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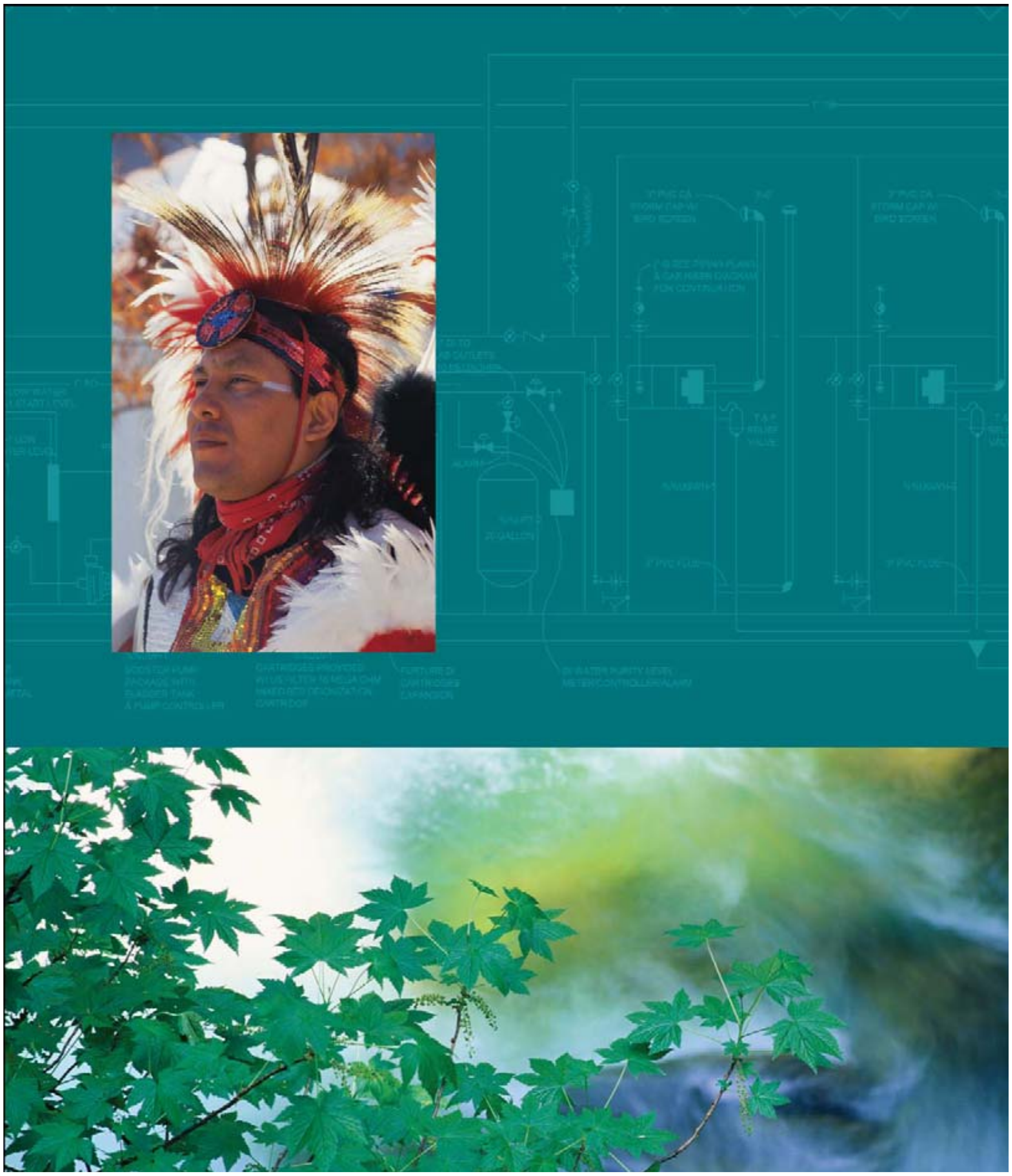

General Assistance Program (GAP) Online 2.3

Quick Reference Guide

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1.0 INTRODUCTION

1.1 GAP Online Quick Reference Guide

The purpose of the GAP Online Quick Reference Guide (QRG) is to provide 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 continually edited and updated to include new system changes and/or business processes as they arise.

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 provided for their tribe.

