How to apply for TAIEX assistance?

Guidelines

Version 10.0.4

Contents

You are a public official from one of the TAIEX beneficiaries and you are about to prepare a TAIEX assistance request. These guidelines are meant to assist you during the online filling of your TAIEX application form.

1. How to access the application form or to get a list of my drafted and submitted application forms?

This online form gathers information related to your TAIEX assistance request. Your application will be carefully examined and if approved, TAIEX will provide technical assistance on the basis of the provided information.

Functionality

1. Visit the **home page**

   https://webgate.ec.europa.eu/TMSWebRestrict/applicationForm

2. **Encodes** your **professional email address** and:

   a. **Press** "**My list**" to **retrieve** the **list of application forms**

   b. **Press** "**Create new**" to create a blank application form:

   1. **Select** the **Instrument** and **press** "**Create**"

Note: TRM application form is only visible for people register in TMS/Twinning under the EUD category and marked with a TRM email address

2. You can always **cancel** the operation by **pressing** the "**Cancel**" **button**. You are **redirected** to or the **Home page** or the **new application form in case you are already authenticated** (see UC 3)

3. A **popup message** ("An email has been send to your professional mailbox. Please continue from there. In case of any issues, please check the help guide") appears and asks you to **check** the **mailbox** to precede the process. The system will send an email, which contains a **secured link** to continue the application form process. The process will check two points:

   a. Verify the "Application email" address
   b. Provide the application form with already predefined field filled out in the application form about the applicant

Checks the mailbox and opens the email with the request for a new application form (3.I) or the application form list (3.II). **Clicks** on the **link** to **open** the **application form** (see How to submit an application form?) or your list of application forms (see How to manage your list of application forms?)

Dear Applicant,

Thanks for your interest in the IPA, ENI instrument.
You can now fill and submit online your IPA, ENI assistance request by clicking this link:

New Application Form

3.I

Kind regards,

Unit C.3 - Institution-Building, TAIEX, Twinning
Directorate C - Neighbourhood East
Directorate-General Neighbourhood and Enlargement Negotiations
European Commission
http://ec.europa.eu/taiex

Dear Applicant,

3.II

Please find below the link to your list of application forms.

https://webgate.acceptance.ec.europa.eu/TMSWebRestrict/resources/js/

In case the link does not work, copy and paste the entire URL into your browser's address bar and press Enter.

Thanks for your collaboration.
Kind regards,

Unit C.3 - Institution-Building, TAIEX, Twinning
Directorate C - Neighbourhood East
Directorate-General Neighbourhood and Enlargement Negotiations
European Commission
http://ec.europa.eu/taiex

2. How to submit an application form?

Below the **main steps** to **complete** and **submit** an **application form**:

a. **Complete** the application form. Check if all required fields marked by an asterisk (*) are properly filled in

b. **Save** regularly the form: you are not obliged to fill in the form in one go. If you do not have all the necessary information, you can easily save your form as a draft and work on it later. You have also the possibility to share it with your colleagues by copying the URL address and paste it in the correspondence with your counterparts

c. Once the application is ready, don't forget to **submit** the application from

Functionality

1. **Complete** the **application form**. Check if all required fields marked by an asterisk (*) are properly filled in

2. **Navigation** through the form can be done in two ways:
    a. Or use the **navigation button** to move through the form
    b. Or **select** the **tab** by **clicking** on the **bullet point**

c. **Select** the **language** in which the **application form** will be submitted. **Press** on the **language label** and **select** the **language** or **press** the **close button** to **cancel** the operation.

Note: By **default** the **application form** is only **available** in **EN** – **English**. Option is **only available** if **multiple languages exist**

