



# Instruction Manual for the FIFRA Work Plan and Report Template

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1/30/2017

Version 3

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## I. Introduction


Beginning in FY 17, the FIFRA Work Plan and Report Template is the required format for the FIFRA grantee work plan, grantee progress reports as well as the year-end evaluation from the EPA regional offices. This template has been approved by OMB and is assigned OMB No. 2070-0198.

This Template is Version 3, which includes proposed work activities from the national FY18-21 FIFRA cooperative agreement guidance, space for proposed and negotiated grantee work activities, space for grantee progress reports on the negotiated work activities, and space for EPA comments and recommendations. The template, a result of a collaborative effort involving staff from EPA regional offices, the Office of Pesticide Programs, the Office of Compliance and several FIFRA state lead agencies, was created in order to:

- 1) streamline the cooperative agreement process for grantees and EPA regional offices;
- 2) promote national consistency in grantee work plans, grantee progress reports and EPA year-end evaluation reports;
- 3) more easily allow for the compilation of data, both regionally and nationally; and
- 4) assist in the design of a new national data system.

While the template is a change in the format of work plans and reports, it does not change the type of information reported or the processes used by regional offices and grantees in submitting cooperative agreement applications, negotiating work plan commitments, and reporting on the progress of those commitments. This template is not intended to change the normal workflow process between the grantee and the EPA project officer.

With any new tool, there will be a period of learning and adjustment. This instruction manual focuses solely on explaining how to use the template within the Excel environment. If you are not familiar with Excel, there are a number of excellent resources available online you can use to learn the program. Your IT department may have further resources to recommend. Getting to know Excel will help you in using the template. You can refer to this website for help:

[Microsoft Excel Help](#). Another resource is the Help function in Excel. Look for the  icon in the upper right corner of the screen. You can type questions in the prompt box after clicking on the question mark.

## II. Software Needs

The template was designed using Microsoft Office's Excel 2007, and updated using Excel 2013. Functionality of the template might be hampered with Excel versions older than 2007.

### III. Contact Information

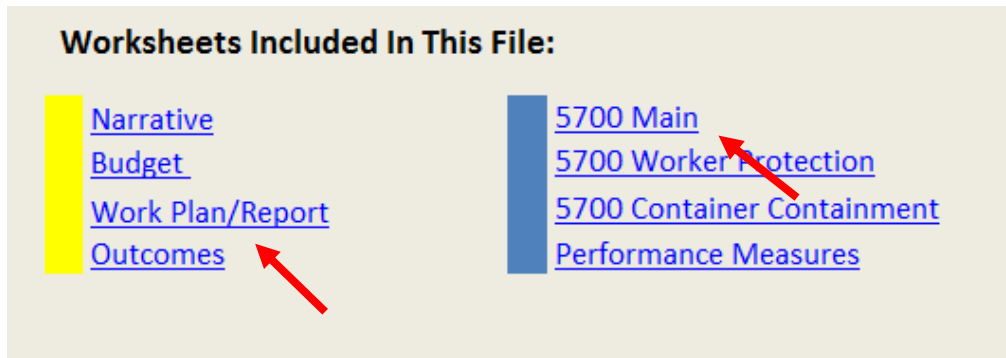
If you discover issues or think of better/easier ways that will improve this template, we would appreciate hearing from you.

For technical questions about Excel, you can call/email Allen Demorest of EPA Region 9 ([demorest.allen@epa.gov](mailto:demorest.allen@epa.gov), 415-947-4214) and for general questions about the Template you can call/email Sandra O'Neill of OPP ([oneill.sandra@epa.gov](mailto:oneill.sandra@epa.gov), 703-347-0141).

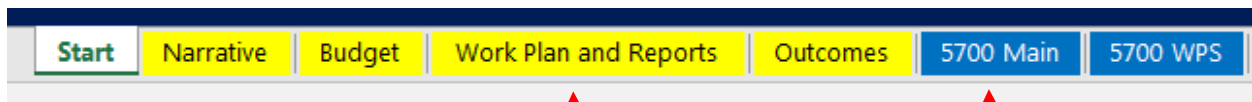
### IV. Contents of the Template



The template is comprised of several worksheets, that all appear at the bottom of the screen once you open the Excel file.