1. Access the GAP Online Web site (https://iaspub.epa.gov/GAP_Online).
2. Click the **GAP Tribe User Login** hyperlink.
3. Enter the username and password into the appropriate textboxes.
4. Click the **Login** button.

2.2 Using a Web Access Management (WAM) Account

Web Access Management (WAM) allows you to log in with an individual user name (your e-mail address) and password assigned from the EPA Oracle Internet Directory (OID). This process ensures greater security and traceability for you and the work plans you develop for your tribe.

1. Access the GAP Online Web site (https://iaspub.epa.gov/GAP_Online).
2. Click the **GAP Portal Login** hyperlink.
3. Enter, as your user id, the e-mail address you enter in the GAP Online User Profile. Enter the password provided to you by your Project Officer.
4. Click the **Login** button.

2.3 First Time GAP Online Users

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

1. Click the **User Profile** hyperlink on the left menu bar.
2. Enter your e-mail address into the **E-mail Address** text field.
3. Enter the Project Officer's e-mail into the **Project Officer's E-mail** text field.
4. Select the page you want to arrive on from the **Home Page Preference** drop-down menu.
5. Click the **Save** button.

2.4 Update the GAP Tribal User Account Password

Users can change their password for their GAP Online tribal user account using the GAP Tribe User Login page.

1. Access the GAP Online Web site (https://iaspub.epa.gov/GAP_Online).
2. Click the **GAP Tribe User Login** hyperlink.

3. Enter your username into the **Username** text field.
4. Click the **Change Password** button.
5. A popup window appears. In order to change the password, you must have your browser's setting set to **Allow Pop-ups**. If your browser is set to not allow pop-ups, a gold bar will appear across the top of the screen informing you that the **Change Password** window does not appear because it is a blocked pop-up window. You can choose whether to temporarily allow pop-ups or to always allow pop-ups.
6. Within the new browser window, enter the current password. Enter the new password. Confirm the new password by entering the new password again.
7. Click the **Change** button to accept the new password.

It is recommended that you change the password of the tribal user account on a 90-day basis and use a complex password (at least eight characters of upper and lower case letters and numbers).

Contact your GAP Project Officer if you forget your password.

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. Click the **Logout** hyperlink on the left side of the screen.

3.0 WORK PLAN

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. After you log into GAP Online, click the **GAP Online Home** hyperlink on the left side of the page.
2. Under the **GAP Online 2.3** section, click **Create New Work Plan**.
3. The tribe name and Region ID will already be entered for you in a display field.
4. Select the appropriate Work Plan Period for your new work plan from the available calendar.
5. If you wish to edit an existing work plan, click the **Copy Data from Previous Work Plans** checkbox, which will allow you to select a previously created work plan. Click the **Copy Data from Previous Work Plans** checkbox to select this option and then click outside the box to view the table of all 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. Click the **Save** Save button to save your record.
7. Once the new work plan has been created, you can change the authors listed in the **Author** field to a specific user name by clicking on the checkbox corresponding to a tribal user.
8. Enter an optional description of the work plan into the **Description** field.
9. Click the **Save** Save button to save your changes to the work plan.

3.2 Add Narrative Background Information

To upload a narrative background:

1. Click the **View Detail** button to expand the **Narrative Background** section of the work plan.
2. Click the **Browse** button to locate the file you wish to upload.
3. Once the file is located, click the **Open** button.
4. Click the **Upload** button to upload the file.
5. The file you selected will appear as an attached document.

3.3 Add Budget Information

To upload a budget:

1. Click the **View Detail** button for the **Budget** section of the work plan.

2. Click the **Browse** button to locate the file you wish to upload.
3. Once the file is located, click the **Open** button.
4. Click the **Upload** button to upload the file.
5. The file you selected will appear as an attached document.

3.4 Detailed Budget Worksheet

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

To upload the Detailed Budget Worksheet:

1. Click the **Detailed Budget Worksheet** hyperlink to download the file to your computer or another location.
2. Open the file and enter your budget information.
3. Click the **Save** button in the Adobe Portable Document Format (PDF) reader to save the file to your PC or another location.
4. Click the **Browse** button to locate the file.
5. Once the file is located, click the **Open** button.
6. Click the **Upload** button to upload the file.
7. The **Detailed Budget Worksheet** will appear as an attached document.

