



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.

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 our Environmental Project Coordinator, Melissa Fiel de Sousa at melissa.fieldesousa@bchydro.com or 604-528-8136.

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Start here: what is a progress report task?

Progress reports and progress statements of accounts are optional for Large Grants and Small Grants. Progress reports are an excellent way to keep the 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 progress report task. For the purposes of these instructions, the contact or collaborators will be referred to as "the proponent" or "you."

If you have initiated a change request that has not been approved yet, the system will no longer allow the creation of a progress report task. The change request must be approved or deleted before a progress report can be initiated. If you want your change request deleted, please contact Melissa Fiel de Sousa at melissa.fieldesousa@bchydro.com or 604-528-8136.

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CREATING THE PROGRESS REPORT TASK

1. Log in to our grant management system at fwcp.smartsimple.ca.
2. Click on the “Grants” tab, where all of your approved projects will be displayed.
3. Next, 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	Open
2	T-COL-F21-F-3161	SOA FixIT Test Case	Columbia Small	--Select--		Awarded	Open

4. Now click the “Progress Report (optional)” button.

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: 04/30/2020 12:12

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

Grant Type: Columbia Small

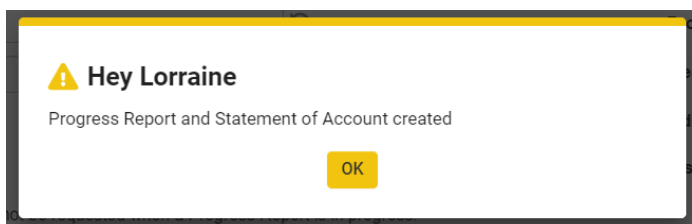
Proponent: Test Accounts UAT0

Created By: Lorraine Ens

Modified By: Lorraine Ens

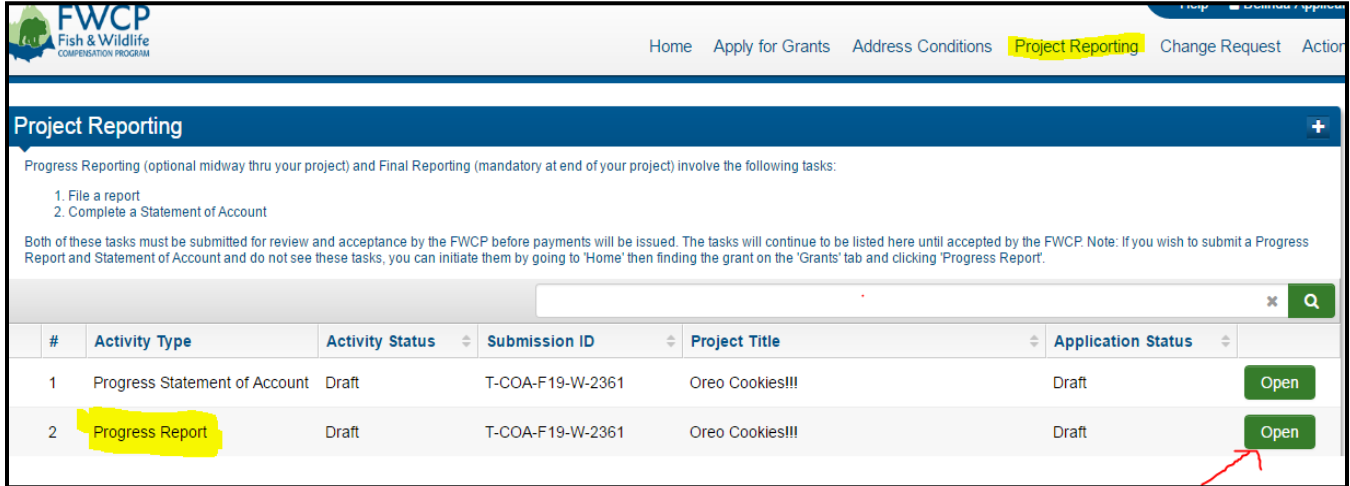
Progress Report: [Progress Report \(optional\)](#)

5. 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). You will receive a confirmation note that the progress report and the statement of account has been created. Click the “OK” button.



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.

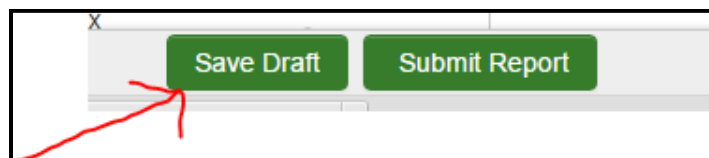


Progress report task tabs

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 in 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.”