To open a worksheet, you can either click on the name of the worksheet in the Worksheets section of the Start page,

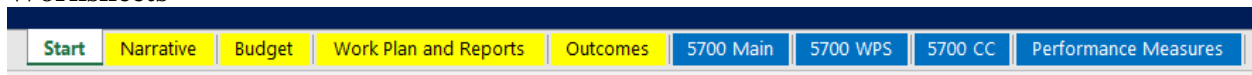


or you can click on the “tab” at the bottom of the template to open a worksheet.



To return to the Start worksheet from another tab, select the “Back” button at the top of a worksheet or simply click on  from the tabs at the base of the document. If the Start icon is not visible, select the  icon to page through all the worksheet tabs and then click the Start icon.

#### Worksheets



In order of appearance from left to right, the worksheets contained in the template are:

**Start:** This is the “cover” page or landing page for the template. This is where the grantee should begin work by answering the questions numbered 1-8 in the top half of the Start page. See page 6 for more detailed information.

**Narrative:** This is the Narrative worksheet where you can add additional narrative descriptions that don’t fit anywhere else in the template. See page 8 for more detailed information.

**Budget:** This worksheet is a placeholder for you to either insert your budget sheet into the white space or embed a separate document into this tab. See page 9 for more detailed information.

**Work Plan and Reports:** This worksheet contains all of the “required” and “pick-list” activities in the national FY18-21 FIFRA cooperative agreement guidance, as well as “inactive” priorities from the FY 15-17 guidance. It also contains space for the grantee to enter in work plan activities and progress reports, and space for EPA to add comments and recommendations. See page 9 for more detailed information.

**Outcomes:** This worksheet contains a chart that links program areas, outcomes and the EPA’s Strategic Plan goals, helping grantees to comply with Grants Policy Issuance 11-03. See page 13 for more detailed information.

## **Inspection and Enforcement Action/ Projections and Accomplishments Forms**

**5700 Main:** This is the standard 5700-33H form to be filled out by the grantee to project inspections and samples and report inspection and enforcement accomplishments on a schedule negotiated with the regional office, annually at a minimum.

**5700 WPS:** This is the form to report worker protection inspections, samples and enforcement actions, on a schedule negotiated with the regional office, annually at a minimum.

**5700 CC:** This is the form to report container/containment inspections, samples and enforcement actions, on a schedule negotiated with the regional office, annually at a minimum.

**Performance Measures:** This is the form to report the new enforcement performance measures. Reporting in the form became mandatory beginning in FY17.

See pages 14-21 for more detailed information on all the 5700 forms and the Performance Measures form.

## **V. General Worksheet Information**

### **A. Protecting Worksheets**

Excel has the ability to “protect” a worksheet to prevent users from accidentally changing or deleting important data, formulas, etc. There are six worksheets in the template that are currently “protected”: Start, Outcomes, 5700 Main, 5700 WPS, 5700 CC and Performance Measures. You can enter data into any of these protected sheets. If you have a need to unprotect a worksheet, go

to Review>(Changes) and select Unprotect Sheet. When done, you may protect the sheet again to prevent accidental deletion of information. No password is required to protect the sheet, just select OK. The data entry cells of worksheets remain editable when a sheet is protected.

## B. Filters

Filters and drop down options are included to easily sort through the items in that particular column. For example, at the top of the Work Plan in each of the column headings, you will see a drop down arrow. Use this to select subsets of information you want to display in that column of the Work Plan. Make sure to review each arrow as you go through the Work Plan. Don't forget to go back and "select all", otherwise you might think you are missing some of your data!

G	I	J	K	L
Activity #	'18 - '21 Grant Guidance Activity	Activity Type	Work Plan Activity Description (Outputs)	Due Date
	Complete administrative/management education and	Required		10/30/2018

## VI. Using the Start Worksheet

The grantee should initially complete work in the Start worksheet.

**FIFRA Cooperative Agreement Work Plan and Report Template EPA ICR No.: 2511.01 OMB Control No: 2070-0198**

Start **10/1/2017** 01/30/17  
End **9/30/2018**

Data entry in white boxes only. Asterik denotes a required field.

