

7.4 - Managing Erasmus funding

This section describes the management of Erasmus funding (SMS, SMP, STT, STA and OM) and the production of interim and final financial reports for the National Agency.

1 - Checking your Erasmus code and charter number

In the "General settings" form you should check the following parameters and make any necessary corrections:

- your EUC (Erasmus charter) number, for example 12345 (numerical characters only)
- your Erasmus code, for example UK BRISTOL98

The configuration of the general settings is described in detail in section 4.2.

The screenshot shows the 'General settings' form with a red box highlighting the 'Erasmus' section. The form is divided into several sections: 'Institution', 'Current settings', 'Local settings', 'moveonnet', and 'Erasmus'. The 'Erasmus' section contains the following fields:

Erasmus	
Erasmus code	UK TEST01
EUC Number	1234567

Fig. 1: "General settings" form, "Erasmus" frame

2- Defining Erasmus funding types

In step "6. Funding types" of the "Reference tables" form, you should define all the Erasmus funding types managed by your institution. The following funding types are available:

- Erasmus-SMS (student mobility for study)
- Erasmus-SMP (student mobility for work placement)
- Erasmus-STA (staff mobility for teaching)
- Erasmus-STT (staff mobility for training)
- Erasmus-OMS (organisation of study mobility)
- Erasmus-OMP (organisation of work placement mobility)

Details of how to add a funding type can be found in section 4.2.

If you are also managing EILC and Special Needs funding types, you should add them to your list of funding types separately from the main funding types, for example under the heading "Erasmus SMP-EILC", "Erasmus STA Special Needs", etc. The names chosen for the funding types are not subject to any restrictions and may differ from the names given above (e.g. "Erasmus Placement").

The screenshot shows the 'Reference tables' interface with the 'Funding types' section selected. The table below lists various funding types with their respective parameters.

Name	Acad. year	Order	Outgoing students	Incoming students	Outgoing staff	Incoming staff	Expenses	Currency
Bourse MEN	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EUR
Bourse Region	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EUR
DFH-LFA	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EUR
Erasmus-OMS	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	EUR
Erasmus-SMP	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EUR
Erasmus-SMP-EILC	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EUR
Erasmus-SMP-Handicap	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EUR
Erasmus-SMS	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EUR
Erasmus-SMS-EILC	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EUR
Erasmus-SMS-Handicap	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EUR
Erasmus-STA	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	EUR
Erasmus-STA-Handicap	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	EUR
Erasmus-STT	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EUR
Free mover funding	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EUR
Leonardo	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EUR
Ministerium funding	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EUR
Università Italo-Francese	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EUR
BW Stipendium	<input checked="" type="checkbox"/>	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	EUR

Fig. 2: "Reference tables" form, Funding types definition

3 - Defining Erasmus funding

In the "Funding" form you should then define all the Erasmus funds managed by your institution for the year in question.

Details of how to add a funding can be found in section 7.1.

Funds are defined as "Erasmus-SMS 2008/09", "Erasmus SMP-EILC 2008/09", etc.

The screenshot shows the 'Fundings' form for 'Erasmus-SMS 2008/09'. The 'Summary' tab is active, displaying general information and a financial overview.

General info.		Remarks	
Funding institution	National Agency		
Reference 1	21321		
Reference 2	30001232		
Agreement number			
Period of use	01.06/2008 - 30.09/2009		

Revenue		Expenses				
10.08.09	Repayment to national agency	-1.230,00	EUR	1st payment	14.014,00	EUR
26.06.09	Remaining funds	17.345,00	EUR	2nd payment	1.428,48	EUR
01.09.08	1st payment National Agency	16.321,00	EUR	3th payment	3.328,39	EUR
				Remaining funds	13.934,08	EUR
				Repayment	-400,00	EUR
Total		32.436,00	EUR	Total	32.304,95	EUR
				Available	131,05	EUR

Fig. 3: "Funding" form

For each fund you can add the sums received from the National Agency on the "Entries" tab.

4 - Defining expense types for travel and stay expenses (STA and STT)

The payments done in relation with Erasmus STA and STT fundings have to be divided in travel expenses and subsistence expenses. To differentiate the entries between those two categories, you have to create 2 expense types for the STA and STT fundings in moveon.

Details of how to add an expense type can be found in section 7.1.

