GENERAL INSTRUCTIONS

ON THE USE OF THE JUNO WEB PLATFORM
HOW TO REGISTER AN USER
AND SUBMIT A GRANT REQUEST

WALDENSIAN CHURCH – Union of the Methodist and Waldensian Churches
OTTO PER MILLE OFFICE - VIA FIRENZE 38, 00184 - ROME

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Foreword

The key indications reported hereby outline how to register a user, to create an Organisation and to submit a Request for Grant (RfG) to the Otto per Mille of the Waldensian Church of Italy (Union of Methodist and Waldensian Churches) via the platform http://juno.chiesavaldese.net.

The platform is available both in English and in Italian, depending on the language the user selects from the menu at the top right-hand side of the screen.

The platform can be used with the most popular web browser in a recent version, though you're kindly advised to use the Google Chrome browser. The screen of system access notifies users when they are using an obsolete/not supported browser. System access is not hindered but the user experience could be, however, compromised and no assistance will be provided in the event of issues caused by continuing using that specific web browser.

Screenshot 1 – The login screen

1. Registering and updating the Organisation's Profile

To submit a Request for Grant (RfG) a new user must follow the steps as indicated below:

- User registration and Organisation's profile creation)
- Filling in of the Organisation's Profile
- Filling in of a Request for Grant (RfG)

1.1. User registration and creation of a new Organisation's Profile

To access the platform at the web address https://juno.chiesavaldese.net/authentication/signin , users should register by clicking on the link «Sign up» and providing the required data.

The password shall have a minimum length of 10 characters and include 1 capital letter, 1 number and 1 special character (e.g. !,%,? etc.).

The "Username" field, on the other hand, is filled in automatically on the basis of the information entered in the other fields.

Screenshot 2 - Registration page for users not yet registered

Once the user registration is completed, you're allowed to register the Organisation on behalf of which you intend to submit a Request for Grant.

To do so, select «Organisation's Profile» in the menu on the left-hand side and click on the button at the top right-hand side «Create New Organisation».

If the Organisation you intend to submit the Grant Request for is registered in the system, you can select its name from the list displayed in the table and associate with it. To associate with an Organisation, click on the button «Associate» and enter the Sharing Code, provided by the user who first registered the Organisation in the system.

Screenshot 3 – How to associate with an Organization already registered and how to create a new Organization

1.2. Sharing Code

The Sharing Code is a *shared key* that enables to associate more users with one Organisation. This way, those operating for the same Organisation shall register the Organisation only once, though they'll be able to work independently from one another when submitting a Grant Request or managing Projects.

The code may be generated by the system upon the user's request after completing the Organisation's Profile by clicking on the orange drop-dawn icon in the Home and then on the button «Generate New Code».

Screenshot 4 - How to create a sharing code

The request for generating the Code is not required but strongly recommended given that without it other users cannot associate with the same Organisation and new registration of the same Organisation is not permitted by the Office.

The Sharing Code is always displayed in the Home of the Administrator user (see paragraph 1.3 *User roles*), who should generate a new code every time he intends to allow a new user to associate with

the Organization. After generating the new Code, which is mandatory for the association of every new user, the old Code will not work any longer.

1.3. User roles

The users of an Organisation are divided into two categories: **Administrator User and Referent User.**

The **Administrator User** registers the Organisation in the first place and has the following roles:

- to manage the Sharing Code, which allows users who will register in a later stage to associate with the same Organisation;
- to edit/cancel the Referent users of the various Requests for Grant who operate for the same Organisation.

To proceed to this second function, the Administrator should select «Grant Request» from the menu on the left-hand side. In the "Requests for Grant" area, it is possible to view a summary table with all RfGs, both those in progress and those already submitted, including any applications submitted by associated colleagues.

By clicking on the icon "Change Referent User" located under the "Actions" column at the right end of the table, the Administrator User will be able to view all the other users who have associated themselves to the Organisation through the sharing code and make any changes for each RfG, choosing from the various names listed. A similar procedure is available for the approved Project.

Screenshot 5 - How the Administrator can change Referent users

The **Referent User** associates with a specific Organisation registered in the system through a Sharing Code and submits a Grant Request on behalf of the Organisation (see Screenshot 3 – How to associate with an Organization already registered and how to create a new Organization). The Referent User can visualise all Grant Requests submitted by the Organisation and edit/cancel/submit only the RfGs he/she has prepared or has been subsequently assigned to. The role of a specific Referent User can be cancelled by the User Administrator since the very moment he/she created a Request for Grant(RfG).

The status of User Administrator cannot be changed by any user of the system, but only by the Otto

per Mille Office, which must therefore be contacted in case of need.

