

POLONEZ FINAL REPORT – GUIDELINES

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PROBLEM HELPLINE

In case of any problems or questions please contact NCN by mail at polonez@ncn.gov.pl or by phone: Jolanta Palowska 12 341 9139.

I. GENERAL INFORMATION

1. When to complete and submit the final report

The deadline for submitting the final report is 60 days from the completion of your fellowship. For example, if your fellowship ends on 30 September 2019, the final report is due no later than 30 November 2019.

2. Where to check the starting and ending dates of the fellowship

To confirm the starting and ending dates of your fellowship refer to section 1 of the fellowship agreement or see agreement section in the electronic submission system (ZSUN/OSF). If any changes were introduced to the dates of your fellowship, please refer to the appropriate annex to the fellowship agreement.

3. What language to use

The report should be completed in English. This includes the descriptions/explanations of changes made during the project either by an annex to the fellowship agreement or at consent of the head of the Host Institution.

4. Where, in how many copies and in what form to submit the final report

The report should be submitted in an electronic version via the ZSUN/OSF system <https://osf.opi.org.pl> and in a hard copy. The hard copy of the report should be printed from the ZSUN/OSF system and should bear appropriate seals and signatures. It must be delivered to the NCN personally or sent by post. The report is deemed to be submitted on time if it has been received by the Centre or has been postmarked within 60 days from the date the reporting period has lapsed.

If the Fellow is no longer in Poland at the time the report is being completed, NCN strongly suggests that the following procedure be adopted:

- The Fellow initiates Part 1 of the report (Administrative and financial report), reviews and modifies BASIC INFORMATION (if necessary) and prepares PUBLICATIONS. The Fellow prepares Part 2 of the report – COMPLETED TASKS.
- The Host Institution (HI) reviews BASIC INFORMATION and prepares financial parts of the report (FINANCIAL REPORT, PROJECT TEAM).
- The Fellow and the HI keep in touch to agree on the final version of the complete report.
- The Fellow prints the final version of both parts of the report to PDF files and uploads them to ZSUN/OSF system (in PDF format).
- The Fellow uploads publications without DOI number or link (if any) to the ZSUN/OSF system.
- The Fellow prints the final version the report on paper, signs both Declarations and sends the hard copy by traditional mail to the HI. If necessary (for section I of the report), the Fellow prepares the CD/DVD and sends it to the HI together with the hard copy of the report.
- The HI has the report signed by authorised person(s) and sends both the hard copy of the report and the CD/DVD (if any) to NCN by post.

5. When can the final report templates be downloaded from the ZSUN/OSF system?

The final report templates can be downloaded from 30 days before the project completion date.

6. Additional attachments required

Paper-based attachments

a. Materials published without the EU logo (flag)

If the publications you report as “published” did not include the EU logo because it was against the general approach used by the scientific journal in question, attach your own signed statement

in English that including the logo was not possible. Alternatively, you may attach the publisher's official guidelines for the authors. It is not necessary to provide statements regarding publications described as "accepted" or „submitted" until their status changes.

b. Changes introduced at consent of the Head of the Host Institution

If during the reporting period any changes have been made based on Section 3.3 of the fellowship agreement, it is not necessary to attach the copies of the written consents of the Host Institution to the report. Please note that any such documents should be kept on file by the Host Institution as NCN may request them later in the process of report review.

Electronic attachments

a. Materials submitted/accepted for publication without DOI number

If the report lists a publication submitted to or accepted by an editor/publisher (i.e. unpublished material for which no DOI/link can be given), upload such publication in PDF format to ZSUN/OSF (click on the REPORT Tab in the top left corner – then use PUBLICATIONS Tab). You can upload up to 15 such publications. There is no need to attach the printouts of publications to the hard copy of the report.

b. Publisher's acceptance letters

For publications accepted by an editor/publisher, please attach the confirmation from the publisher as the last page of the publication in PDF format uploaded to ZSUN/OSF. Again, there is no need to attach the hard copy of the correspondence with the publisher.

