ESF Programme for Employability, Inclusion and Learning (PEIL) 2014 – 2020

Procedures for the Submission of Non-Financial Declarations on the eCohesion IT System

Beneficiary Manual

ESF Managing Authority
April 2019

The Youth Employment Initiative (YEI) is supported under the PEIL 2014-2020
## Version Log

<table>
<thead>
<tr>
<th>Version</th>
<th>Changes</th>
<th>Date</th>
<th>Changed By</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>New Document</td>
<td>April 2019</td>
<td>ESFMA</td>
<td>Guidance developed to reflect additional eCohesion functionality</td>
</tr>
</tbody>
</table>
## Contents

- **INTRODUCTION** .......................................................................................................................... 4
- **1. eCOHESION BASICS** ............................................................................................................... 5
- **2. CREATING A NEW DECLARATION ON eCOHESION** ......................................................... 7
- **3. PREPARING INDICATOR DATA FOR UPLOAD** ....................................................................... 13
- **4. CREATING A PERFORMANCE INDICATOR UPLOAD** ......................................................... 15
- **5. CREATING A MANAGEMENT VERIFICATION** ..................................................................... 22
- **6. UPLOADING A DOCUMENT TO A DECLARATION** .............................................................. 25
- **7. SUBMITTING A DECLARATION TO THE BENEFICIARY APPROVER** ................................. 27
- **8. BENEFICIARY APPROVER DECLARATION REVIEW AND DECISION** ............................ 28
- **9. BENEFICIARY APPROVER DECISION 1 - SUBMIT DECLARATION TO IB** .......................... 32
- **10. BENEFICIARY APPROVER DECISION 2 - REJECT DECLARATION TO SUBMITTER** .......... 33
- **11. BENEFICIARY SUBMITTER PROCESSING REJECTED DECLARATION** .......................... 35
- **12. BENEFICIARY APPROVER APPROVING/SUBMITTING REVISED DECLARATION TO IB** .... 38
- **13. BENEFICIARY SUBMITTER REVIEWING DECLARATION REJECTED BY IB** .................... 39
- **14. BENEFICIARY APPROVER RE-SUBMITTING DECLARATION TO IB** ............................... 42
- **CONCLUSION** ............................................................................................................................. 43
- **Appendix 1** .................................................................................................................................. 44
INTRODUCTION

The purpose of this document is to provide guidance for Beneficiaries tasked with the submission of non-financial participant indicator data onto the eCohesion IT System (referred to as eCohesion in this document) for activities in the ESF co-funded PEIL Operational Programme 2014-2020.

eCohesion has been developed to support the implementation of various European Structural and Investment Funds (ESIF) in Ireland, including the ESF. eCohesion is located at the following web address - https://ecohesion.gov.ie - and is used by the ESF Beneficiaries, Intermediate Bodies, the Managing Authority, Certifying Authority and Audit Authority to submit and process both financial and non-financial Declarations.

Access to eCohesion is administered by the ESF Managing Authority (ESF MA) and is based on user licenses purchased by the MA and assigned to designated users in ESF cascade bodies. New users requiring access to eCohesion should contact the ESF eCohesion Fund Administrator at eCohesion@education.gov.ie. However, you should note that there are a limited number of licences available for each Beneficiary, as there is a significant cost associated with each licence. If a Beneficiary requires a new User to be set up on eCohesion, this will be achieved by re-assigning licences from within the same Beneficiary in the first instance.

eCohesion Users are advised to ensure their web browsers are up-to-date to ensure eCohesion works as well as possible. It is recommended that the following browser versions are used –

- Chrome v57+
- Firefox v53+
- Internet Explorer 11+
- Safari 10+

Using older versions of browsers may lead to some performance or compatibility issues. New applications generally do not utilise old browser versions as these are no longer supported by their developers, and therefore can expose security vulnerabilities. Where users must use an old browser version due to legacy requirements or business systems, it is recommended that they download a newer version of one of the other main browsers and use eCohesion through it. If you are experiencing difficulties logging into eCohesion you should contact the ESF eCohesion Fund Administrator at the email address above.

This document should be read in conjunction with the “Guidance on the Completion of Non-Financial Declarations” document previously issued by the ESF MA and any updates thereto.
1. **eCOHESION BASICS**

1.1 To log into eCohesion, an eCohesion User should navigate to the eCohesion website, [https://ecohesion.gov.ie](https://ecohesion.gov.ie), where they will be presented with the following login screen -

![Login Screen](image1.png)

To access the website, they enter their User Name, Password and click on Log In. They will then be presented with their home page –

![Home Page](image2.png)

The home page above displays links to elements of the system which are of relevance to the eCohesion User concerned. For example, to the right hand-side are links to “My Declarations”, which are the Declarations the User currently has access to, “My Operations/Projects” which are the ESF Operations the User is associated with, and “My Pending Performance/Finance Indicator Uploads”, which are the uploads created by the User which are currently in process.

On the left-hand side of the home page are two shortcut buttons for creating Declarations or uploading data, and a Knowledge Base of “How To” guides which describe how to undertake certain actions on eCohesion.
It should be noted that the home page is dynamically populated, so may appear differently for different Users, depending on their role on eCohesion, and the range of eCohesion elements they have access to.

You can navigate back to your Home Page at any time by clicking the cube icon in the top-left corner of the screen –

![Cube Icon](image)

Of particular relevance to this manual is the “My Declarations” panel, where Users can quickly gain access to the Declarations for which they are currently responsible.

![My Declarations Table](image)

**1.2** Users should note that they should receive automatic emails from eCohesion to notify them of certain actions which have taken place on the system. For example, the Beneficiary Submitter (i.e. the User who created a Declaration), should receive emails when –

- a Declaration they created has been rejected by the Beneficiary Approver,
- a Declaration they created has been submitted to the IB, and
- a Declaration they created has been accepted or rejected by the IB.

Similarly, the Beneficiary Approver (i.e. the User who is tasked with approving Declarations created by a Beneficiary Submitter), should receive emails when –

- a Declaration has been submitted for their approval,
- a Declaration they approved has been accepted or rejected by the IB, and
- the IB has not acknowledged a Declaration two weeks after it was submitted to the IB.

