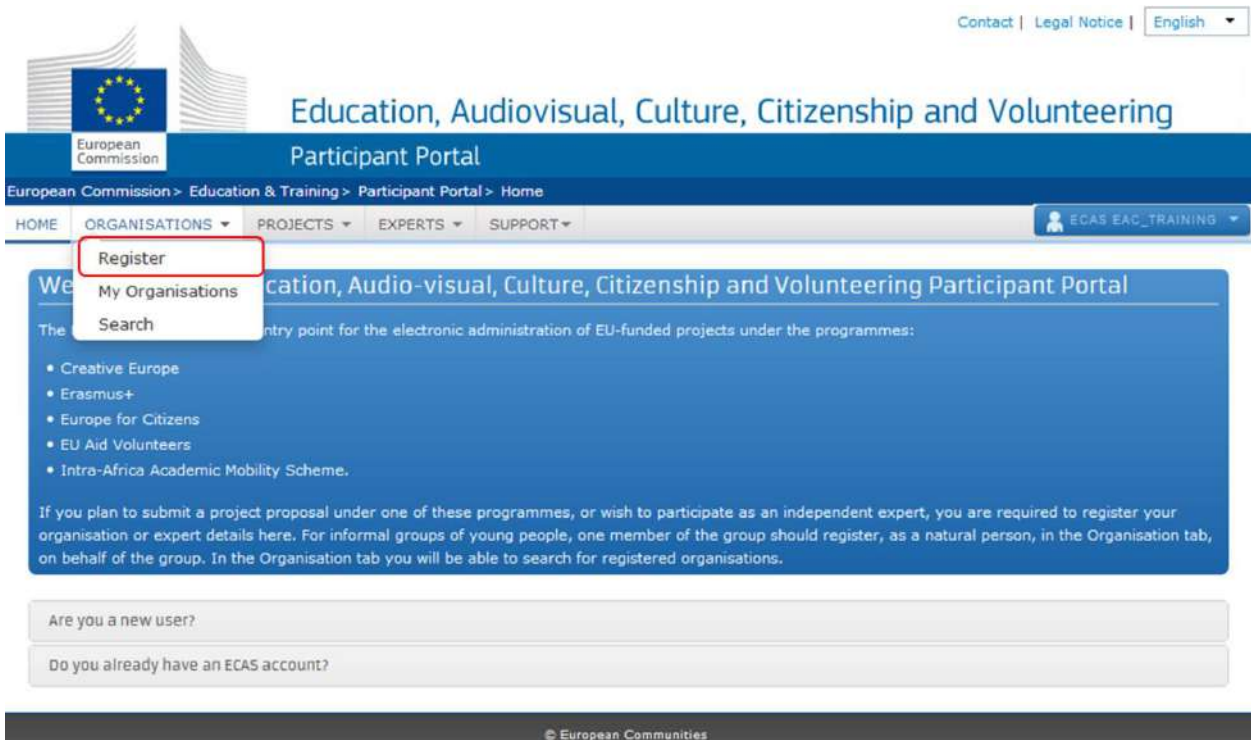
Sign in to continue

Use your e-mail address

Register your organisation

Go to "Organisations" and then select "Register".

Once you have logged-in, click on **Register** in the **ORGANISATIONS** drop-down menu in order to register your organisation.



Contact | Legal Notice | English

Education, Audiovisual, Culture, Citizenship and Volunteering Participant Portal

European Commission > Education & Training > Participant Portal > Home

HOME ORGANISATIONS PROJECTS EXPERTS SUPPORT ECAS EAC TRAINING

Register

My Organisations

Search

We are the entry point for the electronic administration of EU-funded projects under the programmes:

- Creative Europe
- Erasmus+
- Europe for Citizens
- EU Aid Volunteers
- Intra-Africa Academic Mobility Scheme.

If you plan to submit a project proposal under one of these programmes, or wish to participate as an independent expert, you are required to register your organisation or expert details here. For informal groups of young people, one member of the group should register, as a natural person, in the Organisation tab, on behalf of the group. In the Organisation tab you will be able to search for registered organisations.

Are you a new user?

Do you already have an ECAS account?

© European Communities

Click on "Register Organisation".

Click on **REGISTER ORGANISATION** in order to proceed with the registration.

Register an Organisation

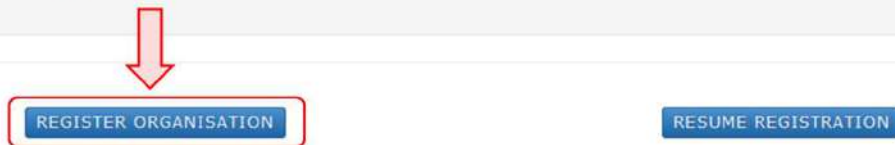
To participate in proposals and projects, you must register your organisation first.

After registration, a unique identifier is assigned to your organisation

This is the 9-digit **PIC (Participant Identification Code) number** that will be used as a reference by the Commission in any future interactions. A **single registration** is required for each organisation in the system.

Please keep the legal data of the organisation and programme related information at hand. You can check the information you will need for the registration in the documentation of the call for proposals. Please note that you have to register your organisation before submitting a project application.

You can pause the registration process at any time and continue it later. The system automatically saves your draft registration and will keep it until you complete it or for up to one year after its last edit.



Click on "Next".

A new window tab opens displaying a **Welcome** message and brief explanation of the registration process.

Click on **Next >** at the bottom right of the screen in order to start the registration or in order to continue your existing registration.

Note that you can pause the registration process at any time and continue it later.

The system automatically saves your draft registration and will keep it until you complete it or for up to one year after its last edit.



Education and training

Participant portal - Beneficiary registration

European Commission > Education And Training > Participant Portal > Beneficiary Register

Welcome

Identification

Organisation

Contact

Summary

Success

Welcome to the Beneficiary's Register

The Registration Wizard will guide you through the process of registration.

✓ Please keep the basic legal information (Registration extract, VAT data) of the organisation at hand so you can fill in the forms quickly and correctly.

✓ The registration process normally takes about 5-10 minutes to complete. The system will automatically save the information provided during registration in case you want to exit the wizard. Your data will be restored the next time you will access the Beneficiary's Register.

✓ At the end, it will assign and display the PIC (Participant Identification Code) of your organisation.



Next >

Commission

Participant portal - Beneficiary registration

European Commission > Education And Training > Participant Portal > Beneficiary Register

Welcome Identification Organisation Contact Summary Success

Welcome to the Beneficiary's Register

The Registration Wizard will guide you through the process of registration.

✓ Please keep the basic legal information (Registration extract, VAT data) of the organisation at hand so you can fill in the forms quickly and correctly.

✓ The registration process normally takes about 5-10 minutes to complete. The system will automatically save the information provided during registration in case you want to exit the wizard. Your data will be restored the next time you will access the Beneficiary's Register.

✓ At the end, it will assign and display the PIC (Participant Identification Code) of your organisation.

Continue your existing registration?

We found an ongoing registration. Do you wish to continue with the existing registration or start a new one?