Similarly, to permanently remove a Referent User from the system, it will be necessary to contact the Otto per Mille Office.

The e-mail address to send such requests to is 8xmille@chiesavaldese.org

1.4. Filling in the Organisation's Profile

Filling in the Organisation's Profile is the second mandatory step before switching to filling in and submitting a Request for Grant (RfG). To access the area, please select ORGANISATION'S PROFILE from the left sidebar menu.

1.4.1. Registering a new Organisation

The Organisation Profile is introduced by a section outlining how to fill in the online form, which is identified by the symbol **(i)**. On the right-hand side of each of the 12 pages composing the section, you find specific instructions.

In this section consisting in 12 pages you can enter the data relating to the identity, *mission,* internal organisation and main activities carried out by the Organisation.

Screenshot 6 - Filling in the Organisation's Profile

You can upload the mandatory annexes in the last page (page 12), as follows:

- **Articles of association**
- **Tax Code Certificate**
- **Bylaws in force**
- **Final financial statements** of the last two financial years (or statement of activities in the terms and cases permitted by the RfG Application Guidelines), with related supplementary notes and/or management report;
- **Minutes of approval of the above-mentioned final financial statements**, decided by the appointed body as per the bylaws.

Only files in PDF format can be uploaded (every file must have a maximum size of 10 MB).

To successfully upload documents, you're kindly advised to load one file at a time, to click on the SAVE button after each upload and to wait for the progress bar to become orange. The documents have been successfully saved if you can view their content by clicking on their name.

The annexes uploaded must be copies of the original documents. The minutes of approval of the financial statements must be those of the bodies in charge in accordance with the provisions laid down in the Applicant's bylaws.

Screenshot 7 – Button's description

1.4.2 Completing the Organisation Profile Organisation

Once the Organisation's Profile has been completed or updated, please go to the verification page, marked with the symbol (✓). The purpose of this procedure is to check if all mandatory fields have been filled in and all information entered comply with the formal requirements.

The circles marking the pages take on different colours depending on their status:

○ → Page in which you can enter data.

● → Page with missing or incorrect information that needs to be entered and/or corrected in order to conclude the verification.

Once all the mistakes reported have been amended, the Verify button will be activated. Click on it to be enabled to create Requests for Grant.

Therefore, it is possible to print the Organisation's Profile to keep a paper copy of the data entered.

1.5. Updating data in Organisation Profiles registered in previous years.

The Organisation's Profile should be filled in only when registering the Organisation. The information entered will be stored in the platform and automatically retrieved when filling in new Requests for Grant (RfGs). On the occasion of a new call for proposal, you shall update the financial

statements and the related minutes of approval.

The data entered in the Organisation's Profile shall be kept updated, even when no call for proposal is open.

Any changes made to the the Organisation's Profile after the Request for Grant has been created will not be reflected in the RfG.

Therefore, if corrections and updates are necessary, the appllicant should first edit the Organisation's Profile and then create a new Request for Grant.

1.6. Changing the name of an Organisation already registered

It may happen that an organization already registered changes its name.

In this case, the Organization must update its Profile and enclose all the documents requested (see paragraphs 1.4.1 Registering new Organisation and 1.5 *Updating data in Organisation Profiles registered in previous years*).

In the event that the already registered organisation is also implementing projects financed by the Otto per Mille, it should not only modify the profile but notify the change of name to the Otto per Mille Office, as well.

Let us remind again that modifications to the Organisation's Profile will not be reported in approved Projects, in RfGs in progress or in RfGs already submitted.

2. HOME page

The HOME field in the left side menu enables the user to view the following:

- Requests for Grant in progress: RfGs being compiled and not yet sent to the Office. The user will see all RfGs for which he/she is the Referent User highlighted in orange and will be able to edit/delete them at any time by clicking on the appropriate buttons under the ACTIONS column;
- Requests for Grant submitted: RfGs submitted and no longer editable that can only be viewed, unless the OPM office requests integrations. In fact, the Referent User will only see his/her RfG forwarded in orange if there are pending requests for clarification or integration from the Office. The Organisation is obliged to respond to such requests within the deadline indicated in the Funding Application Guidelines, under penalty of exclusion of the application. Any user can check, for any RfG, whether there are any pending requests, even for those RfGs with which he/she is not associated as Referent User. The check can be carried out through the column "RfG Status", which indicates the presence of pending requests with the caption "Requested changes".
- Ongoing projects: users can see the status of ongoing projects.

Screenshot 8 - HOME page and possible actions for each RfG

By clicking on the label «REQUESTS FOR GRANT» from the left sidebar menu the user access the area where he can see both the main data and the Referent user for each Request for Grant.