If you are not receiving the emails outlined above, please contact the ESF Fund Administrator so that any issues can be resolved.
2. CREATING A NEW DECLARATION ON eCOHESION

2.1 Both financial and non-financial data is submitted through eCohesion via a ‘Declaration’ created by an ESF Beneficiary Submitter (i.e. an eCohesion User within a Beneficiary who is tasked with creating Declarations).

To create a Declaration, the Beneficiary Submitter logs in to eCohesion as outlined in section 1.1.

The Beneficiary Home dashboard is displayed -

Click on the “New Declaration” button circled above. Then select the relevant Project from the dropdown list -
A blank Declaration (De) dashboard will be displayed -

[Image of a blank dashboard]

Enter the required details, starting by providing the Declaration with a name. The ESF MA requires that the following naming convention is used by Beneficiaries when naming Non-Financial Data Declarations -

`NF_[Activity]_[Beneficiary]_[Data Year]_[Year Uploaded]_N`

- “NF” refers to “Non-Financial” to indicate that the Declaration is non-financial.
- “Activity” refers to the name of the activity, e.g. Third Level Access, Youthreach, etc and the activity abbreviations set out in Appendix 1 should be used.
- “Beneficiary” refers to the name of the body submitting the Declaration, e.g. Trinity College Dublin, Cork Education and Training Board, etc and the abbreviated titles of Beneficiaries set out in Appendix 1 should be used.
- “Data Year” is the year(s) to which the data relates.
- “Year Uploaded” is the year in which that data is being uploaded, e.g. where data for 2016 is uploaded on to eCohesion in 2019, the Year Uploaded is 2019.
- “N” would generally be “1”, as there should be only one Declaration created per operation per year, unless prior approval is sought from the MA.

The example being used in this document, a TLA Declaration from Trinity College Dublin for 2016, and uploaded in 2019, is therefore named as follows –

`NF_TLA_TCD_2016_2019_1`

For some Beneficiaries, the Declaration may, with the prior approval of the MA, relate to more than one year. In such cases, the following naming convention should be used:

`NF_[Activity]_[Beneficiary]_[Data Years]_[Year Uploaded]_N`

For example, a BTEI Declaration by Cork ETB including data for 2017 and 2018 should be named –

`NF_BTEI_CETB_201718_2019_1`
Having provided the Declaration with a name, the Declaration’s “Basic Information” and “Cascade Information” now need to be reviewed/completed.

2.2 To review/complete the Declaration’s Basic Information, click on the “Basic Info” tab -

Complete the Date of Declaration field. Click on the calendar icon located at the extreme right side of the panel to open calendar -

The current date will be shaded. To enter the current date, click on the shaded date -

This date will now appear in the Date of Declaration field -

The Operation/Project and Beneficiary Organisation fields are pre-populated by eCohesion. They should be reviewed to ensure that they are both correct –

The Description field, provide an outline of the contents of the Declaration -
Relevant information relating to the Declaration should be entered into the Description box, including the year/years to which the data relates, and any other information which would be of use to the IB or MA.

Next, complete the “Year Declaration relates to” field. Click on the down arrow located at the extreme right of the field and select the year to which the data relates –

Where the Declaration relates to more than one year, the final year to which the data relates should be entered. For example, where a Declaration relates to the period 2014-2016, 2016 should be entered -

The year selected then appears in the “Year Declaration relates to” field -

Finally, there are three financial fields which must be completed for all Declarations, whether financial or non-financial. These fields are “S&E Amount”, “BMW Amount” and “Expected Total ESF Amount”.

For Non-Financial Declarations, a €0.00 value should be entered into these fields.

To complete a financial field, click on the word “Required” and a box will appear displaying a 0.00 value –

Click on the 0.00, which now appears in the field, replacing the word “Required”. Ensure that the three financial fields all display a 0.00 value -
The system will prompt users to complete mandatory fields by displaying “Required” and will issue a warning, and highlight the relevant fields in red, where an attempt has been made to save the Declaration before mandatory fields have been completed.

Once all of the fields referred to above have been populated, the “Basic Info” tab will be complete -

2.3 To review/complete the Declaration’s Cascade information, click on the Cascade Info tab -

This tab displays Cascade information, pre-populated by eCohesion, which is relevant to the Declaration. Ensure that the Cascade information displayed is correct -
The “Beneficiary Person who will approve” field is generally pre-populated with the name of a relevant User. Check that the User name entered is correct.

If the User name is incorrect, the correct Beneficiary Approver User name should be selected. To do this, click on the down arrow located at the extreme right of the “Beneficiary Person who will approve” field -

Next, click on “Search and Select” -

eCohesion will now display a list of Users in the Beneficiary who are licenced to access eCohesion. Click on the User name of the person who is the Beneficiary Approver.

If the correct Beneficiary Approver is not displayed on the list of User Names, the Beneficiary Submitter should contact the ESF Managing Authority at eCohesion@education.gov.ie to resolve the issue.

If the “Beneficiary Person who will approve” field is not pre-populated, a Beneficiary approver name should be entered using the steps outlined above.

2.4 When the required details have been entered into the mandatory fields for both tabs, click on the “Save” button in the top right –

eCohesion then displays a dialog box which indicates that a Declaration has been successfully created.

The Declaration can be edited after it has been saved by clicking on the “Edit” button in the top right of the Declaration page.

Note that the Declaration can only be edited before it has been submitted for approval, or if it has been rejected by the relevant approver.
### 3. Preparing Indicator Data for Upload

#### 3.1 At this point, participant indicator data must be uploaded to the Declaration. The process for preparing the required data will vary depending on whether the upload file is being exported directly from the Beneficiary’s IT system, or if it is being prepared manually in an Excel workbook developed for that purpose.

As outlined in section 5 of the *Guidance on the Completion of Non-Financial Declarations*, each ESF-supported activity has a different CSV template, to reflect the differing indicators being captured for each activity. If a Beneficiary requires to download the blank CSV template for their activity directly from eCohesion, they should click on the down arrow beside the “Edit” button and select “Performance Template” –

The downloaded template will appear in the bottom left of the screen –

Clicking on the file will open it on the User’s own computer, where it can be saved locally.