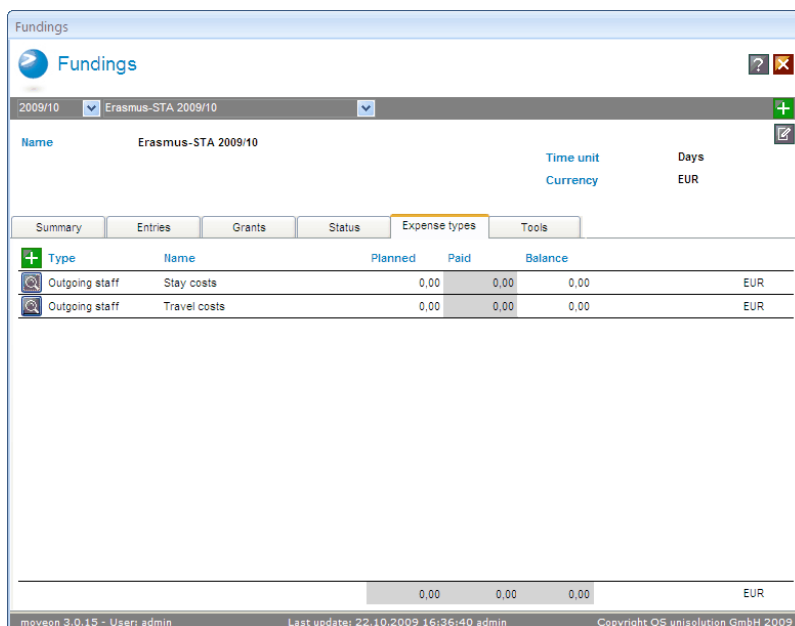


Fig.4 : "Fundings" form, definition of expense types

5 - Identifying Erasmus funding types for financial reports

Because you are able to assign your own choice of name to your funds (e.g. Erasmus Studies, SMS, SM, etc.), moveon cannot automatically identify which of them are to be used for financial reports. To identify your Erasmus funds, open the "Interfaces" form from the main menu by selecting "Configuration", "Interfaces" and then the "Erasmus" option. The list of Erasmus funding types is displayed on the left-hand side. On the right-hand side link each one to the corresponding funding type in your institution, where applicable.

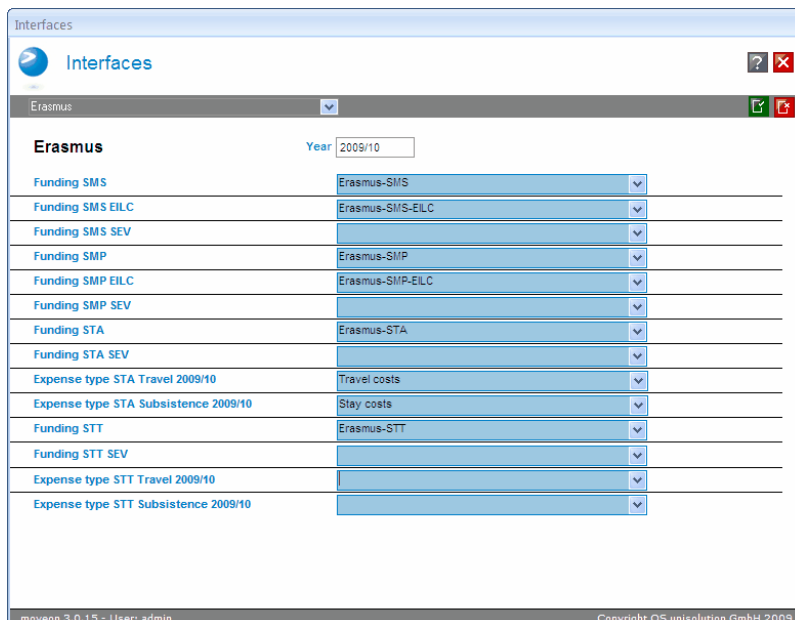


Fig. 5 : "Interfaces" form, Erasmus

6 - Entering grant holder data

All persons (students and staff) in receipt of an Erasmus grant must be entered in the "Persons" form and their mobility/ mobilities entered in the "Mobilities" form. In the "Grants" tab of the "Mobilities" form you should assign to each student or staff member the grant(s) which they receive.

