



## **GRANT MANAGEMENT SYSTEM USER GUIDE SUBMITTING A CHANGE REQUEST TASK**

This user guide outlines the steps you need to follow to submit a change request 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, please contact a regional manager. If you aren't sure who to talk to, contact us at [fwcp@bchydro.com](mailto:fwcp@bchydro.com) or 604-528-8136.

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### **Start here: what is a change request task?**

Change requests are submitted within our grant management system and must be approved by FWCP staff. A change request is required when a project extension is needed or when there is a significant change to the budget or scope of work.

The main project contact and any collaborators on the project may submit a change request. For the purposes of these instructions, the contact or collaborators will be referred to as “the proponent” or “you.”

If you have initiated a progress report task that has not been approved, the system will no longer allow the creation of a change request task. The progress report and progress statement of accounts must be approved or deleted before a change request can be initiated. If you want your progress report activity deleted, please contact us at [fwcp@bchydro.com](mailto:fwcp@bchydro.com) or 604-528-8136.

Let's get started!

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## CREATING THE CHANGE REQUEST

To start a change request, log in to our grant management system at [fwcp.smartsimple.ca](http://fwcp.smartsimple.ca).

Click “Home” in the top menu bar, and then click the “Grants” tab.

Then click the green “Open” button beside the appropriate project.

APPLICATIONS **GRANTS**

These are grants that are 'Approved' (Contribution Agreement not sent out yet), 'Offered' (Contribution Agreement sent out to be signed) or 'Awarded' (Contribution Agreement fully signed). 'Awarded' grants can come to be 'Completed' (project is finished) or 'Cancelled' (project was halted). The most common tasks on grants are as follows:

1. To view your grant, use the 'Open' button.
2. To submit an optional Progress Report for a 40% payment, for small or large 'Awarded' grants, use the 'Progress Report' button. Once initiated, tasks will be found on the 'Project Reporting' menu item.
3. To request a change (scope, budget, schedule) to your 'Awarded' grant, use the 'Change Request' button. Once initiated, tasks for these will be found on the 'Change Request' menu item.
4. To submit the mandatory Final Report on your 'Awarded' grant, use the 'Project Reporting' menu item and locate the final report and final statement of account tasks for the grant.

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#	Submission ID	Project Title	Grant Type	Subregion	Watershed	Status	Details
1	T-COL-F20-W-3152	Signatory test	Columbia Small	East Kootenay		Awarded	<a href="#">Open</a>
2	T-COL-F21-F-3161	SOA FixIT Test Case	Columbia Small	--Select--		Awarded	<a href="#">Open</a>

Once the project is open, you can click the green “Change Request (optional)” button.

Signatory test (T-COL-F20-W-3152)

Submission Manager **Application**

Final Report Due Date: 03/31/2021

\* Grant Type: Columbia Small

Status: Awarded

Region Manager: Crystal Klym

Created Date: 07/23/2019 12:50

Modified Date: 04/29/2020 17:33

Change Request: [Change Request \(optional\)](#)

