

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

What requires to be done in case my organisation changes due to regrouping, splitting or absorption?

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

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

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

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

Definitions:

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

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

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

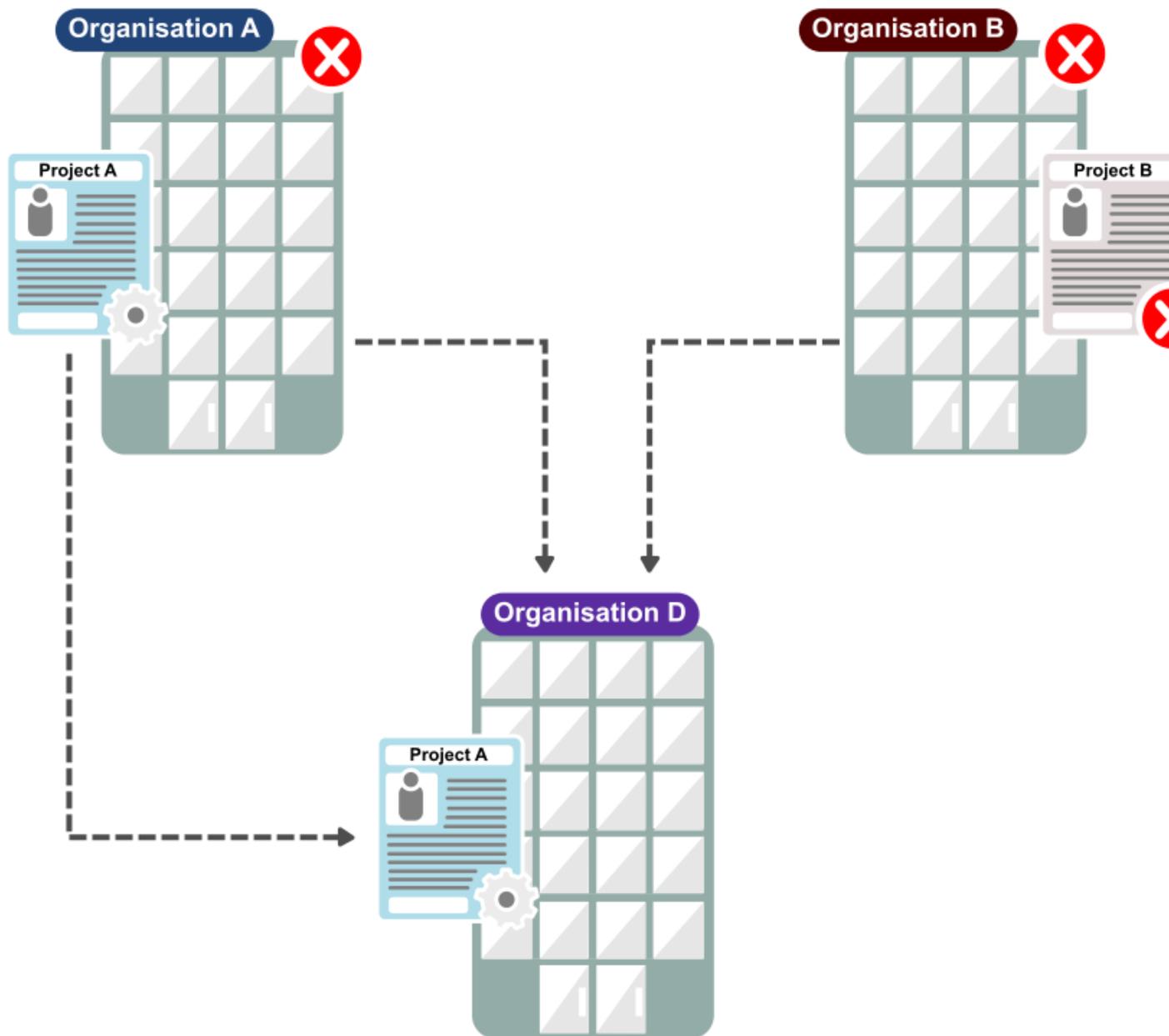
Validated by NA: Modified data of organisation not yet validated by REA and submitting project to decentralised actions.