#### 3.2 For those Beneficiaries whose IT systems directly export participant data in the required format for eCohesion (e.g. PLSS, IRIS, Ability CRM), the Beneficiary Submitter should export the relevant file from their system in accordance with their own procedures. The export file should be saved locally with a name that is related to the Declaration concerned. This file can then be uploaded to eCohesion by following the steps outlined in section 4 below.

It should be noted that Beneficiaries are required to validate indicator data for completeness and consistency before submitting that data through eCohesion. The purpose of such checks is to ensure that the data is as complete as possible, and consistent (e.g. that no participants are recorded as being both under-25 and over-54).
The IT systems referred to above automatically validate data for consistency either upon entry (e.g. by only allowing one Labour Market Status to be selected for each participant) or upon export (e.g. by ensuring only relevant result indicators are reported). Therefore, Beneficiaries whose IT systems directly export ESF data in the required format are not required to validate their data for consistency separately before upload to the system.

In addition, where the relevant IT systems have been configured to ensure that the provision of ESF indicator data is mandatory, and that such fields cannot therefore be left blank, there is no need for the bodies concerned to validate the data for completeness – again, the relevant IT systems have ensured that the required data is complete.

However, where the provision of ESF data is not mandatory within the IT system (e.g. PLSS), the bodies concerned should have processes in place to –

- ensure the required data is entered onto the system in real time,
- identify where participant records are incomplete, and
- back-fill missing data where this is identified.

### 3.3 Beneficiaries who do not export data directly from their own IT systems are required to use an Excel workbook, prepared by the MA for that purpose, to validate their data before upload to eCohesion.

Some activities (e.g. Gender Equality, Integration and Employment of Migrants) have issued such workbooks to their projects so that the data concerned can be populated on an ongoing basis at project level.

Other activities (e.g. GYDPs, YPPs) collect and store participant data in accordance with their own procedures before populating the workbook in advance of submitting the data through eCohesion.

When these Beneficiaries are satisfied that the required participant data has been inserted into the workbook, and that it is consistent, they should then copy the data into the CSV template for their activity, taking care to ensure the data is inserted into the correct columns.

Once satisfied that the template has been populated correctly, they can upload the data into the Declaration by following the steps outlined in section 4 below.

An excerpt from a CSV template with performance indicator data can be seen below:
4. Creating a Performance Indicator Upload

4.1 The Performance Indicator (PI) upload on eCohesion is created by the Beneficiary Submitter.

To create a PI upload, navigate to the relevant Declaration and click on the “Performance Upload” button at the top right of the Declaration dashboard -

![Performance Upload Button](image)

A blank PI upload dashboard will be displayed -

![Blank PI Upload Dashboard](image)

Enter the required details, starting by providing the upload with a name. This should be in same format as the name of the Declaration, but with “PI” substituted for “NF”, e.g.

**PI_TLA_TCD_2016_2019_1**

Relevant information should be entered into the “Description” field, e.g. the year to which the data relates, and any other information which could be useful to the IB or MA.

Click “Choose File” and browse to the location where the relevant CSV data file has been saved locally. Click on the file name. The file will now appear in the “File name” field -

![Choose File](image)

Click on Open.
eCohesion now displays the CSV file selected for the uploading process -

![Upload File]

Choose File: TLA_TESTData_2016_eCoh 2019.csv

The PI CSV upload in the example below contains 10 participant records, of which –

- two contain entries which are not in the correct ‘Yes/No/Requested but not Provided/Not Requested’ format required by eCohesion, i.e. DEF311600001 and DEF311600006 (in both cases, lower case letters are incorrectly used, and are underlined in the screenshot below for effect),
- one participant is ineligible as their participation falls outside the relevant period, i.e. DEF311600003, and
- two contain Date of Birth typographical errors, i.e. DEF311600004 and DEF311600005.

<table>
<thead>
<tr>
<th>Participant ID</th>
<th>Project</th>
<th>Gender</th>
<th>Date of Birth</th>
<th>Commencement</th>
<th>Completion</th>
<th>CO01: Unit</th>
<th>CO018: Homeless</th>
<th>PI e</th>
</tr>
</thead>
<tbody>
<tr>
<td>DEF311600001</td>
<td>HE001</td>
<td>Male</td>
<td>21/05/1995</td>
<td>08/09/2015</td>
<td>07/06/2018</td>
<td>No</td>
<td>Yes</td>
<td>Not Requested</td>
</tr>
<tr>
<td>DEF311600002</td>
<td>HE001</td>
<td>Male</td>
<td>12/03/1995</td>
<td>08/09/2014</td>
<td>31/05/2018</td>
<td>No</td>
<td>Yes</td>
<td>Not Requested</td>
</tr>
<tr>
<td>DEF311600003</td>
<td>HE001</td>
<td>Male</td>
<td>13/03/1995</td>
<td>08/09/2012</td>
<td>02/06/2013</td>
<td>No</td>
<td>No</td>
<td>Not Requested</td>
</tr>
<tr>
<td>DEF311600004</td>
<td>HE001</td>
<td>Male</td>
<td>14/03/2013</td>
<td>08/09/2014</td>
<td>30/05/2017</td>
<td>No</td>
<td>Yes</td>
<td>Not Requested</td>
</tr>
<tr>
<td>DEF311600005</td>
<td>HE001</td>
<td>Female</td>
<td>15/03/1995</td>
<td>08/09/2016</td>
<td></td>
<td>No</td>
<td>Yes</td>
<td>Not Requested</td>
</tr>
<tr>
<td>DEF311600006</td>
<td>HE001</td>
<td>Female</td>
<td>04/04/1995</td>
<td>15/09/2014</td>
<td>02/06/2016</td>
<td>No</td>
<td>Yes</td>
<td>Not Requested</td>
</tr>
<tr>
<td>DEF311600007</td>
<td>HE001</td>
<td>Female</td>
<td>07/02/1995</td>
<td>15/09/2014</td>
<td>31/05/2017</td>
<td>No</td>
<td>No</td>
<td>Not Requested</td>
</tr>
<tr>
<td>DEF311600008</td>
<td>HE001</td>
<td>Male</td>
<td>08/02/1995</td>
<td>15/09/2016</td>
<td></td>
<td>No</td>
<td>Yes</td>
<td>Not Requested</td>
</tr>
<tr>
<td>DEF311600009</td>
<td>HE001</td>
<td>Male</td>
<td>09/02/1995</td>
<td>15/09/2014</td>
<td>06/06/2017</td>
<td>No</td>
<td>Yes</td>
<td>Not Requested</td>
</tr>
<tr>
<td>DEF311600010</td>
<td>HE001</td>
<td>Male</td>
<td>10/02/1995</td>
<td>15/09/2016</td>
<td></td>
<td>No</td>
<td>No</td>
<td>Not Requested</td>
</tr>
</tbody>
</table>