3. You can **save** the form at **any moment**
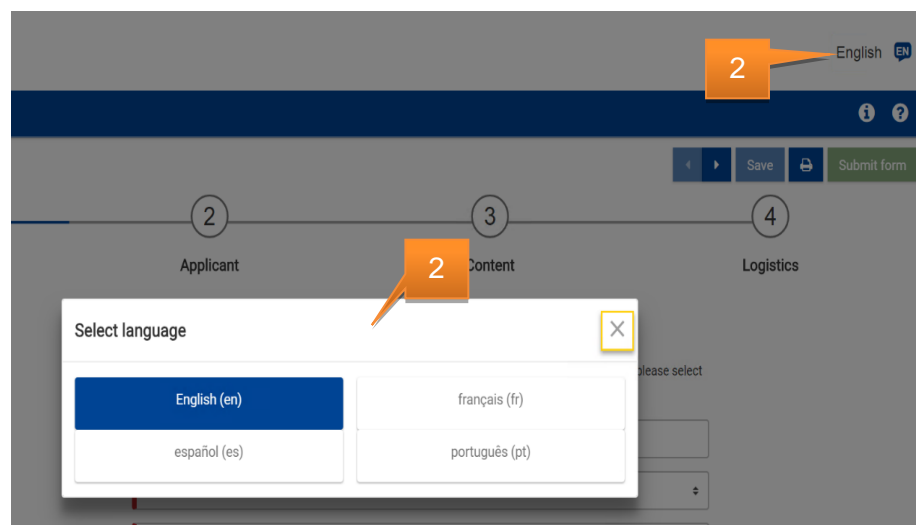
as a **draft version**:
  a. **Save** with **success**, the **green popup message** is displayed
  b. **With failure**, the **popup message** "Saving failed, …" is displayed

Reopening of draft happens from the '**My list'** or via a **link** which is **send** to your **mailbox**

4. If needed (before or after submitting), you can 🖶 **print** the encoded **application form**. As long as the form is not submitted, a **Draft watermark** is **available on the form**. Once submitted, the application form becomes read-only.
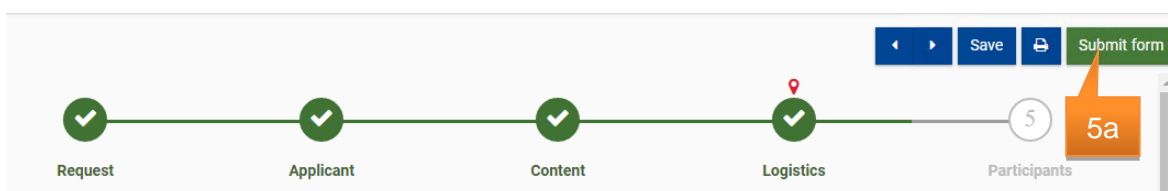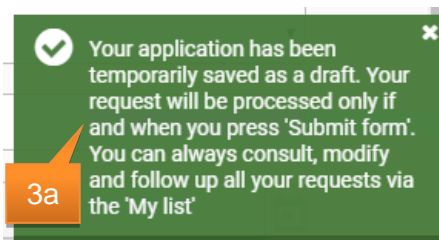
5. When the form filled is filled out you can submit the form:
  a. **Press** the **submit button.** When the **form** is **not completely** valid, an OK popup **message** is **displayed**: "Please complete the missing details for the tabs highlighted in red.". The **submit** is **cancelled**
  b. A popup message is displayed
  c. **Accept** the "**I have read and understood the privacy statement**" message by **clicking** on the **checkbox**
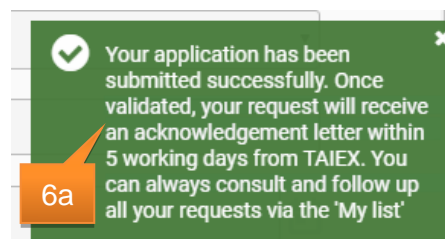 d. Finally, **Press** the "**Submit**" to complete the request
  e. At any moment before pressing the "Submit" button, you can **cancel** the **operation** by **pressing** the "**Cancel**" **button**
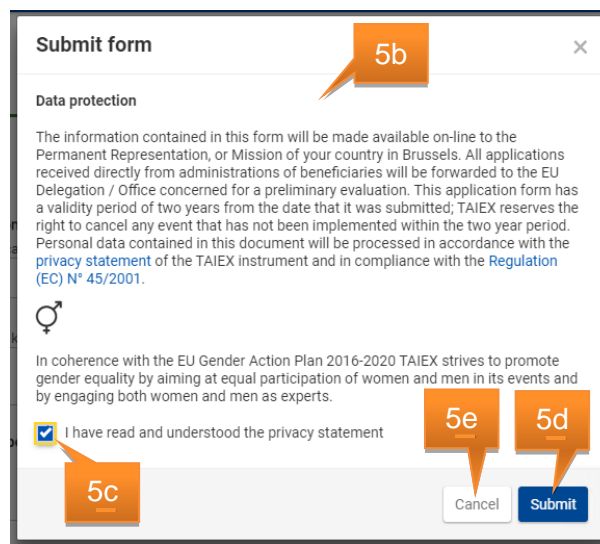
6. When submitting:
  a. **With success**, the popup message informing you that the submitting process was completed successfully and the form becomes read-only
  b. **With failure**, the popup message "Submit failed,

