EMPOWERING HEALTHY LIFESTYLE BEHAVIOUR THROUGH PERSONALISED INTERVENTION PORTFOLIOS TO PREVENT AND CONTROL OBESITY DURING VULNERABLE STAGES OF LIFE

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DISCLAIMER

EXECUTIVE SUMMARY

Background	This document aims to be a practical reference guide and tool for Consortium members, WP leaders and deputy leaders and partners through the course of the project. It will be regularly updated.
Objectives	These Management Guidelines are intended for the Coordinator, the work package (co-) leaders and for all partners from HealthyW8 Project. It provides guidelines for the management and reporting activities in the project in the aim of ensuring the quality and consistency of project outcomes. It allows parties to have a better understanding of procedures within the HealthyW8 project.
Methods	These Management Guidelines are based on and complying with the following reference documents: 1. The GA, Annex I and Annex II 2. The Consortium Agreement (CA) 3. The Annotated Model Grant Agreement, available here

Results & implications	This document has been divided into four sections with additional annexes:
	• Management Structure
	• Project outcomes and Technical controls
	• Financial Issues
	• Communication best practices
	• 3 annexes:
	  ○ Deliverables list
	  ○ Milestones list
	  ○ Time sheet template

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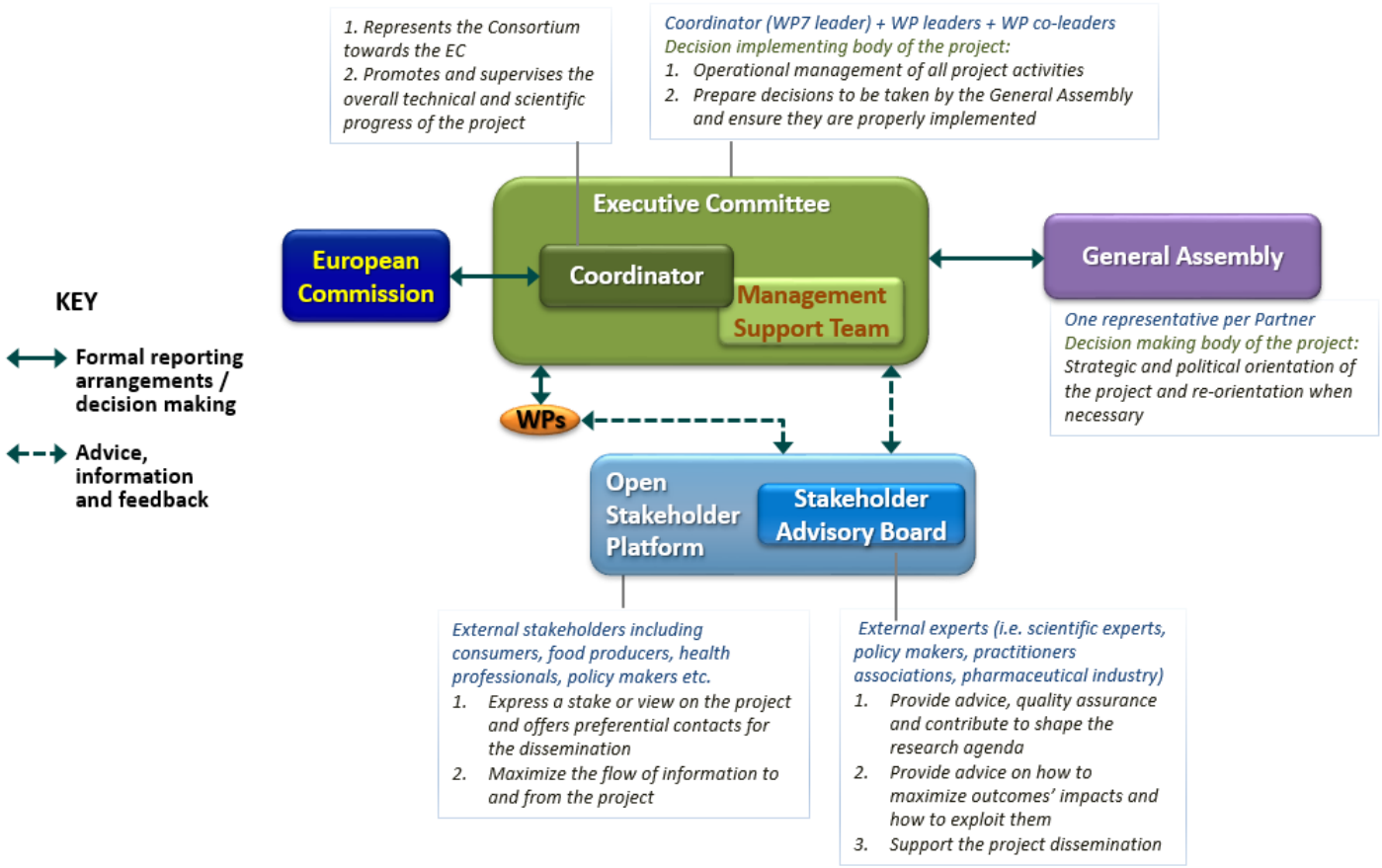
1 Management structure



1.1 The Coordination

The Coordinator of the project is LIH, represented by Dr. Torsten Bohn. His primary role is to **represent the Consortium to the EC**, and to be the promoter and supervisor of the overall technical and scientific progress.

1.2 The General Assembly

The GA is the **decision-making** body of the project. Chaired by the project coordinator, it is composed of one representative per beneficiary organisation, each having one vote for decision-making. The GA will allow taking all project/consortium-level decisions for the strategic and political orientation of the Project, i.e. overall direction of all activities – research, training and management – and re-orientation whenever necessary; and budget revision, tasks reallocation, incorporation of new contractors, measures towards defaulting partners, etc.

1.3 The Executive Committee (ExC)

The ExC is the **decision-implementing** body of the project and will be in charge of the operational management of all the activities of the Project. It is chaired by the Coordinator and includes WPs leaders and the deputy leaders:

WP	WP leaders	WP co-leader
WP1	Sarah Forberger (BIPS)	Tiziana de Magistris (CITA)
WP2	Christoph Stahl (LIST)	Alessia D'Andrea (CNR)
WP3	Astrid Kemperman (TU/e)	Daniela Rodrigues (UC)
WP4	Josep Tur (IDISBA)	Rikke Andersen (DTU)
WP5	Zein Kallas (CREDA)	Pietro Dionisio (MEDEA)
WP6	Joost Wesseling (ENHA)	Cris Barragan (KNEIA)
WP7	Torsten Bohn (LIH)	

Meetings (physical or online) of the ExC are held twice a year, unless the interest of the project may require intermediate meetings. The ExC makes decisions upon simple majority with casting vote for the coordinator, Dr. Torsten Bohn, in case of equality of votes.

1.4 The Stakeholder Advisory Board (StAB)

The StAB comprises external experts including scientific experts, policy makers, health professionals etc., at EU and international levels. The role of the StAB includes to:

- Participate in the diagnostic analysis (mapping and assessment) regarding issues, needs and regulatory aspects that could contribute to obesity prevention;
- Serve as independent experts during the implementation phase of the project, as well as to test and validate preliminary findings and results of the project;
- Contribute to the communication and dissemination activities of the project;
- Act as ambassadors for the project's efforts of building-up policies and prevention strategies in order to combat obesity as part of the global health system;
- Take part in different consortium meetings, clustering activities or General Assemblies based on invitation and time availability.

The StAB will be guided by the ExC and participate in the meetings of the GA once a year. The travel and accommodation expenses of the StAB members will be covered by the project. The StAB is currently being formed, and several potential candidates have been contacted, representing a range of backgrounds and areas of expertise related to obesity prevention. The constitution of the StAB will be finalised by M3 as planned. The consortium may enlarge/amend it along the project lifetime.

StAB members will be bound by a Non-Disclosure Commitment (NDC) signed with the Coordinator on behalf of the consortium.

1.5 The Open Stakeholder Platform (OSP)

The OSP will be a unique platform developed to facilitate exchanges between the HealthyW8 partners and all relevant stakeholders, (including consumers). The OSP will allow for a 2-way-information exchange about additional healthy lifestyle recommendations and educational aspects. The OSP will also provide information on facilities that support healthy behaviour, thus targeting diet, PA and a general healthy lifestyle.

The OSP is not an advisory body. It serves as the key forum for stakeholders to interact with the project and thus ensure that the full diversity of relevant stakeholders' perspectives, demands, concerns and needs is captured and integrated in the entire work cycle of HealthyW8 with the aim of enhancing its value and impact. The OSP will also maximise the flow of information to and from the project to enhance knowledge transfer and effective and timely uptake of HealthyW8 outcomes.

1.6 The Project Management Team (PMT)

Provided by the LIH, this team will consist of the Project Manager (PM) – Yacine Ouzzahra – supervised by the Grant Team Lead – Irina Carpusca – and the Coordinator. The **Project Management Team** is in particular responsible for:

- Day-to-day project administration and logistics, including planning, preparation and follow-up of project meetings;
- Consolidation and submission of project deliverables and reports;
- Financial administration (monitoring of expenses against budget allocations, consolidation of financial summary sheets, etc.);
- Consolidation and control of the cost claims according to the contractual requirements, their conformance with the work done and the audit certificate to be produced by the partners;
- Assistance to individual project partners on specific administrative issues;
- Assistance with internal project communication (e.g. mailing lists, collaborative platform, etc.), including follow-up on legal requirements for internal data flow.

2 Project Outcomes and Technical controls

2.1 Deliverables

Deliverables represent verifiable contractual outputs of the project that are submitted officially to the Granting Authority upon completion.

As deliverables are contractual outputs of the project, the details below are also contractual. The Granting Authority payment can be conditioned by the timely submission of project deliverables and their compliance with quality requirements. Project reviewers will thus be in charge of evaluating project deliverables and providing the Granting Authority with an evaluation report. It is therefore essential that project deliverables are produced and submitted in time and with a high quality standard (to be evaluated by the WP leader, the project ExC and the Coordinator as detailed in fig. 1 below) to ensure that the project runs according to plan and to secure payment from the EC.

HealthyW8 project deliverables are listed according to the work package (WP) in which they will be produced in the Description of Action (DoA) and are listed in annex 1 to this document.

NB As deliverables are defined in the contract, any changes to these deliverables are subjected to a revised version of the DoA by the Coordinator and the PM to be approved by the Granting Authority.

Deliverables will be produced in each WP during the project lifetime. The deliverable leader is responsible for defining the exact content of the deliverable and the contribution to be made by each contributing partner. He is also responsible for ensuring the timely submission and quality of the deliverable.

