General Assistance Program (GAP) Online 2.3.5

Quick Reference Guide

EPA United States Environmental Protection Agency

1.0 INTRODUCTION

1.1 GAP Online Quick Reference Guide Purpose

The GAP Online Quick Reference Guide (QRG) is a condensed version of instructions for entering and updating work plans by Tribal Grantees and Project Officers.

The GAP Online QRG is a living document and will be continuously revised to include new system changes and/or business processes as they occur.

1.2 New Features for Tribal Users in GAP Online 2.3.5

- Simplified layout for the **Create New Progress Report** and **Edit Progress Report** pages

- Improved Adobe Portable Document Format (PDF) and Rich Text Format (RTF) for work plans and progress reports

- Replaced **EPA Strategic Goal** with **EPA Program Coding** for components

- Removed the **Primary Capacity Area** (PCA) field from components and commitments

- Added the **Change Password** field on the **User Profile** page for Project Officers

- Increased the character limit for the **Work Accomplished** field for progress reports

- Improved data processing

2.0 LOG INTO GAP ONLINE

2.1 Using a Tribal User Account

Tribal users can access GAP Online by entering the username and password specific to their tribe.

1. Go to the GAP Online Web site (https://iaspub.epa.gov/GAP_Online) to see the **GAP Online Login** page.

2. Enter the username and password provided by your Project Officer.

3. Select the **Login** button.

2.2 First Time GAP Online Users

When you log in for the first time as a tribal user, enter the e-mail address of the Project Officer assigned to review, comment, and approve your work plan. You will also need to select the page in GAP Online you want to display after you log in.

1. Select the **User Profile** hyperlink on the left side of the page.

2. Enter your e-mail address in the **E-mail Address** field.

3. Enter the Project Officer's e-mail in the **Project Officer's E-mail** field.

4. Select the page you want to display on the **Home Page Preference** drop-down menu.

5. Select the **Save** button.

2.3 Update the GAP Online Password

Users can change their password for their GAP Online account using the **GAP Online User Profile** page.

1. Select the **User Profile** hyperlink on the left side of the page.

2. Enter your new password in the **New Password** field.

3. Confirm the new password by entering the new password again in the **Confirm New Password** field.

4. Select the **Save** button.

It is recommended that you change the password of the tribal user account every 90 days and use a complex password (at least eight characters using a combination of numbers and upper and lower case letters).

2.4 Forgot your Password

To retrieve a forgotten GAP Online password:

1. Select the **Forgot Password** button from the **GAP Online Login** page to view the **Forgot Password** window.

2. Enter your username in the **Username** field.

3. Select the **Submit** button to submit the request.

A new password will be sent to the e-mail account for the username entered in the **Forgot Password** window.

## 2.5   Logout of GAP Online

To log out of GAP Online:

1. **Save your work in the window that you are working**. Please make sure to save your work often while you are developing a work plan.
2. Select the **Logout** hyperlink on the left side of the page.

3.0   WORK PLANS

The work plan is created by the tribe. A work plan is composed of tribal specific data, composed of the work plan components, descriptors, financial attributes, descriptive information, and additional attachments. The work plan is managed in a cooperative effort between the tribe, the EPA Regional office in which the tribe is located, and EPA Headquarters.

3.1   Create a New Work Plan

A tribe can create a new work plan or maintain an existing work plan for each year a plan is in place. A work plan can include any number of components. Each component can include any number of commitments.

1. Select the **GAP Online Home** hyperlink on the left side of the page.

2. Select the **Create New Work Plan** button from the center of the **GAP Online Home** page.

3. The tribe name and Region ID is entered for you.

4. Select the appropriate work plan period for your new work plan from the available calendar.

5. If you wish to use data from an existing work plan, select the **Copy Data from Previous Work Plans** checkbox to choose a previously created work plan. Select the checkbox corresponding to a specific work plan from the list of available work plans. This feature is useful if you are continuing a project started in the previous fiscal year (FY), or starting a new work plan similar to one from an earlier year.

6. Select the **Save**   button to save your record.

7. Upon completion of the new work plan, select the tribal user(s) to receive automated messages during the work plan negotiation process, by selecting the checkbox next to each tribal user listed in the **Author** field.