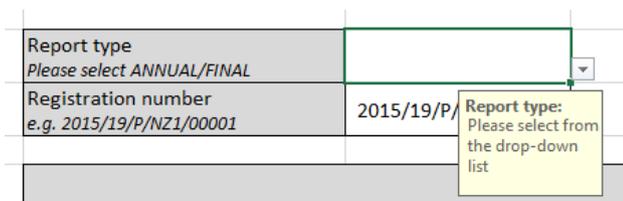
c. Visual materials to accompany section I of the report should be saved on a CD/DVD attached to the hard copy.

II. TECHNICAL INFORMATION

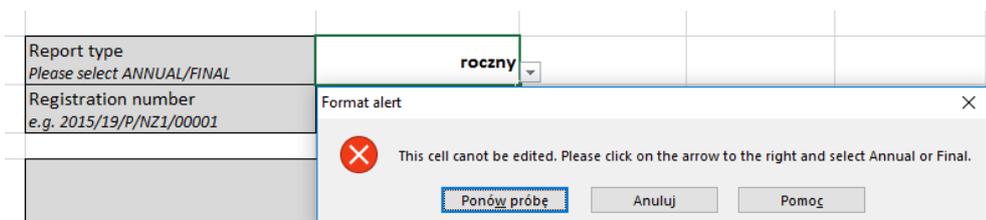
To complete the report you should have Microsoft Office 2010 or later on your computer.

Part 1 of the report is an Excel file and contains pre-formatted cells:

Drop-down lists to select from – marked by an arrow on the right which shows when you select a given cell:



Drop-down lists cannot be edited – if a wrong value is entered, a format alert will be shown:



Monitor cells that "react" to changes made with respect to the information given in the fellowship proposal – these are set to „NO" by default and will automatically change to „YES" if the content of the neighbouring cell is edited. If this is the case, a reminder will be displayed to enter explanation in the description of changes box.

8. statistical ID no. (REGON)	000288811			NO
9. Head of the host institution	Professor	Jacek Wysocki	Vice-rector	YES
10. Description of changes made				
Describe all changes made, including those on the basis of an annex to the agreement				
Please, explain				

In some cases a note in red is placed next to a cell to remind you of an action. If the action is done properly, the note will disappear.

Report type Please select ANNUAL/FINAL		You must first select the report type.		
Registration number e.g. 2015/19/P/NZ1/00001		Enter the project registration number to initiate the report. M		

III. CREATING THE FINAL REPORT

1. Log in to ZSUN/OSF system <https://osf.opi.org.pl> and find your POLONEZ project. Click on the REPORT tab in the top left corner. The tab will be active ca. 30 days before the project end date.
2. You should see two templates to download (*Part 1 – Administrative and financial report* and *Part 2 – Completed Tasks*). A separate PUBLICATIONS tab is placed under the REPORT tab on the left.

Download the report parts and complete them according to the instructions given below. When finished, print the files to two separate PDF documents and upload them to ZSUN/OSF. For technical reasons, **it is important that these files should be printed to PDF**. Do not upload the scans of the signed versions, as this would make it impossible to open any hyperlinks in the text of the report.

3. Check the publications you reported in section F of the Part 1 of the report – these for which no link or DOI number was given should be uploaded under PUBLICATIONS tab. You can upload up to 15 such publications.
4. You can view the progress of the report by clicking *Completeness check* or by printing the draft report form the PRINT DRAFT Tab on top of the screen.

IV. COMPLETING THE REPORT – step-by-step instructions

PART 1 – ADMINISTRATIVE AND FINANCIAL REPORT

Download the Excel file entitled “Part 1 – Administrative and financial report” from the ZSUN/OSF system and complete according to the instructions below.

1. The Excel file is composed of several worksheets, each containing a different aspect of the report. For your convenience the worksheets’ names indicate the areas they cover.
2. **Start from the first worksheet „HOST INSTITUTION AND FELLOW”.**
3. At first some cells will be set to “0”. When you enter your project registration number and fellow’s date of birth, they will be automatically filled with your project data.

Type of report

This cell has been pre-set to FINAL and cannot be edited.

Registration number

Enter the registration number of your application. Make sure you follow the correct format e.g. 2015/19/P/NZ1/00001.

Fellow's date of birth

Enter the Fellow's date of birth following the correct format YYYY-MM-DD.