NB Partners must be aware of the deliverables to which they are planned to contribute (see annex 1 of this document).

Deliverables are most often written reports but can also take another form like prototype, molecular data, protocol setting up, software, etc. Even if the deliverable is not a written report, a written document must be produced and sent to the Granting Authority outlining the nature of the deliverable.

For example if the deliverable is a software, a report describing the software (its conception, functionalities etc.) must be submitted to the Granting Authority as the deliverable.

A general process of deliverables production is needed in order to help the WP leaders and deliverable leaders to prepare and deliver HealthyW8 deliverables in a timely and efficient manner. The Project Manager will send reminders for upcoming Deliverables to WP leaders 4 and 2 months before the due date.

Step 1 The deliverable leader prepares a plan for the deliverable and circulates the plan to the relevant WP leader, task leader and to all partners contributing to the deliverable. This plan should include a draft table of contents, expected contributions per partner, timing for contributions etc. The deliverable leader writes the deliverable using the deliverable template and includes the contributions of the partners involved in a harmonized fashion (same styles etc.). The deliverable leader sends the draft deliverable to the involved partners for their feedback and comments and integrates this feedback thereafter. The template will be made available by the PM (Project Manager) on the HealthyW8 collaborative platform.

Step 2 The deliverable leader sends the final draft to the WP leader for his feedback and potential modifications. These exchanges may take some time so we advise deliverable leaders to send to the WP Leader the final draft at least 1 month before the deliverable due date to the EC.

Step 3 The WP leader sends the final draft of the deliverable to the Project Coordinator and the PM at least 2 weeks before the deliverable due date. The Project Coordinator, with support from the ExC, has 2 weeks to review the deliverable and send back any comments to the WP leader.

Step 4 The Coordinator submits an electronic copy of the deliverable to the Granting Authority in due time.

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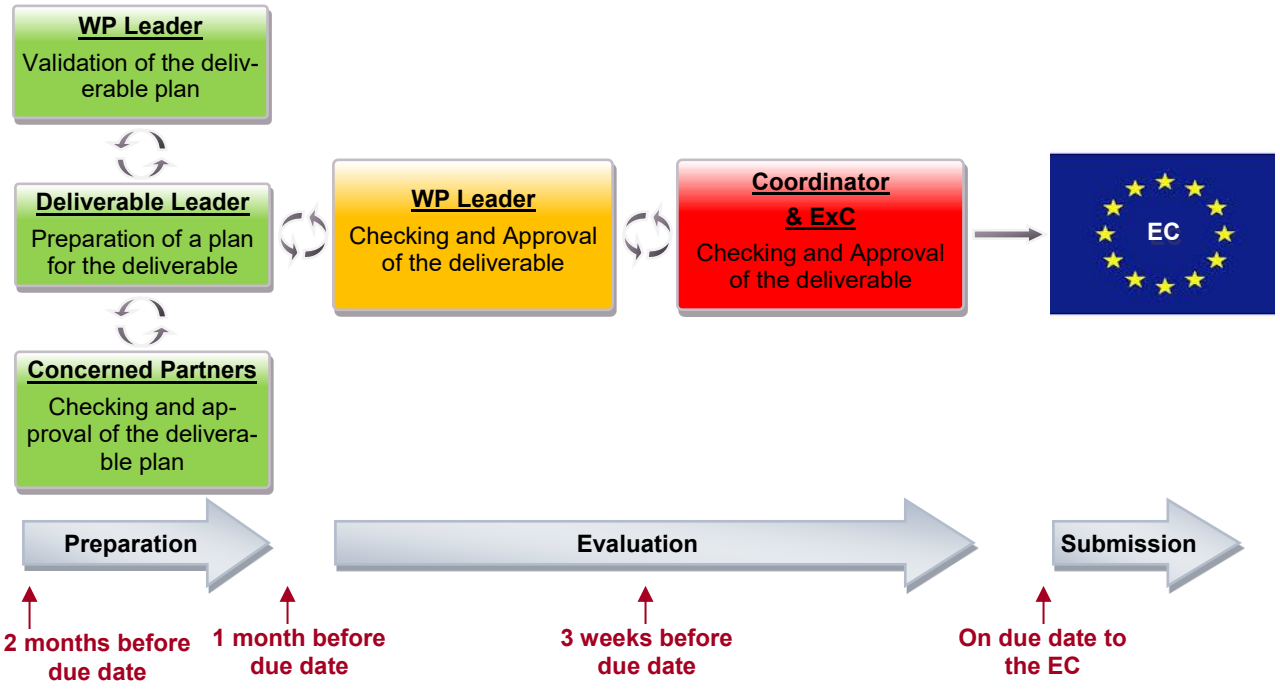

Fig. 1 Deliverables production process

NB If a deliverable is delayed, no longer relevant to the initial Description of Action or its content, its leaders or contributors have changed, inform the PM (yacine.ouzzahra@lih.lu) and the Coordinator (torsten.bohn@lih.lu) as soon as possible, at the latest 1 month before the deliverable due date explaining the reason of the deviation and indicating the new delivery date.

NB WP leaders should identify as soon as possible any item which may affect or delay the production of the deliverable and forward as soon as possible this information to the Coordinator and the Project Manager. If necessary, they should ask with appropriate arguments the ExC to postpone its delivery, but they should be aware that the delay could be refused by the ExC and could induce changes in budget allocation.

NB Role & Responsibilities

Deliverable leader is responsible for:

• Producing a deliverable plan including a draft table of contents, expected contributions per partners, timing for contributions, etc.

• Overseeing the quality and nature of the contributions from deliverable contributors or authors.

• Ensuring that the deliverable is produced in line with the contractual documents (DoA) and is submitted in due time to the WP leader for the evaluation process.

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WP leader is responsible for:

• Defining the deliverables of their WP in consultation with their WP partners and designating a suitable deliverable leader and providing this information to the PM.

• Overseeing the timely production of each deliverable by the designated deliverable leader.

• Evaluating the deliverable submitted in final draft format by the deliverable leader and endorsing its quality before submitting it to the Coordination and the PM.

• Overseeing any revising the deliverable further to the evaluation process initiated by the PM.

The PM is responsible for:

• Providing a deliverable template and guidelines on deliverable submission in the project.

• Following up the production and evaluation of project deliverables.

• Sending reminders when necessary.

• Making deliverables available to all partners, by publishing them on the collaborative platform.

The Coordinator is responsible for:

• Contributing, with the ExC, to the evaluation and endorsement of project deliverables.

• Submitting electronically the project deliverables to the EC.

2.2 Milestones

A milestone is a critical point in the development of an achievement or product at which decisions about next steps may have to be made. A milestone is not necessarily a document. It could be a prototype, an intermediary report, or a decision to be taken based on previous results to orient action during the next period.

The milestones for each WP are defined, together with their mean of verification, in the Description of Action (DoA).

NB The mean of verification of each milestone must be sent to the Coordinator and the PM 2 weeks before the due date of the milestone.

The PM is responsible for publishing on the collaborative workspace in the appropriate WP folder the information about the milestone.

2.3 Project Reporting to the EC

This section is based on the reporting requirements as stipulated in the Grant Agreement (GA) and the Consortium Agreement (CA).

The purpose of this part is to provide guidance to assist partners in preparing reports and also to provide a uniform framework for all reports in HealthyW8 (figure 2).

HealthyW8 is divided into four reporting periods:

Reporting Periods:

- ✓ **RP1:** 1st May 2023 (M1) to 30th October 2024 (M18)
- ✓ **RP2:** 1st November 2024 (M19) to 30th April 2026 (M36)
- ✓ **RP3:** 1st May 2026 (M37) to 30th April 2027 (M48)
- ✓ **RP4:** 1st May 2027 (M49) to 30th April 2028 (M60)

For each of these major reporting periods, different periodic reports are required by the EC.

The reports required are:

- **M20 (31st December 2024):** Submission of the 1st periodic report covering period M1 to M18.
- **M38 (30th June 2026):** Submission of the 2nd periodic report covering period M19 to M36.
- **M50 (30th June 2027):** Submission of 3rd periodic report covering M37 to M48
- **M62 (30th June 2028):** Submission of 4th periodic report covering M49 to M60 & the final report covering the entire project period (M1 to M60)

Four months before the report submission, the Project Manager will provide the templates for the technical report, which will be filled in by each WP leader together with partners involved in their WP, and a template to prepare the financial statement, which will be filled in by each partner. These templates, together with guidelines on how to fill them in, will be made available to WP leaders and all other partners 4 months before report submission and a reminder will be sent 2 months before submission.