Fig. 6: "Mobilities" form, "Grants" tab

Before you can assign a funding to a student or staff member you must define one or more grant statuses at the funding level. Grant statuses are defined in the "Statuses" tab of the "Funding" form. If you do not wish to define multiple statuses, create a standard status using the code "G", for example, and the name "Grant holders".

The management of grants to students and staff members is defined in section 7.2.

Once a grant from an Erasmus fund is assigned to a student or staff member, a new "Erasmus" tab appears in the "Mobilities" form. This tab contains all the information needed to create the financial report for the National Agency which is not provided as standard in the "Persons" and "Mobilities" forms.

Fig. 7: "Mobilities" form, "Erasmus" tab

The tables below list the information required for the financial report and specify where that information should be entered in moveon.

NB:

- The inclusion of the financial value of grants is not mandatory in the interim report.
- The period used for SMS and SMP mobilities is the period of the grant in months ("Mobilities" form, "Grants" tab) and not the period of the mobility.
- The period used for EILC mobilities is the period in months of the EILC grant ("Mobilities" form, "Grants" tab), which can only be 1 or 2.
- The periods used for STT and STA mobilities are the total period of the stay in days including teaching/training and travel ("Mobilities" form, "Teaching" tab) and the duration of travel in days ("Mobilities" form, "Erasmus" tab) and not the period of the mobility or the grant.

Student mobility (SMS/SMP)

Form/tab	Information	Comments
"Persons" form, "Identity" tab	Last name	
	First name	
	Gender	
	Date of birth	
	Nationality	
"Mobilities" form, "General information" tab	Start date	effective if not planned
"Mobilities" form, "Studies" tab	Studies at the home institution - Degree type	free-text field, e.g. Bachelor
	Studies at the host institution - Level	options are F (bachelor), S (master), T (doctorate), C (certificate)
	Studies at the host institution - Subject area	choose from list
	Number of ECTS credits 1st Sem.	
	Number of ECTS credits 2nd Sem. 2	where applicable
	Number of study years before mobility	
	Language (of tuition or work)	choose from list
	"Mobilities" form, "Erasmus" tab	Linguistic preparation
EILC institution code		where applicable, choose from list
Reason for visit < 3 months		where applicable, choose from list
Qualification abroad		choose from list
Erasmus-Mundus		
Duration of work placement included in study visit		SMS only, in months
Former participation in Erasmus		choose from list
"Mobilities" form, "Grants" tab	SMS or SMP grant with period in months	permissible values for duration: 5; 10.5, etc.
	SMS-EILC or SMP-EILC grant with period in months	where applicable, permissible values for duration: 1; 2
	SMS-Special Needs or SMP-Special Needs grant	where applicable

Form/tab	Information	Comments
"Institutions" form, "General information" tab	Erasmus code of host institution	other than for SMP mobility in industry
	Economic sector of host institution	for SMP mobility in industry only, choose from list
	Size of host institution	for SMP mobility in industry only, choose from list

Teaching and staff mobility (STT/STA)

Form/tab	Information	Comments
"Persons" form, "Identity" tab	Last name	
	First name	
	Gender	
	Date of birth	
	Nationality	
"Mobilities" form, "General information" tab	Start date	actual if not planned
	Teaching at the home institution - Level	only for STT mobility with teaching=yes (see below), options are F (bachelor), S (master), T (doctorate), C (certificate)
	Teaching at the home institution - Subject area	only for outgoing STA or STT mobility with teaching=yes (see below), choose from list
	Teaching at the host institution - Level	outgoing STA mobility only, options are F (bachelor), S (masters), T (doctorate), C (certificate)
	Teaching at the host institution - Subject area	outgoing STA mobility only, choose from list
	Duration in days	total duration of grant in days, including training/teaching period and travel days
	Number of teaching hours	STA mobility only
	Seniority	only for outgoing STA or STT mobility with teaching=yes (see below), options are: Junior, Intermediate, Senior
	Language (of tuition or training)	choose from list
"Mobilities" form, "Erasmus" tab	First Erasmus mobility	options: Yes/No
	Linguistic preparation	options are Host institution, Home institution, None
	Teaching	STT mobility only, options: Yes/No
	Field of study/department	incoming STA mobility only, choose from list
	Type of activity	STT mobility only, options are work shadowing, workshop, training, other