The errors are indicated in red in the extract above for effect only, and are included as examples referenced in subsequent sections.

To upload the CSV file to the Declaration, click on the “Save” button in the top right corner -

![Save Button]

eCohesion then displays a dialog box indicating that the PI upload has been successful -

![Success Message]
4.2 When the CSV file has been processed and uploaded by the system (which happens in the background and may take some time depending on the amount of data) the Performance Indicator Upload status will then display “Complete” and sub-status will display “Pending” -

Click on the Performance Indicator upload name and eCohesion will display the Performance Indicator dashboard -

The top right displays “Accept Upload Data” and “Reject Upload Data” options -

For the data upload example above, eCohesion indicates that Performance Indicators for eight participants have been accepted, but an Error File for two records has been generated, as eCohesion has identified erroneous data within the upload -

To access the Error File, click on the Error File panel, which will expand to make the file visible -
When clicked, the Error File will appear in CSV format at the bottom left of the screen. **The Beneficiary should save the CSV Error File onto its own local drive for future reference.**

The first column in the CSV file will list the error(s) in the upload as per the example below -

<table>
<thead>
<tr>
<th>Errors</th>
<th>Participant Id</th>
<th>Project Id Gender</th>
<th>Date of Birth/Commencement/Completion</th>
<th>CO01: Line CO03: Inco</th>
</tr>
</thead>
<tbody>
<tr>
<td>errors</td>
<td>pi_project</td>
<td>pi_project_id</td>
<td>date_of_birth/commencement/completion</td>
<td>pi_complete/pi_complete/CO01: pi_complete/CO01: pi_complete/CO01: pi_complete/CO01:</td>
</tr>
<tr>
<td>invalid Columns: pi_esf_co01, pi_esf_co02</td>
<td>DEF311600001</td>
<td>HE001</td>
<td>Male</td>
<td>21/05/1995</td>
</tr>
<tr>
<td>invalid Columns: pi_esf_co18</td>
<td>DEF311600006</td>
<td>HE001</td>
<td>Female</td>
<td>04/04/1995</td>
</tr>
</tbody>
</table>

In the above example, the error file identifies errors relating to indicators CO01, CO03 and CO18, corresponding to the two records in the file with values in the incorrect format, i.e. the two records with erroneous lower case letters.

When eCohesion generates an Error File, the Beneficiary Submitter has two options –

- accept the valid data within the PI Upload with sub-status “Pending”, amend the two invalid participant records contained within the Error File, create a new upload containing those two records, and accept the new upload (see 4.3 below), or

- reject the uploaded data in its entirety, amend the relevant records with the overall CSV file, and upload the amended CSV file (see 4.4 below).

**4.3 Option 1 - Accept the valid data, amend the invalid data, and upload amended data.**

To proceed with the first option, click on the PI upload name (with “Pending” sub-status) and eCohesion will display the PI upload dashboard –

The “Accept Upload Data” and “Reject Upload Data” buttons are displayed in the top right -
Click on the Accept Upload Data button.

eCohesion will generate a warning requesting confirmation -

![Warning]

Click on Confirm. The eight valid participant records are now uploaded to the Declaration.

It is then necessary to correct the two invalid participant records for upload to the Declaration.

Having saved the Error File as set out in section 4.2 above, the Beneficiary Submitter should open the Error File, make the required amendments to the CSV, and save the amended file to their local drive. The amended CSV file should be given a different name to the CSV file included in the upload previously accepted.

A new PI Upload must now be created for the data contained in the amended CSV file and uploaded to the same Declaration, following the steps outlined above. The PI should be given a different name to the PI previously uploaded and accepted, by adding “v2” to the end of the name, e.g. –

```
PI_TLA_TCD_2016_2019_1v2
```

The Beneficiary Submitter can now proceed to “Accept Upload Data” as outlined above.

Once the upload has been processed, the Declaration home page will show two successful uploads, both with the sub-status “Approved”.

### 4.4 Option 2 – Reject the uploaded data, amend invalid data, and upload entire file.

To proceed with the second option, click on the “Reject Upload Data” button in the top right –

![Accept Upload Data, Reject Upload Data]

eCohesion will generate a warning requesting confirmation -

![Warning]
Click on Confirm. The original CSV upload file created by the Beneficiary and saved in the local drive must now be amended to correct the errors identified. The amended CSV upload file should be given a different name to the rejected CSV upload. File **TLA_TCD_2016_2019_1v2** below has been amended to correct **CO01, CO03 & CO18** for DEF311600001 and DEF311600006 (amended data is shown in Green for illustrative purposes only).