…" is displayed

Note: Once submitted, application forms can no longer be modified. Via the "Get my list" button you can follow the status of the submitted application forms. Once submitted and validated, the applicant will receive an acknowledgement within 5 working days from TAIEX

3. How to manage your list of application forms?

Functionality

1. Use the **link** open the application form list. Two possible results:

   a. **Valid token:** The **application form list** for the specified actor is opened

   b. **Expired token:** The **warning message** "The token is expired. Please create a new token via the "My list" button" is displayed. You are redirected to the **home page** (see How to access the application form or to get a list of my drafted and submitted application forms?)

2. **Press** the 🔍 button to **reload the list**

3. **Press** the ➕ button to **create a new application form**. See How to access the application form or to get a list of my drafted and submitted application forms? – point 2.b

4. To modify an application form, **select** an application form from the **list** and press the ✏ button. If **no row** is **selected** the **button** is **disabled**. It will open the application form detail page. See How to submit an application form?

5. The ➖ button allows you to **delete** or **hiding** a **request** from the **list**:

   a. **Delete** is only possible for requests with a status **Draft** and will remove the data

   b. **Hiding** is only possible for requests with a status **Refused by CP** or **Refused**
   A confirmation message is displayed: "Are you sure you want to delete this Application Form?". If **yes**, the application form is **removed** from the list. If **no** the action is **cancelled**. The **button** is **only enabled** for application forms in the **status**: **Draft, Refused by CP, Refused**.

6. The ⧉ button allows to **duplicate** the **selected item** in the list. For the reuse an existing application form only some predefined parts of the form are reused, **except** when a **refused** or **refused by CP** form is selected. In this case, you could reintroduce a modified request.
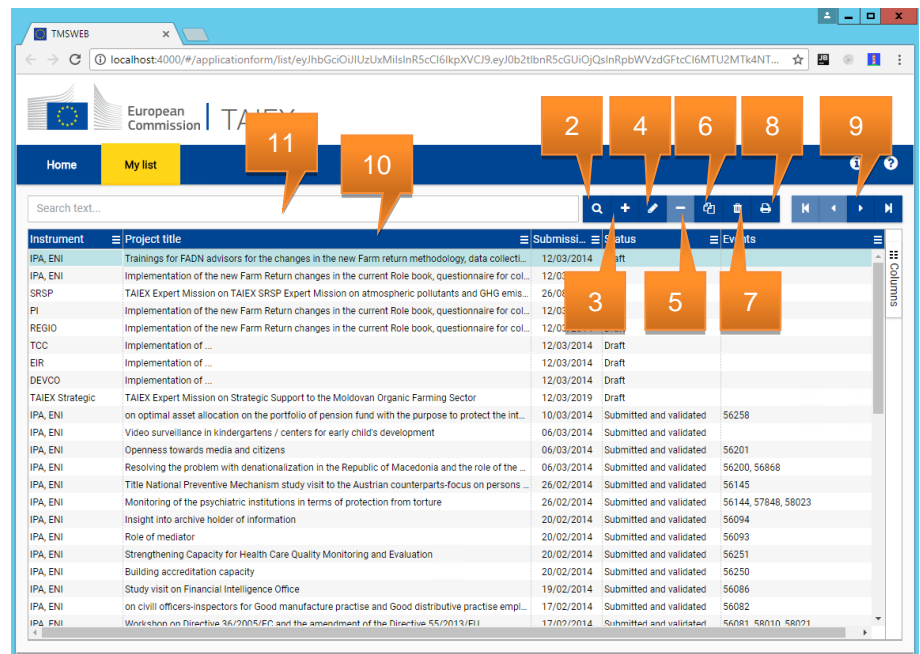
Duplicate option is only enabled if the selected application form is from the last existing version

7. To **reset** the **default filters**, **press** on the 🗑 button. All filters are cleared and the result set is refreshed

8. **Press** the 🖨 button to **export** the (filtered, without pagination) list to excel. **Maximum allowed number of records** to download is limited to **50000**

9. The ⏮◀▶⏭ **navigation button** allow you to **navigate** through the different pages of the **result**

10. The grid layout can be extended with the following fields below. Filters and sort order will be remembered during the session.