- Legal name: XYZ
- Saved at: 11:24:54 28/06/2016

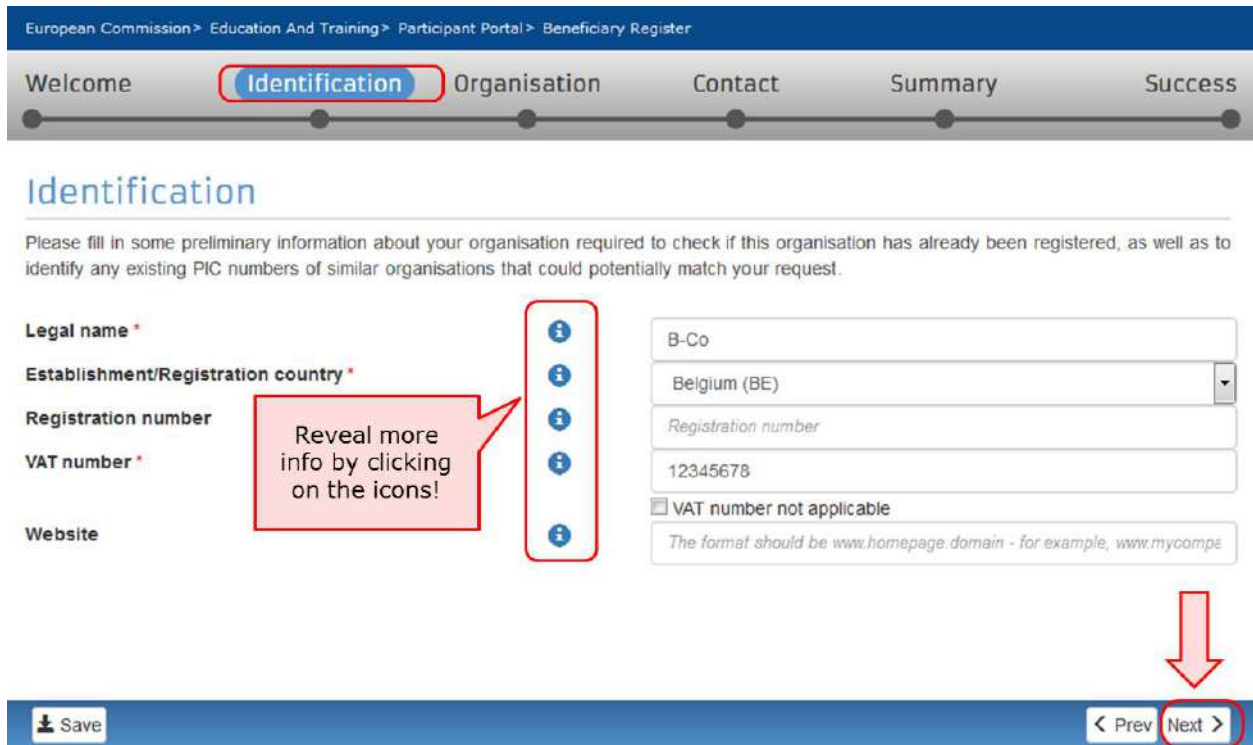


Start a new registration Next >

Fill in the organisation's "Identification" details and click on "Next".

Fill in the mandatory fields in the **Identification** screen and click on **Next >** at the bottom right of the screen in order to proceed to the next step.

You can click on the blue **i** icons in order to reveal more information about the fields.



European Commission > Education And Training > Participant Portal > Beneficiary Register

Welcome **Identification** Organisation Contact Summary Success

Identification

Please fill in some preliminary information about your organisation required to check if this organisation has already been registered, as well as to identify any existing PIC numbers of similar organisations that could potentially match your request.

Legal name * B-Co

Establishment/Registration country * Belgium (BE)

Registration number 12345678

VAT number * 12345678

VAT number not applicable

Website The format should be www.homepage.domain - for example, www.mycomp

Complete the "Organisation" details.

In the **Organisation** screen fill in the information regarding the **Legal name and status**, **Registration data** and **Legal Address**.

Click on **Next >** at the bottom right of the screen in order to proceed to the next step.

European Commission > Education And Training > Participant Portal > Beneficiary Register

Welcome Identification **Organisation** Contact Summary Success

Organisation

Fill in the information related to the organisation you want to register, as stated in your official documents (registration act/statute, VAT extract, etc)

Legal name and status

Legal name *

Describe the legal status of your organisation by selecting the appropriate options

Legal status

- a natural person a legal person
- non-profit for profit
- private entity public body
- NGO

Registration data

Establishment/Registration country *

Registration number

Registration date

Saved at: 16:30:15 26/01/2016

Fill in "Contact" details and click on "Next".

Fill in the details in the **Contact** screen. These details will be used to contact and send notifications about the actions to be done.

If a different contact is to be indicated other than the self-registrant (person who is logged in via ECAS and who is currently registering the organisation), then do this by checking the **No** box to the question at the top of the contact person section. Then fill in the contact person details.

Note that you can copy the existing organisation's address and phone numbers as entered in the **Organisation** screen by checking the **Yes** box.

New organisations registered in EU countries and other countries included in the list, will not be able to register without providing a valid Post Code.

For these specific countries, only Postal Codes respecting a specific format will be accepted.

Whenever a Regular expression is not foreseen (countries not included in the list) also empty Post Codes are accepted.

Only Post Code for "Legal address" of the organisation are mandatory.

No direct relationship is enforced between Post Code and Region it is the responsibility of the registering organisation to insure coherence.

Click on **Next >** at the bottom right of the screen in order to proceed to the next step.

Contact information

Until the [LEAR of the organisation](#) has not been validated, the Commission will use this information to contact you and send automatic e-mail notifications about the actions to do. You have the so-called [Self-Registrant role](#) on the Participant Portal.

Contact person

Is ECAS EAC_TRAINING the contact person?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Title	
Position in the organisation	
Department	
Professional e-mail *	EAC-TRAINING-14@ec.europa.eu
Gender *	<input type="radio"/> Female <input type="radio"/> Male
Last name *	EAC_TRAINING
First name *	ECAS

[Change personal information](#)

Address

Use the existing organisation's address?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Country *	Belgium (BE)
Region/county	--Select one--
Street name and number *	Koning Albert II-Laan 1
P.O. box	
Postal code	1234
City *	Brussels

Check **Yes** if you wish to copy the details!

Phones

Use the existing organisation's phone numbers?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Main phone *	+3212345678

[Save](#) Saved at: 17:45:08 26/01/2016

[< Prev](#) [Next >](#)

Review the summary of details entered.

A **Summary** screen will open. Review the information provided and click on **Edit** if any changes should be introduced.

Once you have reviewed the details, click on **Submit** at the bottom right of the screen in order to complete your registration.

European Commission > Education And Training > Participant Portal > Beneficiary Register

Welcome Identification Organisation Contact **Summary** Success

All required information has been provided. The Registration process is almost completed. Before submitting your data to the system, please take a minute to review the information.

Organisation

Legal name and status

Legal name	B-Co
Legal status	a legal person for profit private entity NOT a NGO

Registration data

Establishment/Registration country	Belgium
Registration number	
Registration date	
Registration authority	
Legal form	CONSORTIUM
VAT number	12345678
Business name	
Official language	English

Legal Address

Region/county	
Street name and number	Koning Albert II-Laan 1
P.O. Box	

[Edit](#)

Edit the details if necessary!

[Print summary](#)

[< Prev](#) [Submit](#)


The 9 digit Participant Identification Code (PIC) is displayed.

A **Success** screen will open informing that the registration has been completed and the system will provide you with your organisation's **PIC number**.

Now you are ready to submit your application using the generated PIC.

European Commission > Education And Training > Participant Portal > Beneficiary Register





Welcome Identification Organisation Contact Summary **Success**


Registration completed
You have successfully registered your Legal Entity.
Your PIC number is:
923129407

Your **PIC number** is provided here!

What's next?

You will shortly receive an email confirming your registration.
Go to the Participant Portal, section 'My Organisations' to:

-  **Provide programme specific information***
If you apply for H2020, it is essential to fill in this information as it is used in proposal evaluations, e.g. deciding eligibility and funding rates.
-  **Provide SME information***
If you submit a proposal to an SME instrument call of H2020, you must carry out the SME self-assessment. For most other H2020 calls you only need to declare the fact that your organisation is SME.
-  **Update your organisation data**
-  **Upload required documents and read/send messages to the European Commission**

* Organisations applying for the Erasmus+, Creative Europe, Europe for Citizen or EU Aid Volunteer programmes only can ignore this part.

[Continue to update](#)

What to do if a similar organisation is found

This page explains how to proceed if during the registration process the system notifies you that a similar organisation already exists in the **Beneficiary Register**.

- Analyse your data.
- Proceed if not relevant.
- "Contact Organisation" to use PIC.

Analyse your data.

Explanation and illustration

At the **Identification** step of your registration process you might get notified that a similar organisation already exists in the **Beneficiary Register**. Click on the blue tabs in order to expand the details and analyse the organisation data.

European Commission > Education And Training > Participant Portal > Beneficiary Register

Welcome **Identification** Organisation Contact Summary Success

The following organisations are already existing in the Beneficiary Register

If you recognise one of these organisations as yours, click on it and then click on the 'Use this PIC' button to proceed.

🏠 B-Co
🌐 Belgium - 923139786

🏠 B-Co
🌐 Belgium - 923129407

Address	VAT number	National registration number	Status	PIC
Koning Albert II-Laan 1, 1234, Brussels	12345678		Declared	923129407

Use this PIC

🏠 Test SA
🌐 Belgium - 998476000

Click on the tabs to expand details!

None of the organisations above corresponds to B-Co and I want to proceed with the registration of B-Co.

Proceed if not relevant.

Explanation and illustration

If none of the organisations listed corresponds to your organisation, check the box below the list and click on the **Next >** in order to proceed with the registration as normal.

European Commission > Education And Training > Participant Portal > Beneficiary Register

Welcome Identification **Organisation** Contact Summary Success

The following organisations are already existing in the Beneficiary Register

If you recognise one of these organisations as yours, click on it and then click on the 'Use this PIC' button to proceed.

🏠 B-Co
🌐 Belgium - 923139786

🏠 B-Co
🌐 Belgium - 923129407

🏠 Test SA
🌐 Belgium - 998476000

None of the organisations above corresponds to B-Co and I want to proceed with the registration of B-Co.

2
< Prev Next >

Save Saved at: 11:16:49 27/01/2016

"Contact Organisation" to use PIC.