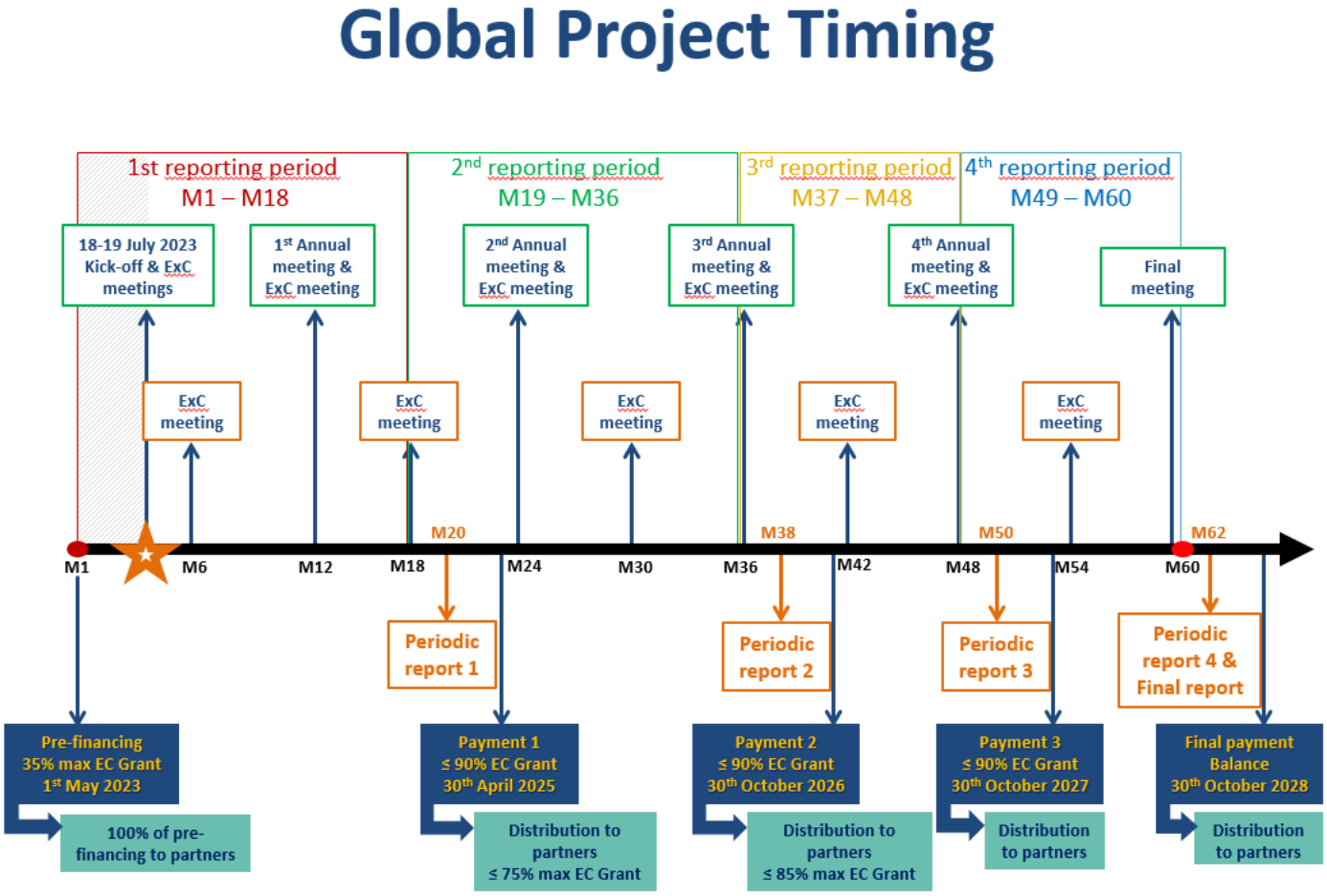

Fig. 2 General project timetable

Periodic Technical Report

The technical report contains an overview of the activities carried out during the reporting period and describes the progress in relation to the project objectives, the progress towards the milestones and the deliverables set for the period. Any observed or foreseeable deviations from the initial plan or problems and their corrective actions, taken or to be taken, must be described in this report.

It will be compiled by the coordinator and the PM from input sent by the beneficiaries (WP leaders & partners involved in each WP). Once validated, it will be submitted online through the EC portal by the Coordinator.

It will consist of:

- An explanation of the work carried out by the beneficiaries;
- An overview of the progress towards the objectives of the action, including milestones and deliverables identified in Annex I of the GA (DoA). This report must include explanations justifying the differences between work planned in Annex I and that actually carried out. The report must also enclose a detailed description of the exploitation and dissemination of the results and — if required — an updated 'plan for the exploitation and dissemination of the results;

- A summary for publication by the EC;
- The answers to the 'questionnaire' covering issues related to the action implementation and its economic and societal impact, notably in the context of the Horizon Europe key performance indicators and the Horizon Europe monitoring requirements.

A procedure is needed to ensure timely submission of the technical reports (figure 2).

NB Tips to make a good report

• Check the content of the report

• Check reality of the work performed against the DoA → **explain & justify changes**

• Mirror explanations in the use of resources (description of deliverables, tasks & persons performing them within the considered period)

• Mirror those again in the invoices (best practice invoices)

• Write your use of resources based on the invoices

• Reflect the use of resources in describing the work in the report

• Check the report against DoA

Periodic Financial report

The periodic financial report will contain:

- An individual financial statement from each beneficiary, covering the reporting period concerned. The individual financial statement must detail the eligible costs for each budget category. The beneficiaries must declare all eligible costs. Amounts which are not declared in the individual financial statement will not be taken into account by the EC. The individual financial statements of the last reporting period must also detail the revenues[1] of the action, if any (see Article 22.3.4 of the GA).

  Each beneficiary must certify that:

  - the information provided is full, reliable and true;
  - the costs declared are eligible (see Article 6 of the GA);
  - the costs can be substantiated by adequate records and supporting documentation that will be produced upon request or in the context of checks, reviews, audits and investigations, and
  - for the last reporting period: that all the revenues have been declared by the relevant partners.

- An explanation of the use of resources and the information on subcontracting and in-kind contributions given by third parties from each beneficiary, for the reporting period concerned;

[1] 'Revenue' is all income generated by the action, during its duration, for beneficiaries that are **profit legal entities** (— with the exception of income generated by the exploitation of results, which are not considered as revenues).

- A 'periodic summary financial statement', created automatically by the electronic submission system, consolidating the individual financial statements for the reporting period concerned and including — except for the last reporting period — the request for interim payment.

A procedure is needed to ensure the submission on time of the financial report and to ensure the internal follow-up of the use of resources (figure 3). Each beneficiary must submit online its financial report *via* the EC portal (Periodic Reporting Module).

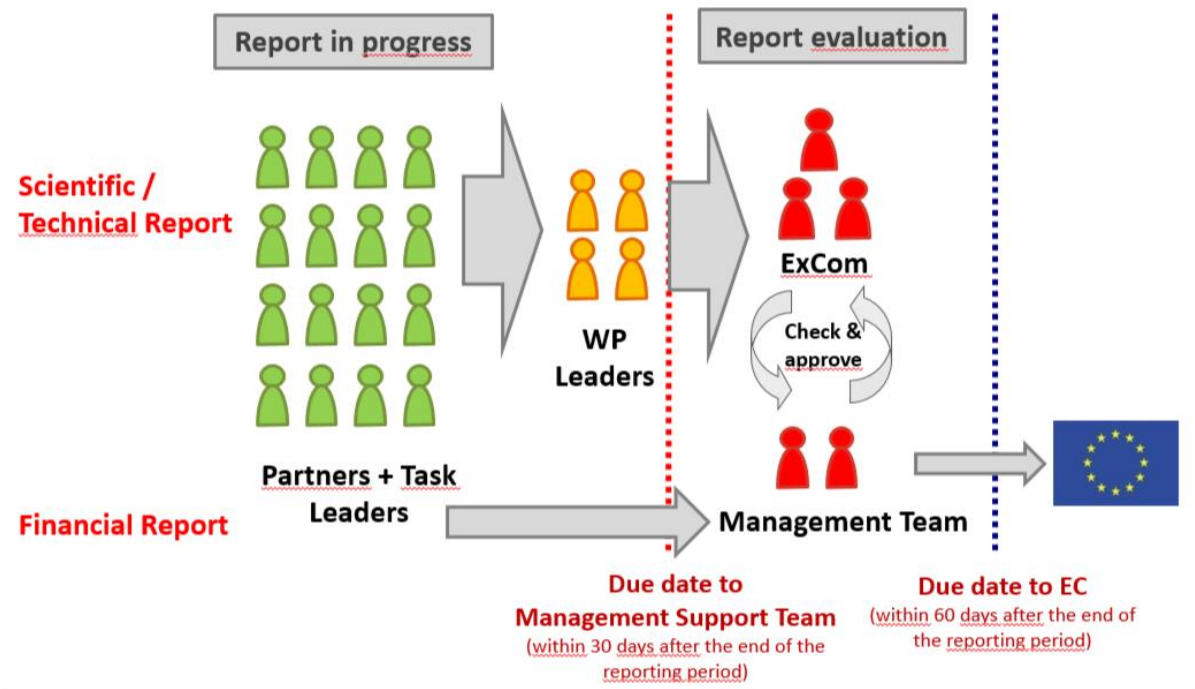

Fig. 3 Procedure for production and submission of the periodic reports

NB Tips to avoid errors when claiming costs

Costs are eligible if they are:

- Actually incurred by the beneficiary and necessary to achieve the objectives of the project and expected results
- Incurred during the reporting period within the action (1st May 2023 /30th April 2028)
- Connected to the action
- Identifiable and verifiable (recorded in the beneficiary`s accounting records)
- In compliance with national law
- In accordance with each beneficiary's organization accounting principles and management practices (e.g. depreciation, travel standard class)
- Reasonable, financially sound
- Value added tax is eligible only if non-deductible (including non-identifiable VAT) or non-refundable

Therefore, please:

• Be transparent

• Keep supporting documents up to 5 years after project end (i.e. 5 years after date of last payment) as set out in the Data Sheet (Point 6)

• Treat all costs as you usually do in your business practice (according to organisation's internal rules)

• Check for exceptions beforehand (inform the coordinator and the PM who will be in contact with Project Officer (PO))

• Record hours or days devoted to the project and keep trace of expenses linked to the project

NB Periodic Report single submission & single rejection

TheGranting Authorityrequires that the Coordinator submits the technical and financial reports as a **"single package"**.

If a beneficiary does not include its financial statement in a periodic report the costs will be considered **'zero'**. However the beneficiary can declare its costs in the next reporting period but will not receive intermediary payment for the reporting period where costs were considered zero.

If one document requires changes or corrections the full package is rejected because of the SINGLE SUBMISSION.

Final Report

The final report will be submitted at the same time as the last periodic report.

The final report will consist of:

- A **final technical report** with a **summary** for publication consisting of an overview of the results for the full duration of the project and their exploitation and dissemination, the conclusions on the action, and the socio-economic impact of the action. It is aimed at the general interested reader and therefore should not be very technical. The overview report will be mainly drafted by the Coordinator, the WP leaders and the PM with the help of partners where required.
  A **final financial report** consisting of a **final summary financial statement** created automatically by the electronic exchange system, consolidating the individual financial statements for all reporting periods and including the request for payment of the balance and the relevant **Certificates on the Financial Statements** (CFS) (if necessary).

2.4 Project Reviews

The aim of the technical reviews is to have an external expert assessment of the work carried out under the project over the considered period and provide recommendations to the Granting Authority and the Consortium. Such reviews may cover scientific, technological and other aspects relating to the proper implementation of the project's workplan and of the Grant Agreement.

During the whole duration of the HealthyW8 project, 4 reviews may be envisioned, 60 days after each reporting period (see tentative schedule in the table below). This usually takes place 2 to 3 weeks after the submission of the report. It is the Granting Authority who takes the decision to plan a review for a given reporting period.

Review number	Tentative timing	Planned venue of review	Comments
RV1	M21 (December 2024)	To be decided	Contact PO on M18
RV2	M39 (July 2026)	To be decided	Contact PO on M36
RV3	M51 (July 2027)	To be decided	Contact PO on M48
RV4	M63 (July 2028)	To be decided	Contact PO on M60

The organisation of project reviews should be further discussed and planned with the PO according to the advancement of the project, the periodic reports submission and the project meetings.