Caption	Default columns Order*	Sort/ Filter	Filters options**
ID	*1*	Y/Y	Contains
Create date	*2*	Y/Y	Contains
Instrument	3	Y/Y	Contains
Type	*4*	Y/Y	Contains
Project title	5	Y/Y	Contains
Submission date	6	Y/Y	Contains
Status **Draft Submitted Translating Translated Submitted and validated Refused by CP Accepted Refused Done**	7	Y/Y	Contains
Events	8	Y/Y	Contains
Removable	*9*	Y/Y	Contains (Y/N)
Can duplicate	*10*	Y/Y	Contains (Y/N)

* Italic underlined = Default hidden

** Text filter definition

*** Status

a. **Draft**: a temporary version of the form is saved but not submitted

b. **Submitted**: application form has been submitted and waits for validation by the contact point (CP).

c. **Translating**: Translation of the application form is in progress

d. **Translated**: Translation of the application form has been submitted and waiting for approval

e. **Submitted and validated**: application form has been submitted and validated. The applicant will receive an acknowledgement of receipt by email within 5 working days

f. **Refused by CP**: the request has been refused by the CP. The applicant is informed by email. In case of rejection because of an incomplete application form, you can use the duplicate button to complement and resubmit a refused application form.

g. **Accepted**: the request has been accepted by TAIEX. The applicant is also informed by email

h. **Refused**: the request has been refused. The applicant is informed by email. In case of rejection because of an incomplete

application form, you can use the duplicate button to complement and resubmit a refused application form

     i.   **Done**: an event has been planned/held to execute the requests as described in the application form

11. You can **filter** the list based on a **global search**.

   a. **Typing** the **word searching**

   b. Followed by **pressing** the **button** which will **extract** an updated **list**

4. How to validate an application form?

Application form validation is performed by the contact point.

Functionality

1. **Opens** the received **email** which contains the link to for the application form that need to be validated

2. By **clicking** on the "**Application form to validate**" in the email, the application form which needs to be validated is opened in read-only mode.

3. In case the validation was already done, a popup message is displayed and the application form is opened in read-only mode

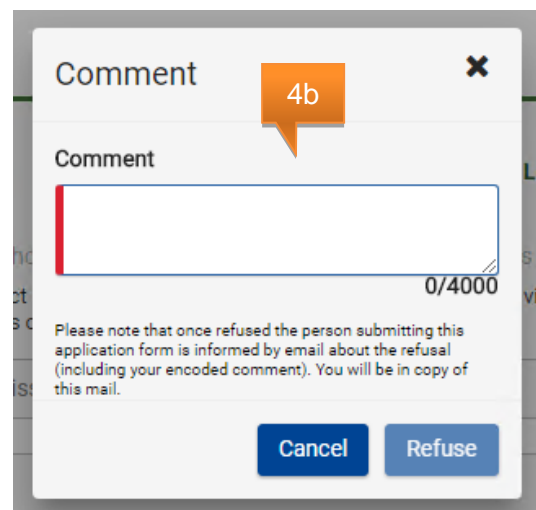4. **Verify** the **request**. Once done, there are two options:

   a. In case the application form is **submitted** in a **language different** than **English**, you have the **possibility** to **request** a **translation**. **Reply** to the **message** "Application form in …. Should the form be translated in EN?". **Press Yes** to **request** a **translation** or **No** for **no translation**. The action can be **cancelled** by **pressing** the **close button**. In case of Yes or No, **clicks** on the "**Validate**" button to validate the request or the "**Cancel**" button to cancel the validation. A popup message is displayed which allows you to **encode** an **optional comment**. If you **press** "**Validate**" the data is saved and an alert is displayed (<u>success</u>: "Successfully approved" , <u>failure</u>: "Application form validation failed - …").
   Finally, if the request is validated and a translation was requested, automatically a draft translation request email is downloaded. Please don't forget to send this email to the translator

   b. Or **clicks** on the "**Refuse**" button to refuse the request. A popup message is displayed. You needs to encode a comment. If you **press** "**Refuse**" the data is saved and an alert is displayed (<u>success</u>: "Successfully

refused" , <u>failure</u>: "Application form refusal failed - …")

5. In both situations, the person submitting the application form is informed about the decision including the encoded comment. You are in CC of that email.