When the registration number and the date of birth are in place, data already submitted in the fellowship proposal will be filled in automatically.

Fill in the white cells only. The grey cells cannot be edited and often contain formulas which work automatically when you enter information in the neighbouring cell.

A: HOST INSTITUTION

Items 1-9 will be completed automatically with the information from your fellowship proposal when you enter the registration number and Fellow's date of birth.

To the right of each line of information a monitor cell has been placed to indicate changes made. All such cells are initially set to "NO". If you edit the information in items 1-9, the relevant monitor cells will change their value to „YES". If you change something by mistake, press Ctrl+Z to restore previous values.

Item 10. Description of changes box

If you modified any information about your HOST INSTITUTION and any of the monitor cells read „YES", describe the changes made, including those made on the basis of an annex to the agreement.

B: FELLOW

Items 1-2 will be completed automatically with the information from your fellowship proposal when you enter the registration number and Fellow's date of birth.

If you edit the information in items 1-2, the relevant monitor cells will change their value to „YES".

Item 3. Gender. Please select from the drop-down list.

Items 4 - 6. Contact information. Complete with the telephone number, e-mail address and the mailing address where the Fellow can be reached in case of questions about the report. Make sure the contact data are valid for 5 years within the date of project completion. Do not give the Host Institution address. If your contact information has changed since you signed the fellowship agreement, select YES in the relevant cell(s) to the right.

Item 7. Description of changes box

If you modified any information about the FELLOW and any of the monitor cells read „YES", describe the changes made, including those on the basis of an annex to the agreement.

C: FELLOWSHIP INFORMATION

Items 1-8 will be completed automatically with the information from your proposal when you enter the registration number and Fellow's date of birth. If you edit the information in items 1-8, the relevant monitor cells will change their value to „YES".

Item 9. Description of changes box

If you modified any of the FELLOWSHIP INFORMATION and any of the monitor cells read „YES", please describe all changes made, including those on the basis of an annex to the agreement.

F: PUBLICATIONS

The report should include only the publications which resulted from the research conducted during the fellowship and which contain acknowledgments indicated in section 6 of the fellowship agreement. Publications without the appropriate acknowledgements will not be taken into account in report evaluation.

If the publications you report as “published” did not include the **EU logo** because it was against the general approach used by the scientific journal in question, attach your own signed statement in English that including the logo was not possible. Alternatively, you may attach the publisher’s official guidelines for the authors. The declaration should not be uploaded to the ZSUN/OSF system. Please note that it is not necessary to provide statements regarding publications described as “accepted” or „submitted” until their status changes.

Please remember that in line with the rules laid down in Article 29.2 of the agreement No. 665778, researchers must ensure open access to the publication within at most 6 months (12 months for publications in the social sciences and humanities).

Fill in the information requested in particular fields. Separate tables are given for papers in journal, books or book chapters and papers in conference proceedings. Two entries are given for each publication type. For subsequent publications add lines in compliance with the table format for the given publication type. You may need to add extra rows before copying, so as not to overwrite the data in the rows below.

Status. The report should first of all list research results already published or accepted for publication. You may also include publications submitted to the reviewer/publisher. Select PUBLISHED, ACCEPTED or SUBMITTED from the drop-down list.

Titles. All titles should be given in the original publication language.

Impact Factor data. If the journal does not have an Impact Factor (IF), enter „0”. Otherwise, enter the IF value for the year of publication or current five-year IF.

Year of publication. For works already published, give the actual year of publication. For publications with the status „accepted” or „submitted”, indicate the planned publication year.

The year of publication cannot precede the starting year of the grant – if an incorrect date is given, you will see an alert box.

Open access model. Select the GREEN or GOLD from the drop-down list. For more information on open access, you may also refer to the following:

- [Horizon 2020: Open Access to Scientific Publications](#)
- [Guidelines on Open Access to Scientific Publications and Research Data](#)
- [The open access to publications obligations In Horizon 2020 \(mailing to all Horizon 2020 Participants\)](#)

DOI. If the publication has a Digital Object Identifier number (DOI), use the following format: <http://dx.doi.org/<nr-DOI>>. For example, for a journal paper with a DOI number 10.1007/s11107-011-0336-9, the correct DOI reference is: <http://dx.doi.org/10.1007/s11107-011-0336-9>.