Reporting Period

Please specify the period that this Progress Report is for.

Reporting Period Start: 07/30/2017

Reporting Period End: 07/30/2017

* **Start Date:** 07/30/2017 

* **End Date:** 07/30/2017 

Project phases

1. As you scroll down, you will see the project phases table that was completed in your grant application.
2. Click the radio 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 Phases - Progress

Provide an update for each phase of the project. If a phase is 'Delayed', please provide an explanation in the 'Status Comment' field.

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 checked="" type="radio"/> On track <input type="radio"/> Delayed	<div style="background-color: yellow; height: 20px; width: 100%;"></div> <p>200 characters left</p> <div style="background-color: yellow; height: 20px; width: 100%;"></div>
Field Work	04/05/2017	04/27/2017	xx	<input checked="" type="radio"/> On track <input type="radio"/> Delayed	<div style="background-color: yellow; height: 20px; width: 100%;"></div>

Progress update

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

Progress Update

*** Activity Details**

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

[Redacted text]

2000 characters left

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?).

[Redacted text]

2000 characters left

*** Community or Stakeholder Benefits**

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

[Redacted text]

2000 characters left

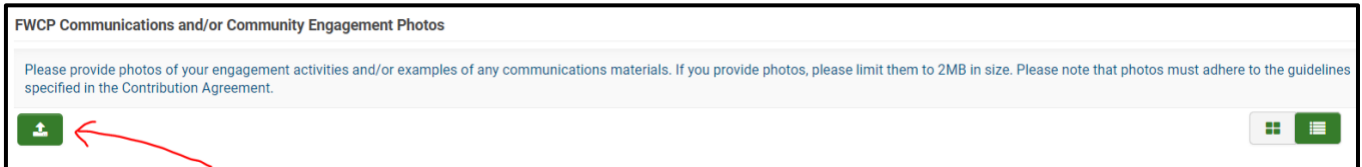
*** FWCP Recognition**

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

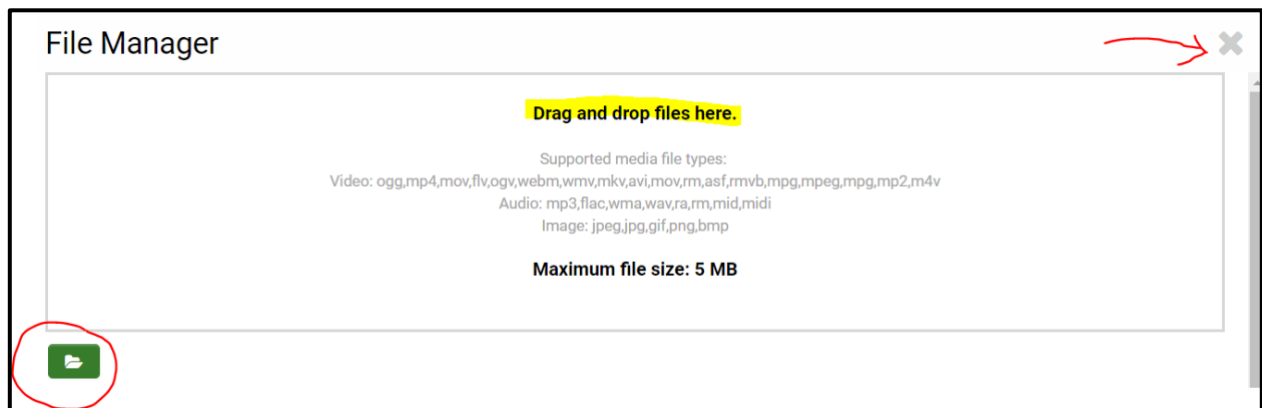
[Redacted text]

Uploading photos

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

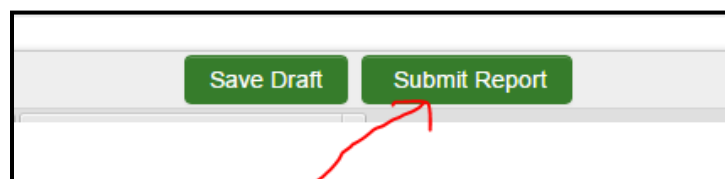


2. A window will appear. Use the green button with the folder icon to browse through your files. Drag and drop your photos, and then click the “X” at the top right when you are done.