<p><b>Grantee Information:</b></p> <p>*Name: <input type="text"/> 1)</p> <p>*Grantee: <input type="text"/> 2)</p>	<p><b>Cooperative Agreement Information:</b></p> <p>*Agreement Type: <input type="text" value="PPG"/> 3)</p> <p>*Number of Years: <input type="text" value="4"/> 4)</p> <p style="text-align: center;"><b>Start</b>                      <b>End</b>    <b>Extended to:</b></p> <p>*Project Period: <input type="text" value="10/1/2017"/> 5)    <input type="text" value="9/30/2021"/>    <input type="text"/></p> <p style="font-size: x-small;">Budget Period #1    10/1/2017                      9/30/2018</p> <p style="font-size: x-small;">Budget Period #2    10/1/2018                      9/30/2019</p> <p style="font-size: x-small;">Budget Period #3    10/1/2019                      9/30/2020</p> <p style="font-size: x-small;">Budget Period #4    10/1/2020                      9/30/2021</p> <p>*Work Plan and Report Applies to: <input type="text" value="Budget Period #1"/> 6)</p> <p>EPA Grant #: <input type="text"/></p>	<p><b>Work Plan/Report Status:</b> <input type="text"/> 7)</p> <p><b>Date:</b> <input type="text"/> 8)</p>
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<p><b>Worksheets Included In This File:</b></p> <ul style="list-style-type: none"> <li><a href="#">Narrative</a></li> <li><a href="#">Budget</a></li> <li><a href="#">Work Plan/Report</a></li> <li><a href="#">Outcomes</a></li> </ul>	<ul style="list-style-type: none"> <li><a href="#">5700 Main</a></li> <li><a href="#">5700 Worker Protection</a></li> <li><a href="#">5700 Container Containment</a></li> <li><a href="#">Performance Measures</a></li> </ul>	<p><b>Reporting Links:</b></p> <ul style="list-style-type: none"> <li><a href="#">Certification and Training-CPARD</a></li> <li><a href="#">Pesticides in Water-POINTS</a></li> </ul>	<p><b>References:</b></p> <ul style="list-style-type: none"> <li><a href="#">EPA Grant Forms List</a></li> <li><a href="#">Template Instructions/Help</a></li> <li><a href="#">FY 18-21 Grant Guidance</a></li> </ul>
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## A. Information Required in Top Panel

The grantee should complete fields 1-8 in the top panel. Some of the responses in these fields (Grantee and Project Period) autofill other fields within the template (e.g. 5700 forms and Performance Measures form) and create unique identifiers to aid in data compilation.

Many of the fields have drop down selections that you can choose from. Simply position your cursor in the white area and click. If there are response choices, a drop down arrow will appear to the right of the white area. Click on the arrow and the response choices will appear. Select your response by clicking on it, and it will appear in the white box. To clear contents in a cell, click in the cell and hit the delete key.

#### Grantee Information

- 1) **Name:** Enter the name of the individual primarily responsible for completing the template. The name does not have to match the name that appears on the SF-424 form.
- 2) **Grantee:** Grantee will select the agency name from the drop down list. Once selected, the agency name will also appear at the top of the Start worksheet, and on other worksheets. The EPA regional office associated with the selected agency will also appear below the Grantee box.

#### Cooperative Agreement Information

- 3) **Agreement Type:** Select from the drop down list the type of Cooperative Agreement appropriate for your agency: “Consolidated” or “PPG” (Performance Partnership Grant).
- 4) **# Years:** Select the number of years (i.e. project period) covered by this cooperative agreement: 1, 2, 3, or 4 years.
- 5) **Project Period:** Select the beginning date of the project period from the drop down list. Once selected, the end date for the project period along with the supporting budget periods will autofill on the Start page, and on other forms in the template.

**Extended to:** This box is only to be filled out if there is a no-cost extension associated with the cooperative agreement.

- 6) **Work Plan and Report Applies to:** Select from the dropdown list the appropriate budget period to which the work plan applies.
- 7) **Work Plan/Report Status:** Select from the drop down list what the current document represents (i.e. either work plan or report) and its status (choices are: “Work Plan Draft, Work Plan Final, Work Plan Final Amended, Grantee Report Draft, Grantee Report Final, Grantee Report Final Amended, EPA Report Draft, EPA Report Final, EPA Report Final Amended”). Make sure to save a unique template file for each type and stage of document. It is recommended you add to the status column, rather than deleting previous descriptors in order to provide a historical sequence.
- 8) **Date:** Enter the date in mm/dd/yyyy format that corresponds to the type of document in the Work Plan/Report Status field.