The Granting Authority may seek for an expert's opinion, and will invite one or several scientific or technological experts to review the reports. Notwithstanding, it is the Granting Authority who decides if reports are accepted or not.

Objectives of the review

The reviewer's task is to give external expert guidance to the Granting Authority on the project, with respect to the following issues:

1. The degree of fulfillment of the project work plan for the relevant period and of the related deliverables;
2. The continued relevance of the objectives and breakthrough potential with respect to the scientific and industrial state of the art;
3. The resources planned and utilized in relation to the achieved progress, in a manner consistent with the principles of economy, efficiency and effectiveness;
4. The management procedures and methods of the project;
5. The beneficiaries' contributions and integration within the project;
6. The expected potential impact in scientific, technological, economic, competitive and social terms (where relevant), and the plans for the use and dissemination of results.

The reviewer(s) will also assist the Granting Authority by recommending any reorientation that may be required, but the final decision on recommendations and reorientation is taken only by the Granting Authority.

Reviewing Process

The Granting Authority transmits the name(s) of the appointed expert(s) to the Consortium in order to check if there are no issues raised on grounds of commercial confidentiality of conflict of interest. The Consortium can also suggest experts and the Granting Authority can approve or reject this choice.

A review meeting has to be scheduled by the Project Manager together with the Project Officer. The expert(s) will read all relevant documents before the meeting (Annex I: Description of Action, Project periodic reports, deliverables). The expert(s) will then provide an assessment of the project based on the written material and information provided at the meeting.

During the review meeting, each WP leader will present his/her WP objectives, progress, difficulties and alternative solutions selected. Ideas can be exchanged with the reviewer(s) on main issues. The reviewer is not a fault-finder but an adviser who can give useful information for the future of the project.

The technical review report of the project (consolidated if there are several experts) is transmitted by the Granting Authority to the Consortium via the Coordinator but it is not made public.

NB It is important to be transparent and open to the reviewer(s). If there have been problems in the project, you can talk about them and tell how you have planned to solve them. Good preparation of the review (including a rehearsal meeting) is a key success factor.

2.5 Project assessment by the Granting Authority

On the basis of expert's formal recommendations, the Granting Authority will inform the Coordinator of its decision (which may differ from expert's recommendations):

- to accept or reject the deliverables;
- to allow the Project to continue without modification of Annex I or with minor modifications;
- to consider that the Project can only continue with major modifications;
- to initiate the termination of the Grant Agreement or of the participation of any Beneficiary according to Article 32 of the Grant Agreement;
  to issue a recovery order regarding all or part of the payments made by the Granting Authority and to apply any applicable sanction.

3 Financial issues

3.1 Costs of the project

The purpose of this section is to summarize how costs claims are made and how claims will be verified by the Granting Authority. In order to be considered for reimbursement, costs incurred by the beneficiaries in the course of the project must satisfy the eligibility criteria laid down by the Grant Agreement.

Eligible costs

- **Actual** (*not estimated, budgeted or imputed*) and **necessary** to achieve the objectives of the project and expected results
- **Incurred by the Beneficiary or Affiliated Entity**
- **Identifiable and verifiable** in particular recorded in the beneficiary's accounts (*keep supporting documents up to 5 years after last payment*)
- Incurred **during** the timescale of project (with the exception of costs relating to the submission of the final periodic report, which may be incurred afterwards; cf. Article 21)
- **In accordance with your organization accounting principles and management practices** (e.g. depreciation, travel standard class)
- Compliant with **applicable national law on taxes, labour and social security**
- Compliant with **principle of sound financial management** (efficiency and economy)

- **Identifiable and verifiable, recorded** in your organization accounts
- **Planned** under one of the budget categories set out in Article 6.2 and Annex 2 (overall budget)
- **Value added tax (VAT)** is eligible if non-deductible (including non-identifiable VAT)

Non-eligible costs

- Identifiable taxes and duties
- Deductible VAT
- Interest owed
- Provisions for possible future losses/charges
- Debt and debt service charges
- Costs related to the return on capital
- Currency change losses
- Bank costs charged by the beneficiary`s bank for transfer from the Commission
- Expensive or reckless expenditure
- Costs declared under another EU or Euratom grant
- Others

NB Tips

1. Discuss in advance with the Coordinator and the PM any doubt about eligibility
2. Non-deductible or non-refundable VAT is an eligible cost.
3. If costs are invoiced or paid outside the actions duration, it is the date of the event that triggers the costs that is taken in consideration for the eligibility of costs (e.g. purchase of travel to attend the kick-off meeting may be done prior to the action start and eligible if the meeting is held within the action duration). For invoices or payments issued after the action end date, they are eligible only if the debt existed already during the action duration (supported by documentary evidence) and the final cost are known at the moment of the final report.

3.2 Expense categories for eligible costs

General information

The budget allocated to each partner is not an 'acquired' budget and is only valid once the partner has reported and justified the claimed costs and validated those by a certificate on the financial statements (CFS) where applicable at the end of the action.

Direct costs

Direct costs are costs directly linked to the action implementation and can be directly attributed to it. The measurement system used by the Beneficiary must accurately quantify the cost. Direct measurement of costs does not mean fair apportionment of costs through proxies, cost drivers or allocation keys. Once you use them,

the costs must be considered as indirect costs and will be covered by the flat-rate contribution to indirect costs (see following section).

Personnel costs

- Personnel costs (eligible if they are related to personnel working for the beneficiary under an employment contract (or equivalent appointing act) and assigned to the action. They must be limited to salaries (including during parental leave), social security contributions, taxes and other costs included in the remuneration, if they arise from national law or the employment contract (or equivalent appointing act).

- The costs for natural persons working under a direct contract with the beneficiary other than an employment contract are eligible personnel costs, if:
    - the person works under the beneficiary's instructions and, unless otherwise agreed with the beneficiary, on the beneficiary's premises;
    - the result of the work carried out belongs to the beneficiary, and
    - the costs are not significantly different from those for personnel performing similar tasks under an employment contract with the beneficiary.

- The costs of personnel seconded by a third party against payment are eligible personnel costs with no more special article in the GA (as opposed to H2020).

- The costs of personnel contributed by a third party free of charge must be declared under the personnel costs category as if they were costs incurred by the beneficiary, if the conditions in Article 9 of GA are met.

- The number of actual hours or days (depending on the recording system of the Beneficiary) declared for a person must be identifiable and verifiable through a timesheet. A time sheet is needed for **persons who do NOT work exclusively for the action** (see below an extract from article 20.1 of the Grant Agreement).

ARTICLE 20 — RECORD KEEPING

20.1 Keeping records and supporting documents

Moreover, the following is needed for specific budget categories:

(e) for personnel costs: time worked for the beneficiary under the action must be supported by **declarations signed monthly** by the person and their supervisor, unless another reliable time-record system is in place; the granting authority may accept **alternative evidence** supporting the time worked for the action declared, if it considers that it offers an adequate level of assurance

NB Tips

Time records:

For persons who work for the action (regardless of them being full-time or part-time employees and/or if they work exclusively or not for the action; new for Horizon Europe), the Beneficiary may either:

1. use reliable time records (i.e. timesheets) either on paper or in a computer-based time recording system to record (at least) all the hours worked in the action. Reliable time records must be dated and signed at least monthly by the person working for the action and their supervisor. If the time recording system is computer-based, the signatures may be electronic (i.e., linking the electronic identity data, e.g., a password and username, to the electronic validation data), with a documented and secure process for managing user rights and an auditable log of all electronic transactions.

or

2. sign a monthly declaration on days spent for the action (see template in annex 3).

What to include in your timesheet as minimum information?

- The call identifier, acronym, and number of the action, as specified in the GA
- The beneficiary's full name, as specified in the GA
- The year
- The full name of the person working for the action
- The number of days worked for the action monthly in the year covered by the time record
- The person's full name and signature/month
- The supervisor's full name and signature/month
- A **reference to the work packages of Annex 1, to which the person has contributed by the reported working days**.

Very important: The information that you include in the timesheets must match records of the annual leave, sick leave, other leaves, and work-related travel.

Examples of possible alternative evidence for time spent on the project (non-exhaustive list): *travel documents proving participation in a project meeting (boarding pass, obliterated travel ticket, hotel invoice, etc.); agenda and minutes of the meeting; attendance lists; working papers; laboratory logbooks; professional/personal diaries; documents related to presentations; scientific publications; correspondence such as letters, notes, memos, emails; etc.*

NB Tips

Calculation of personnel costs

Provisions on personnel costs have been further simplified in Horizon Europe.

The concept of productive hours and the various prescriptive methods to determine and report eligible personnel costs implemented under H2020 have been discontinued. Instead, a corporate and simpler formula is to be applied allowing for reducing errors and administrative burden for beneficiaries.

A **daily rate** approach for personnel costs is now a fixed provision across all programmes.

Daily rate calculation

Daily Rate = annual personnel costs for the person / 215

{**actual personnel costs during the months within the reporting period** *divided by the* ***maximum declarable day-equivalents***}

The maximum declarable day-equivalents for each reporting period are calculated as follows:

{((215 / 12) multiplied by the number of months [during which the person is employed] within the reporting period) multiplied by the working time factor [e.g. 1 for full-time, 0.5 for 50% part time etc.]}

Calculation of eligible personnel costs (for each person)

Eligible personnel costs = Daily rate x Days worked on the action

{***daily rate for the person*** *multiplied by* ***number of actual days*** *worked on the action (****rounded up or down to the nearest half-day equivalent****)}*

For time recording system in hours:

If your usual cost accounting practice is to calculate hourly rates instead of daily rates and you want to continue using your existing time-recording system where you record your time in hours, you need to convert the productive hours into productive days.

Three conversion options are available:

1. A conversion based on the average number of hours that the person must work per working day according to her/his contract.

EXAMPLE: If the contract says that the person must work 37,5 hours per week distributed in 5 working days, a day-equivalent for the person in 7,5 hours (37,5/5). In the same example if the person works 50%, part time, the day-equivalent would be 3,75 hours (18,75/5)

2. A conversion based on the usual standard annual productive hours of the Beneficiary, if it is at least 90% of the annual workable hours of the beneficiary

EXAMPLE: Standard annual productive hours of the beneficiary=1558,75. Standard annual workable hours of the beneficiary=1700.