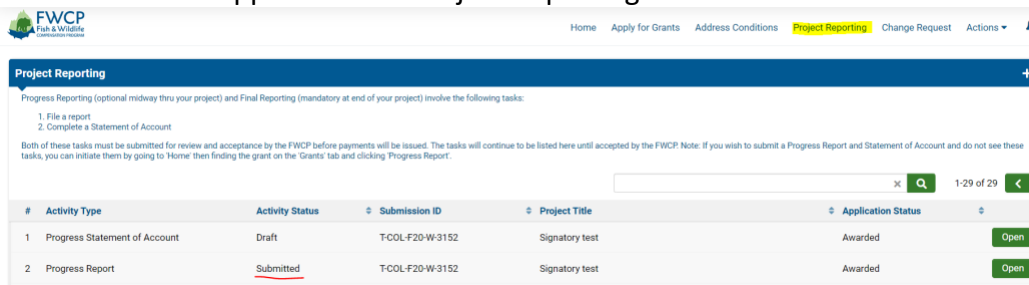


3. SUBMITTING THE PROGRESS REPORT TASK

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.



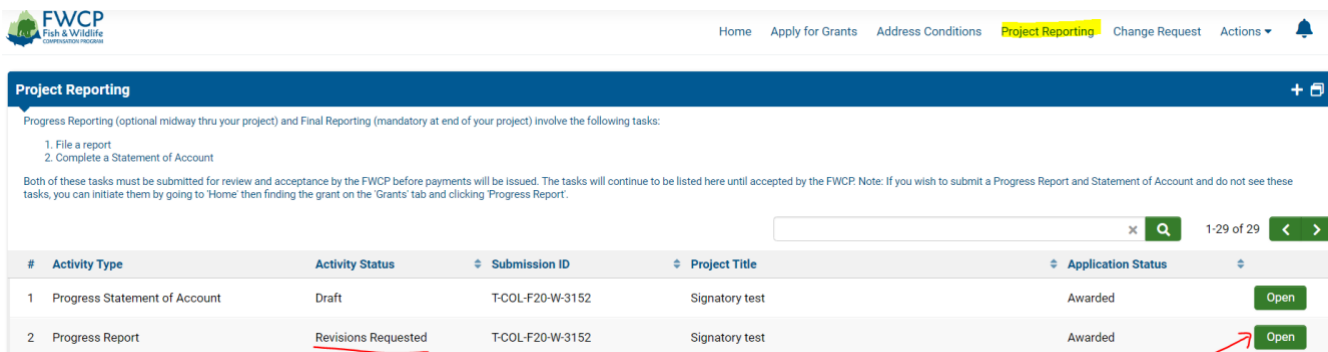
- When the progress report task has been submitted, it can no longer be modified by the proponent. The task will continue to appear in the “Project Reporting” tab in Submitted status.



4. REVIEW AND REVISIONS TO PROGRESS REPORT TASK

- A regional manager will do an initial review of the progress report. If revisions are required, they will put the progress report task into “Revisions Requested” status. The regional manager will email you the required revisions or add them to the “Notes” tab (see section 6).

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



5. RESUBMITTING THE PROGRESS REPORT TASK

- 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.



- When the progress report is fully approved, it will appear on the “Project Report” tab in Accepted status.

The screenshot shows the FWCP Project Reporting interface. At the top, there is a navigation bar with links for Home, Apply for Grants, Address Conditions, Project Reporting (highlighted), Change Request, and Actions. Below this is a blue header for 'Project Reporting' with a plus sign. The main content area contains instructions for reporting and a table of activities.

#	Activity Type	Activity Status	Submission ID	Project Title	Application Status	
1	Progress Statement of Account	Draft	T-COL-F20-W-3152	Signatory test	Awarded	Open
2	Progress Report	Accepted	T-COL-F20-W-3152	Signatory test	Awarded	Open

6. NOTES/QUESTIONS TAB

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

The screenshot shows the 'Notes/Questions' tab in a web application. The title is 'Statement of Account - Oreo Cookies!!! (T-COA-F19-W-2361)'. There is a green '+' button circled in red, next to a document icon. Below this is a form for 'Notes/Questions Type' with a dropdown menu set to 'Questions to FWCP', and fields for 'From' and 'To' with a search icon. At the bottom right, it says 'No Records Found'.

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

The screenshot shows a text input field with the placeholder text 'I have a questions about'. Below the input field is a green 'Save' button circled in red.

- 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.