Explanation and illustration

If you recognise the organisation as yours, first click on the **Use this PIC** in order to proceed. A **Use this PIC** window will open.

If your organisation data is correct and no modifications are needed you can already use the PIC number in the application form you may want to submit. If modifications are needed, only the contact person of your organisation (or the LEAR in some cases) can do them.

To verify, who is responsible within your organisation, and to ensure that the latest documentation can be updated to the PIC details, click on **Contact Organisation**. This will open the **Send message** window, allowing you to write a message to the contact person of the organisation. You may also seek this contact person inside your organisation by any other means at your disposal through internal channels.

Please note, if the contact person has left the organisation or if the email address associated to the contact details is incorrect, the system will not notify you. In this case it is advisable to contact your local **National Agency**. They will be able to inform you of the contact details for your organisation in URF.

European Commission > Education And Training > Participant Portal > Beneficiary Register

Welcome **Identification** Organisation Contact Summary Success

The following organisations are already existing in the Beneficiary Register

If you recognise one of these organisations as yours, click on it and then click on the 'Use this PIC' button to proceed.

<p>🏠 B-Co</p> <p>🌐 Belgium - 923139786</p>															
<p>🏠 B-Co</p> <p>🌐 Belgium - 923129407</p> <table border="1"> <thead> <tr> <th>Address</th> <th>VAT number</th> <th>National registration number</th> <th>Status</th> <th>PIC</th> </tr> </thead> <tbody> <tr> <td>Koning Albert II-Laan 1, 1234, Brussels</td> <td>12345678</td> <td></td> <td>Declared</td> <td>923129407</td> </tr> </tbody> </table> <p>1</p> <p>Use this PIC</p>						Address	VAT number	National registration number	Status	PIC	Koning Albert II-Laan 1, 1234, Brussels	12345678		Declared	923129407
Address	VAT number	National registration number	Status	PIC											
Koning Albert II-Laan 1, 1234, Brussels	12345678		Declared	923129407											
<p>🏠 Test SA</p> <p>🌐 Belgium - 998476000</p>															

None of the organisations above corresponds to B-Co and I want to proceed with the registration of B-Co.

European Commission > Education And Training > Participant Portal > Beneficiary Register

Welcome Identification Organisation Contact Summary Success

Use this PIC

B-Co
PIC: 923129407
VAT number: 12345678
Address: Koning Albert II-Laan 1, 1234, Brussels
Country: Belgium

You recognised the organisation above as the one you are registering. If you would like to verify if it is the correct PIC for you to use, you can send a message to the Contact person/ LEAR of the organisation.

Contact Organisation ↗

To go back to the list of previously registered organisations, click the "PREV" button.

Click on <Prev to view the list of the similar organisations again!

< Prev

European Commission > Education And Training > Participant Portal > Beneficiary Register

Welcome Identification Organisation Contact Summary Success

Use this PIC

B-Co
PIC: 923129407
VAT number: 12345678
Address: Koning Albert II-Laan 1, 1234, Brussels
Country: Belgium

From EAC-TRAINING-14@ec.europa.eu
Subject Registration of 923129407 - B-Co
To B-Co

Message

Dear organisation,
I write you on behalf of B-Co.

Kind regards,
ECAS EAC_TRAINING

3

Send message

Cancel

< Prev

How to add a document

The steps explained here will open the same screen to update the organisation details as if you had selected to **Continue to update** after registering the organisation.

Quick steps

- 1 Click on "My Organisations".
- 2 Click on "MO" icon to modify.
- 3 Add a document in the "Documents" section.
 - 3.1 Click on "Add document".
 - 3.2 Select a file to upload.
 - 3.3 Close browser window - no need to click on "Submit changes".

Detailed steps

Steps

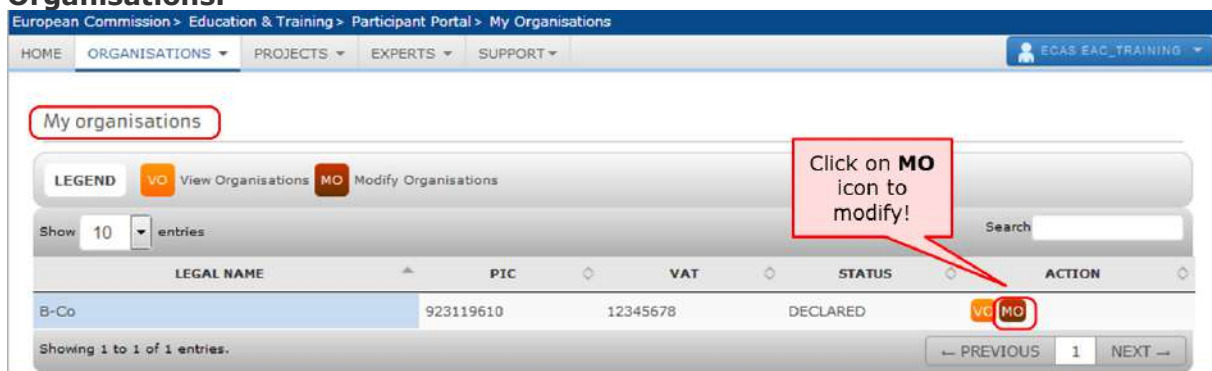
Click on "My Organisations".

After the organisation is registered, you can modify the organisation's details at any stage. From the **Participant's Portal** homepage, click on **My Organisations** in the **ORGANISATIONS** drop-down menu.



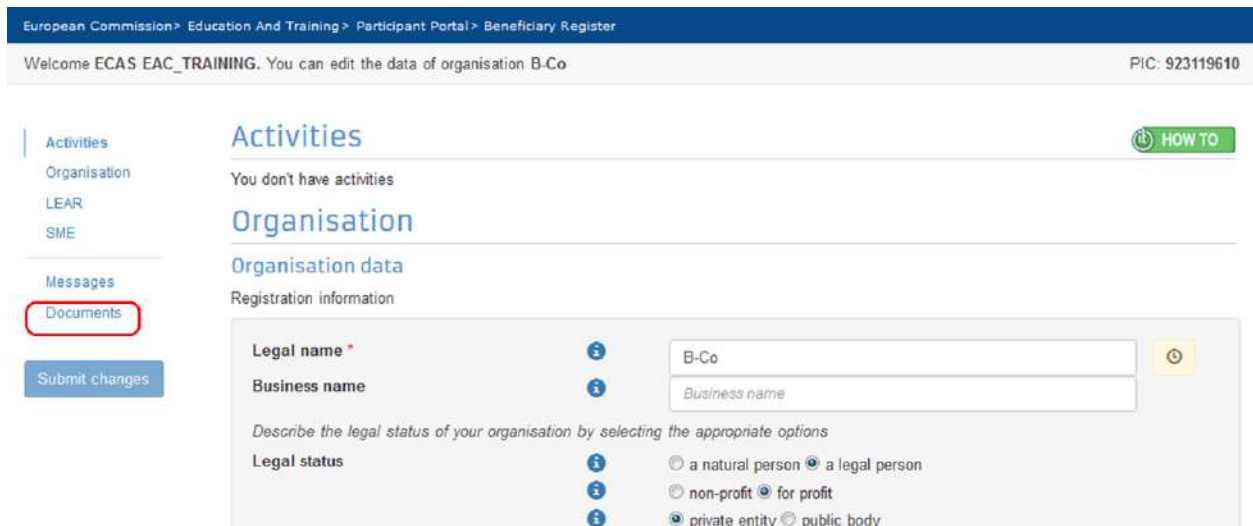
Click on "MO" icon to modify.

My organisations screen will open. Click on the **MO** icon in order to **Modify Organisations**.



Add a document in the "Documents" section.

The window will open in a new browser tab allowing you to view and modify the data of your organisation. You can either click on **Documents** at the top left corner of the screen or scroll down to the **Documents** section manually.



European Commission > Education And Training > Participant Portal > Beneficiary Register

Welcome ECAS EAC_TRAINING. You can edit the data of organisation B-Co PIC: 923119610

Activities HOW TO

You don't have activities

Organisation

Organisation data

Registration information

Legal name *

Business name

Describe the legal status of your organisation by selecting the appropriate options

Legal status

a natural person
 a legal person
 non-profit
 for profit
 private entity
 public body

Messages

Documents

Submit changes

Click on "Add document".


Note that the maximum allowed document size is 6MB.