3.5 Add Position Information

The **Position Information** section allows you to identify the skill sets of the people who will be utilized in performing the work identified in the work plan, as well as the percentage of GAP funding that will be used to support them. The personnel entered will be referenced during the creation of commitments.

To enter a new position:

1. Click the **View Detail** button to expand the **Position Information** section of the work plan.
2. Click the **Add New Position** button.
3. On the **Create New Position** screen, select a position category from the **Category** drop-down menu.
4. Select a position title from the **Position Title** drop-down menu.
5. If **Other** is selected from the Position Title drop-down menu, enter a position title in the **Enter New Position** text field.
6. Enter the percentage of GAP funding that will be used to support the position in the **Percentage of Position Paid by GAP** text field.
7. Click the **Save** button to submit the new position.

3.6 Create a Work Plan Component

To create a work plan component:

1. Click the **View Detail** button to expand the **Work Plan Component** section of the work plan.
2. Click 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 title from the drop-down list of available component titles. Note: the title of the work plan component cannot be greater than 200 characters. *This is a required field for entry.*
5. Enter a description of the work component associated with the work plan in the **Description** text field. The description gives an overview of what environmental activities the component will address. *This is a required field for entry.*
6. Select the type of activity that will be undertaken to fulfill the component from the **Primary Capacity Area Developed** drop-down list.
7. Enter a description into the **Long-Term Outcome** text area. *This is a required field for entry.*
8. Enter a description into the **Measure(s)** text field.
9. Enter descriptions of the intermediate outcomes related to the component into the **Intermediate Outcomes** text fields. The Intermediate Outcomes are in bulleted format. If you want to include more than two Intermediate Outcomes, click the **Add More Intermediate Outcomes** button. *This is a required field for entry.*
10. Enter the appropriate amount into the **Estimated Component Cost** text field. *This is a required field for entry.*
11. Enter the estimated work year full time equivalent (FTE) associated with the component in the **Estimated Work Year (FTE)** text 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*
12. Click the **Save Component** button to save the record.
13. If there are required fields that do not have information entered in them, an error message appears. Click the **OK** button on the error message and enter the required information to advance to the next screen.

3.7 Reordering Work Plan Components

Work plan components can be rearranged to meet your needs as you develop the work plan. Each component has an ID associated with it. As you build your work plan, you can rearrange components by reordering the numeric sequence in which you want components to appear.

To rearrange work plan components:

1. Enter the numeric sequence of the components by changing the numbers in the **Component ID** text fields.
2. Click the up or down arrow in the ID column header to save the changes to the component IDs.

3.8 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. Click the **New Commitment** button located under the **Work Plan Commitment** section.
2. Enter the commitment information by completing the following steps. You should capture as much detail as possible for completing the commitment. All required information will have an asterisk (*) after the field name.
   a. In the **Commitment** text area, enter a description of the commitment to indicate what aspect of the component is being addressed by the commitment. *This is a required field for entry.*
   b. Select the appropriate Primary Capacity Area from the **PCA** drop-down menu. *This is a required field for entry.*
   c. Click the checkboxes associated to the **Positions** required to complete the commitment. If you do not have all the positions listed that are needed for a commitment, go to the **Position Information** section to enter additional positions.
   d. 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.
   e. Enter the **End Date** for when this commitment will be completed. *This is a required field for entry.*
   f. Enter the **Outcomes and Deliverables** for the commitment. This will be reported in the Progress Report for the work plan. *This is a required field for entry.*
3. Click the **Save Commitment** button to save the commitment.

3.9 Add a Work Plan Commitment ID

Work plan commitments can be rearranged to meet your needs 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 numeric sequence in which you want commitments to appear.

To rearrange work plan commitments:

1. Enter the numeric sequence of the commitments by changing the numbers in the **Commitment ID** text fields.
2. Click the up or down arrow in the ID column header to save the changes to the commitment IDs.

3.10 Add Attachments

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

To add an attachment:

1. Click the **View Detail** button to expand the **Attachments** section of the work plan.
2. Click the **Browse** button to locate the file you wish to upload.
3. Once the file is located, click the **Open** button.
4. Click the **Upload** button to upload the file.
5. The file you selected will appear as an attached document.
6. If you find an attachment has been uploaded by mistake, or if you have another version that is more recent, you can delete the attachment by clicking on its corresponding **Delete** button to remove it from your work plan.