<table>
<thead>
<tr>
<th>Participant id</th>
<th>Project</th>
<th>Gender</th>
<th>Date of Birth</th>
<th>Commencement</th>
<th>Completion</th>
<th>CO01: Unit CO03: Income CO18: Homeless/CO1</th>
</tr>
</thead>
<tbody>
<tr>
<td>DEF311600001</td>
<td>HEI001</td>
<td>Male</td>
<td>21/02/1995</td>
<td>08/02/2015</td>
<td>Yes</td>
<td>Not Requested</td>
</tr>
<tr>
<td>DEF311600002</td>
<td>HEI001</td>
<td>Male</td>
<td>12/02/1995</td>
<td>08/02/2014</td>
<td>No</td>
<td>Not Requested</td>
</tr>
<tr>
<td>DEF311600003</td>
<td>HEI001</td>
<td>Male</td>
<td>13/02/1995</td>
<td>08/02/2012</td>
<td>Yes</td>
<td>Not Requested</td>
</tr>
<tr>
<td>DEF311600004</td>
<td>HEI001</td>
<td>Male</td>
<td>14/02/1995</td>
<td>08/02/2014</td>
<td>No</td>
<td>Not Requested</td>
</tr>
<tr>
<td>DEF311600005</td>
<td>HEI001</td>
<td>Female</td>
<td>15/02/1995</td>
<td>08/02/2016</td>
<td>No</td>
<td>Not Requested</td>
</tr>
<tr>
<td>DEF311600006</td>
<td>HEI001</td>
<td>Female</td>
<td>04/02/1995</td>
<td>15/02/2014</td>
<td>Yes</td>
<td>Not Requested</td>
</tr>
<tr>
<td>DEF311600007</td>
<td>HEI001</td>
<td>Female</td>
<td>07/02/1995</td>
<td>15/02/2014</td>
<td>No</td>
<td>Not Requested</td>
</tr>
<tr>
<td>DEF311600008</td>
<td>HEI001</td>
<td>Male</td>
<td>08/02/1995</td>
<td>15/02/2016</td>
<td>No</td>
<td>Not Requested</td>
</tr>
<tr>
<td>DEF311600009</td>
<td>HEI001</td>
<td>Male</td>
<td>09/02/1995</td>
<td>15/02/2014</td>
<td>Yes</td>
<td>Not Requested</td>
</tr>
<tr>
<td>DEF311600010</td>
<td>HEI001</td>
<td>Male</td>
<td>10/02/1995</td>
<td>16/02/2016</td>
<td>No</td>
<td>Not Requested</td>
</tr>
</tbody>
</table>

Note that in the table above there are 3 rows containing errors highlighted in red. These have been deliberately included for indicative purposes to show that certain types of errors are not identified by eCohesion for inclusion in Error Files, but must instead be identified by the Beneficiary, IB or MA. Ideally, these should be identified by the Beneficiary before the data is uploaded to eCohesion, as part of the checks described in the **Guidance on the Completion of Non-Financial Declarations**.

A new Performance Indicator Upload must then be created and assigned to the same Declaration.

Click on Performance Upload in the top right, repeat the process as outlined previously, and provide the new PI upload with a different name to the previously rejected upload by adding “v2”, “v3”, etc., as appropriate and in sequence, e.g. **PI_TLA_TCD_2016_2019_1v2** -
Review the data contained in the Performance Upload and when satisfied that it is correct, click on “Accept Upload Data” in the top right -

![Accept Upload Data and Reject Upload Button]

eCohesion will generate a warning requesting confirmation -

![Warning Message]

Click on Confirm.

The Declaration home page will show two Performance Indicator uploads. The rejected upload has a “rejected” sub-status and the accepted upload has an “approved” sub-status:

![Performance Indicator Uploads]

Note that the outcome of both options is that there are 10 participant records included in the Declaration. Using Option 1 provides that the 10 records are uploaded in two tranches – the first containing the eight valid records, and the second containing two records which have been amended to correct errors identified in the Error File. Using Option 2 provides that the 10 records are uploaded in a single tranche, with the first upload having been rejected, and the two invalid records having been corrected for upload together with the eight valid records.

4.5 One of the options available to Beneficiaries on eCohesion is to cancel a Declaration. However, **Beneficiaries are requested not to cancel a Declaration created on eCohesion without the prior approval of the MA.** The new functionality which allows Beneficiaries to reject the data uploaded to a Declaration, described above, means that there are very limited circumstances where a Declaration may require to be cancelled. Instead, Beneficiaries should seek to re-use Declarations already created, editing them as required, to reduce the overall number of Declarations on the system, thereby making it easier for all bodies within the cascade to keep track of Declarations which are in progress.
5. **Creating a Management Verification**

5.1 Before a Declaration can be submitted to the Beneficiary Approver for review and approval, a **valid** Management Verification is required.

Management Verifications on eCohesion are created by the BeneficiarySubmitter.

To create a Management Verification (MV) record, click on the “Management Verification” button in the top-right of the Declaration dashboard -

The MV dashboard is displayed -

The status of a new Management Verification defaults to “No Data”.

Complete the MV dashboard, starting by providing the MV with a name relating to the Declaration. This should be in the same format as the name of the Declaration, but with “MV_” at the start, i.e.

```
MV_[Activity]_[Beneficiary]_[Data Year]_[Year Uploaded]_N
```

Enter a description of the MV in the description box located directly below the Declaration name -

The status of the MV will be shown as “Invalid”.

---

22
Click on the “ESF – Non Financial” tab. The two fields to be completed are related to the relevant ESF Control Objectives - that the data submitted is reliable and complete, and that there are no other material issues which would prevent the submission of the data.

If satisfied that the data is reliable and complete, and that there are no other major issues of concern, select “Yes” within the two required fields and click on “Save” located in the top right corner -

![Image showing filled out form]

eCohesion shows a message that the MV has been successfully created -

![Image showing successful creation message]

The MV status will now be updated to “Valid” -

![Image showing MV status updated to Valid]

5.2 eCohesion will prevent a Declaration being submitted to the Beneficiary Approver if an MV has an “Invalid” status –

![Image showing MV status as Invalid]
If the Beneficiary Submitter attempts to click on the button where an MV has an “Invalid” status, eCohesion will generate a warning message –

![Warning]

If this warning message appears, the Beneficiary Submitter should navigate to the MV panel at the bottom of the Declaration dashboard and click on the name of the MV –

![Management Verifications]

They should then ensure that the two relevant fields have been completed and save the MV. This should update the MV to valid, and allow the Declaration to be submitted to the Beneficiary Approver.
6. **Uploading a Document to a Declaration**

6.1 Documents will be added to a Declaration to reflect/support the Beneficiary’s own checks, or to provide documents to the IB or MA as part of their management verifications procedures. Such documents may include –

- Checklists referred to in the *Guidance on the Completion of Non-Financial Declarations*
- Application or referral forms,
- Screenshots of online applications or databases,
- Documents relating to data protection, or data collection policies and procedures.