1700x90%= 1530<1558,75 1558,75/215=7,25 hours = 1 day-equivalent

3. A conversation based on a fixed number of hours (e.g. for beneficiaries with no reference in their contracts nor standard annual productive hours): 1 day-equivalent = 8 hours

Further details and practical examples can be found in the **Annotated Grant Agreement (AGA).**

Direct costs of subcontracting

They are eligible if the tasks to be implemented and the estimated cost for each subcontract is set out in the DoA and the total estimated cost of subcontracting per beneficiary is set out in the budget. The beneficiaries must award the subcontracts ensuring the best value for money or, if appropriate, the lowest price. In doing so, they must avoid any conflict of interests.

If a beneficiary needs to subcontract tasks and it was not planned in the DoA, he will have to inform the Coordinator and the PM who will take care to check with the PO if an amendment is needed or not. **Subcontracting costs not foreseen in the DoA are not eligible.**

Purchase costs

This category includes:

- **Travel costs and related subsistence allowances** (including related duties, taxes and charges such as non-deductible VAT paid by the beneficiary), eligible if they are in line with the beneficiary's usual practices on travel.
- **The depreciation costs of equipment, infrastructure or other assets** (new or second-hand) as recorded in the beneficiary's accounts are eligible, if they were purchased in accordance with Article 6.2 of the GA.

  The costs of renting or leasing equipment, infrastructure or other assets (including related duties, taxes and charges such as non-deductible VAT paid by the beneficiary) are also eligible, if they do not exceed the depreciation costs of similar equipment, infrastructure or assets and do not include any financing fees.

  The costs of equipment, infrastructure or other assets contributed in-kind to the action are eligible, if they do not exceed the depreciation costs of similar equipment, infrastructure or assets, do not include any financing fees and if the conditions in Article 9.2 of the GA are met.

  The only portion of the costs that will be taken into account is that which corresponds to the duration of the action and rate of actual use for the purposes of the action. It has to be in the beneficiary's records and the full time use of the equipment is required.
- **Costs of other goods, works and services** (including related duties, taxes and charges such as non-deductible VAT paid by the beneficiary). Such goods, works and services include, for instance, consumables and supplies, dissemination (including open access), protection of results, certificates on the financial statements (if they are required by the Agreement), certificates on the methodology, translations and publications.

Other cost categories

This category includes:

- Internally invoiced goods and services

What is covers?

This budget category covers the cost of goods and services that are produced or provided within two units of the same beneficiary organisation to be used directly on a Horizon Europe project. This includes self-produced consumables, the use of specific research devices or research and technology infrastructures and facilities, standardized in-house testing procedures, as well as specialised premises for hosting the research specimens used for the project (e.g. animal house, clean room…).

How to include actual indirect costs for internally invoiced goods and services?

In order to do this, beneficiary is required to have a well-documented methodology for using allocation keys based on the organisation's usual cost accounting practices. For example, the beneficiary will be able to charge the actual power supply costs allocated to a specific laboratory or room based on the square meters it occupies, instead of simply claiming the standard 25% flat rate, which may not cover all overheads. Organisations that do not yet have a methodology for calculating actual indirect costs may wish to establish one before the main Horizon Europe calls are launched. Allocation keys resulting in a higher unit cost for the internally invoiced good or service when used in EU projects compared with other projects will not be accepted – the methodology must be used consistently, regardless of the source of funding.

Consequently, because the **actual indirect costs are expected to be included in the unit cost for internally invoiced goods or services**, they will not attract the 25% flat rate for indirect costs in the proposal's budget table.

- Financial support to third parties (not applicable)

Indirect costs

Indirect costs cannot be directly attributed to the project implementation, but can be justified by accounting system, and are incurred in direct relationship.

Indirect costs are eligible if they are declared on the basis of the **flat-rate of 25% of the eligible direct costs**, from which are excluded:

- costs of subcontracting
- costs from specific cost categories (unit costs, lump sum costs) that already include indirect costs, including the **internally invoiced goods and services**
- costs of providing financial support to third parties (not applicable)

3.3 Budget transfers

The estimated budget of the action is calculated on the basis of the estimated eligible costs submitted by the consortium and is annexed to the GA (Annex II). This budget is therefore an estimation, implying:

- At the time of reporting, beneficiaries may declare costs that are different from the estimated eligible costs in the budget (deviations must be highlighted and justified in the technical report).
- Moreover, beneficiaries may transfer budget among themselves, between Affiliated Entities or between budget categories without requesting an amendment.
- If the incurred eligible costs are lower than the estimated eligible costs, the difference can be allocated to another beneficiary or another budget category.

During the whole duration of the project, budget transfers can be done through the **simplified approval procedure** (*ex post* in the periodic report) (if needed and if the conditions are acceptable). Please, refer to the table below and to the figure 4.

Table 1: Budget transfers

Budget transfers and re-allocation	Amendment needed ?
From one beneficiary to another	**NO**
From one budget category to another	**NO**
Re-allocation of Annex I tasks	**YES**
Transfers between forms of costs (actual costs, unit costs, etc.)	**YES** if the "form" receiving the transfer was not included in the budget (except for transfer of amounts to budget categories which are based on unit costs or unit contributions calculated using the usual cost accounting practices of the beneficiary (e.g. budget category D.2 Internal invoices)
Transfers within *personnel* costs	**NO**
Transfers to costs of *internally invoiced goods and services*	**NO**
New subcontracts or in-kind contributions	**YES** (strongly advised)

	Estimated eligible[1] costs (per budget category)							
	Direct costs							Indirect costs
	A. Personnel costs			B. Subcontracting costs	C. Purchase costs			D. Other cost categories	E. Indirect costs[3]
	A.1 Employees (or equivalent) A.2 Natural persons under direct contract A.3 Seconded persons		A.4 SME owners and natural person beneficiaries	B. Subcontracting	C.1 Travel and subsistence	C.2 Equipment	C.3 Other goods, works and services	D.2 Internally invoiced goods and services	E. Indirect costs
Forms of funding	Actual costs	Unit costs (usual accounting practices)	Unit costs[2]	Actual costs	Actual costs	Actual costs	Actual costs	Unit costs (usual accounting practices)	Flat-rate costs[4]
	a1	a2	a3	b	c1	c2	c3	d2	e = 0,25 * (a1 + a2 + a3 + c1 + c2 + c3)
1 - LIH	1 183 041.00	0.00	0.00	25 000.00	12 000.00	0.00	122 000.00	65 060.00	329 260.25
2 - LIST	420 807.00	0.00	0.00	0.00	8 000.00	0.00	5 000.00	0.00	108 451.75

Fig. 4: Budget transfers allowed requiring or not an amendment

Other cases where no amendment is needed:

- ✓ Change of name/address of beneficiaries & Affiliated Entity
- ✓ Change of beneficiary due to universal takeover
- ✓ Changes to name of the bank/address of branch/ name of account holder (validation of this data on the PP by the Commission is sufficient)

Procedure to change this information:

- Beneficiaries must keep information stored in the 'Participant Register' up to date via the Participant Portal (Article 36.3)
- The LEAR of the beneficiary updates this information
- Beneficiaries have to inform as well the Coordinator (offline)
- Validation Services validate the information in the IT system
- The validated changes will be notified via the Participant Portal

NB If Granting Authority considers change affects the action implementation, it will inform the coordinator

Example: beneficiary changes its legal address to a third country.

NB If the change is significant an amendment to the GA is needed. Each time you need to operate a budget transfer, please inform the Coordinator and the PM. They will take care of contacting the Granting Authority in order to discuss the typology and impact of change.

4 Granting authority: contributions

The grant reimburses a maximum of:

- **100% of the eligible costs of all beneficiaries that are non-profit legal entities**.

4.1 Payments schedule

Each partner's budget is described in the DoA and has been accepted by each partner through the signature of the GA.

The Granting Authority will transfer to the Coordinator 5 instalments (figure 5):

- **Pre-financing,** paid by the Granting Authority after the signature of the GA. The payment was fixed by the Granting Authority and was equal to the 40% of the total EU grant. The pre-financing includes the Mutual Insurance Mechanism (MIM) fund (5% of the total EU grant), which was retained by the Granting Authority and will be released at the end of the project. So the EC pre-financing payment received for each beneficiary corresponds to 35% of its EU contribution.

- **1st Interim Payment** will be issued by the Granting Authority maximum 90 days after the approval of the 1st periodic report (or additional information or explications, if requested). The sum of received interim payment and pre-financing will not exceed the 90% of the EU grant of each partner. However, as per the Consortium Agreement, the Coordinator will limit the individual amounts received (prefinancing + payment 1) to maximum 75% of the respective maximum grant amounts.

- **2nd Interim Payment** will be issued by the Granting Authority maximum 90 days after the approval of the 2nd periodic report (or additional information or explications, if requested). The sum of received 1st & 2nd interim payments and pre-financing will not exceed the 90% of the EU grant of each partner. However,

as per the Consortium Agreement, the Coordinator will limit the individual amounts received (prefinancing + payment 1) to maximum 85% of the respective maximum grant amounts.

- **3rd Interim Payment** will be issued by the Granting Authority maximum 90 days after the approval of the 3rd periodic report (or additional information or explications, if requested). The sum of received 1st & 2nd & 3rd interim payments and pre-financing will not exceed the 90% of the EU grant of each partner.

- **Final Payment** will be made after the approval of the last periodic report and of the final report. It will be equal to the amount of project accepted EU grant claimed by the partner – amount of payments already paid (pre-financing and interim payments).