6. **Press** the 📖 **button** to **extract** the **translation request email**

7. For **application forms** which are validate and in the **process of translating**, you have the possibility to **cancel** the **translation process** at any moment by **pressing** the **"Cancel Translating" button**. Since the form was validated, the **status will be updated** to **Submitted and validated**
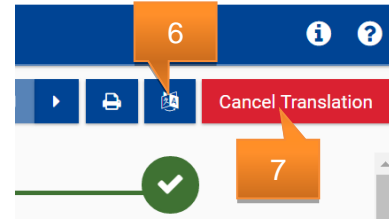
5. How to translate an application form?

You as translator received an email from the validator containing a link to the application form.

Functionality

1. **Opens** the received **email** which contains the link to for the application form that need to be translated

2. By **clicking** on the "**Application form to translate**" in the email, the application form which needs to be validated is opened. The form is opened with the labels in English. You can **change** the **language** by **pressing** the **language button** (top right) and **selection** the **language**.

3. In the **upper right corner** you find the **status** of the **process**. **Translating** is only **possible** if the status = **Translation in progress**

4. **Translate** all the **fields** which **needs to be translated** in the different tabs of the application form

5. **Save** the form at **any time**:
   a. **Save** with **success**, the **green popup message** "The application form including translations has been temporarily saved. To finalise the process you need to 'Submit form' the form"
   b. With **failure**, the **popup message** "Saving failed, …" is displayed
   Reopening happens from the **link** in the **email** which is send to your mailbox

6. **Press** the **submit button** to **submit** the **translation.** When the **form** is **not completely** valid, an OK popup **message** is **displayed**: Please complete the missing details for the tabs highlighted in red. The **submit** is **cancelled**.

a. Submit with **success**, the **green popup message** "The application form including translations have been submitted successful"

Note: The validator is automatically informed by email about the submitted translation

b. With **failure**, the **popup message** "Saving failed - …" is displayed

7. You can print the encoded application form

6. Further details

a. Description of the state of play

TAIEX takes the decision on the introduced requests based on the relevance and the appropriateness of the assistance. It is therefore very important to properly fill in the description fields.

b. Objective of the request

Here it is expected to have a short and clear description of the objectives that your administration aims to reach thanks to TAIEX assistance.

c. EU legislation concerned

TAIEX mandate covers all EU legislation. All requests of assistance have to be based on EU legislation. It will also provide TAIEX with a more focused field of expertise when looking for the experts in the Member States.

d. Main topics/content

It is needed to mention the activities which you expect TAIEX to organise in collaboration with the experts and ideally to provide details on a provisional agenda.

e. Current situation/justification

The situation in the country or this specific sector has to be described. This information is key for TAIEX to understand the state of play and the needs.

f. Planned or currently running project

All projects planned or running in the sector of the requested assistance should be listed. In case consultations show that the request is a duplication of existing projects, it will be rejected; on the other hand, if it is complementary and has a significant added value, TAIEX support will be provided.

g. Contact persons

Person submitting is the public official who physically encodes the assistance request.

Authorisation from your Administration is the official authorising the request for assistance. In case the "Person submitting" is also authorising the request, you can press "Copy data" and information will be duplicated.

Contact person for administrative questions and practical matters related to this event is the official in charge of all administrative and practical matters related to the organisation of the technical assistance. TAIEX will be in contact with this person along the preparation and implementation of the assistance. It is necessary to designate a person who has allocated time and who speaks one of the working languages of the Commission.

Contact person for evaluation is involved in the assistance process and well aware of the effects of the support provided. Six months after its implementation an automated email will be sent to the contact person for evaluation asking to provide an overall assessment of the impact (approximation, implementation of EU legislation, institutional development) of previous TAIEX assistance.