8. Enter an optional description of the work plan in the **Description** field.

9. Select the **Save**   button to save your changes to the work plan.

3.2   Add Narrative Background Information

To upload a Narrative Background:

1. Select the **View Details**   button to expand the **Narrative Background** section of the work plan.

2. Select the **Browse** button to locate the file to upload.

3. Once the file is located, select the **Open** button.

4. Select the **Upload**   button to upload the file.

5. The file you selected will appear as an attached document.

3.3 Delete Narrative Background Information

To delete an attached narrative background file:

1. Identify the file you wish to delete.

2. Select the corresponding **Delete** ![x] button. A pop-up message box will appear asking if you want to delete the selected file.

3. Select the **OK** button. **Warning:** Once you delete the file, it cannot be retrieved.

3.4 Add Budget Information

To upload a budget:

1. Select the **View Detail** ![magnifier] button in the **Budget** section of the work plan.

2. Select the **Browse** button to locate the file to upload.

3. Once the file is located, select the **Open** button.

4. Select the **Upload** ![upload] button to upload the file. The file you selected will appear as an attached document.

3.5 Add a Detailed Budget Worksheet

The **Detailed Budget Worksheet** (in the **Budget** section) is an optional tool for calculating and storing a work plan budget.

To upload the Detailed Budget Worksheet:

1. Select the **Detailed Budget Worksheet: an optional tool for calculating and storing your work plan budget** hyperlink.

2. A description of the Detailed Budget Worksheet appears below the hyperlink.

3. Select the **Click to download Budget Worksheet** hyperlink to open the file.

4. Select the **Save** ![save] button in the Adobe Portable Document Format (PDF) reader to save the file to your computer or another location.

5. Enter your budget information in the worksheet.

6. Select the **Save** ![save] button to save the information in the worksheet.

7. Upon completion of the worksheet, upload the file in the **Budget** section of the work plan.

8. Select the **Browse** button to locate the file.

9. Once the file is located, select the **Open** button.

10. Select the **Upload** ![upload] button to upload the file.

11. The **Detailed Budget Worksheet** will appear as an attached document.

3.6   Delete Budget Information

To delete an attached budget file:

1. Identify the file you wish to delete.

2. Select the corresponding **Delete** button. A pop-up message box will appear asking if you are sure you want to delete the selected file.

3. Select the **OK** button. **Warning:** Once you delete the file, it cannot be retrieved.

3.7   Add Attachments

You may attach additional documentation and information to support your work plan.

To add an attachment:

1. Select the **View Details** button to expand the **Attachments** section of the work plan.

2. Select the **Browse** button to locate the file you wish to upload.

3. Once the file is located, select the **Open** button.

4. Select the **Upload** button to upload the file.

5. The file you selected will appear as an attached document.

3.8   Delete Attachments

To delete an attachment:

1. Identify the attachment that you wish to delete.

2. Select the corresponding **Delete** button. A pop-up message box will appear asking if you are sure you want to delete the selected file.

3. Select the **OK** button. **Warning:** Once the file is deleted, it cannot be retrieved.

3.9   Add Position Information

The **Position Information** section allows you to identify the skill of the people that will perform the work identified in the work plan, as well as the percentage of GAP funding used to support them. During the creation of commitments, reference the people that will perform the work.

To enter a new position:

1. Select the **View Details** button to expand the **Position Information** section of the work plan.

2. Select the **Add New Position** button.

3. On the **Create New Position** page, select a position category from the **Category** drop-down menu.

4. Select a position title from the **Position Title** drop-down menu.

5. If you select "**Other"** from the **Position Title** drop-down menu, enter a position title in the **Enter New Position** field.

6. Enter the percentage of GAP funding used to support the position in the **Percentage of Position Paid by GAP** field.

7. Select the **Save** button to submit the new position.

Once the **Create New Position** page is closed, the new position will appear in the **Position Information** section.

3.10 Delete Position Information

To delete a position:

1. Identify the position you wish to delete.

2. Select the corresponding **Delete** ❌ button. A pop-up message box will appear asking if you are sure you want to delete the selected position.