Documents

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

[Find out more on how to submit a document.](#)

You don't have documents to display



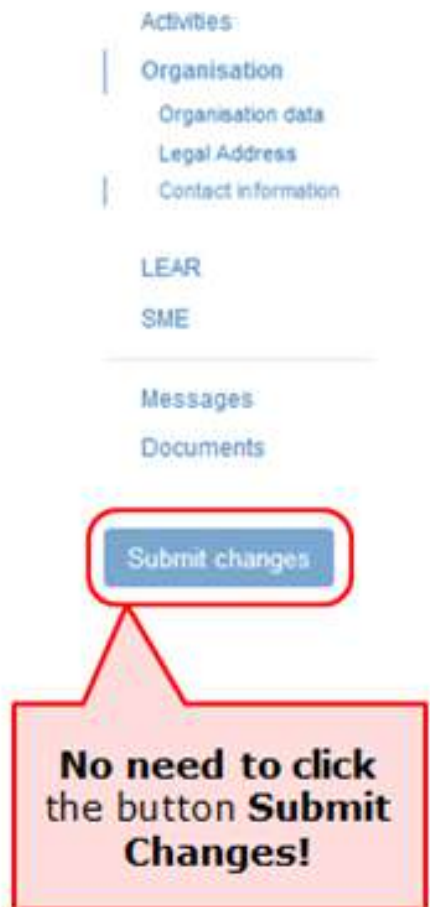
Select a file to upload.

The section will expand allowing you to **Select a file**. Once selected, indicate the **Document type** from the drop-down list. You can also add a **Description** and check the box to specify that the document has been submitted in **Original language**. After that, click on **Submit for processing**. Note that once uploaded, the document type may not be withdrawn or modified but a new version of that type of document may be added.

Close browser window - no need to click on "Submit changes".

The document uploaded has been saved and no further information requires to be entered on this screen to complete this action.

The **Submit Changes** button does not have to be clicked in order for the document to be submitted. The browser window can be closed and the documents uploaded are saved without further actions.



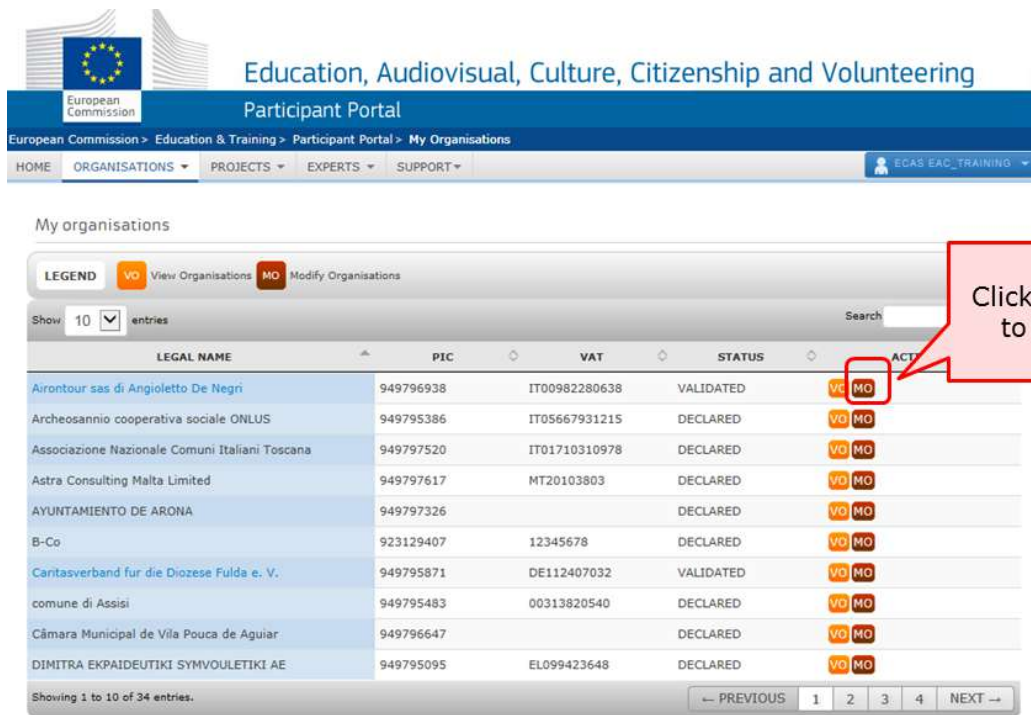
Modify Organisation

Organisation details, which are registered in the participant portal, may require to be modified at any stage.

There might be different scenarios when an organisation needs to modify data of organisation:

1. Modifications of organisation's details - for both Declared and Validated PICs
2. Change of the contact person
3. Give access to documents
4. Change of Organisation as a result of splitting, regrouping or merge - Without and with HEI Accreditation

Whether the data is modified for centrally validated PICs (i.e. validated by REA) or the data is modified for locally validated PICs (i.e. validated by your National Agency), the modifications will be done directly in **Education & Training Participant Portal**. Click on the hyperlink or the **MO** button to modify data.



Education, Audiovisual, Culture, Citizenship and Volunteering
Participant Portal

European Commission > Education & Training > Participant Portal > My Organisations

HOME ORGANISATIONS PROJECTS EXPERTS SUPPORT ECAS EAC TRAINING

My organisations

LEGEND VO View Organisations MO Modify Organisations

Show 10 entries Search

LEGAL NAME	PIC	VAT	STATUS	ACT
Airontour sas di Angioletto De Negri	949796938	IT00982280638	VALIDATED	VO MO
Archeosannio cooperativa sociale ONLUS	949795386	IT05667931215	DECLARED	VO MO
Associazione Nazionale Comuni Italiani Toscana	949797520	IT01710310978	DECLARED	VO MO
Astra Consulting Malta Limited	949797617	MT20103803	DECLARED	VO MO
AYUNTAMIENTO DE ARONA	949797326		DECLARED	VO MO
B-Co	923129407	12345678	DECLARED	VO MO
Caritasverband für die Diözese Fulda e. V.	949795871	DE112407032	VALIDATED	VO MO
comune di Assisi	949795483	00313820540	DECLARED	VO MO
Câmara Municipal de Vila Pouca de Aguiar	949796647		DECLARED	VO MO
DIMITRA EKPAIDEUTIKI SYMVOULETIKI AE	949795095	EL099423648	DECLARED	VO MO

Showing 1 to 10 of 34 entries. PREVIOUS 1 2 3 4 NEXT

Click the **MO** button to modify data!

There can be different statuses of PIC in PDM/URF:

- **DECLARED:** Organisation registered in PDM/URF by self-registrant.
- **VALIDATED:** Organisation validated centrally by REA.
- **SUSPENDED:** Change in the organisation (e.g. merge, split), need to suspend the obsolete organisations.
- **SLEEPING:** When the contact person does not react on any demands from the validation team.
- **DEPRECATED:** Marked as obsolete, usually in case of duplicates and the master PIC is filled in.
- **BLOCKED:** The legal entity is "frozen" due to an external reason (Bankruptcy, etc.)

Modify Organisation - URF Centrally validated PIC

Whenever there is a change, the organisation needs to update the data in PDM/URF. If the PIC is validated centrally, REA needs to validate the organisation's change request before the data can be saved and used in an application form or applied in the application/project information in the National Agencies project management system.

If the PIC has been centrally validated and you require to modify the organisation, you can do it in the same way as explained in the section: [URF - Modify Organisation](#).

Change Contact person - Declared PIC

The context of this process impacts organisations with **Declared PIC** with a self-registrant and contact person and without a Legal Entity Appointed Representative (**LEAR**). Declared PICs are assigned to organisations that go through decentralised validation done by National Agency. Declared PICs usually have one contact person with

the rights to update the organisation data. In most cases the self-registrant and the contact person are the same person, unless the self-registrant registers on behalf of someone else.

Please note, that the **Contact person** in URF is not the same person as the **Preferred Contact** person indicated in the Application form. For those projects that have been selected and awarded, see how to manage contacts in the Mobility Tool [here](#).

When the contact person leaves the organisation without appointing another person, the access to update the PIC is lost. An organization can always request password reset, however this only works when the person forgets the password. If the person left the organisation, in most cases, the organisation does not have access to the email address any longer so a password rest will not help. Therefore, it is recommended for each organisation to have at least two people with access to PIC to ensure a backup.

In order to request to change the contact person that was registered in PDM/URF, a beneficiary should contact the NA, informing the full name and email of the new contact person.

There is a first step to check the organisation data, leading to two scenarios:

- A. If the contact person is the same as the self-registrant, the NA proceeds with the request to update the organisation's data to the new contact person directly in PDM/URF.
- B. If the contact person is different from the self-registrant, the NA will inform the self-registrant contact details to the beneficiary.