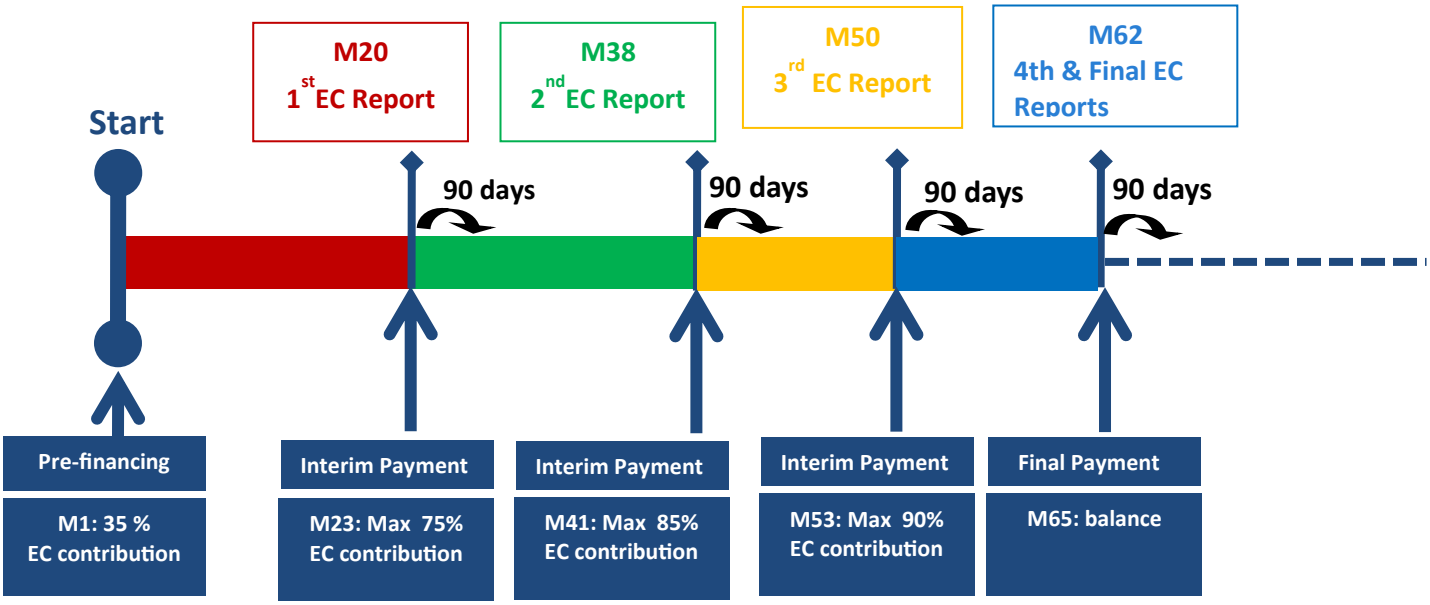

Fig. 5 Schedule of Payments, Reporting Periods

4.2 Funds transfer from LIH to Beneficiaries

- The Coordinator receives payments made by the Granting Authority (as outlined above).
- All partners provide the Coordinator with details of their bank account (if an update is necessary, complete a new Financial Identification form and have it duly signed before sending it to the PM).
- Once the Coordinator has received the payment, the relevant amounts (see Consortium Agreement for detailed internal arrangements) will be transferred to Beneficiaries without unjustified delay.

4.3 Certificate on Financial Statement (CFS)

Some beneficiaries/Affiliated Entities must submit a Certificate on the Financial Statement (CFS). Such a certificate is needed if the beneficiary/Affiliated Entity indicates **a total financial contribution of 430.000 € or more** as **Requested EU Contribution**.

If a certificate is required, all costs declared as actual costs or average personnel costs must be covered by the certificate. Incomplete certificates will be returned for correction or costs can be rejected.

Affiliated Entities must submit a certificate if it (on its own, without its beneficiary) reaches the EUR 430.000 threshold.

Certificates submitted before the 430.000 € threshold is reached will be rejected by the Granting Authority.

Beneficiaries/Affiliated Entities may submit either one certificate per reporting period or a single CFS for the whole action.

In both cases, the certificate may only be submitted with the final financial report. The Granting Authority will not accept certificates submitted at any other moment (and costs incurred for those certificates will not be considered eligible, because not necessary).

The certificate must be issued by an external auditor, using the template in Annex V of the GA. Only qualified auditors may issue a certificate. 'Qualified' means qualified in accordance with national legislation implementing Directive 2006/43/EC43 (or any EU legislation that replaces this Directive).

The auditor must certify that the costs declared in the financial statement are accurately recorded in the beneficiary's accounting system and eligible and that all receipts have been declared. If the auditor cannot confirm (for any reason), s/he must explain this in detail in the certificate. The Granting Authority will consider the explanation in light of the facts provided by the auditor, and decide on steps to take.

Specific cases (certificates on the financial statements):

For **public bodies**, the certificate may be issued by an independent public officer with formal competence to audit the beneficiary/linked third party (instead of by an external auditor).

For **international organisations**, it can be an internal or external auditor that is appointed in accordance with the internal financial regulations and procedures of the organisation.

Beneficiaries/Affiliated Entities from a third country — established in a non-EU country — must provide a certificate that complies with national regulations in the field.

4.4 EC audit

The Granting Authority may — **at any moment and up until 5 years after the final payment** — carry out an audit (these audits are different from the CFS).

Audits are based on the financial statements submitted by the beneficiary, the extension of audit findings is mandatory. The Coordinator and the Beneficiary concerned will be contacted by the Granting Authority in this respect.

5 Communication best practices

5.1 Communication between partners

Communication and its traceability are very important particularly in view of the number and large geographical distribution of the partners.

NB It is very important to communicate as soon as possible any foreseeable delay in project work and outcomes to the WP leader, to the Coordinator and to the Project Manager.

Document traceability

During the project, numerous documents will be created and modified by partners. That's why it is important to have a good traceability of any document.

For this purpose, a nomenclature has been defined for HealthyW8. Each document must be named as follows:

HealthyW8 – WPx (or Dx.x or MLx) – document title – name of the creator – version n° - date (ddmmyyyy)

If you have to modify a document, please activate the track changes and rename the document by adding your name at the end.

NB It is important to respect this nomenclature especially for deliverable, milestones and reports to the Granting Authority in order to allow the follow up of any contractual documents.

Pay attention if the mention "confidential" is listed.

Mailing lists

A HealthyW8 mailing list (HealthyW8@lih.lu) has been created in order to facilitate communication between partners. This mailing list will enable you to send messages to all HealthyW8 partners.

If you need to include a new member in the HealthyW8 mailing list, contact the PM (yacine.ouzzahra@lih.lu), and justify your request by giving the name and the role of the new member as well as the work package(s) were s/he is involved.

Additional mailing lists have been created by WP, so that information can be smoothly exchanged within each WP. These list are the following:

- wp1-HealthyW8@lih.lu : Contacts within WP1
- wp2-HealthyW8@lih.lu : Contacts within WP2
- wp3-HealthyW8@lih.lu : Contacts within WP3
- wp4-HealthyW8@lih.lu : Contacts within WP4
- wp5-HealthyW8@lih.lu : Contacts within WP5
- wp6-HealthyW8@lih.lu : Contacts within WP6

HealthyW8 collaborative workspace

The project intranet (collaborative workspace) is under construction and is accessible at https://cloud.lih.lu/apps/files/?dir=/HealthyW8&fileid=822069 with your individual credentials, which you have received from LIH.

The Project Manager (yacine.ouzzahra@lih.lu) is setting up this platform and will ensure its maintenance throughout the project.

This internal website is a secured collaborative workspace on the web where all partners can share information and documents:

- scientific documents
- administrative documents
- financial documents

This platform is intended to enable collaboration between the different partners at all levels: work packages, Executive Committee, etc. and to trace document delivery. It should also be used as a central storage system of the project.

Its functions include scientific, administrative and financial information exchange and archiving. It will also be used to monitor the projects through appropriate tools to be developed.

This secured internal website shall be used during the project to avoid any excessive exchange of emails, which may saturate users' mailboxes.

This Collaborative Workspace is secured by password and only authorized people can access this site as editors.

NB Obligations of the partners:

- Not sharing the login/password
- Asking for new access only to authorized people working for the partner
- Providing information in advance on any withdrawal of persons working for a partner (*e.g.* temporary employees)

5.2 External communication / HealthyW8 website

The external communication will provide information on HealthyW8 activities and outputs in order to share, assess and disseminate HealthyW8 data and results.

All deliverables and all documents with public dissemination level have to be put on the HealthyW8 website after validation by the ExC.

Procedure for results dissemination

During the Project and for a period of 1 year after the end of the Project, the dissemination of results is governed by the procedure of Article 17 of the Grant Agreement and article 8.4 of the Consortium Agreement.

Any publication, patents or communication (presentation, seminars, conference) by one beneficiary, in connection with the project or with the Background, is required to be submitted to the Coordinator and to the other Beneficiaries. A Beneficiary cannot publish Foreground or Background of another beneficiary without the other Beneficiary's prior written approval.

Procedure

Step 1: An abstract of the intended scientific publication shall be submitted, at least 30 days prior to the submission of the publication, to the other Beneficiaries and to the Coordinator. The delay for submission prior to the communication shall be reduced to (i) 15 calendar days for the following communications: oral or poster presentations at scientific meetings, press releases, short news items for the website, blog and online social network contributions.

Step 2: The Coordinator and the Beneficiaries have the number of days indicated in the CA from the date of referral to object or ask for complementary data. Beyond this period, consent shall be deemed to have been given unless an objection is raised.

NB Please keep in mind that any communication / dissemination activity related to the action and any results (in any form, including electronic) must:

- Display the EU emblem (downloadable here) and

- Include the following text:

"The research leading to these results has been conducted as part of the HealthyW8 project which received funding from the European Union's Horizon Europe Research and Innovation Programme under the grant agreement n° 101080645. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Health and Digital Executive Agency. Neither the European Union nor the granting authority can be held responsible for them."

When displayed together with another logo, the EU emblem must have appropriate prominence.

6 Glossary

CA	Consortium Agreement
CFS	Certificate on Financial Statements
DoA	Description of Action (same as Annex I of the GA)
EC	European Commission
ExC	Executive Committee
FO	Financial Officer (@ Granting Agency)
GA	Grant Agreement / General Assembly
OSP	Open Stakeholder Platform
PM	Project Manager
PMT	Project Management Team
PO	Project Officer (@ Granting Agency)
RP	Reporting Period
PR	Periodic Report
StAB	Stakeholder Advisory Board
WP	Work package

