



## GRANT MANAGEMENT SYSTEM USER GUIDE

### Submitting a progress report task

This user guide outlines the steps to submit a progress report task after your grant has been approved.

We have prepared four user guides to help simplify managing your grant. They are available at [fwcp.ca/user-guides-grant-recipients](http://fwcp.ca/user-guides-grant-recipients).

#### Contact us anytime if you have questions about how to manage your grant

If you have any questions about your approved grant application, please contact a Regional Manager. If you aren't sure who to talk to, contact our Business Coordinator, Lorraine Ens, at [lorraine.ens@bchydro.com](mailto:lorraine.ens@bchydro.com) or 604-528-8136.

#### Coastal Region Manager

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#### Start here:

Progress reports and progress statement of accounts are optional for large and small grants. Progress reports are an excellent way to keep FWCP informed about your project.

A progress report **and** a progress statement of account must be submitted and approved by FWCP staff in order to trigger the optional second payment.

The main project contact and any collaborators on the project will have access to the final report task. For the purposes of these instructions, the contact or collaborators will be referred to as “the proponent” or “you”.

Please ***do not*** create a “progress report task” and a “change request task” at the same time.

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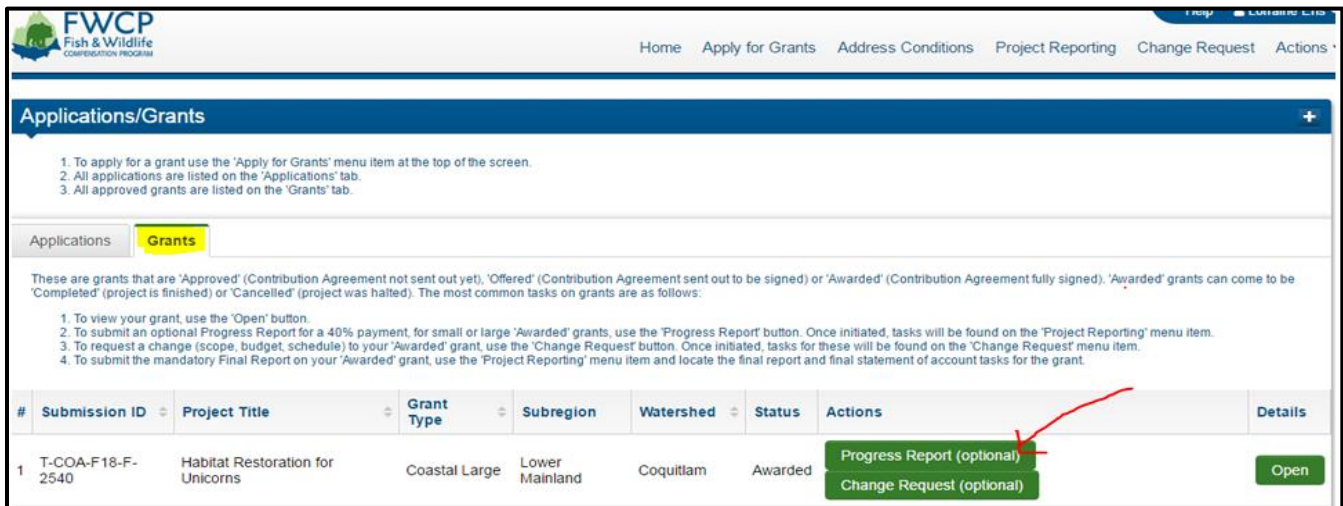
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## CREATING THE PROGRESS REPORT TASK

1. Log in to our Grant Management System at [fwcp.smartsimple.ca](http://fwcp.smartsimple.ca).
2. Click on the Grants tab where all of your approved projects will be displayed.
3. Click the green “Progress Report (optional)” button beside the appropriate project.

This action will create a progress report task **and** a progress statement of accounts task (note: there are separate instructions for completing a progress statement of accounts).