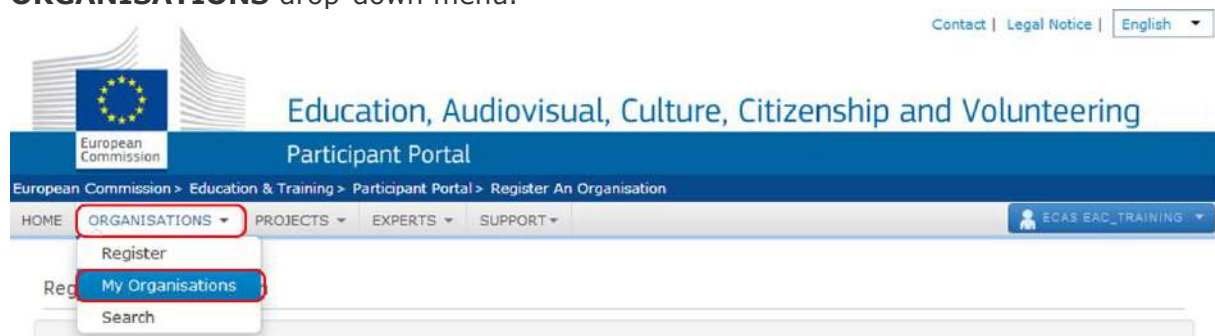
The beneficiary then contacts the self-registrant to request them to add a different contact person. The self-registrant adds in PDM/URF the new contact person, who will be from now on the person, who makes changes in the organisation's data.

For the self-registrant to add a contact person, the self-registrant logs into the participant portal and performs the following steps.

- 1 Click on "My Organisations".
- 2 Click on "MO" icon to modify.
- 3 Change the self-registrant role to another contact person
 - 3.1 Select "No"
 - 3.2 Add in the contact details
 - 3.3 Click on "Submit changes"
 - 3.4 Confirm the changes by clicking on "Submit changes"

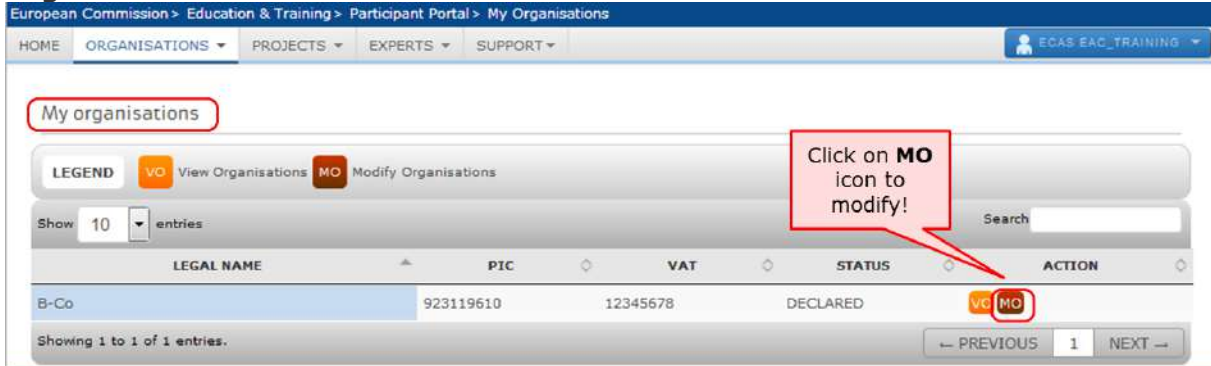
Click on "My Organisations".

After the organisation is registered, you can modify the organisation's details at any stage. From the **Participant's Portal** homepage, click on **My Organisations** in the **ORGANISATIONS** drop-down menu.



Click on "MO" icon to modify.

My organisations screen will open. Click on the **MO** icon in order to **Modify Organisations**.



European Commission > Education & Training > Participant Portal > My Organisations

HOME ORGANISATIONS PROJECTS EXPERTS SUPPORT ECAS EAC TRAINING

My organisations

LEGEND VO View Organisations MO Modify Organisations

Show 10 entries Search

LEGAL NAME	PIC	VAT	STATUS	ACTION
B-Co	923119610	12345678	DECLARED	VO MO

Showing 1 to 1 of 1 entries. PREVIOUS 1 NEXT

Change the self-registrant role to another contact person

In the section **Contact information**, the self-registrant is indicated as Nina Name. The self-registrant is indicated also as the **contact person**. This can be seen by the answer **Yes** to the question **Is Nina Name the contact person?**. Nina Name's contact details have been copied from EU Login (previously ECAS) to the contact details fields.

Contact information

Until the [LEAR of the organisation](#) has been validated, the Commission will use this information to contact you and send automatic e-mail notifications about the actions to do. You have the so-called [Self-Registrant role](#) on the Participant Portal.

Is Nina NAME the contact person?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Country *	Finland (FI)
Title	Title
Position in the organisation	Position in the organisation
Department	Department
Professional e-mail *	Nina.NAME@email.com
Gender *	<input checked="" type="radio"/> Female <input type="radio"/> Male
Last name *	NAME
First name *	Nina
Use the existing organisation's address?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Street name and number *	STREET
P.O. box	P.O. box
Postal code	Expected format: NNNNN (12345)
City *	CITY
Region/county	Keski-Pohjanmaa
Use the existing organisation's phone numbers?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Main phone *	+34567890345678
Fax	Expected format: +CCGNNNNNNNNNNNNxBBBBB
Secondary phone	Expected format: +CCGNNNNNNNNNNNNxBBBBB

Select "No"

If a different contact is to be indicated other than the self-registrant, then do this by answering **No** to the question **Is Nina Name the contact person?**

Contact information To Submit

Until the [LEAR of the organisation](#) has been validated, the Commission will use this information to contact you and send automatic e-mail notifications about the actions to do. You have the so-called [Self-Registrant role](#) on the Participant Portal.

Is Nina NAME the contact person?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Country *	Finland (FI)
Title	Mr
Position in the organisation	Admin
Department	Department
Professional e-mail *	John@domain.com
Gender *	<input type="radio"/> Female <input checked="" type="radio"/> Male
Last name *	Field
First name *	John
Use the existing organisation's address?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Street name and number *	STREET
P.O. box	P.O. box
Postal code	Expected format: NNNNN (12345)
City *	CITY
Region/county	Keski-Pohjanmaa
Use the existing organisation's phone numbers?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Main phone *	+34567890345678
Fax	Expected format: +CCNXXXXXXXXXXXXxBBBBB
Secondary phone	Expected format: +CCNXXXXXXXXXXXXxBBBBB

Add in the contact details

Fill in the details of the new contact person.

Organisation data
Legal Address
Contact information **11**

LEAR
Erasmus Charter
SME

Messages
Documents

Submit changes

Contact information **To Submit**

Until the [LEAR of the organisation](#) has been validated, the Commission will use this information to contact you and send automatic e-mail notifications about the actions to do. You have the so-called [Self-Registrant role](#) on the Participant Portal.

Is Nina NAME the contact person? Yes No

Country * Finland (FI)

Title Mr

Position in the organisation Admin

Department Department

Professional e-mail * John@domain.com

Gender * Female Male

Last name * Field

First name * John

Use the existing organisation's address? Yes No

Street name and number * sTREET

P.O. box P.O. box

Postal code Expected format: NNNNN (12345)

City * CITY

Region/county Keski-Pohjanmaa

Use the existing organisation's phone numbers? Yes No

Main phone * +34567890345678

Fax Expected format: +CCCN/NNNNNNNNNNNNNNxBBBBB

Secondary phone Expected format: +CCCN/NNNNNNNNNNNNNNxBBBBB

Click on "Submit changes"

After all the mandatory fields have been filled in, click the **Submit changes** button on the left-hand side of the screen.

Organisation data
Legal Address
Contact information **11**

LEAR
Erasmus Charter
SME

Messages
Documents

Submit changes

Contact information **To Submit**

Until the [LEAR of the organisation](#) has been validated, the Commission will use this information to contact you and send automatic e-mail notifications about the actions to do. You have the so-called [Self-Registrant role](#) on the Participant Portal.