3.11 Submit a Work Plan

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

To submit a work plan:

1. At the bottom of the **Edit Work Plan** screen, click the **Send Work Plan to Project Office** button.
2. The **Sending Work Plan to Regional Project Officer** page displays in a new pop-up browser window appears.
3. Enter an optional version number and comment.
4. Click the **Confirm Sending Work Plan to Project Office** button to send the work plan to the Regional Project Officer. The pop-up browser window closes and the submitted work plan appears in the list of work plans with the status of **Submitted**.

4.0 EDIT WORK PLAN

The work plan is the basis for the tribal management function. The work plan provides the tribe with the opportunity to submit data in a precise, informative and comprehensive manner. Once the work plan has been created, the tribal user may view the work plan details accordingly through GAP Online. In addition, the tribal user may view the work plan components. If a work plan is submitted to the Regional Project Officer for review and comment, the tribal user cannot edit or modify the work plan until the Regional 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 Regional 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. Click the **GAP Online Home** hyperlink on the left side of the page.
2. Under the **GAP Online 2.3** section, click the **Edit Work Plan** button.
3. Identify the work plan with a status of **Accepted**, **Review**, or **Submitted** from the list.
4. To view the work plan, click the corresponding **View Work Plan** button under the **Action** column to review each component and its commitments within the work.

4.2 Update a Work Plan

Once the work plan is created, the work plan may continue to be edited and modified so long as the tribal user has not clicked the **Send Work Plan to Project Office** button to submit the work plan to the Region. Once the work plan has been submitted, the Project Officer can return or release the work plan in order for the recipient to update it.

To update a work plan:

1. Click the **GAP Online Home** hyperlink on the left side of the page.
2. Click the **Edit Work Plan** button.
3. Identify the work plan with a status of **Created** from the list of work plans.
4. Click the corresponding **Update Work Plan** button under the **Action** column to update the work plan.
5. After the appropriate changes have been made, click the **Send Work Plan to Project Office** button to submit the updated work plan to the Region.

4.3 View Change History

A tribal user may wish to view a work plan's history. The **View Change History** provides a useful reference for the tribal user to review the change history associated with a work plan. The viewing option is often a convenient and quick reference point to determine if a particular action has been taken in the past.

To view the change history:

1. Click the **View Detail** button to view details of the changes made for the selected work plan progress report.
2. Click the commitment and component hyperlinks to be redirected to the corresponding section of the work plan.

4.4 Print Change History

To print the change history:

1. Click the **Print Change History** button to print a copy of the work plan change history report.

4.5 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. Select the **Component** that you wish to delete.
2. Under the **Action** column, click on the corresponding **Delete** button. A pop-up message box appears asking if you are sure you want to delete this component.
3. Click the **OK** button to proceed with the deletion of the work plan component. Be very careful with deleting a component. Once the component is deleted, it cannot be retrieved.

4.6 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. Select the **Commitment** that you wish to delete.
2. Under the **Action** column, click on the corresponding **Delete** button. A pop-up message box appears asking if you are sure you want to delete this commitment.
3. Click the **OK** button to proceed with the deletion of the work plan commitment. Be very careful with deleting a commitment. Once the commitment is deleted, it cannot be retrieved.

4.7 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 delete a work plan **ONLY** if it has not been submitted to the Project Officer. Work plans with the status of **Created** can be deleted.

To delete a work plan:

1. From the **Edit Work Plan** screen, select the work plan that you wish to delete.
2. Under the **Action** column, click the corresponding **Delete** button. A pop-up message box appears asking if you are sure you want to delete this work plan.

3. Click the **OK** button to proceed with the deletion of the work plan. Be very careful with deleting a work plan. Once the work plan is deleted, it cannot be retrieved.

4.8 Recall a Work Plan

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

To recall a work plan:

1. Click the **Edit Work Plan** button.
2. Identify the work plan from the list of work plans.
3. To recall the work plan, under the **Action** column, click the corresponding **Recall** button.
4. You will be asked "Are you sure you want to RECALL this work plan?"
5. If you wish to RECALL this work plan, click the **OK** button.
6. If you do not wish to RECALL this work plan, click the **CANCEL** button.
7. If you click the **OK** button, an e-mail will be automatically generated and sent to the Regional Project Office notifying them that the work plan has been recalled.