7 Annexes

7.1 Annex 1 - Deliverables List

Del. n°	Deliverable name	Short description	WP n°	Lead partner	Type	Dissem. level	Delivery date
D1.1	Internal (incl. relevant biomarkers) & external factors predicting obesity risk & nudges/ gamification features in HLRS	Report summarising the results of T1.1, T1.2, T1.3 to inform the work in WP2 (co-creation process and user-centred design)	1	CITA	R	SEN (under embargo until publ.)	M16
D1.2	Analysis/Audit of nutrition guidelines dedicated to overweight & obesity prevention	Report on summarised Audit/guideline work	1	BIPS	R	SEN (under embargo until publ.)	M27
D1.3	Results triangulation	Report on results' triangulation	1	BIPS	R	SEN	M40
D2.1	HDT-based obesity intervention toolkit specification & implementation	Architecture and knowledge base of the HDT and includes the implemented software with algorithms for health telemonitoring	2	LIST	R+O	SEN	M31
D2.2	Overweight/obesity intervention strategies	Insights gained from the participatory design process and resulting overweight/obesity intervention strategies	2	CNR	R	SEN	M33
D2.3	Final prototype of the intervention tools & recommendations for studies resulting from the participatory design	Identified user needs and functionalities of the intervention tools/software prototypes for the HLRS with required content. A 1st prototype will be issued in M8 for uptake in the trials. A holistic intervention portfolio will be defined for each target group that provides overweight/ obesity indicators for monitoring of outcomes	2	NIUM	R+O	SEN	M36
D3.1	Pilot studies initiation packages	For each trial: registration number of the clinical study and final version of study protocols The regulatory and ethics approvals will be provided for the 1st study participant	3	TU/e	R	PU	M10
D3.2	Pilot studies midterm recruitment report	Overview of the number of participants recruited/pilot, issues in recruitment and, if applicable, detailed description of applied and planned measures to compensate if any delay	3	TU/e	R	PU	M15
D3.3	Status of posting results for pilot studies	Posting of summary results in the applicable registry/ies (where the study was registered)	3	TU/e	R	PU	M24
D3.4	Pilot study inititon package -Bulgaria- RCNE-Young Adults	Submission package, prior to enrolment of first study participant, containing:	3	RCNE		PU	M10

		- the final version of the study protocol as submitted to regulators / ethics committee(s); - a registration number of the clinical trial in a WHO or ICMJE-approved registry; - regulatory and ethics (if applicable institutional) approvals required for the enrolment of the first study participant from ethics committees and national competent authorities if applicable					
D3.5	Pilot study initiation package - Bulgaria- RCNE-Elderly	Same as D3.4	3	RCNE		PU	M10
D3.6	Pilot study initiation package - Bulgaria- Virtech-Children	Same as D3.4	3	VIRTECH		PU	M10
D3.7	Pilot study initiation package - Bulgaria- Virtech-Elderly	Same as D3.4	3	VIRTECH		PU	M10
D3.8	Pilot study initiation package - Denmark- DTU-Children	Same as D3.4	3	DTU		PU	M10
D3.9	Pilot study initiation package - Germany- DFKI/BIPS-Children & Young adults	Same as D3.4	3	DFKI		PU	M10
D3.10	Pilot study initiation package - Italy-USGYoung Adults	Same as D3.4	3	USG		PU	M10
D3.11	Pilot study initiatin package - Luxembourg- LIH-Elderly	Same as D3.4	3	LIH		PU	M10
D3.12	Pilot study initiation package - The Netherlands-TU/e-Children & Young Adults	Same as D3.4	3	TU/e		PU	M10
D3.13	Pilot study initiation package - Portugal-UCYoung Adults	Same as D3.4	3	UC		PU	M10
D3.14	Pilot study initiation package - Portugal- UEV-Children	Same as D3.4	3	UEV		PU	M10
D3.15	Pilot study initiation package - Portugal- UEV-Young Adults	Same as D3.4	3	UEV		PU	M10

D3.16	Pilot study initiation package - Spain-CITAYoung Adults	Same as D3.4	3	CITA		PU	M10
D3.17	Pilot study initiation package - Spain-CITAElderly	Same as D3.4	3	CITA		PU	M10
D3.18	Pilot study initiation package - Spain- CREDA-Children	Same as D3.4	3	CREDA		PU	M10
D3.19	Pilot study initiation package - Spain- IDISBA-Children	Same as D3.4	3	IDISBA		PU	M10
D3.20	Pilot study initiation package - Spain- IDISBA-Young Adults	Same as D3.4	3	IDISBA		PU	M10
D3.21	Pilot study initiation package - Spain- IDISBA-Elderly	Same as D3.4	3	IDISBA		PU	M10
D3.22	Pilot study inititation package - Italy-AOUBO-Liver and Kidney Transplant Recipients	Same as D3.4	3	AOUBO		PU	M10
D3.23	Pilot study midterm recruitment report - Bulgaria-RCNE-Children	This report is due when 50% of the study population is recruited. The report shall include an overview of the number of participants recruited/pilot, issues in recruitment and, if applicable, detailed description of applied and planned measures to compensate if any incurred delay.	3	RCNE		PU	M15
D3.24	Pilot study midterm recruitment report - Bulgaria-RCNE-Elderly	Same as D.23	3	RCNE		PU	M15
D3.25	Pilot study midterm recruitment report - Bulgaria-Virtech-Children	Same as D.23	3	VIRTECH		PU	M15
D3.26	Pilot study midterm recruitment report - Bulgaria-Virtech-Elderly	Same as D.23	3	VIRTECH		PU	M15
D3.27	Pilot study midterm recruitment report - Denmark-DTU-Children	Same as D.23	3	DTU		PU	M15
D3.28	Pilot study midterm recruitment report - Germany-DFKI/BIPS-Children & Young Adults	Same as D.23	3	DFKI		PU	M15
D3.29	Pilot study midterm recruitment report - Italy-USG-Young Adults	Same as D.23	3	USG		PU	M15
D3.30	Pilot study midterm recruitment report -	Same as D.23	3	LIH		PU	M15

	Luxembourg-LIH-Elderly						
D3.31	Pilot study midterm recruitment report - The Netherlands-TU/e-Children & Young Adults	Same as D.23	3	TU/e		PU	M15
D3.32	Pilot study midterm recruitment report - Portugal-UC-Young Adults	Same as D.23	3	UC		PU	M15
D3.33	Pilot study midterm recruitment report - Portugal-UEV-Children	Same as D.23	3	UEV		PU	M15
D3.34	Pilot study midterm recruitment report - Portugal-UEV-Young Adults	Same as D.23	3	UEV		PU	M15
D3.35	Pilot study midterm recruitment report - Spain-CITA-Young Adults	Same as D.23	3	CITA		PU	M15
D3.36	Pilot study midterm recruitment report - Spain-CITA-Elderly	Same as D.23	3	CITA		PU	M15
D3.37	Pilot study midterm recruitment report - Spain-CREDA-Children	Same as D.23	3	CREDA		PU	M15
D3.38	Pilot study midterm recruitment report - Spain-IDISBA-Children	Same as D.23	3	IDISBA		PU	M15
D3.39	Pilot study midterm recruitment report - Spain-IDISBA-Young Adults	Same as D.23	3	IDISBA		PU	M15
D3.40	Pilot study midterm recruitment report - Spain-IDISBA-Elderly	Same as D.23	3	IDISBA		PU	M15
D3.41	Pilot study midterm recruitment report - Italy-AOUBO-Liver and Kidney Transplant Recipients	Same as D.23	3	AOUBO		PU	M15
D3.42	Status of posting results for pilot study - Bulgaria-RCNE-Young Adults	Irrespective of the successful completion of the clinical study, posting of summary results in the applicable registry/ies (where the study was registered)	3	RCNE		PU	M24
D3.43	Status of posting results for pilot study - Bulgaria-RCNE-Elderly	Same as D.42	3	RCNE		PU	M24
D3.44	Status of posting results for pilot study - Bulgaria-Virtech-Children	Same as D.42	3	VIRTECH		PU	M24
D3.45	Status of posting results for pilot study - Bulgaria-Virtech-Elderly	Same as D.42	3	VIRTECH		PU	M24

D3.46	Status of posting results for pilot study - Denmark-DTU-Children	Same as D.42	3	DTU		PU	M24
D3.47	Status of posting results for pilot study - Germany-DFKI/BIPS-Children & Young Adults	Same as D.42	3	DFKI		PU	M24
D3.48	Status of posting results for pilot study - Italy-USG-Young Adults	Same as D.42	3	USG		PU	M24
3D3.4	Stuts of posting results for pilot study - Luxembourg-LIH-Elderly	Same as D.42	3	LIH		PU	M24
D3.50	Status of posting results for pilot study - The Netherlands-TU/e-Children & Young Adults	Same as D.42	3	TU/e		PU	M24
D3.51	Status of posting results for pilot study - Portugal-UC-Young Adults	Same as D.42	3	UC		PU	M24
D3.52	Status of posting results for pilot study - Portugal-UEV-Children	Same as D.42	3	UEV		PU	M24
D3.53	Status of posting results for pilot study - Portugal-UEV-Young Adults	Same as D.42	3	UEV		PU	M24
D3.54	Status of posting results for pilot study - Spain-CITA-Young Adults	Same as D.42	3	CITA		PU	M24
D3.55	Status of posting results for pilot study - Spain-CITA-Elderly	Same as D.42	3	CITA		PU	M24
D3.56	Status of posting results for pilot study - Spain-CREDA-Children	Same as D.42	3	CREDA		PU	M24
D3.57	Status of posting results for pilot study - Spain-IDISBA-Children	Same as D.42	3	IDISBA		PU	M24
D3.58	Status of posting results for pilot study - Spain-IDISBA-Young Adults	Same as D.42	3	IDISBA		PU	M24
D3.59	Status of posting results for pilot study - Spain-IDISBA-Elderly	Same as D.42	3	IDISBA		PU	M24
D3.60	Status of posting results for pilot study - Italy-AOUBO-Liver and Kidney Transplant Recipients	Same as D.42	3	AOUBO		PU	M24

D4.1	RCT initiation package - Bulgaria-RCNE-Young Adults	A Submission package, prior to enrolment of first study participant, containing: - the final version of the study protocol as submitted to regulators / ethics committee(s); - a registration number of the clinical trial in a WHO or ICMJE-approved registry; - regulatory and ethics (if applicable institutional) approvals required for the enrolment of the first study participant from ethics committees and national competent authorities if applicable.	4	RCNE	R	PU	M24
D4.2	RCT midterm recruitment report - Bulgaria-RCNE-Children	This report is due when 50% of the study population is recruited. The report shall include an overview of the number of participants recruited/RCT, issues in recruitment and, if applicable, detailed description of applied and planned measures to compensate if any incurred delay.	4	RCNE	R	PU	M30
D4.3	Status of posting results for RCT - Bulgaria-RCNE-Children	Posting of summary results in the applicable registry/ies (where the study was registered)	4	RCNE	R	PU	M55
D4.4	RCT initiation package - Bulgaria-RCNE-Children	Submission package, prior to enrolment of first study participant, containing: - the final version of the study protocol as submitted to regulators / ethics committee(s); - a registration number of the clinical trial in a WHO or ICMJE-approved registry; - regulatory and ethics (if applicable institutional) approvals required for the enrolment of the first study participant from ethics committees and national competent authorities if applicable.	4	RCNE		PU	M24
D4.5	RCT initiation package - Bulgaria-RCNE-Elderly	Same as D4.4	4	RCNE		PU	M24
D4.6	RCT initiation package - Bulgaria-Virtech-Children	Same as D4.4	4	VIRTECH		PU	M24
D4.7	RCT initiation package - Bulgaria-Virtech-Elderly	Same as D4.4	4	VIRTECH		PU	M24
D4.8	RCT initiation package - Denmark-DTUChildren	Same as D4.4	4	DTU		PU	M24
D4.9	RCT initiation package - Germany-BIPS-Children	Same as D4.4	4	BIPS		PU	M24