Is Nina NAME the contact person? Yes No

Country * Finland (FI)

Title Mr

Position in the organisation Admin

Department Department

Professional e-mail * John@domain.com

Gender * Female Male

Last name * Field

First name * John

Use the existing organisation's address? Yes No

Street name and number * sTREET

P.O. box P.O. box

Postal code Expected format: NNNNN (12345)

City * CITY

Region/county Keski-Pohjanmaa

Use the existing organisation's phone numbers? Yes No

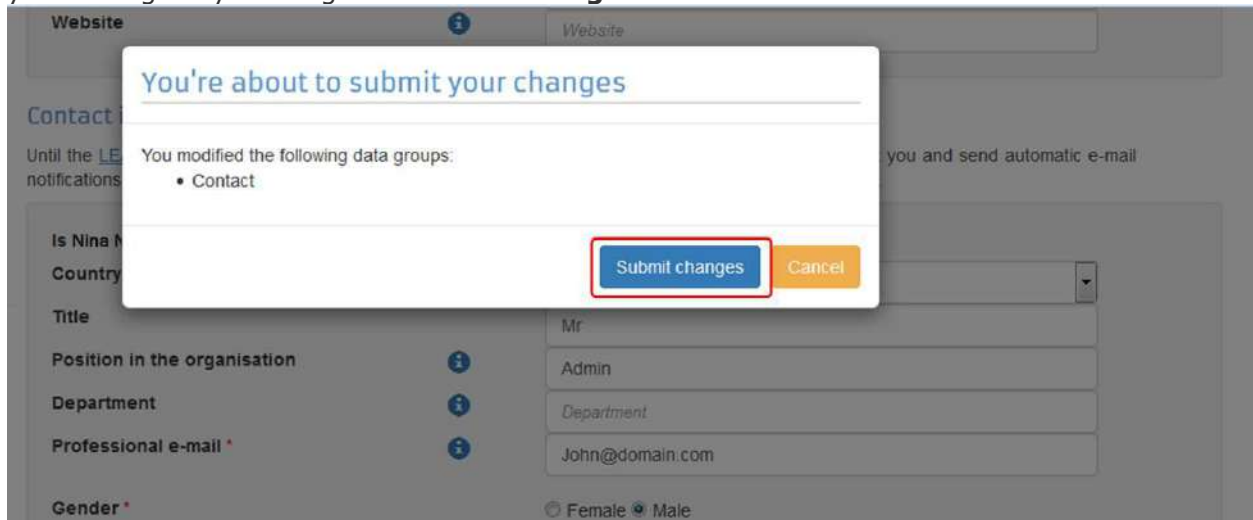
Main phone * +34567890345678

Fax Expected format: +CCCN/NNNNNNNNNNNNNNxBBBBB

Secondary phone Expected format: +CCCN/NNNNNNNNNNNNNNxBBBBB

Confirm the changes by clicking on "Submit changes"

A pop-up message will appear, summarising the data groups you have modified. Confirm your changes by clicking the **Submit changes** button.



Give Access to Documents - Declared PIC

In rare cases, PICs that were registered centrally, do not display the documents in the National Agency's project management system. The NA may ask the beneficiary to confirm that the documents were actually added. Once the NA has confirmed that the documents are correctly uploaded in URF, the NA can request to reset the access to the documents so the NA can proceed to validate the organisation.

Change Organisation due to regrouping, splitting or absorption - Without Accreditation

- 1 Summary (a new PIC is created and existing PICs remain).
- 2 Organisations are regrouped into new one (a new PIC is created).
- 3 Organisations are merged/absorbed into one (an existing PIC is updated).
- 4 Organisation is Split.

Summary (a new PIC is created and existing PICs remain).

In summary, these are the main activities in case a change of the status of an organisation without accreditation:

1. The organisation [registers](#) (for **New organisations**) or modifies (modify organisation validated by NAs for decentralised actions or [modify organisation validated centrally](#)) the organisation's details (for **Existing organisations**) in the Participant Portal.
2. If it is a **new organisation**, the organisation submits a grant application form outside the annual call. Once completed, submit to the NA in PDF form. The form is filled based on internal agreement between the organisations on how they intend to share the budget and mobilities. The new project will be created in the NA management system and the NA will create the budget for the new project. If it is an **existing organisation**, the organisation needs to notify the NA about the organisation update and if applicable to any changes to arrangements of the budget and mobilities between the projects. The NA will update the budget in their

management system. The NA will send the latest project data to MT+, thereby updating the organisation information and current approved budget in MT+.

3. The organisation (new registration or modified registration) will be **validated by the NA** and/or REA. REA follows its own validation process. The NA will check if the data registered in URF corresponds to the organisation's legal data as set out in the supporting documents uploaded in the tool.
4. A grant agreement will be signed with the **new organisation**. For **existing organisations**, the NA creates an amendment to the grant agreement due to the budget change of existing project or depending on the type of change in organisation detail.
5. The beneficiary needs to move mobilities in MT+ from the original projects to the new ones:
 1. Add partner organisations if applicable;
 2. Export list of mobilities from original project;
 3. Change the project reference in the mobilities list exported from the project to be terminated.
 4. Change the organisation ID to that of the remaining project organisation ID for each PIC.
 5. Ensure that the Participant ID or mobility ID do not overlap with the existing mobilities in the remaining project.
 6. Import into new project.
6. The new organisation sends a message to their partners to update the PIC in MT+.
7. If applicable, the beneficiary should reassign OLS licenses to reflect the changes in the current budget overview in MT+.
8. If the change leads to obsolete or absorbed organisations, the NA **terminates the project** of the obsolete institution.

Definitions:

Existing organisation: An existing (or part of an) institution continues existing after a change, which can be regrouping, splitting or absorption.

New organisation: A new institution (new legal status) is founded that regroups former institutions after a change, e.g. regrouping, splitting or absorption.

Validated by REA: Modified data of organisation previously validated by REA or submitting project to centralised actions.

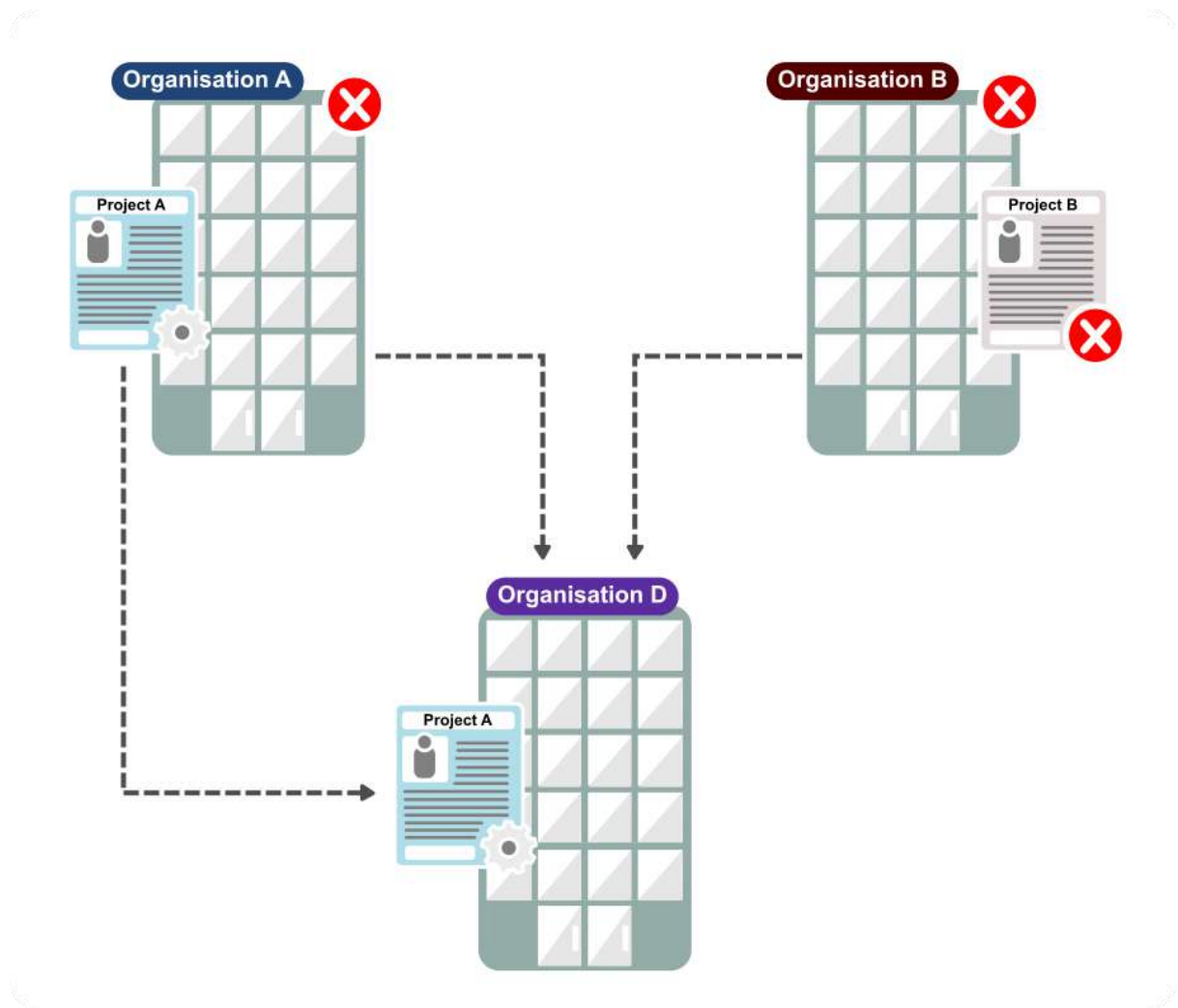
Validated by NA: Modified data of organisation not yet validated by REA and submitting project to decentralised actions.

Please, note that REA is only involved in the process to validate applicants of **centralised actions**.