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

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

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

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



Scenario

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

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

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

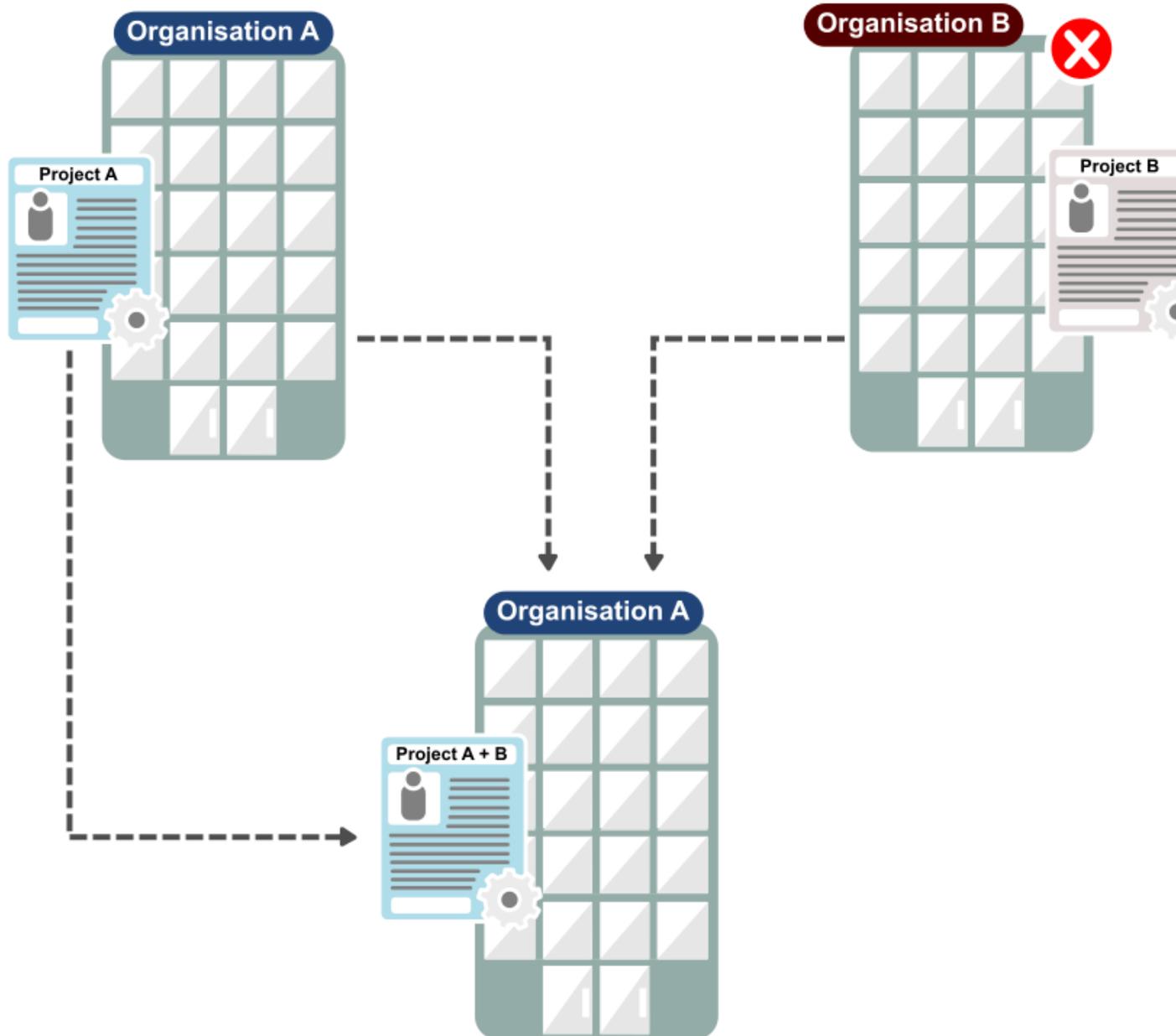
During selection

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

Project is awarded and grant agreement signed

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

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



Scenario

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

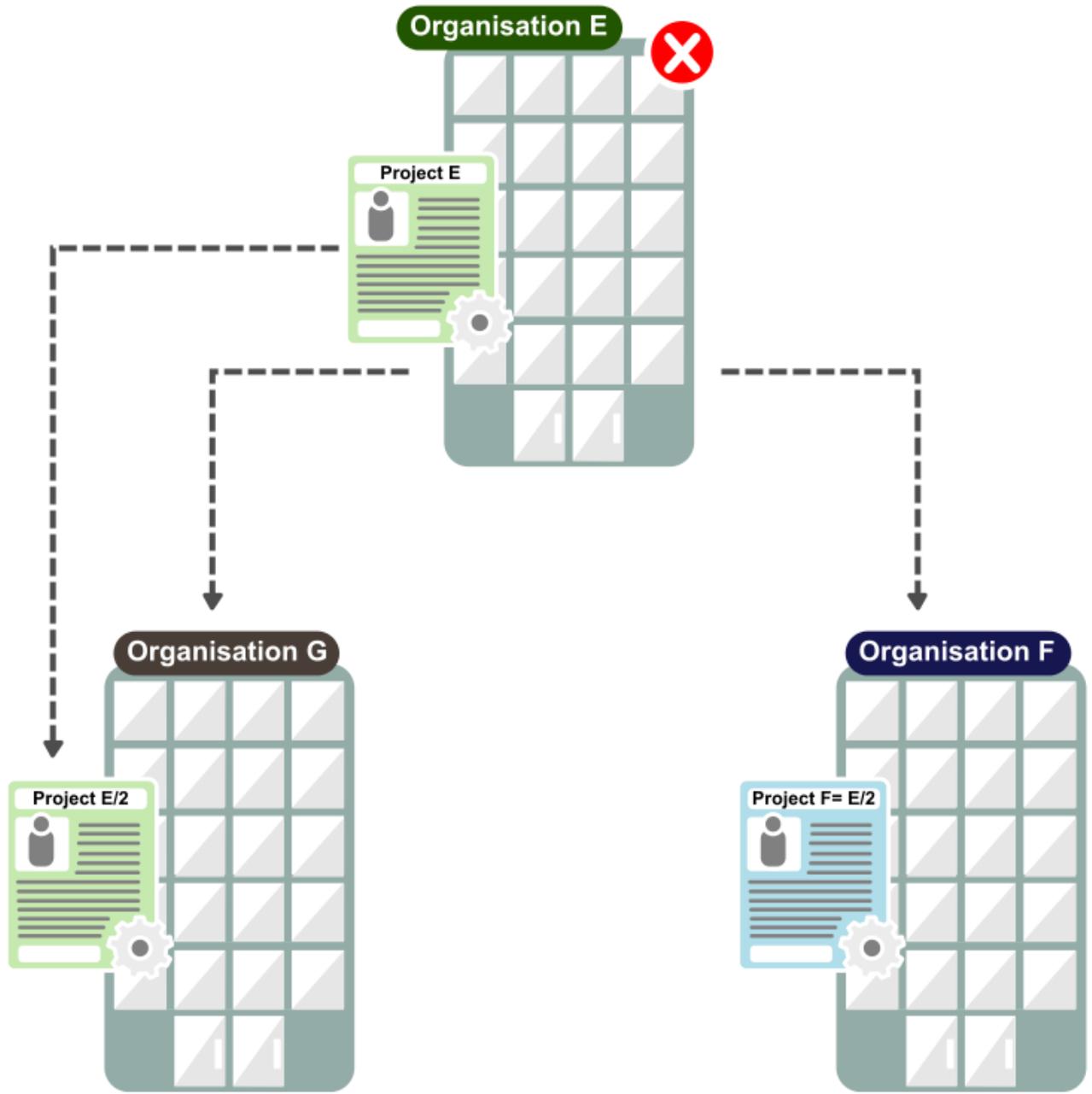
During selection

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

Project is awarded and grant agreement signed

1. The organisation modifies ([modify organisation validated by NAs for decentralised actions](#) or [modify organisation validated centrally](#)) the organisation's details (for **Existing organisations**) in the Participant Portal.
2. The organisation needs to notify the NA about the organisation update and if applicable to any changes to arrangements of the budget ; mobilities between the projects. The NA will update the budget in their management system. The NA will send the latest project data to thereby updating the organisation information and current approved budget in MT+.
3. The organisation (with modified registration) will be [validated by the NA](#) and/or REA. REA follows its own validation process. The NA will the data registered in URF corresponds to the organisation's legal data as set out in the supporting documents uploaded in the tool.
4. The NA creates an amendment to the grant agreement due to the budget change of existing project or depending on the type of change organisation detail.
5. The beneficiary needs to move the mobilities in the Mobility Tool+ from the original projects to the new one (see steps in **Summary**).
6. If applicable, the beneficiary should reassign OLS licenses to reflect the changes in the current budget overview in MT+.
7. The NA [terminates the project](#) of the obsolete or absorbed institutions.

Organisation is Split.



Scenario

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

During selection

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

- URF - How to add/remove Self-Registrants (SR) to an Organisation
- URF - How to add a document
- Change Organisation status - with HEI Accreditation
- Change Organisation due to regrouping, splitting or absorption - Without Accreditation