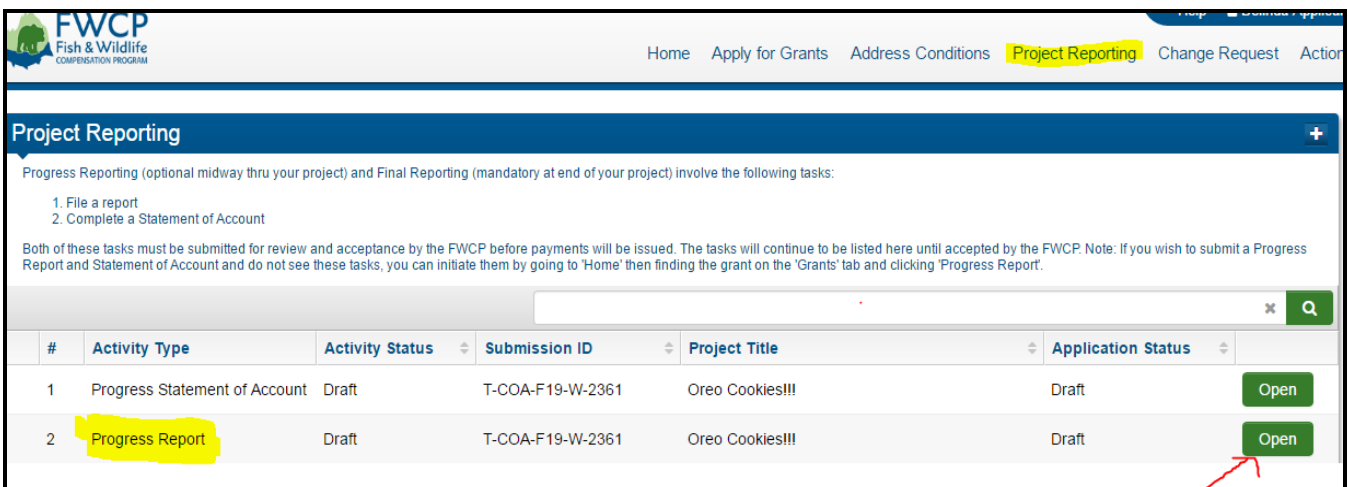


The screenshot shows the 'Applications/Grants' page in the FWCP system. The 'Grants' tab is selected. Below the navigation bar, there are instructions for users. A table lists grants with columns for #, Submission ID, Project Title, Grant Type, Subregion, Watershed, Status, Actions, and Details. The first row shows a grant with Submission ID T-COA-F18-F-2540, Project Title Habitat Restoration for Unicorns, Grant Type Coastal Large, Subregion Lower Mainland, Watershed Coquitlam, and Status Awarded. In the Actions column, there are two green buttons: 'Progress Report (optional)' and 'Change Request (optional)'. A red arrow points to the 'Progress Report (optional)' button.

#	Submission ID	Project Title	Grant Type	Subregion	Watershed	Status	Actions	Details
1	T-COA-F18-F-2540	Habitat Restoration for Unicorns	Coastal Large	Lower Mainland	Coquitlam	Awarded	<a href="#">Progress Report (optional)</a> <a href="#">Change Request (optional)</a>	<a href="#">Open</a>

## 1. ACCESSING THE PROGRESS REPORT TASK

1. To access the task, click on “Project Reporting” on the top right menu bar. Click the green “Open” button beside the progress report to open the task.



The screenshot shows the 'Project Reporting' page in the FWCP system. The 'Project Reporting' tab is selected. Below the navigation bar, there are instructions for users. A table lists reporting tasks with columns for #, Activity Type, Activity Status, Submission ID, Project Title, Application Status, and an 'Open' button. The second row shows a task with Activity Type Progress Report, Activity Status Draft, Submission ID T-COA-F19-W-2361, Project Title Oreo Cookies!!!, and Application Status Draft. A red arrow points to the 'Open' button.

#	Activity Type	Activity Status	Submission ID	Project Title	Application Status	Open
1	Progress Statement of Account	Draft	T-COA-F19-W-2361	Oreo Cookies!!!	Draft	<a href="#">Open</a>
2	Progress Report	Draft	T-COA-F19-W-2361	Oreo Cookies!!!	Draft	<a href="#">Open</a>

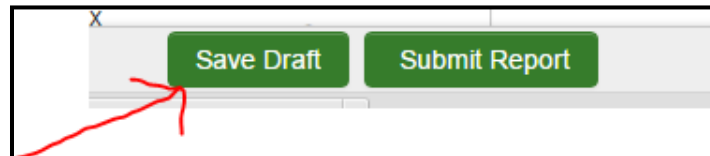
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## Progress report task tabs

1. When the progress report task is opened, three tabs will display: Instructions, Progress Report Details and Export.
2. The “Instructions” tab contains general instructions and the “Export” tab allows you to create a PDF version of the progress report, which can be saved to your desktop. All progress report entries will be made on the “Progress Report Details” tab.