See also: [How will the organisation be validated - Centralised or Decentralised?](#)

For specific scenarios, refer to the common identified cases in change of status of organisations listed below:

Organisations are regrouped into new one (a new PIC is created).



Scenario

In the scenario where two organisations are regrouped into a new organisation, a new PIC is created with the latest information in the participant portal. The obsolete PIC should be invalidated (centrally or not centrally).

If the regrouping is partial and parts of the organisations continue to exist, it leads to a new PIC and existing PICs: apply the same steps as in the **Summary**.

The scenario is applicable where the organisation is the coordinating organisation of the project.

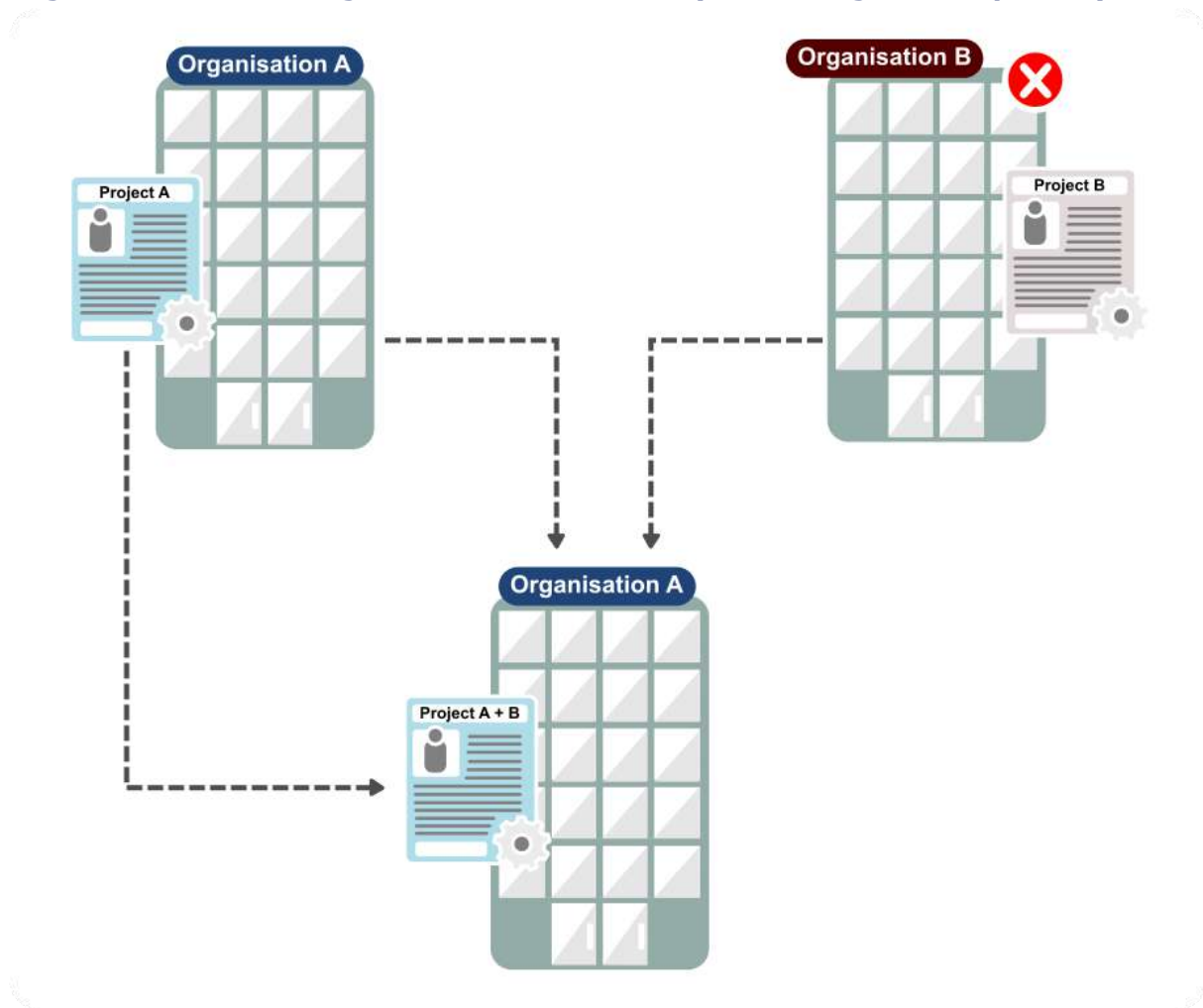
During selection

In this case if there is an application process running for each PIC: Please, inform your NA to update one application request with the new PIC and budgetary information if required, while the other application is rejected. During the selection process the new organisation will be validated and linked to the obsolete ones, thereby invalidating them. In the case of central validation by REA, this process must first be finalised by REA before the new organisation will appear as validated in the National Agency project management system.

Project is awarded and grant agreement signed

1. [Register](#) the new organisation in the Participant Portal.
2. The new organisation submits a grant application form outside the annual call. Once completed, submit to the NA in PDF form. The form is filled based on internal agreement between the organisations on how they intend to share the budget and mobilities. The new project will be created in the NA management system and the NA will create the budget for the new project. The NA will send the latest project data to MT+, thereby updating the organisation information and current approved budget in MT+.
3. The new organisation will be [validated by the NA](#) and/or REA. REA follows its own validation process. The NA will check if the data registered in URF corresponds to the organisation's legal data as set out in the supporting documents uploaded in the tool.
4. A grant agreement will be signed with the new organisation.
5. The beneficiary needs to move mobilities in MT+ from the original projects to the new ones:
 1. Add partner organisations if applicable;
 2. Export list of mobilities from original project;
 3. Change the project reference in the mobilities list exported from the project to be terminated.
 4. Change the organisation ID to that of the remaining project organisation ID for each PIC.
 5. Ensure that the Participant ID or mobility ID do not overlap with the existing mobilities in the remaining project.
 6. Import into new project.
6. The new organisation sends a message to their partners to update the PIC in MT+.
7. If applicable, the beneficiary should reassign OLS licenses to reflect the changes in the current budget overview in MT+.
8. The NA [terminates the project](#) of the obsolete or absorbed institutions.

Organisations are merged/absorbed into one (an existing PIC is updated).



Scenario

In the scenario where two organisations are merged into one, the existing PIC of one may be updated with the latest information in the participant portal (URF). The obsolete PIC should be invalidated (centrally or not centrally).

During selection

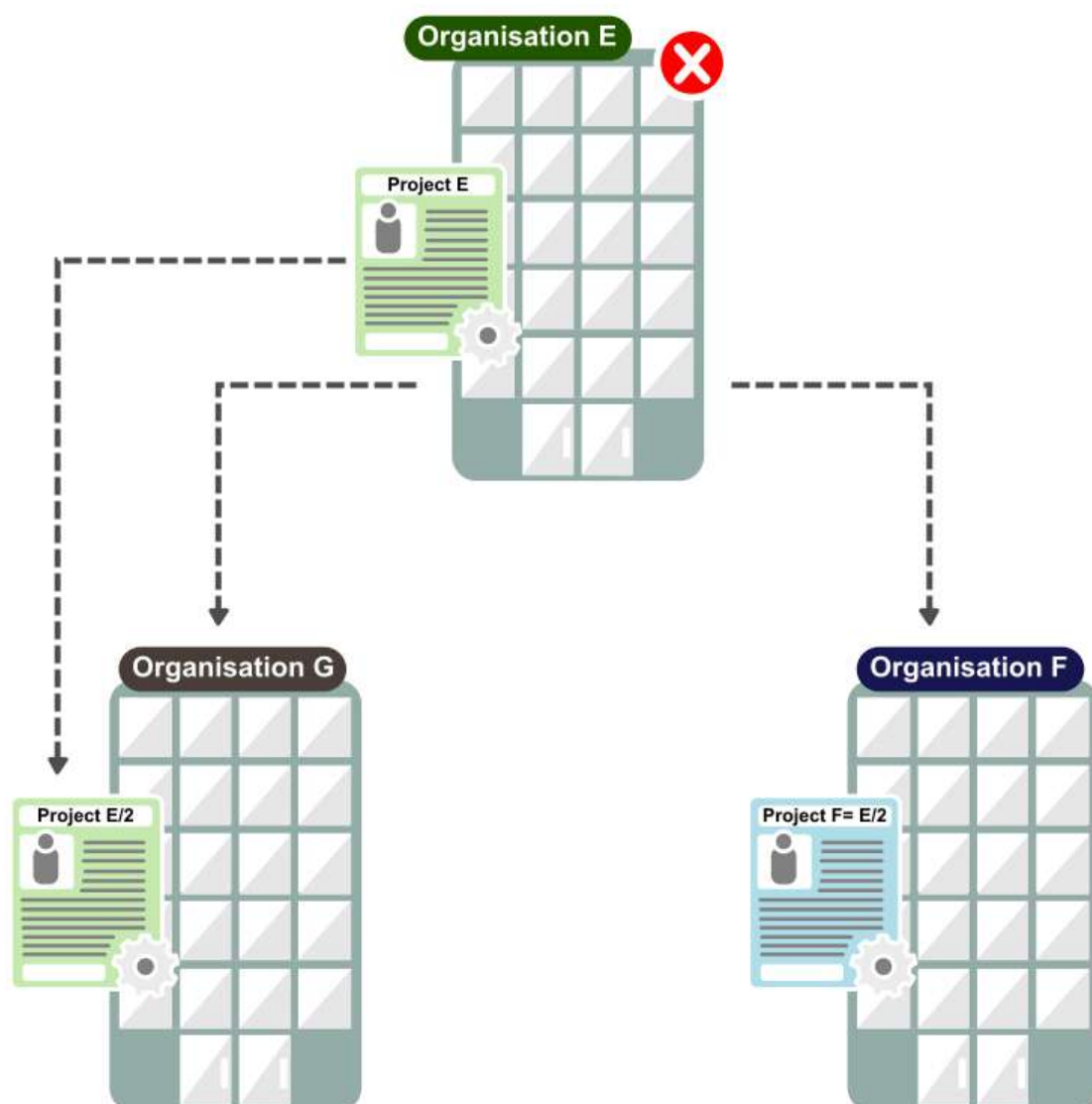
In this case, if there is an application process running for each PIC: After updating information in URF, inform your NA to update one application request with the latest project and budgetary information while the other project is rejected. During the selection process, the existing PIC will be linked to the obsolete PIC and thereby invalidating it (if not done centrally by REA).