To upload documents to a Declaration which is still at Beneficiary level, click on the Declaration name in the My Declarations panel on the eCohesion home page -

Select the Declaration concerned and scroll down the Declaration dashboard to the Documents panel -

Click on the [+ ] sign located on the extreme right to create the document record as follows -

Enter a name for the Document which relates to the Declaration and to the document itself –

Where the document being uploaded relates to an individual participant, the name used should include their Participant ID, e.g. “Participant 12345678 Application Form”. Names of other documents should also clearly describe their contents.
Click on “Choose File” to browse to the location where the document is saved -

Select the document type from the drop-down option -

A description of the document being added should also be outlined in the description box -

Again, this description should clearly describe the document in question, and should set out the reason(s) it is being uploaded.

When the Document dashboard has been completed, click on “Save” located in the top right. eCohesion displays a dialog box indicating that the document has been successfully created -

The Documents panel in the Declaration dashboard indicates that the document has been added to the Declaration.

6.2 After a Declaration has been submitted to the IB, and before it has been accepted by the IB, Beneficiaries may still upload documents to the Declaration, although it will not appear in the “My Declarations” panel. Instead, Beneficiaries should click on the Declarations Module at the top of their screen –

Once clicked, this will take Users to a list of all Declarations of relevance to them, no matter their status on the system.

Users should also note that the Declaration will appear back in the “My Declarations” panel on their home page once the Declaration has been accepted by the IB.
7. **SUBMITTING A DECLARATION TO THE BENEFICIARY APPROVER**

**7.1** The Beneficiary Submitter, having reviewed the Declaration, submits it to the Beneficiary Approver by clicking on “Submit to Approver” located at the top right of the Declaration dashboard -

![Submit to Approver screenshot]

eCohesion generates a warning requesting confirmation -

![Warning confirmation screenshot]

Click on Confirm.

The Declaration has now been submitted to the Beneficiary Approver and the Declaration status has been updated to “Submitted to Approver” -

![Declaration status screenshot]
8. Beneficiary Approver Declaration Review and Decision

8.1 To review a Declaration submitted to them by a Beneficiary Submitter, the Beneficiary Approver logs in to eCohesion by entering their User Name, Password and clicking on Log In –

Their home page will then be displayed -
The Beneficiary Approver opens the relevant Declaration by clicking on the Name in the “My Declarations” module -

![Image](image1)

The Beneficiary Approver should now examine the content of the Declaration to check its accuracy, consistency and completeness.

8.2 There are a number of checks which should be undertaken by the Beneficiary Approver.

Firstly, the Beneficiary Approver should navigate to the Performance Upload panel at the bottom of the Declaration dashboard and click into each approved Upload associated with the Declaration (rejected Uploads are irrelevant as their data will not be contained within the Declaration).

![Image](image2)

The Beneficiary Approver should click on the “Validations” tab to check that the data uploaded is consistent. eCohesion applies a number of high-level validation checks to the aggregated data contained within each non-financial Declaration, and each check should have the status “Pass” -

![Image](image3)
The Beneficiary Approver should also ensure that the Status and Sub-Status of each approved upload is “Complete” and “Approved” respectively.

They should then check that the value in the “Indicator Count” field (highlighted above) agrees with the value in the Performance Indicators panel (also highlighted).

They should also check that any Error Files associated with the Performance Indicator Upload have been taken into account.

The Beneficiary Approver can also export the indicator data contained within the Declaration in CSV format, by clicking on the down arrow beside “Change Log” in the top right corner, and then selecting “Export CSV with Performance Indicators” -

This CSV file will appear in the bottom left corner of the screen, in the same manner as a downloaded Error File, described in section 4.2 above. The Beneficiary Approver can save this file locally as an Excel file, and apply validation checks to the data.
Finally, the Beneficiary Approver should check the Management Verification to ascertain if there is a No answer to either or both of the questions in the “ESF Non-Financial” tab.

Having undertaken the checks referred to above, the Beneficiary Approver can now opt to either “Submit to IB” or “Reject” the Declaration. These processes are outlined in sections 9 and 10 below.
9. **Beneficiary Approver Decision 1 - Submit Declaration to IB**

9.1 The Beneficiary Approver, having reviewed the content of the Declaration, is satisfied that the Declaration can be submitted to the IB.

To submit the Declaration to the IB, the Beneficiary Approver should click on “Submit to IB” -

![Submit to IB button](image)

eCohesion displays a warning requesting confirmation to submit the Declaration -

![Warning message](image)

Click on Confirm.

When the Declaration has been successfully submitted, the Declaration Status is updated to “Submitted to IB” -

![Submitted to IB status](image)
10. **Beneficiary Approver Decision 2 - Reject Declaration to Submitter**

10.1 Having exported the indicator data within the Declaration for checking, the Approver notices that the Commencement and Completion dates for Participant DEF311600003 (from the CSV file used at section 4.1 above) precede the Commencement Date for the PEIL Activity concerned (1/1/14), and that this participant is therefore ineligible.

<table>
<thead>
<tr>
<th>Participant ID</th>
<th>Project</th>
<th>Gender</th>
<th>Date of Birth</th>
<th>Commencement</th>
<th>Completion</th>
<th>CO01: Unit CO03: Inac CO18: Homeless</th>
<th>CO18: Not Requested</th>
</tr>
</thead>
<tbody>
<tr>
<td>DEF311600003</td>
<td>HE001</td>
<td>Male</td>
<td>08/09/1995</td>
<td>02/06/2013</td>
<td>08/09/2011</td>
<td>20/09/2011</td>
<td>No</td>
</tr>
</tbody>
</table>

The Beneficiary Approver decides to reject the Declaration by clicking the “Reject” button in the top right –

![Image of rejection button](image)

eCohesion generates a warning requesting confirmation -

![Warning image](image)

Click on Confirm.

eCohesion requests the Beneficiary Approver to provide reason(s) for rejecting the Declaration. This is a required field –

![Reasons for rejection](image)