By accessing to this area, the Administrator User is enabled to edit the Referent User, as detailed in the paragraph 1.3 *User roles*.

Screenshot 9 – REQUESTS FOR GRANT area

3. Filling in and Verifying a Request for Grant (RfG)

Once you have filled in and verified your Organisation Profile, you can proceed to draft a Request for Grant (RFG) by clicking on the "+" button displayed at the top of the homepage, beside the call in which you intend to participate.

Screenshot 10: Creating a Request for Grant

The Grant Request is divided into two sections:

- **Organisation Section**: where the information about the key management and organisational aspects of the applicant Organisation registered in the Organisation's Profile is retrieved;
- **Project Section**: where the applicant is required to enter data and information about the type of action the grant is applied for.

The **Organisation Section** is pre-filled on the basis of the data and attachments entered in the Organisation's Profile and cannot be modified. Such data and attachments are identical to those appearing in the Organisation's Profile when the Request for Grant was created.

Any changes made in the Organisation's Profile after creating the Grant Request are not reported in the Organisation Section associated to the specific RfG.

Therefore, it is recommended to check that all the pre-filled data and all the attachments that can be viewed on page 12 of the Organisation Section of the RfG (Articles of Association, Tax Code Certificate, Bylaws, financial statements and related approval minutes) are still valid and correct before proceeding with the completion of the Project Section. Should corrections and updates be necessary, the applicant must modify the Organisation Profile and then proceed with the creation of a new RfG.

From the verification page of the Organisation Section the only active function is "print", in the light blue rectangle, which allows the user to print all the data contained in the section; it is also possible to access the Project Section from this page by clicking on "Access to Project Section" in the green rectangle.

The **Project Section** also consists of 12 pages and is accompanied by specific instructions for completion.

The system allows you to access the Project Section, fill it in partially and complete it later: all data entered and correctly saved at the end of each page will, in fact, be retained and visible at the next access.

In the Project Section, you can provide comprehensive information about the project for which you intend to apply, e.g. information on the context, activities to be implemented, beneficiaries, partners and spending plan. The section ends with the page marked with the symbol ✓ allowing you to proceed with checking and submitting your application (see Chapter 4 *Submitting a Request for Grant*).

Screenshot 11 – The Project Section of the Request for Grant

3.1. Page 2: Country of implementation and Field of action

The system enables to select the specific field of action of the project by using a dedicated menu. More details on the fields of action are provided in the *Funding Application Guidelines*.

The portal requires the user to indicate the country where the project will be implemented by selecting it from the drop-down menu and indicating the number of sites where the activities will be implemented. For projects taking place in two or more countries, you must enter them all and indicate which is the main one by ticking the corresponding box.

Screenshot 12 – Filling in page 2 of the Project Section

3.2. Page 6: Providing Place of implementation details and deeds of property

This page requires the user to write down the details concerning the area of implementation specified at PAGE 2 of the Project section. At PAGE 6 there will be as many fields to complete as the number of sites of implementations indicated at PAGE 2.

If the project requires the acquisition, construction or renovation of immovable properties, the user must select the orange flag and has to complete the fields with the details about the immovable property's ownership. The property deed has to be uploaded at PAGE 12 of the project section.

Screenshot 13 - Boxes for places of implementation details and for enclosing deeds of property on page 6

3.3. Page 9: Other financial backers

When defining the budget, other financial backers of the project can be indicated.

You can enter both the funding already allocated by other financing bodies (in this case, you are advised to enclose the financing contract or other document proving the allocation of funds in the "Other Project Annexes" field) and other funding applied for but whose approval is still pending.

In case of approval by other financing bodies for the same project proposal, you are recommended to transmit the official communication of the approved funding to the Office, so as to be able to update the Request for Grant (RfG) even after the closing of the call. The new documentation will provide further elements to comprehensively evaluate the project.

The portal will automatically structure the budget table on p. 10 by adding the columns corresponding to the other donors indicated on p. 9.

The Organisation applying to the Otto per Mille call is neither a project partner, nor one of the other financial backers of the project. The platform will enable the applicant Organisation to indicate the amount of its own funds allocated to the project in a specific column at PAGE 10 titled “Own funds”.

3.4. Page 10: Budget Plan

On p. 10 of the Project section, the user must detail the Budget Plan for the intervention, including the items for which he's requesting the contribution. The Budget plan should be divided into actions, when possible, and must be consistent with the planned activities, detailed and expressed in Euros.

3.4.1. Key Components Of The Budget Plan

The platform enables to organise the project into Actions.