Project is awarded and grant agreement signed

1. The organisation modifies ([modify organisation validated by NAs for decentralised actions](#) or [modify organisation validated centrally](#)) the organisation's details (for **Existing organisations**) in the Participant Portal.
2. The organisation needs to notify the NA about the organisation update and if applicable to any changes to arrangements of the budget and mobilities between the projects. The NA will update the budget in their management system. The NA will send the latest project data to MT+, thereby updating the organisation information and current approved budget in MT+.

3. The organisation (with modified registration) will be **validated by the NA** and/or REA. REA follows its own validation process. The NA will check if the data registered in URF corresponds to the organisation's legal data as set out in the supporting documents uploaded in the tool.
4. The NA creates an amendment to the grant agreement due to the budget change of existing project or depending on the type of change in organisation detail.
5. The beneficiary needs to move the mobilities in the Mobility Tool+ from the original projects to the new one (see steps in **Summary**).
6. If applicable, the beneficiary should reassign OLS licenses to reflect the changes in the current budget overview in MT+.
7. The NA **terminates the project** of the obsolete or absorbed institutions.

Organisation is Split.



Scenario

In this scenario, one organisation is split into two. The existing PIC may be updated in URF and one new PIC is created. This is the same as explained in the **Summary**.

During selection

In this case, if there is an application process running for one PIC: After updating information in URF, inform your NA to update the existing application request with the latest project and budgetary information. A new application may be submitted. If outside the annual call, request the grant application form outside the annual call from your National Agency. Once completed, submit to the NA in PDF form. *Project is awarded and grant agreement signed*

1. The organisation [registers](#) (for **New organisations**) or modifies ([modify organisation validated by NAs for decentralised actions](#) or [modify organisation validated centrally](#)) the organisation's details (for **Existing organisations**) in the Participant Portal.
2. If it is a **new organisation**, the organisation submits a grant application form outside the annual call. Once completed, submit to the NA in PDF form. The form is filled based on internal agreement between the organisations on how they intend to share the budget and mobilities. The new project will be created in the NA management system and the NA will create the budget for the new project. If it is an **existing organisation**, the organisation needs to notify the NA about the organisation update and if applicable to any changes to arrangements of the budget and mobilities between the projects. The NA will update the budget in their management system. The NA will send the latest project data to MT+, thereby updating the organisation information and current approved budget in MT+.
3. The organisation (new registration or modified registration) will be [validated by the NA](#) and/or REA. REA follows its own validation process. The NA will check if the data registered in URF corresponds to the organisation's legal data as set out in the supporting documents uploaded in the tool.
4. A grant agreement will be signed with the **new organisation**. For **existing organisations**, the NA creates an amendment to the grant agreement due to the budget change of existing project or depending on the type of change in organisation detail.
5. The beneficiary needs to move mobilities in MT+ from the original projects to the new ones:
 1. Add partner organisations if applicable;
 2. Export list of mobilities from original project;
 3. Change the project reference in the mobilities list exported from the project to be terminated.
 4. Change the organisation ID to that of the remaining project organisation ID for each PIC.
 5. Ensure that the Participant ID or mobility ID do not overlap with the existing mobilities in the remaining project.
 6. Import into new project.
6. The new organisation sends a message to their partners to update the PIC in MT+.
7. If applicable, the beneficiary should reassign OLS licenses to reflect the changes in the current budget overview in MT+.

If the change leads to obsolete or absorbed organisations, the NA [terminates the project](#) of the obsolete institution.

When the organisation becomes obsolete in the result of regrouping or splitting, the NA will terminate the grant agreement with obsolete HEI in MT+.

Change Organisation status - with HEI Accreditation

When a change of the status concerns an organisation with an HEI accreditation:

1. The organisation [registers](#) (for **New organisations**) or modifies (modify organisation validated by NAs for decentralised actions or [modify organisation validated centrally](#)) the organisation's details (for **Existing organisations**) in the Participant Portal.
2. The organisation fills in change [request form "institutional profile – change of status of the higher education institution"](#), informing the contact details of the new Erasmus coordinators including the new PIC and the underlying official documents, and send it to the NA.
3. The NA will check the eligibility of the institution in cooperation with their National Authority (NAU). NAUs check whether a given institution can be considered as an HEI eligible for participation in Erasmus+, according to their national legislation.
4. Now the change request form can be verified by the NA and sent to EACEA for evaluation. For **new organisations**, EACEA has 5 calendar days to evaluate the request form. For **existing organisations**, the PIC and Erasmus code are maintained.
5. EACEA will issue new Erasmus codes and attribute transitory accreditation to the **new organisation**.
6. EACEA sends a note to the HEI, and in copy the NA, on the attribution of the transitory charter, its validity end-date and the new Erasmus ID code.
7. If it is a **new organisation**, the organisation submits a grant application form outside the annual call. Once completed, submit to the NA in PDF form. The form is filled based on internal agreement between the organisations on how they intend to share the budget and mobilities. The new project will be created in the NA management system and the NA will create the budget for the new project. If it is an **existing organisation**, the organisation needs to notify the NA about the organisation update and if applicable to any changes to arrangements of the budget and mobilities between the projects. The NA will update the budget in their management system. The NA will send the latest project data to MT+, thereby updating the organisation information and current approved budget in MT+.
8. The organisation (new registration or modified registration) will be [validated by the NA](#) and/or REA. REA follows its own validation process. The NA will check if the data registered in URF corresponds to the organisation's legal data as set out in the supporting documents uploaded in the tool.
9. A grant agreement will be signed with the **new organisation**. For **existing organisations**, the NA creates an amendment to the grant agreement due to the budget change of existing project or depending on the type of change in organisation detail.
10. The beneficiary needs to move mobilities in MT+ from the original projects to the new ones:
 1. Add partner organisations if applicable;
 2. Export list of mobilities from original project;
 3. Change the project reference in the mobilities list exported from the project to be terminated.
 4. Change the organisation ID to that of the remaining project organisation ID for each PIC.
 5. Ensure that the Participant ID or mobility ID do not overlap with the existing mobilities in the remaining project.
 6. Import into new project.
11. The new organisation sends a message to their partners to update the PIC and Erasmus ID code in MT+.

12. If applicable, the beneficiary should reassign OLS licenses to reflect the changes in the current budget overview in MT+
13. If the change leads to obsolete or absorbed organisations, the NA [terminates the project](#) of the obsolete institution.

Definitions:

Existing organisation: An existing (or part of an) institution continues existing after a change, which can be regrouping, splitting or absorption. **New organisation:** A new institution (new legal status) is founded that regroups former institutions after a change, e.g. regrouping, splitting or absorption.

Validated by REA: Modified data of organisation previously validated by REA or submitting project to centralised actions. **Validated by NA:** Modified data of organisation not yet validated by REA and submitting project to decentralised actions.

Please, note that REA is only involved in the process to validate applicants of [centralised actions](#).

See also: [How will the organisation be validated - Centralised or Decentralised?](#)

The transitory accreditation is temporary (with a validity end-date corresponding to the publication date of the results of the next available ECHE call), therefore the organisation must submit an accreditation request within the following accreditation call.