The Beneficiary Approver enters the reason(s) for rejecting the Declaration in the box provided and then clicks on “Save” located in the top right of the dashboard –

![Reason for rejection](image)
The Declaration status has been updated to “Rejected by Beneficiary Supervisor”, indicating the Declaration is now rejected back to Submitter for further action(s) -
11. BENEFICIARY SUBMITTER PROCESSING REJECTED DECLARATION

11.1 When a Declaration has been rejected by the Beneficiary Approver, the Beneficiary Submitter then needs to -
   - o Reject the PI upload, and
   - o Create a revised PI upload

11.2 The Beneficiary Submitter opens the Declaration in the My Declarations panel on their home page. The Beneficiary Submitter scrolls down the Declaration page and clicks on Notes -

The Declaration Status “Rejected by Beneficiary Supervisor” and the reason(s) provided by the Approver for rejecting the Declaration appear -

The Submitter re-opens the Declaration by clicking on the Declaration in My Declarations -

Scroll down the Declaration Dashboard to the Performance Indicator Upload panel -
Click on the button and eCohesion displays the Performance Upload -

Click on the Performance Upload name and Click on “Reject Upload Data” in the top right -

eCohesion generates a warning requesting confirmation -

Click on Confirm.

eCohesion will display a “Rejection in Progress” status for a short time.

Scroll to the Performance Indicator Upload - the upload sub-status has updated to “Rejected” -

11.3 The Performance Indicator CSV upload file previously created by the Beneficiary Submitter and saved locally must now be amended by the Submitter to correct the errors identified by the Approver.

The amended CSV upload is created and given a different name to the rejected file (e.g. NF_TLA_TCD_2016_2019_4v2). The revised file with 9 indicators below now excludes the ineligible participant DEF311600003 -
Click on Performance Upload and repeat the process as outlined in section 4 above, naming the Upload in accordance with the convention outlined on page 11 (e.g. *PI_TLA_TCD_2016_2019_1v3*).

The Beneficiary Submitter submits the revised Declaration to the Beneficiary Approver by clicking on Submit to Approver in the top right -

![Submit to Approver](image)

eCohesion generates a warning requesting confirmation -

![Warning](image)

Click on Confirm.

The Declaration status has now been updated to “Submitted to Approver”.

---

| Participant ID | Project | Gender | Date of Birth | Commencement | Completion | CO01: Unit CO03: Inai CO18: Homelessness CO19: | |
|---------------|---------|--------|--------------|--------------|------------|-----------------------------------------------|
| DEF311600001  | HE001   | Male   | 21/05/1995   | 08/09/2015   | 07/08/2018 | No | Yes | Not Requested | Not |
| DEF311600002  | HE001   | Male   | 12/03/1995   | 08/09/2014   | 31/05/2018 | No | Yes | Not Requested | Not |
| DEF311600004  | HE001   | Male   | 14/03/2019   | 08/09/2014   | 30/05/2017 | No | Yes | Not Requested | Not |
| DEF311600005  | HE001   | Female | 15/03/1995   | 08/09/2016   | No          | Yes | Yes | Not Requested | Not |
| DEF311600006  | HE001   | Female | 04/04/1995   | 15/09/2014   | 02/06/2016 | No | Yes | Not Requested | Not |
| DEF311600007  | HE001   | Female | 07/02/1995   | 15/09/2014   | 31/05/2017 | No | Yes | Not Requested | Not |
| DEF311600008  | HE001   | Male   | 08/02/1995   | 15/09/2016   | No          | Yes | Yes | Not Requested | Not |
| DEF311600009  | HE001   | Male   | 09/02/1995   | 15/09/2014   | 06/06/2017 | No | Yes | Not Requested | Not |
| DEF311600010  | HE001   | Male   | 10/02/1995   | 16/09/2016   | No          | Yes | Yes | Not Requested | Not |
12. BENEFICIARY APPROVER APPROVING/SUBMITTING REVISED DECLARATION TO IB

12.1 Upon receipt of a Declaration, the Beneficiary Approver opens the Declaration by clicking on the Declaration name in the “My Declarations” dashlet on their home page -

The Beneficiary Approver, having reviewed the contents of the Declaration in accordance with section 8.2 above, including any amended PI uploads, now decides to submit the Declaration to the IB.

To submit the Declaration to the IB, click on Submit to IB –

ecaHesion generates a warning requesting confirmation -

Click on Confirm.

When the Declaration has been successfully submitted the Declaration Status is updated to “Submitted to IB”.
13. **Beneficiary Submitter Reviewing Declaration Rejected by IB**

**13.1** The Intermediate Body (IB) is required to review the data included in the Declaration. Where the IB is of the opinion that the Declaration needs to be amended, it may reject the Declaration and return it on eCohesion to the Beneficiary for the necessary amendment to be made. The IB may also decide, in certain circumstances, to amend the data itself, using one of the eCohesion modules designed for that purpose.

It should be noted that IB-rejected Declarations revert straight back to the Beneficiary Submitter rather than to the Beneficiary Approver.

The IB may create a Case in conjunction with their decision to reject the Declaration in order to notify the Beneficiary of their findings, and may request the Beneficiary to perform additional actions.

**13.2** To access the IB-rejected Declaration, the Beneficiary Submitter clicks on the Declaration name in the “My Declarations” module -

![Declaration Status](image)

The status of the Declaration has been updated to IB Rejected.

Scroll down the Declaration dashboard to the Notes button. eCohesion states that the Declaration was “Rejected by ……” -

![Notes](image)

Click on this text and eCohesion will display the reason(s) provided by the IB for rejecting the Declaration -

![Reason](image)
The Beneficiary Submitter reviews the reason(s) why the Declaration was rejected and makes the required updates. This can be done by rejecting the Performance Indicator upload file, and amending the data, as outlined in section 11 above.

The Beneficiary Submitter then submits the updated Declaration with the amended Performance Indicator upload to the Beneficiary Approver for review and approval in accordance with section 12 above.

In the PI upload file below, the 2 incorrect Dates of Birth identified by the IB (both typographical errors, 1895 and the current year 2019) are corrected in green -

13.3 Cases may be added to a Declaration by the other bodies within the ESF Cascade, arising from findings/recommendations identified as part of their management verifications.

