

[How to access the Update page](#)  
[How to modify - Contact and Support](#)  
[Content of the Update page](#)  
[Structure of the Update page](#)  
[Data Fields](#)  
[Navigation Menu](#)  
[Submission of the data](#)  
[Data Groups - Organisation](#)  
[Data Groups - LEAR](#)  
[Data Groups - Bank Accounts](#)  
[Data Groups - Programme Specific Information](#)  
[Data Groups - SME](#)  
[Data Groups - Financial Capacity Assessment](#)  
[Messages](#)  
[Documents](#)

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**Note:** This section concerns you only if your organisation can be considered as SME. For more information, check the SME information in the [H2020 page](#) in the Funding & Tenders Portal.

The Small Medium Enterprise (SME) Status can be set and modified in this data group.

Use this section to provide information about your SME Status. In some programmes, such as Horizon 2020 calls - SME instrument topics, the Self-Assessment is mandatory.

**Important: SME Information is optional if you apply for the Education Programmes, you may use the SME Self-declaration in that case.**

Activity log  
Organisation  
LEAR  
Programme specific information  
Legal Status  
FP7 ICM  
Certification  
SME  
Financial capacity  
  
Messages  
Documents

## SME 1

Provide information about your SME status. Carry out the **SME Self-Assessment** below or provide the **SME Self-Declaration** (Yes/No). When using the Self-Declaration, please check the [Commission definition of SMEs](#) before. The SME Self-Assessment is mandatory for some actions, like the SME instrument topics, for which the SME status is an eligibility criterion.

For more information on the SME instrument, see the [Online Manual](#).

SME information is NOT obligatory if you are applying only for the Erasmus+, Creative Europe, Europe for Citizen or EU Aid Volunteer programmes.

### SME data

The table below presents your existing SME data.

Year	Result	Type	Details	Closing date	Status
2017	SME	Self-assessed		21/08/2017	

### SME Self-Assessment 2

In some Horizon 2020 calls (specified in the topic conditions and submission system) the SME Self-Assessment is mandatory and the lack of it may block your submission. Find additional information about the SME Self-Assessment on the [IT HOW TO wiki](#).

Continue SME self assessment
Start SME self assessment

### SME Self-Declaration 3

If the SME Self-Assessment is not necessary in your case (e.g. for the Education, Audio-visual and Culture programmes), use the declaration below.

I declare my organisation as

☐ SME
☐ Non SME
as from

Registration date dd-MM-yyyy

Submit changes

In the SME section of the Update mode of the Participant Register, you can:

View existing SME data for the available financial periods;  
Open the SME Self-Assessment Wizard to run the SME self-assessment questionnaire and check whether your organisation qualifies as an SME by clicking on **Start SME self assesment** (or finalise an incomplete SME Self-Assessment, starting from an existing draft by clicking on **Continue SME self assessment**, this button will be only visible if there is an existing draft);  
Declare your organisation's SME Status with the Self-Declaration (this option is not valid for SME instrument calls).

#### Viewing the SME data of your organisation

If some SME data has already been provided, the first sub-section of SME data group will display a table with the existing SME information.

Each table row relates to a specific existing financial year and displays the following information:

- Financial year;
- Result (SME/Not SME);
- Type of SME data (Self declaration, Self-Assessment, EC validation);
- Details (available for Self-Assessments and EC validations);
- Financial Closing date;
- Status (this shows the **To Submit** status for data not yet submitted);

**SME data**

The table below presents your existing SME data.

Year	Result	Type	Details	Closing date	Status
2015	Not SME	Self-declared	N/A	02/09/2015	<b>To Submit</b>

**Important:** the SME Data table is only visible if some SME information is available.

#### Run the SME self-assessment

To perform the SME self-assessment, you can click the START SME self-assessment button.


When starting the assessment, please consider the following points:

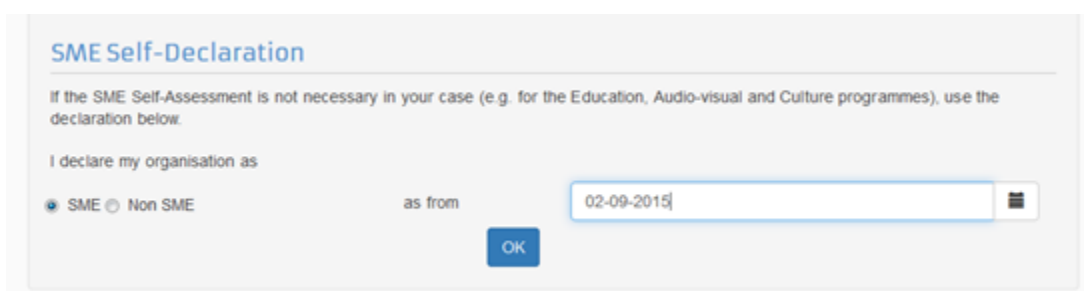
- You can find relevant information and guidelines on the "How to" link that you will find in the SME self-assessment section;
- An SME self-assessment for a specific financial year will overwrite existing SME data for the same year;
- After completing the SME self-assessment, you will see a new row appearing in the SME data table with the status **To Submit** . In order to adopt the changes made, you must click the **Submit changes** button;
- The system will save a draft copy of your Self Assessment and keep it for you to work on later. You can continue working on it by selecting the option **Continue SME self assessment** .

**Important :** this option is not available if you completed the SME self-assessment wizard. Please, also note that the SME wizard do not support the use of mobile devices.

#### Provide an SME self-declaration

To declare your organisation as SME (or not SME), you can use the option in the last section of the SME data group (SME self-declaration). After selecting your SME status, you must add a date and click the "ok" button.

A new row will appear in the SME data table displaying the status "To Submit". In order to adopt the changes made, you must click the  button.



The screenshot shows a web form titled "SME Self-Declaration". It contains a text box with instructions: "If the SME Self-Assessment is not necessary in your case (e.g. for the Education, Audio-visual and Culture programmes), use the declaration below." Below this, it says "I declare my organisation as" followed by two radio buttons: "SME" (selected) and "Non SME". To the right, it says "as from" followed by a date input field containing "02-09-2015" and a calendar icon. At the bottom right of the form is an "OK" button.

#### WARNING - change of SME status

The change you are making will impact your organisation's SME status for the period concerned.

Please be aware that:

- this self-declaration will **overwrite** any previous SME self-assessment;
- this change may have consequences on your organisation's rights to submit certain proposals and/or on submitted proposals (e.g. the Dedicated SME instrument).

#### Nice to know:

**Q:** SME Declaration and Self-Assessment: which Financial Year am I creating?

**A:** The Financial Year you create is computed from the date you enter. For dates from 1/1/xx to 30/6/xx the system will generate the financial year xx-1; for dates from 1/7/xx to 31/12, the system will generate Financial Year xx.

Download the whole Participant Register User Guide as an Adobe PDF file.



Next step 

Click [here](#) to access the full guide on how to run the **SME Wizard**.