Grant Type: Columbia Small

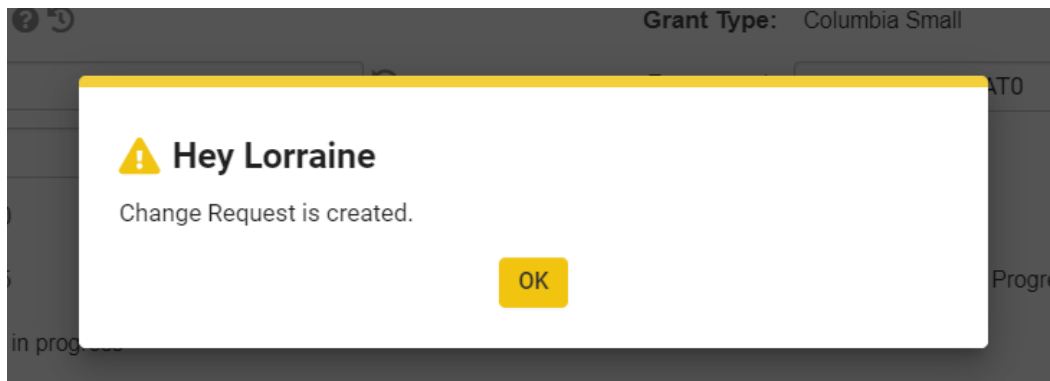
Proponent: Test Accounts UATO

Created By: Lorraine Ens

Modified By: Lorraine Ens

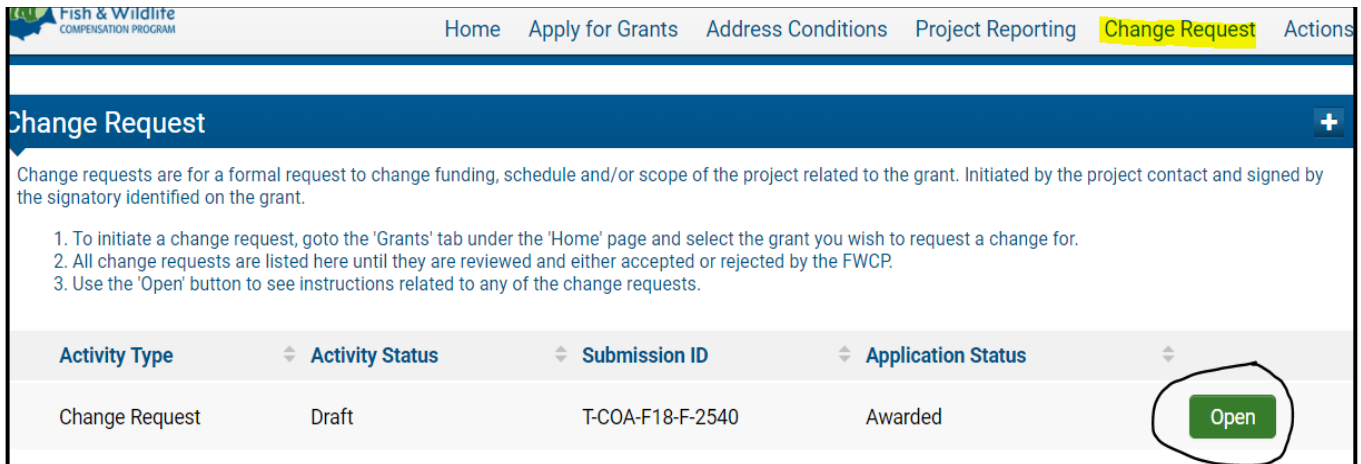
Progress Report: [Progress Report \(optional\)](#)

You will receive confirmation that the change request has been created. Click “OK.”



## ACCESSING AND COMPLETING THE INFORMATION IN THE CHANGE REQUEST

Next, go to the “Change Request” section in the top menu bar. Here you will see the change request activity that was created. Click the green “Open” button to open the activity.



The screenshot shows the top navigation bar with the following items: Home, Apply for Grants, Address Conditions, Project Reporting, Change Request (highlighted in yellow), and Actions. Below the navigation bar is a blue header for "Change Request" with a plus icon. The main content area contains instructions for change requests and a table with the following data:

Activity Type	Activity Status	Submission ID	Application Status	
Change Request	Draft	T-COA-F18-F-2540	Awarded	<a href="#">Open</a>

Read the instructions on the “Instructions” tab, and then click the “Change Request Details” tab.

Created Date: 04/29/2020 17:35

### Signatory test (T-COL-F20-W-3152): [Year 1 of 1]

Grant Type: **Columbia Small**  
Sub Region: **East Kootenay**  
Contact: **Winston Bunny**  
Email: **lorraine.ens@gmail.com**  
Phone:

INSTRUCTIONS

[CHANGE REQUEST DETAILS](#)



Please provide the requested information on the 'Change Request Details' tab to address this task:  
At the bottom of the screen there are two buttons:

1. **Save Draft** - use this button to save your work and resume at a later time.
2. **Submit Change Request** - when you've finished providing all the details, use this button to submit the information.

**If you have Questions:** You can post questions to our administrative staff by clicking on **Notes/Questions** at the bottom of the screen and answer them in the same **Notes/Questions** area. Responses may take one or two business days.

You will be required to answer three questions related to project extension, revision to a budget, and revision to the project scope.

## 1. Project extension

If you click “Yes” to the project extension question, you will be asked to enter the extension date and provide a rationale for the extension in the text box.

**Habitat Restoration for Unicorns (T-COA-F18-F-2540)**

Grant Type: Coastal Large	Test Accounts UAT0
Sub Region: Lower Mainland [Coquitlam]	Address: 123 Pleasant Street
Contact: Marcus Nielsen	City: Rich
Email: FWCP_Pizza@gmail.com	FWCP:
Phone:	Project:

**\* Do you wish to request an extension to the reporting due date?**

As per the original Contribution Agreement, the reporting due date is March 31st. You cannot submit your final report later than this without requesting an extension.