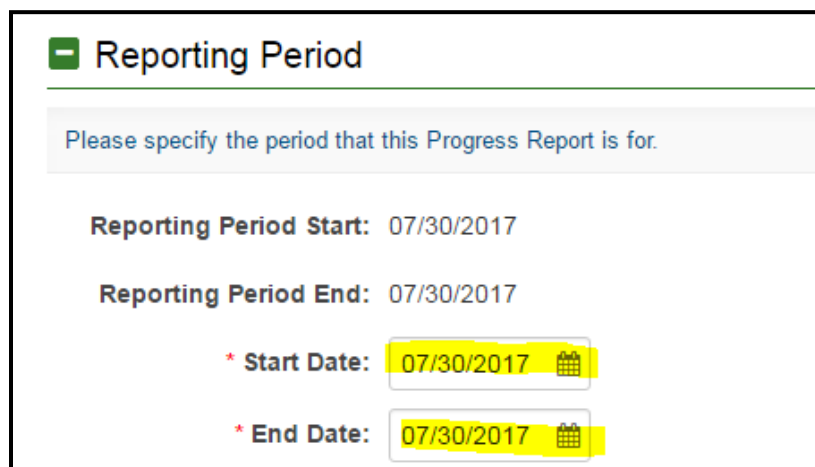


3. When completing the progress report details section, you are required to provide all the information indicated by a red asterisk.
4. At any time you can save your work by clicking the green “Save” button at the bottom of the screen. This allows you to exit the system and continue working on the progress report task at another time.



## 2. STARTING THE PROGRESS REPORT

1. To start your progress report task, enter the date range of your report below “Reporting Period.”

A screenshot of a web form titled 'Reporting Period'. The form contains the following text: 'Please specify the period that this Progress Report is for.' Below this, there are two lines: 'Reporting Period Start: 07/30/2017' and 'Reporting Period End: 07/30/2017'. At the bottom, there are two fields: '\* Start Date: 07/30/2017' and '\* End Date: 07/30/2017'. Each date field has a calendar icon to its right.

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## Project phases

1. As you scroll down, you will see the project phases table that was completed in your grant application.
2. Select (i.e. click) from the round buttons to confirm if a project phase is on track or delayed.
3. Use the “Status Comment” field to elaborate on the work that has been done and/or enter the status of the phase.

Project Phase	* Phase Start Date	* Phase End Date	* Phase Description	* Progress Status	* Status Comment
Project Start-Up	04/01/2017	05/31/2017	xx	<input type="radio"/> On track <input type="radio"/> Delayed	[Redacted]
Field Work	04/05/2017	04/27/2017	xx	<input type="radio"/> On track <input type="radio"/> Delayed	[Redacted]

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## Progress update

1. After the project phases section, scroll down to “Progress Update” to provide details on outcomes, successes, milestones, etc. to-date.

**\* Activity Details**

Please provide a detailed account of activities undertaken, outcomes, successes and milestones achieved, challenges encountered and associated resolutions

[Redacted]

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## Community engagement

1. The final section of the progress report task is community engagement. If you answer “Yes” to the question “Have your proposed outreach, education and/or community engagement activities (shown above) occurred yet?” You will be asked to provide further details.

**Community Communications, Engagement and Outreach**

\* **Benefits to local stateholders and community members, including any proposed opportunities for community engagement, education and outreach.**  
 You specified the following information on your application and questions below will relate to this information.  
 xx

\* **Have your proposed outreach, education and/or community engagement activities(shown above) occurred yet?**  
 Please report any achievements. There will be further opportunity to report any future achievements on the Final Report.

Yes  
 No

\* **Outreach and Community Engagement Activities**  
 Briefly, describe your outreach and community engagement activities (i.e. what did you do, when, how many people participated, did you reach the audiences you anticipated with your project information?).

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\* **Community or Stakeholder Benefits**  
 Briefly describe the benefits to community members or stakeholders as a result of your outreach, education and community engagement activities.

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\* **FWCP Recognition**  
 How did you recognize FWCP in your communications and community engagement activities?