Form/tab	Information	Comments
	Category of work Home	STT mobility only, options are international office, student information, finance, general admin and technical, continuing education, academic staff, other
	Duration of travel	in days
"Mobilities" form, "Grants" tab	STT or STA grant with period in weeks	the period in weeks is for information only and is not exported
	STT Special Needs or STA Special Needs grant	where applicable
"Institutions" form, "General information" tab	Erasmus code of host institution	for mobility in university only
	Economic sector of host institution	for mobility in industry only, choose from list
	Size of host institution	for mobility in industry only, choose from list

8 - Special cases

Erasmus SMS with 2 destinations

If a student is receiving Erasmus SMS (study) grants for two mobilities in two institutions, you can define two separate mobilities for the same student. Only one grant can be assigned, however (for the first mobility). The period of grant specified for the first mobility must correspond to the total period of the two visits.

Erasmus SMS with work placement included in study visit

If a student is receiving an Erasmus-SMS (study) grant for a mobility period with a work placement included in the study visit, you can either define a single mobility in moveon for the entire stay (without specifying the institution for the work placement) or define two separate mobilities for the student. In the second case only one grant may be assigned (for the study mobility). In both cases the period of the grant specified for the study mobility must be the total period of the two visits. You should specify the period of the integrated work placement in the Erasmus tab for this mobility.

6 - Checking and exporting data for financial reports to the National Agency

The "LLP-Erasmus interface" form allows you to prepare, check and then export the necessary data for interim and final financial reports in three stages. This form can be accessed by selecting the "Interfaces" menu from the main menu and then clicking "LLP Erasmus". Use the Next and Previous buttons to move from one stage to another.

Stage 1: Configuration

This stage allows you to select the applicable academic year and to check that the configuration data has been entered correctly: country, EUC number, Erasmus code and funding types (see sections 3 and 4).

Fig. 8: "LLP-Erasmus interface" form, stage 1: "Configuration"

Stage 2: Data preparation and verification

This stage allows you to prepare the data for the report according to the funding types used at your institution. If errors (missing mandatory data, data errors, etc.) are found, moveon creates error reports for each funding type. Please check these reports and correct any errors in moveon before moving on to the next stage.

Erasmus SMS (Studies)			
The SMS-report contains errors. Open error report:			
Number grantholders SMS	19	157 months	32.304,95 €
Number grantholders SMS-EILC	1	2 Weeks	0,00 €
Number grantholders SMS-SEV	0		0,00 €
Erasmus SMP (Internship)			
The SMP-report contains errors. Open error report:			
Number grantholders SMP	1	6 months	0,00 €
Number grantholders SMP-EILC	1	1 Weeks	0,00 €
Number grantholders SMP-SEV	0		0,00 €
Erasmus STA (Teaching)			
The STA-report contains errors. Open error report:			
Number grantholders STA	1	0 Weeks	0,00 €
Number grantholders STA-SEV	0		0,00 €
Erasmus STT (Training)			
The STT-report contains errors. Open error report:			
Number grantholders STT	1	0 Weeks	0,00 €
Number grantholders STT-SEV	0		0,00 €

Fig. 9: "LLP-Erasmus interface" form, stage 2: "Data preparation and verification"

Stage 3: Data export

If a standard interface is available in moveon for your country and the selected year, this third stage prompts you to export data in the format recommended by your agency. Otherwise moveon prompts you to export the data for each funding type to MS Excel.

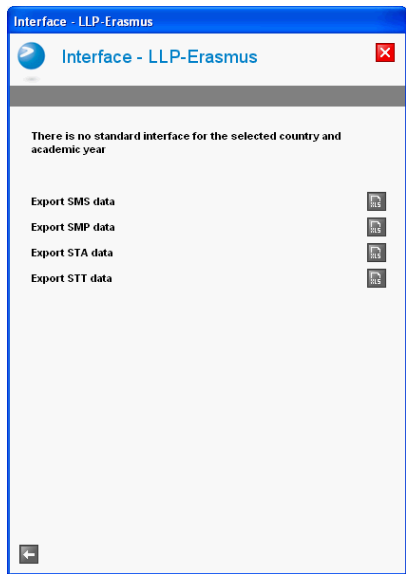


Fig. 10: "LLP-Erasmus interface" form, stage 3: "Data export"