3. Select the **OK** button. **Warning:** Once the position is deleted, it cannot be retrieved.

3.11 Create a Work Plan Component

To create a work plan component:

1. Select the **View Details** 🔍 button to expand the **Work Plan Component** section of the work plan.

2. Select the **Create New Component** button.

3. The **Work Plan Component** screen will appear. Enter component information. All required information will have an asterisk (*) next to the field name.

4. Enter the appropriate component title manually into the **Title** text field or select a pre-defined component title from the **Title** drop-down list. **Note**: the title of the work plan component cannot be greater than 200 characters. *This is a required entry field.*

5. Enter a description of the work component in the **Description** field. The description gives an overview of what environmental activities the component will address. *This is a required entry field.*

6. Enter a description in the **Long-Term Outcome** text area. *This is a required entry field.*

7. Enter a description in the **Measure(s)** field.

8. Enter descriptions of the intermediate outcomes related to the component into the **Intermediate Outcomes** fields. The Intermediate Outcomes are in bulleted format. If you want to include more than two Intermediate Outcomes, select the **Add More Intermediate Outcomes** button. *This is a required entry field.*

9. Enter the appropriate amount in the **Estimated Component Cost** field. *This is a required entry field.*

10. Enter the estimated work year full time equivalent (FTE) associated with the component in the **Estimated Work Year (FTE)** field. The Estimated Work Year is the amount of time required to complete the component (this can be a whole number or a decimal). The duration of the component's work year should not exceed the duration of the entire work plan. *This is a required field for entry*

11. Select the **Save Component** button to save the component information.

12. If there are required fields that do not have information entered in them, an error message appears. Select the **OK** button on the error message and enter the required information to advance to the next screen.

3.12 Reordering Work Plan Components

As you build your work plan, you can rearrange components by reordering the sequence in which you want components to appear. Each component has an associated ID.

To rearrange the sequence of the work plan components:

1. Identify the component to reorder.

2. Select the component ID with your mouse and drag it into the preferred sequence.

3. Release the mouse to save the new component sequence.

3.13 Delete Work Plan Component

If you enter a component and save it, you can later delete it if you are not satisfied with the wording or if you decide not to pursue that particular component's work.

To delete a component:

1. Identify the **Component** that you wish to delete.

2. Under the **Action** column, select the corresponding **Delete** ❌ button. A pop-up message box appears asking if you are sure you want to delete this component.

3. Select the **OK** button. **Warning:** Once the component is deleted, it cannot be retrieved.

3.14 Create a Work Plan Commitment

Once you have created a work plan component, you may add the commitment(s) necessary to achieve each component of the work plan. Commitments are task-oriented activities that have shorter durations than the components. There can be any number of commitments for any component.

To create a work plan commitment:

1. Select the **New Commitment** button located under the **Work Plan Commitment** section.

2. Capture as much detail as possible for completing the commitment. All required information will have an asterisk (*) after the field name. Enter the commitment information by completing the following steps:

    a. In the **Commitment** text area, enter a description to indicate the component aspect addressed by the commitment. *This is a required entry field.*

    b. Select the checkbox that corresponds to the **Position(s)** required to complete the commitment. If you do not have all the required positions listed for a commitment, go to the **Position Information** section to enter additional positions.

    c. Enter the **Estimated Cost**. The sum total should be representative of the total cost for the commitment, but does not have to be equal to the estimated cost for the component.

    d. Enter the **End Date** the commitment is to be completed. *This is a required entry field.*

    e. Enter **Outcomes and Deliverables** for the commitment (reported in the Progress Report for the work plan). *This is a required entry field.*

3. Select the **Save Commitment** button to save the commitment.

3.15   Reorder Work Plan Commitments

You can rearrange each work plan commitment to meet your need as you develop the work plan. Each commitment has an ID associated with it. As you build your work plan, you can rearrange commitments by reordering the sequence you want commitments to appear.

To rearrange the sequence of the work plan commitments:

1. Identify the commitment to reorder.

2. Select the commitment ID with your mouse and drag it in the preferred sequence.

3. Release the mouse to save the new commitment sequence.

3.16   Delete Work Plan Commitment

If you enter a commitment and save it, you can later delete it if you are not satisfied with the wording or if you decide not to pursue that particular commitment's task.