Link to the full text of the publication. Provide links to reliable online locations, which allow for permanent access to the full text of the publication (persistent URL e.g. publisher’s web page or publication platform, the host institution’s repository or web page, abstract/indexing search engines like PubMed, etc.).

PDF of materials submitted/accepted for publication without DOI number. If a publication is reported as submitted to or accepted by an editor/publisher (i.e. unpublished material for which no

DOI or link can be given), the PDF of such publication should be uploaded to the ZSUN/OSF system. Use PUBLICATIONS Tab right under the REPORT Tab on the left of the screen. You can upload up to 15 such publications.

If a publication has been accepted by an editor/publisher, please attach the confirmation from the publisher at the end of the PDF uploaded to ZSUN/OSF. There is no need to attach the hard copy of the actual publications or the correspondence with the publisher to the report.

G: FINANCIAL REPORT

Cost statement. Present costs planned in the fellowship agreement and incurred from the beginning of the fellowship to the end of the reporting period. All amounts should be given in Polish currency (PLN). NCN strongly recommends that this section be completed by or at least with the assistance of the Host Institution’s financial officers.

Make sure the costs are entered as NUMBERS and not copied from other documents or ZSUN/OSF as text. Please enter numbers without spaces between digits and use a comma as decimal separator (e.g. 2500,56).

Annex(es). This is a mandatory question – the names of columns in the budget table change depending on your answer here. If any annexes have been concluded with the National Science Centre to move the funds allocated to different budget categories, please select „YES” from the drop-down list. Then fill in the columns ‘Planned’ for every year, in compliance with the amounts given in the most recent financial annex.

Years covered. The financial report table shows columns for three consecutive calendar years. If the table displays *Year 0, 1, 2* – the report has not been properly initiated. Please go back to the first section “HOST INSTITUTION and FELLOW” and enter the project registration number and Fellow’s date of birth. If the fellowship does not cover one of the years shown, set all cells for planned and actual costs for this year to „0”.

Automatic sums and monitoring of the total amounts spent. The table will calculate sums for lines and columns automatically. If the sum total of costs actually incurred during the fellowship is higher than the sum of the costs planned, the system will display a mistake alert.

Year 2		Total					
planned in the fellowship agreement	actual	planned in the fellowship agreement	actual				
10 000,00 zł	12 500,00 zł	10 000,00 zł	12 500,00 zł	The actual costs incurred cannot exceed the costs planned			
10 000,00 zł	12 500,00 zł	10 000,00 zł	12 500,00 zł	The actual costs incurred cannot exceed the costs planned			

Funds for the applicant:

Please declare the salary paid to the Fellow including related pension and social security costs borne by the employer and other employee benefits if applicable (i.e. paid sick leave). Living allowance, mobility allowance and family allowance should be reported separately even if they were paid as one salary. **If the sum paid to the applicant within the reporting period is lower than the sum planned, please explain the reason in the description of changes box below the cost statement.**

Personnel costs. Declare the costs of remuneration for team members other than the Fellow or collective investigators (a collective investigator/participant is a group of at least 5 people involved in tasks of the same type e.g. survey interviewers, nurses, survey respondents).

Compliance with the budget given in attachment 1 to the fellowship agreement. This is a mandatory question. Answer the question below the table by selecting „TAK/YES” or „NIE/NO” from the drop-down list. You should answer „NIE/NO” if:

- fellowship budget was changed based on an annex to the fellowship agreement,
- fellowship budget was changed by consent of the Head of the Host Institution,
- the sum of the costs incurred in “Funds for the applicant” is lower than the sum of the costs planned for the reporting period,
- the sum of the costs incurred in any category is lower than 50% of the costs planned for the reporting period.

Description of changes box. If the answer to the above question is “NIE/NO”, describe and explain the changes made, specifying items affected by the transfer of funds and the amounts of such transfer. Explain why the costs incurred were lower than planned, where applicable.

Please note that the documents confirming the Host Institution’s consents to changes in the budget should be kept on file by the Host Institution. While it is not necessary to attach the copies to the report, NCN may request them later in the process of report review.