## Uploading photos

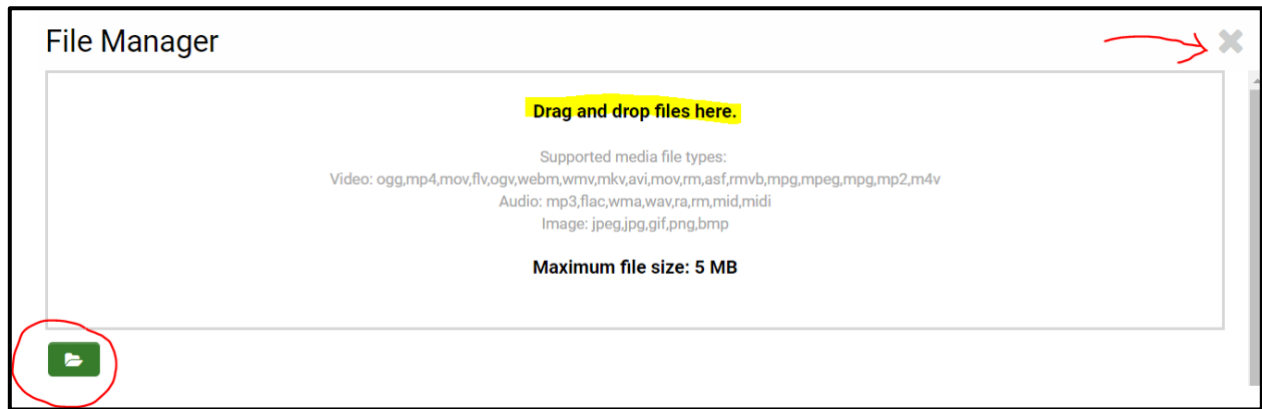
1. You are also encouraged to upload photos of any community events. To add a photo, click the green “Upload” button.

**FWCP Communications and/or Community Engagement Photos**

Please provide photos of your engagement activities and/or examples of any communications materials. If you provide photos, please limit them to 2MB in size. Please note that photos must adhere to the guidelines specified in the Contribution Agreement.

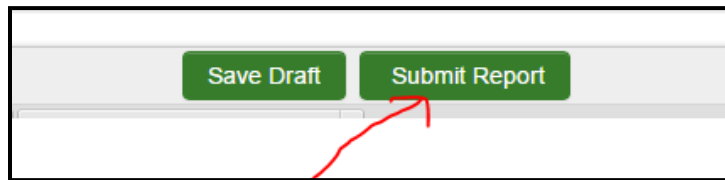
  

2. A window will appear where you can drag and drop photos in Jpeg format. Alternatively you can use the browse button to access your files. Double click on the photo file to load the photo. When you are done, click the “X” in the top right.

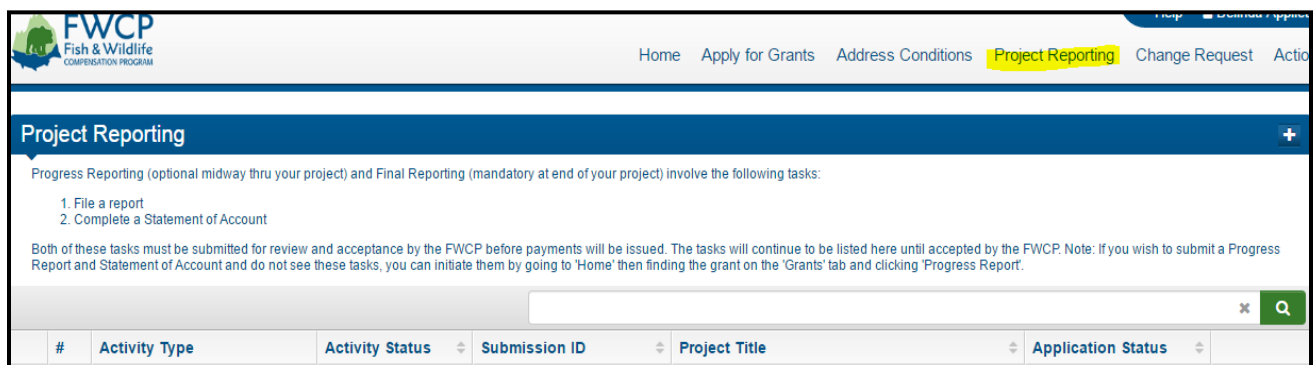


### 3. SUBMITTING THE PROGRESS REPORT TASK

1. Once you have completed your entries in the progress report, click “Submit Report.” This will prompt FWCP staff to review and approve your progress report. Progress report tasks left in “Draft” status will not be reviewed.



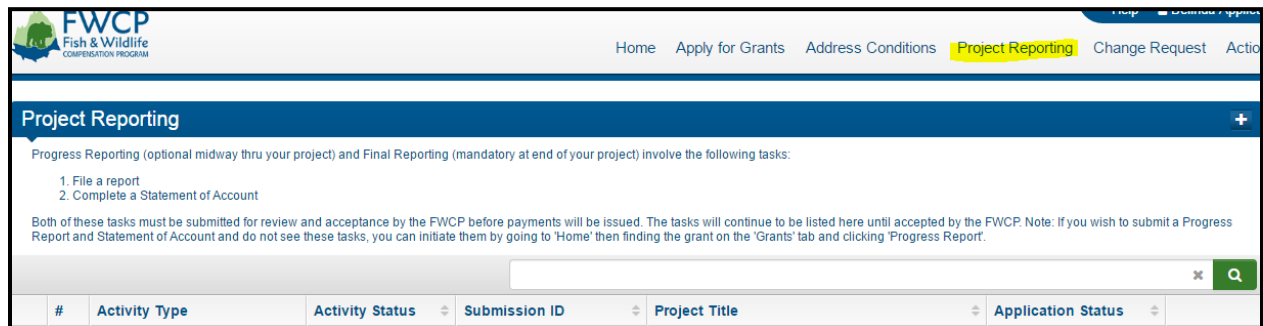
2. When the progress report task has been submitted, it can no longer be modified by the proponent. The task will continue to appear in the “Project Reporting” tab in submitted status.