To delete a commitment:

1. Identify the **Commitment** that you wish to delete.

2. Under the **Action** column, select the corresponding **Delete** ❌ button. A pop-up message box appears asking if you are sure you want to delete this commitment.

3. Select the **OK** button. **Warning:** Once the commitment is deleted, it cannot be retrieved.

3.17   Submit a Work Plan

Once you have completed the necessary work plan components and commitments and uploaded all supporting documents associated with the work plan, send the work plan to your Project Officer for work plan review.

To submit a work plan:

1. At the bottom of the **Edit Work Plan** screen, select the **Send Work Plan to Project Office** button.

2. The **Sending Work Plan to Regional Project Officer** page displays in a new pop-up window appears.

3. Enter an optional version number and comment.

4. Select the **Confirm Sending Work Plan to Project Office** button to send the work plan to the Project Officer. The pop-up browser window closes and the submitted work plan appears in the list of work plans with the status **Submitted**.

4.0   VIEW AND EDIT WORK PLANS

After creation of the work plan, the tribal user may view the work plan details, components, and commitments in GAP Online. After submission of a work plan to the Project Officer for review and comment, the tribal user cannot edit or modify the work plan until the Project Officer returns or releases the work plan to the tribal user.

4.1   View a Work Plan

A tribal user can view a work plan once the information has been entered and submitted to the Project Officer; however, the tribe cannot edit the document or modify it unless the document has been returned or released by the Project Officer.

To view a work plan:

1. Select the **GAP Online Home** hyperlink on the left side of the page.

2. Under the **GAP Online 2.3.5** section, select the **Edit Work Plan** button.

3. Identify the work plan with a status of **Accepted**, **Reviewed**, or **Submitted** from the list.

4. To view the work plan, select the corresponding **View Work Plan** button under the **Action** column to review each component and its commitments within the work.

4.2   Edit a Work Plan

Upon creation of a work plan, you may continue editing the work plan as long as the tribal user has not selected the **Send Work Plan to Project Office** button to submit the work plan to the Region.

To update a work plan:

1. Select the **GAP Online Home** hyperlink on the left side of the page.

2. Select the **Edit Work Plan** button.

3. Identify the work plan with a status of **Created** or **Commented** from the list of work plans.

4. Select the corresponding **Update Work Plan** button under the **Action** column to update the work plan.

5. Upon completion of updating the work plan, select the **Send Work Plan to Project Office** button to submit the updated work plan to the Region.

4.3 View Change History

The **View Change History** is a useful reference for the tribal user to review the change history associated with a work plan.

To view the change history:

1. Select the **View Details** button to expand the **View Change History** section to view details of the changes made for the selected work plan's progress report.

2. Select the commitment and component hyperlinks to the corresponding section of the work plan.

4.4 Print Change History

To print the change history:

1. Select the **Print Change History** button to view a printer-friendly version of the work plan change history on the **Work Plan Change History** page.

2. Select the **Print Change History** button at the top of the **Work Plan Change History** page to print a copy of the work plan change history report.

4.5 Recall a Work Plan

A tribal user can recall a submitted work plan **ONLY** if it has not been opened by the Project Officer. Once the Project Officer opens a work plan for review, it will be locked and you will not be able to modify it until the Project Officer sends it back to you.

To recall a work plan:

1. Select the **Edit Work Plan** button.
2. Identify the work plan from the list of work plans.
3. Under the **Action** column, select the corresponding **Recall** button.
4. The following message appears, "Are you sure you want to RECALL this work plan?"
5. If you wish to RECALL this work plan, select the **OK** button.
6. If you do not wish to RECALL this work plan, select the **CANCEL** button.
7. If you select the **OK** button, an e-mail will be automatically generated and sent to the Project Officer notifying them on the work plan recall.

4.6 Delete Work Plan

If you enter a work plan and save it, you can later delete it if you are not satisfied with the wording or if you decide not to pursue the work plan. A tribal user can only delete a work plan with the status of **Created**.