H: PROJECT TEAM

Fill in the tables for each member of the project team participating in research and receiving remuneration in the reporting period. Each member of the research team should be reported separately – add more tables of the same format if needed. NCN strongly recommends that this section should be completed by or at least with the assistance of the Host Institution’s financial officers.

Please note that while the proposal did not require listing actual names of co-investigators, it was, however, possible to list different positions on the research team. Consequently, a position described in the proposal could be filled by a Mary Brown or by a John Smith. If your proposal indicated co-investigators’ names, but the positions were actually filled by somebody else, NCN does not consider this a change of plans as long as one person was recruited for each position. If you planned one co-investigator but ended up employing two different people, you need to include both of them in the report and provide an explanation for employing the second one.

Planned number of investigators. This is a mandatory question. Please enter the number of investigators planned in the proposal.

New investigator. Select YES if a given team member has not been previously employed by the Host Institution (regardless of the form of employment).

Role in the project. The first table has been pre-filled automatically with the information about the Fellow and the second with the name of the Research Partner.

Research Partner must be reported regardless of whether s/he received remuneration. If the Research Partner was paid from indirect costs of the project, report both planned and actual costs as „0” and choose “not applicable” in the form of employment cell.

Planned remuneration. Enter the total sum of the remuneration planned in the proposal budget for the given person throughout the project.

Remuneration costs incurred. For each team member report the total actual cost of the salary paid to this investigator in each of the calendar years indicated.

Remuneration costs - special cases

- If remuneration was planned for a given position for or within the reporting period, but no remuneration was actually paid, please report the plan as stated in the proposal, and enter „0” for actual costs. Then provide an explanation in the description of changes box at the end of the project team section.
- If a given team member was not included in the proposal, but actually received remuneration in the reporting period, report the amount planned as „0”, and actual costs as they were incurred. Then provide an explanation in the description of changes box at the end of the project team section. Please note that the Host Institution should have agreed to introducing new team members in writing, and a copy of such consent should be kept on file on file by the Host Institution as NCN may request them later in the process of report review.
- If a given team member signed different contracts for different project tasks, complete a separate table for each relevant form of employment.

Whom not to report

- Research team members who were not included in the proposal budget and joined the team without remuneration should not be reported in the tables, but may be mentioned in the description of changes box at the end of the project team section.
- Collective investigators or research participants (i.e. a group of at least 5 people involved in tasks of the same type e.g. survey interviewers, nurses, survey respondents). The costs incurred for their remuneration should be declared in the financial report as other direct costs and not as personnel costs.

TOTAL remuneration for the project team and TOTAL costs incurred. After you have completed the individual tables for all members of the research team, sum up both the remuneration planned and actual personnel costs for the whole team in each calendar year indicated. The total planned personnel remuneration should equal the sum of the total funds planned for the applicant and total planned salaries declared in the financial report worksheet.

Description of changes box. Describe and explain changes introduced in respect to the amount of the remuneration, form of employment and changes to the composition of the research team.

PART 2 – COMPLETED TASKS

Download the Word file entitled “Part 2 – Completed task” from the ZSUN/OSF system and complete according to the instructions below.

D. SCIENTIFIC REPORT

(max. five (5) A4 pages)

Address all of the points given in the report.

D.2. STUDY VISIT REPORT

(max. one (1) A4 page)

Address all of the points given in the report. Please focus on how your study visit enabled the exchange of knowledge and transfer of good practices and what opportunities there were during the study visit to observe and participate in hosting organisation daily activities.

E. ETHICAL ASPECTS OF RESEARCH CARRIED OUT WITHIN THE RESEARCH PROJECT

Complete this part if you flagged any questions in the Ethics Issues Table in the fellowship proposal. Specify measures undertaken to ensure that the project is carried out in compliance with ethical requirements set forth in national and EU law. List necessary permits, authorizations and/or approvals of national authorities/ethics committees/institutional review

boards obtained, (e.g. for animal procedures or research on human participants conducted within the project, or any other permits), giving the number, date of issue and validity date of each permit, approval or authorization.