Note that Beneficiaries are not required to create Cases, but may view Cases created by other bodies within the ESF cascade.

Where a Case has been created by the IB, they may request Beneficiaries to amend the data within the Declaration, or to provide additional information or upload documents relating to the Declaration.

To view a Case created by the IB, the Beneficiary should scroll down the Declaration Dashboard to the Cases module -

Clicking on the field will display the Case(s) associated with the Declaration -
This dashboard will display details of the issues identified by the IB (or other body as the case may be). The Beneficiary Submitter should seek to address the issues identified, as appropriate, before re-submitting the Declaration to the Beneficiary Approver, in accordance with the procedures set out in section 11 above.

In some situations, Cases may be created which do not directly impact on the submission of the relevant non-financial Declaration. For example, if some participant records have been omitted from a Declaration pending confirmation that the participants were eligible for enrolment in the activity concerned, a Case may be created to note that an issue remains to be resolved. In the meantime, data relating to other participants could be submitted – the purpose of the Case is to ensure there’s a record on the system of any issues which require to be addressed.
14. BENEFICIARY APPROVER RE-SUBMITTING DECLARATION TO IB

The Beneficiary Approver should follow the same procedures as set out in section 12 above.

When the Approver is satisfied that the revised Declaration and Performance Indicator uploads, and any other relevant information uploaded, is correct and complete, s/he should re-submit the revised Declaration to the IB.

When the Declaration has been successfully submitted the Declaration Status is updated to “Submitted to IB” -

Assuming it does not identify any further issues, the IB will then approve the Declaration -
**CONCLUSION**

The procedures outlined above reflect the functionality of the eCohesion system as of April 2019. The ESF MA are continuing to work with the developers of eCohesion, and the other authorities which use eCohesion, to improve the functionality of the system, particularly to introduce more “quality of life” improvements. Examples of functionality which is under development include –

- the ability for Fund Administrators to delete cancelled Declarations from the system, to reduce clutter,
- the ability for Beneficiaries to create “Indicator Amendments” on the system, which will record individual changes to participant records that may result from the findings of management verifications, and
- the inheritance by Performance Indicator uploads and Management Verifications of the name of the related Declaration. This will save beneficiaries from having to re-type similar names into various fields when creating Declarations.

The ESF MA will revise this manual in parallel with the rollout of these additional features, to ensure all Beneficiary Users have up-to-date instructions on how to maximise the use of eCohesion.

As is set out in the introduction, any queries relating to the use of the system should be addressed to the ESF eCohesion Fund Administrator at ecohesion@education.gov.ie.

If you have any queries relating to the collection and preparation of non-financial data you can address them to esfdata@education.gov.ie.
## Appendix 1 – Abbreviations for Activity Titles and Beneficiaries

<table>
<thead>
<tr>
<th>Activity</th>
<th>Activity Abbreviation</th>
<th>Beneficiary Abbreviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1: ETB Training for the Unemployed</td>
<td>ETBTU</td>
<td>CDETB, WWETB, etc.</td>
</tr>
<tr>
<td>1.2: Springboard</td>
<td>SPD</td>
<td>HEA</td>
</tr>
<tr>
<td>1.3: ICT Skills Conversion</td>
<td>ICT</td>
<td>HEA</td>
</tr>
<tr>
<td>1.4: Momentum</td>
<td>MOM</td>
<td>SOLAS</td>
</tr>
<tr>
<td>1.5: EU Intra Mobility</td>
<td>EUIM</td>
<td>DEASP</td>
</tr>
<tr>
<td>2.1: Social Inclusion &amp; Community Activation Programme</td>
<td>SICAP</td>
<td>TLCDC, DCityLCDC, etc.</td>
</tr>
<tr>
<td>2.2: Youthreach</td>
<td>YR</td>
<td>CDETB, WWETB, etc.</td>
</tr>
<tr>
<td>2.3: Garda Youth Diversion Projects</td>
<td>GYDP</td>
<td>IYJS</td>
</tr>
<tr>
<td>2.4: Young Persons Probation Projects</td>
<td>YPP</td>
<td>PROB</td>
</tr>
<tr>
<td>2.6: Disability Activation Project</td>
<td>DACT</td>
<td>DEASP</td>
</tr>
<tr>
<td>2.7: Integration and Employment of Migrants</td>
<td>IEM</td>
<td>EUFUNDS</td>
</tr>
<tr>
<td>2.8: Tus Nua</td>
<td>TN</td>
<td>PROB</td>
</tr>
<tr>
<td>2.9: Gender Equality</td>
<td>GE</td>
<td>EUFUNDS</td>
</tr>
<tr>
<td>3.1: Third Level Access</td>
<td>TLA</td>
<td>UCD, DIT, MIC, etc.</td>
</tr>
<tr>
<td>3.2: Back to Education Initiative</td>
<td>BTEI</td>
<td>CDETB, WWETB, etc.</td>
</tr>
<tr>
<td>3.3: Adult Literacy</td>
<td>AL</td>
<td>CDETB, WWETB, etc.</td>
</tr>
<tr>
<td>4.1: Back to Work Enterprise Allowance</td>
<td>BTWEA</td>
<td>DEASP</td>
</tr>
<tr>
<td>4.2: JobsPlus Incentive Scheme</td>
<td>JP</td>
<td>DEASP</td>
</tr>
<tr>
<td>4.5: Youthreach</td>
<td>YR</td>
<td>CDETB, WWETB, etc.</td>
</tr>
<tr>
<td>4.6: Momentum</td>
<td>MOM</td>
<td>SOLAS</td>
</tr>
<tr>
<td>4.8: Community Training Centres</td>
<td>CTC</td>
<td>CDETB, WWETB, etc.</td>
</tr>
<tr>
<td>4.9: Defence Forces Employment Support Scheme</td>
<td>DFESS</td>
<td>DEF</td>
</tr>
<tr>
<td>4.10 Youth Employment Support Scheme</td>
<td>YESS</td>
<td>DEASP</td>
</tr>
</tbody>
</table>