Yes  
 No

**\* Please indicate the desired report due date:**

**\* Please provide an explanation for the extension request**

## 2. Revision to a budget

If you click “Yes” to the budget revision question, you will be asked to provide a rationale for the revision.

**\* Do you wish to modify your budget ?**

If you wish to reallocate funds from one line item to another in your budget or you wish to request additional funding, then you must provide a revised budget. If you need to modify your budget, answer 'Yes' and then follow instructions very carefully.

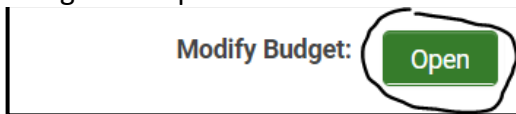
Yes  
 No

**\* Budget Change Summary**

Please provide the explanation for any funding reallocation (moving budget from one line item to another) AND/OR (under extreme circumstances) any additional funding you are requesting.

1500 characters left

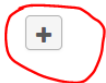
After providing the rationale, you will need to make requested revisions to the budget. To do this click the green “Open” button.



The current budget will be displayed and the system will allow you to make modifications to the FWCP contribution for each budget item. All items highlighted in yellow below can be modified. If you need to create new budget items, use the “+” sign.

**A) Labour Expenses (i.e. Salaries/Wages)**

Service	Daily Rate	Total Days	Total Cost	FWCP Contribution	Interim Description	Actual Cost
xx	\$400.00	20.00	\$8,000.00	\$8,000.00		\$0.00
Sub-Total(A)			\$8,000.00	\$8,000.00		\$0.00

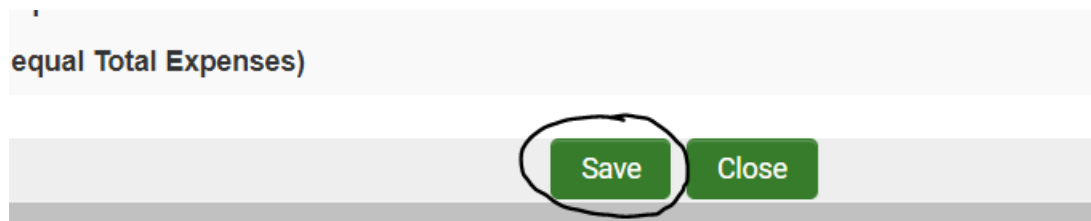


**B) Materials, Equipment, Transportation and Field Expenses**

- FWCP does NOT provide funding to purchase non-consumable items (eg. GPS units, cameras, electronics, boats, tents etc). However, rental rates for non-con-

Item	Number Units	Unit Cost	Total Cost	FWCP Contribution	Interim Description	Actual Cost
dsfsd	10	\$100.00	\$1,000.00	\$1,000.00		\$0.00

When you have made all the modifications, be sure to click the “Save” button *before* you close the window.



Also note that if you increase or decrease the total budget, the system will still validate that the total expense is equal the total revenue.

<b>Total Expenses</b>		<b>\$10,050.00</b>	<b>\$2,000.00</b>	
Non-FWCP Total	\$0.00	\$4,000.00	\$4,050.00	\$8,050.00
Total FWCP Funding Request				\$2,000.00
<b>Total Revenue (should equal Total Expenses)</b>				<b>\$10,050.00</b>

### 3. Revision to the project scope

If you click “Yes” to the project scope question, you will be asked to provide details of the scope change in the text box. If the scope change is fairly significant, you also have the option to upload a revised proposal.

\* Do you wish to modify the scope of the project ?

As per the original Contribution Agreement, the scope of your project was clearly defined. Changes to scope must be requested and approved by the FWCP

Yes


No

\* Please describe the scope changes you are proposing and the rationale for them and how they impact schedule or budget

If scope changes to your project are quite significant, please also upload a revised proposal.

2000 characters left

Revised Proposal (if necessary)



### SUBMITTING THE CHANGE REQUEST

Once you have answered the three questions and provided all of the appropriate information, be sure to click the green “Submit Change Request” button at the bottom. If you are not ready to submit, you can click “Save Draft” and return and complete the change request when you are ready.

After you click “Submit Change Request,” FWCP staff will receive a notification to review your request. You do not need to email us. If you leave the change request in draft status, it will not be reviewed.

If you have any questions about these instructions or require further clarification, please do not hesitate to contact us at [fwcp@bchydro.com](mailto:fwcp@bchydro.com) or 604-528-8136.