Please remember that according to § 2 section 4(f) of the fellowship agreement scans of the required permits, approvals or positive opinions of relevant ethics/bioethics committees, together with certified translation into English, must be sent electronically to the Centre before research tasks requiring these approvals are commenced. If you have not yet done so, please forward them by mail to polonez@ncn.gov.pl.

I. PROJECT DESCRIPTION FOR THE GENERAL PUBLIC

Provide a description of the project comprehensible to the general public. The description must include key tasks performed/undertaken and the importance of the project – its impact on the development of the discipline, existing knowledge and the importance of the research to society. The complete description should not exceed one (1) A4 page. If you have interesting visual materials illustrating the project (e.g. drawings, photos, models), please include them with the report **in an electronic form on a CD/DVD** as .JPG, .BMP, or .PDF files.

J. DISSEMINATION – RESEARCH PROJECT RESULTS

Conferences/symposia. Describe the nature of participation such as presentation, poster, organization, participation, membership in the scientific committee (up to 2000 characters).

Activities promoting research conducted during the Fellowship or its results to the general public, outside the research community. Describe, including the type and frequency of actions, target group (up to 300 characters).

Project website. Give the website address and the date of its launching.

Other forms of dissemination of results. Describe (up to 300 characters).

K. ACADEMIC DEGREES

To be completed only if any academic degrees were awarded thanks to the implementation of the fellowship.

INFORMATION, DECLARATIONS AND SIGNATURES

Complete according to instructions.

Item 1. Information for team members whose personal data were disclosed to the Host Institution and included in the report.

Item 2. Information for persons participating in the preparation of project documentation, whose personal data were disclosed to the Host Institution and included in the report.

Item 3. Confirmation by the Fellow and the representatives of the Host Institution that persons mentioned in items 1 and 2 actually read the information on how their personal data are processed by the National Science Centre.

Item 3A. Additional consent for NCN to publish the description of the project given in section I of the final report.

Item 4. Person responsible. Indicate the person with actual access to the fellowship documentation (e.g. a financial/administrative officer of the Host Institution).

Item 5. Person responsible. Indicate the person with actual access to the fellowship research results. For final reports, NCN strongly recommends that this person should be an employee of the Host

Institution, whose knowledge of the project would enable her/him to answer questions of controlling authorities or auditors after the fellowship has ended (e.g. Research Partner).

V. PREPARING THE REPORT FOR UPLOAD IN PDF FORMAT

Both parts of the final report should be **printed to PDF** – no other file formats will be accepted. Do not upload the scans of the signed versions, as this would make it impossible to open any hyperlinks in the text of the report.

Part 1. The Excel workbook has been preformatted for printing (page orientation, margins, page breaks). Since a lot of information will be entered in the report, please preview each worksheet before printing it to PDF file to make sure that the full content of every cell is clearly visible in print. Please check the cells which were completed automatically by the programme, since Text Wrap (Zawijaj tekst) does not work on them. If you need to adjust the cell size to make all the text inside visible – change the row height.

To print all the worksheets of the report at once, select Print workbook (Drukuj cały skoroszyt) from the print menu.

Part 2. COMPLETED TASKS have to be printed to PDF file separately.

Use UPLOAD button to upload each part of the report to ZSUN/OSF. If necessary, you may delete or replace the uploaded file.

No printouts of publications are required. Publications for which no link has been given in section F of the report should be uploaded directly to ZSUN/OSF system, together with the relevant correspondence with the publisher. To upload, please use the PUBLICATIONS tab under the REPORT tab on the left of the screen.

VI. SUBMITTING THE REPORT TO NCN

Use **PRINT DRAFT** Tab on top of the screen to check if the report is complete and readable. Correct if necessary.

Use **SUBMIT THE REPORT TO NCN** Tab (on top of the screen) or button (on the right) to generate the final version to be signed. Clicking on this tab will not allow further editing but will create a new tab on top of the screen – **PRINT THE FINAL VERSION OF THE REPORT TO BE SUBMITTED TO NCN.**

Print one copy of the final version of the report and collect signatures on the first and last page of the report as indicated (Declaration of Compliance and Information and Declarations). Post the signed printout together with attachments (if any) to NCN by traditional mail.

Attachments. See section I.6 on pages 2 and 3 above.

Dates due. See section I.1 on page 2 above.