To delete a work plan:

1. Select the **Edit Work Plan** button.

2. Identify the work plan that you wish to delete.

3. Under the **Action** column, select the corresponding **Delete** ![X] button. A pop-up message box appears asking if you are sure you want to delete this work plan.

4. Select the **OK** button. **Warning:** Once the position is deleted, it can only be retrieved by a Project Officer.

5.0 PROGRESS REPORTS

Progress Reports are created to reflect their completion of commitments. Deliverables associated with the completed commitment can also be uploaded as attachments.

Reporting frequency is set by the Project Officer before the work plan is accepted. Depending on the required reports (monthly, quarterly, semi-annually, or annually), you will update information on how commitments addressing the work plan are being completed.

5.1 Create a Progress Report

To create a progress report entry:

1. Select the **GAP Online Home** hyperlink on the left side of the page.

2. Under the **GAP Online 2.3.5** section, select the **Create/Edit Progress Report** button.

3. Select the **View Work Plan Progress Report** ![icon] button corresponding to an **Accepted** work plan.

4. On the **View Work Plan Progress** page, select a component title to expand the component. A list of commitments corresponding to the component will appear.

5. Select a commitment to view its corresponding progress report.

6. Under the **Progress Reports** section, select the **Create New Report** button to view the **Create New Report** window.

7. Select the time period from the **Time Period** drop-down menu. *This is a required entry field.*

8. Enter the milestone date into the **Milestone Date** field by typing a date or using the calendar pop-up browser window. *This is a required entry field.*

9. Select the status of the work plan commitment from the **Progress Status** drop-down menu. *This is a required entry field.*

10. Enter a comment about the progress status into the **Status Comment** field.

11. Enter the status of the commitment and additional requirements for the commitment into the **Work Accomplished** field. *This is a required entry field.*

12. Select the **View previous work accomplishment(s)** hyperlink to view the work accomplished from previous progress reports.

13. To upload documents related to the progress report entry, select the **Browse** button under the **Output (attachments)** column. Locate the file from your PC that you wish to upload.

14. Select the **Add** button to save the new progress report.

15. A new progress report entry will appear with the status of **Created.**

5.2   View a Comment

To view a comment:

1. Expand a progress report entry to view its contents.

2. Select the **Comment(s)** button to view comments in the **Progress Report Comments** window.

5.3   Respond to a Comment

To respond to a comment:

1. Expand a progress report entry to view its contents.

2. Select the **Comment(s)** button to view comments in the **Progress Report Comments** window.

3. Enter a response to a comment in the **Enter Comments** field.

4. Select the **Save Comment** button to save the response.

5.4   Delete a Progress Report

A tribal user can only delete a progress report with the status of **Created** or **In Negotiation**.

To delete a progress report:

1. Select the **GAP Online Home** hyperlink on the left side of the page.

2. Under the **GAP Online 2.3.5** section, select the **Create/Edit Progress Report** button.

3. Select the **View Work Plan Progress Report** button corresponding to an **Accepted** work plan.

4. On the **View Work Plan Progress** page, select a component title to expand the component. A list of commitments corresponding to the component will appear.

5. Select a commitment to view its corresponding progress reports.

6. Expand a selected progress report to view its contents.

7. Select the **Delete** button. A pop-up message box appears asking if you are sure you want to delete this progress report.

8. Select the **OK** button. **Warning:** Once the progress report is deleted, it cannot be retrieved.

5.5 Submit a Progress Report

A tribal user can submit progress report entries for commitments to their Project Officer for review. The **Send Progress Report to Project Officer** button should be used after **ALL** progress report entries are completed by the tribal user for a selected reporting period.

To submit a progress report:

1. On the **View Work Plan Progress** page, select a component title to expand the component. A list of commitments corresponding to the component will appear.

2. Select a commitment to view its corresponding progress report entries.

3. Select the **Send Progress Report to Project Officer** button to open the **Send Progress Report to Project Officer** window.

4. Enter an optional comment in the **Enter Comments** field.

5. Select the **Send Progress to Project Officer** button to submit the progress report to your Project Officer.

An e-mail notification will be sent to your Project Officer informing them of your progress report entry submissions.