### 4. REVIEW AND REVISIONS TO PROGRESS REPORT TASK

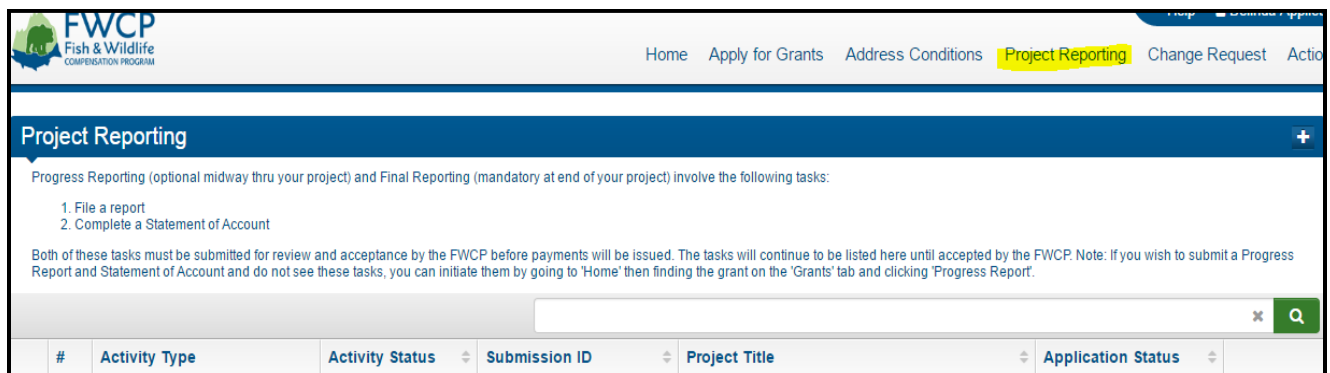
1. A Regional Manager will review and approve the submitted task. If revisions are required, they will put the progress report task into “Revisions Requested” status.

The main project contact will receive an email indicating revisions have been requested. The task will appear in the “Project Reporting” tab in “Revisions Requested” status and proponents will be able to open and modify any section of the progress report task.



## 5. RESUBMITTING THE PROGRESS REPORT TASK

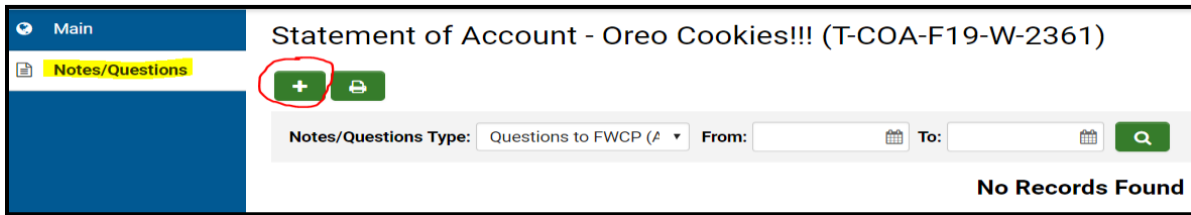
1. Once you have completed the requested revisions on the progress report, please be sure to submit it by using the button at the bottom of the screen. This will prompt FWCP staff to review and approve the revised progress report. Progress report tasks left in “Revisions Requested” status will not be reviewed.
2. When the progress report is fully approved, it will appear on the “Project Report” tab in accepted status.



## 6. NOTES/QUESTIONS TAB

1. At any time, you can post questions to FWCP staff by clicking on the “Notes/Questions” tab, on the left side of the screen.
2. Use the “Questions to FWCP” option to post questions. Click the green “+” sign and a text box will open and you can enter your question.





3. Click the green “Save” button to send your question to FWCP staff.



4. Our staff will answer your question in the same “Notes/Questions” area. Responses may take one to two business days. FWCP staff may also use the “Notes/Questions” tab to communicate required revisions on the progress report task.