



European Union

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Action Note

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New and Revised Claims Guidance for Grant Recipients and Co-Financing Organisations

Who

All ESF Beneficiary Organisations, the Greater London Authority and the ESF Managing Authority

What

This action note is to notify CFOs and Grant Recipients that new and revised ESF Claims Guidance has been published on GOV.UK.

Cleared

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Background

1. Following the rollout of EClaims to ESF beneficiaries for the submission of their quarterly claims to the ESF Managing Authority, the “ESF Claims Guidance for Grant Recipients” and “ESF Claims Guidance for Co-Financing Organisation” products have been revised and updated on GOV.UK.

2. In addition to the direct uploading of claims information, these revised products also include the following key changes:-

- a. Clarifications on the General Data Protection impacts on ESF claim documents;
- b. Confirmation that quarterly, narrative ESF Progress Reports should be recorded directly into ECLAIMS, unless the ESF Contract Manager has agreed use of a separate uploaded document by exception;
- c. Clarifications on the required Progress Report content for Procurement, State Aid and Cross-Cutting Themes;
- d. Rewording of guidance to align with the most recent ESF Dual Forecast & Submission Form changes;
- e. Clarification on completion of the Participant Data Schema, pre-uploading checks for beneficiary organisations and an additional Annex explaining how common delivery scenarios should be reflected when reporting Outputs & Results;
- f. Confirmation that a single Participant Data Schema should be submitted per claim, unless agreed otherwise with the ESF Contract Manager for a given claim period by exception;
- g. Additional Annex explaining common issues with submitted claims and how to avoid these;
- h. Mandation of a ‘Claim Reviewer’ check in ECLAIMS by the beneficiary organisation, including the limitations on who the ‘Claim Reviewer’ can be.

3. A new “ESF ECLAIMS External User Guidance (Claims)” product has also been published on GOV.UK to support beneficiary organisations in uploading their claims information into the ECLAIMS system.

4. The ESF Progress Report template has been removed from GOV.UK as per bullet point (b.) above.

Action

It is highly recommended that the new and revised guidance products are read in full by Grant Recipient and CFO organisation staff involved in delivery of the ESF project, including those directly involved in compiling, reviewing and submitting claims and Delivery Partners where applicable.

This guidance should be used from the date of publication for new ESF claims not yet submitted to the ESF Managing Authority.

Where a financial claim has already been submitted by a beneficiary under the previous claims guidance, unless requested otherwise by the ESF Contract Manager, there is no requirement for the beneficiary to re-work or re-submit that claim in order to meet the revised guidance changes.

Contact

If a beneficiary organisation has any concerns about adherence with the new and revised ESF Claims guidance, they should raise this with their ESF Contract Manager.