By clicking on the button «Create new action» a new table opens every time, which allows to calculate the specific costs of each action. The Budget Plan can be made of as many tables as the number of actions the project intends to carry out, and every table can be named after the title of the corresponding action.

The projects that are not very complex by their own nature can be submitted as a single action at both level of narrative description and budget plan.

Project Co-ordination and Overhead Costs: costs related to project co-ordination expenses can be carried over to an ad hoc action or spread across all actions of the project. A share of the overhead costs can be claimed, too. These must not exceed 5% of the Otto per Mille contribution requested. Overhead costs include the General expenses of the Organisation that are not directly related to the project, such as: rent of the headquarters, utilities, secretarial costs, general equipment, accountant's costs, postage/bank charges, cleaning services, building insurance, etc.

The Budget Plan is divided horizontally into **7 Categories** that group all costs generally expected within a project:

1. Human Resources
2. Travel and subsistence
3. Services
4. Training
5. Equipment and materials
6. Acquisition, construction and renovation of immovable properties
7. Communication and visibility.

The Budget Plan is divided vertically into **7 columns**, plus any additional columns corresponding to the co-funders entered on p. 9:

o ***Items***: indicate the type of expenditure referred to, e.g. doctor, educator, psychologist, flight ticket, food kit, medicine, etc.

o ***Unit***: indicate the way in which the expense item is quantified, e.g. day, month, hour, year, round trip, etc. Use a lump sum only for those expenses that cannot, by their nature, be expressed with a precise unit of reference.

o ***Unit cost***: report the cost of every single unit of measurement identified e.g. cost of monthly salary, cost of a food kit, hourly labour rate of a social assistant, cost per package of medications, cost of round-trip ticket, etc.

o **Number of units**: indicate the number of units for which you want to calculate the total cost. In the case of a lump sum, enter 1 in the Number of units column.

For example, Expense item: co-ordinator; unit: month; unit cost: 1500 euros; Nà of unit: 12; total cost: 18,000 euros. The co-ordinator will be paid 1500 euros per month for 12 months for a total amount of 18,000 euros.

When entering this information it is necessary to indicate how the total cost of each item of expenditure is divided between the organisation's own funds (Own Funds column), any other financial backers and the Otto per Mille funding. The sum of these addendums must cover the entire amount of the item. The total absorbed by each expenditure item is calculated by the system automatically when the required information is entered.

3.4.2. How to Fill in the Budget Plan

Within each category of expenditure, it is necessary to list the individual items that make it up and which will vary according to the type of project proposed.

To complete the entry of each item in the budget plan, it is necessary to click on the orange-coloured CHECK button on the right (point 7 of Screenshot no. 14)

Screenshot 14 - Completing the Budget Plan

After having filled in the budget items for each individual action, it is necessary to close the action by clicking on the CLOSE button at the bottom right of the action and save the page by clicking on the SAVE button at the bottom right of the page.

The expenditure items entered by means of the VERIFY tick may be edited by clicking on the pencil button or it is possible to delete them by clicking on the delete button

Screenshot. 15 - Possible actions on an expenditure item already entered

3.5. PAGE 12: Annexes

On this page it is mandatory to upload the following documents:

- Withholding Tax Declaration form duly completed and signed (use of the form attached to the *Funding Application Guidelnes* is mandatory).
- Bylaws of the Partners (in the case that these are not public bodies registered outside Italy)
- Letter of intent of the Partner and/or other bodies involved
- Property deed to the land / building concerned in the event of renovation / construction (the field will be available to the uploading of the attachment if the applicant correctly selected the appropriate box on PAGE 6).

Every document can be uploaded in PDF format only in the related window automatically generated according to the number of partners and/or any other bodies involved in the project whose data is entered when filling in PAGE 7.

4. Submitting a Request for Grant (RfG)

To submit a Request for Grant (RfG), you need to click on the last verification page of the Project Section and proceed as follows:

- To verify that the data is correctly filled in by clicking on the button «VERIFY». The fields not correctly filled in will be notified in red by the system.
- To print the Request for Grant (RfG) by clicking on the button «PRINT».
- To submit the Request for Grant (RfG) by clicking on the button «SUBMIT REQUEST».

Note: Once the Grant Request has been sent to the Otto Office for Mille, it will no longer be possible

to edit it or cancel it.

Screenshot 16 – Sending the Grant Request

You can print a copy of the submitted Request for Grant (RfG) any time you access the system. This possibility will be deactivated upon eventual approval of the RfG.

5. Contacts

For technical assistance on the use of the platform write to the e-mail address: opm.bando@chiesavaldese.org, always providing a telephone number and the name of the Organisation.