	& Young Adults						
D4.10	RCT initiation package - Italy-USG-Young Adults	Same as D4.4	4	USG		PU	M24
D4.11	RCT initiation package - Luxembourg-LIHElderly	Same as D4.4	4	LIH		PU	M24
D4.12	RCT initiation package - The Netherlands-TU/e-Children & Young Adults	Same as D4.4	4	TU/e		PU	M24
D4.13	RCT initiation package - Portugal-UCYoung Adults	Same as D4.4	4	UC		PU	M24
D4.14	RCT initiation package - Portugal-UEVChildren	Same as D4.4	4	UEV		PU	M24
D4.15	RCT initiation package - Portugal-UEVYoung Adults	Same as D4.4	4	UEV		PU	M24
D4.16	RCT initiation package - Spain-CREDAChildren	Same as D4.4	4	CREDA		PU	M24
D4.17	RCT initiation package - Spain-IDISBAChildren	Same as D4.4	4	IDISBA		PU	M24
D4.18	RCT initiation package - Spain-IDISBAYoung Adults	Same as D4.4	4	IDISBA		PU	M24
D4.19	RCT initiation package - Spain-IDISBAElderly	Same as D4.4	4	IDISBA		PU	M24
D4.20	RCT midterm recruitment report - Bulgaria-RCNE-Young Adults	This report is due when 50% of the study population is recruited. The report shall include an overview of the number of participants recruited/RCT, issues in recruitment and, if applicable, detailed description of applied and planned measures to compensate if any incurred delay.	4	RCNE		PU	M30
D4.21	RCT midterm recruitment report - Bulgaria-RCNE-Elderly	Same as D4.20	4	RCNE		PU	M30
D4.22	RCT midterm recruitment report - Bulgaria-Virtech-Children	Same as D4.20	4	VIRTECH		PU	M30
D4.23	RCT midterm recuitment report - Bulgaria-Virtech-Elderly	Same as D4.20	4	VIRTECH		PU	M30

D4.24	RCT midterm recruitment report - Denmark- DTU-Children	Same as D4.20	4	DTU		PU	M30
D4.25	RCT midterm recruitment report - Germany- BIPS-Children & Young Adults	Same as D4.20	4	BIPS		PU	M30
D4.26	RCT midterm recruitment report - Italy- USG-Young Adults	Same as D4.20	4	USG		PU	M30
D4.27	RCT midterm recruitment report - Luxembourg-LIH-Elderly	Same as D4.20	4	LIH		PU	M30
D4.28	RCT midterm recruitment report - The Netherlands-TU/e-Children & Young Adults	Same as D4.20	4	TU/e		PU	M30
D4.29	RCT midterm recruitment report - Portugal- UC-Young Adults	Same as D4.20	4	UC		PU	M30
D4.30	RCT midterm recruitment report - Portugal- UEV-Children	Same as D4.20	4	UEV		PU	M30
D4.31	RCT midterm recruitment report - Portugal- UEV-Young Adults	Same as D4.20	4	UEV		PU	M30
D4.32	RCT midterm recruitment report - Spain- CREDA-Children	Same as D4.20	4	CREDA		PU	M30
D4.33	RCT midterm recruitment report - Spain- IDISBA-Children	Same as D4.20	4	IDISBA		PU	M30
D4.34	RCT midterm recruitment report - Spain- IDISBA-Young Adults	Same as D4.20	4	IDISBA		PU	M30
D4.35	RCT midterm recruitment report - Spain- IDISBA-Elderly	Same as D4.20	4	IDISBA		PU	M30
D4.36	Status of posting results for RCT - Bulgaria- RCNE-Young Adults	Irrespective of the successful completion of the clinical study, posting of summary results in the applicable registry/ies (where the study was registered)	4	RCNE		PU	M55
D4.37	Status of posting results for RCT - Bulgaria-	Same as 4.36	4	RCNE		PU	M55

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	RCNE-Elderly						
D4.38	Status of posting results for RCT - Bulgaria- Virtech-Children	Same as 4.36	4	VIRTECH		PU	M55
D4.39	Status of posting results for RCT - Bulgaria- Virtech-Elderly	Same as 4.36	4	VIRTECH		PU	M55
D4.40	Status of posting results for RCT - Denmark- DTU-Children	Same as 4.36	4	DTU		PU	M55
D4.41	Status of posting results for RCT - Germany- BIPS-Children & Young Adults	Same as 4.36	4	BIPS		PU	M55
D4.42	Status of posting results for RCT - Italy- USG-Young Adults	Same as 4.36	4	USG		PU	M55
D4.43	Status of posting results for RCT - Luxembourg-LIH-Elderly	Same as 4.36	4	LIH		PU	M55
D4.44	Status of posting results - The Netherlands- TU/e-Children & Young Adults	Same as 4.36	4	TU/e		PU	M55
D4.45	Status of posting results - Portugal-UCYoung Adults	Same as 4.36	4	UC		PU	M55
D4.46	Status of posting results - Portugal-UEVChildren	Same as 4.36	4	UEV		PU	M55
D4.47	Status of posting results for RCT - Portugal- UEV-Young Adults	Same as 4.36	4	UEV		PU	M55
D4.48	Status of posting results for RCT - Spain- CREDA-Children	Same as 4.36	4	CREDA		PU	M55
D4.49	Status of posting results for RCT - Spain- IDISBA-Children	Same as 4.36	4	IDISBA		PU	M55
D4.50	Status of posting reults for RCT - Spain- IDISBA-Young Adults	Same as 4.36	4	IDISBA		PU	M55
D4.51	Status of posting results for RCT - Spain- IDISBA-Elderly	Same as 4.36	4	IDISBA		PU	M55

D5.1	List of factors affecting the success of intervention trials	Report including results of the integration of data collected and interpretation of the success of the application during trials	5	CREDA	R	SEN	M56
D5.2	Impact assessment report	Results of the assessment of the clinical studies	5	MEDEA	R	SEN	M58
D5.3	Report on economic & cost-benefit evaluation	Results of the cost benefit ratio of the medical cost and the effectiveness of the App	5	CREDA	R	SEN	M58
D6.1	CDTEC - plan	Comprehensive CDTEC plan with elements of the project identity, targeted events and actions including a mapping of actors to be targeted and a set of KPIs to monitor activities	6	ENHA	R	SEN	M6
D6.2	Launch of the OSP	Official release of fully functional OSP based on partner & user feedbacks	6	KNEIA	DEC	PU	M8
D6.3	Exploitation & sustainability report & Research Ownership List	Analysis of different exploitation routes and business models considering both trial sites and project-generated ecosystem business models and stakeholders´ needs to understand the role to play in the sustainability of project's ecosystem. It will include a ROL	6	MEDEA	R	SEN	M60
D6.4	Final evaluation of the CDTEC plan	Evaluation of CDTEC activities based on CDTEC plan and defined KPIs	7	ENHA	R	SEN	M60
D7.1	Project Management Guidelines	Guidelines and rules for the coordination, reporting and quality control of the project	7	LIH	R	SEN	M1
D7.2	Data Management Plan (DMP)	Detailed DMP describing various data types, datasets, data quality & privacy issues, data management procedures, IT infrastructure and the data governance model	7	LIH	DMP	PU	M6

7.2 Annex 2 – Milestones List

MS n°	Milestone name	WP	Due date	Means of verification
1	Protocol for scoping and systematic reviews with meta-analyses finalised	1	M6	Areas for the roadmap of the main personal and environmental determinants selected
2	Important drivers for overweight / obesity selected based on reviews and meta-analysis	1	M16	List of biomarkers and external factors predictive of obesity onset handed over to next WPs
3	Motivational features in Apps for obesity prevention and PA promotion	1	M16	Best motivational features to ascertain long-term user engagement with healthy lifestyle apps
4	First prototype of the lifestyle recommender ready for trials	2	M10	Architecture and content integrated in a 1st prototype to be used and upgraded during trials
5	Evaluated pilot trials and roadmap for longer term trials	3	M24	Pilot trials are conducted and evaluated and roadmap for longer term trials passed on to WP4
6	Evaluated RCTs based on all primary and secondary outcomes	4	M54	RCTs completed and evaluated and potential follow-up organized
7	Development of the protocol to homogenise and standardize data collection	5	M18	Excel file generated
8	Data from pilots and RCTs and possible iterative enhancements ready to be analysed	5	M38	All data from pilots and long-term studies and WP1 collected, received, and combined
9	HealthyW8 electronic communication toolkit	6	M3	Issued logo and graphical chart, leaflet, standard PPT and poster templates, website, social network
10	Policy Making Toolkit	6	M48	Publication on the HealthyW8 project website
11	StAB established	6,7	M3	Stakeholders appointed to constitute the StAB core-group, confidentiality agreements signed
12-21	ExC meetings organised every 6 months	7	M1-54	Minutes validated

7.3 Annex 3 – Time-sheet template

EU GRANTS DECLARATION OF DAYS WORKED ON A PROJECT *To be kept on file in case of audits.*	YEAR:	

Project acronym:		**Project number:**	
Participant name:			
Name of the person:		**Type of personnel:** (employee/ natural person under direct contract/ seconded/ other)	

Month	**Days worked in the action**[2] (e.g.15, 7,5, 0,5)	**Work Packages worked on** (e.g. WP2; WP5)	Date and signature of the person	Name, date and signature of the supervisor
January			Signature: Date:	Name: Signature: Date:
February			Signature: Date:	Name: Signature: Date:
March			Signature: Date:	Name: Signature: Date:
April			Signature: Date:	Name: Signature: Date:
May			Signature: Date:	Name: Signature: Date:
June			Signature: Date:	Name: Signature: Date:
July			Signature: Date:	Name: Signature: Date:
August			Signature: Date:	Name: Signature: Date:
September			Signature: Date:	Name: Signature: Date:
October			Signature: Date:	Name: Signature: Date:
November			Signature: Date:	Name: Signature: Date:
December			Signature: Date:	Name: Signature: Date:
TOTAL				

[2] 1 day = number of hours that a full-time employee of the participant has to work in a standard day (e.g. 8 hours).