## B. Worksheets & Reporting Links

Worksheets Included In This File:		Reporting Links:
<a href="#">Narrative</a>	<a href="#">5700 Main</a>	<a href="#">Certification and Training-CPARD</a>
<a href="#">Budget</a>	<a href="#">5700 Worker Protection</a>	
<a href="#">Work Plan/Report</a>	<a href="#">5700 Container Containment</a>	<a href="#">Pesticides in Water-POINTS</a>
<a href="#">Outcomes</a>	<a href="#">Performance Measures</a>	

The yellow section in this panel relates mainly to non-inspection related information, while the blue section relates mainly to inspection related information. You can click on any of the titles, and this will open the selected worksheet.

Links to the external databases, CPARD and POINTS, are provided under “Reporting Links” only as a convenience. ⚠️ You do not need to report information entered into these databases again in the template.

## C. References

References:
<a href="#">EPA Grant Forms List</a>
<a href="#">Template Instructions/Help</a>
<a href="#">FY 18-21 Grant Guidance</a>

This panel provides access to the various documents that support template users.

**EPA Grant Forms List:** This link will take you to the EPA Grants and Debarment grant forms page.

**Template Instructions/Help:** This link takes you to this document if you need to refer to it as you complete the template.

**FY 18-21 Grant Guidance:** This link takes you to the FY18-21 national FIFRA cooperative agreement guidance.

## VII. Using the Narrative Worksheet

The Narrative worksheet is where you can add additional narrative descriptions that don't fit anywhere else in the template. The Grantee can append documents in the top half of the tab (e.g. authority to accept the cooperative agreement, legislative changes, neutral administrative



inspection schemes, emerging/significant issues, etc.) The roles and responsibilities of the Grantee and EPA is already appended there. Regional PO/TCs can append documents in the bottom half of the document (e.g. case review results or an executive summary of the midyear or yearend report). There is a suggested outline for an executive summary included in the Narrative tab.

The recommended method for appending documents here is by using the menu ribbon: 1) Go to Insert>Text>Object>Create from File>Browse. 2) Once you have selected the file you want to insert (Word, PPT, PDF, JPG, etc.), click on Insert> Display as Icon>Change Icon>rename the file with a short descriptive title, such as "Authority" or "Legislative Changes", etc. and click on "OK" twice. Your document will appear. You can drag and move it under the Grantee or EPA banner as appropriate. The alternate method is to double click on the Microsoft Office Word Document icon below, and add content.

## VIII. Using the Budget Worksheet

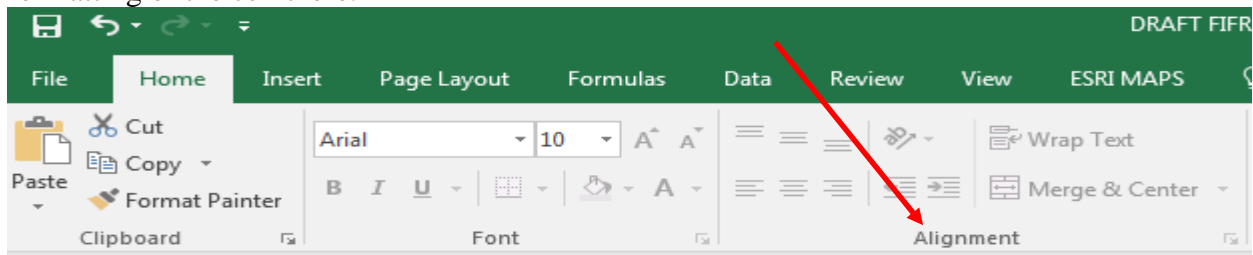
This worksheet is a placeholder for you to either enter budget information directly into the white space or embed a separate document into this tab. To embed a document, go to the menu and click on “Insert”>Text, then click on “Object”. Here you can choose to create a new file or choose an existing file (Word, PPT, PDF, etc.) by selecting “Create from File”, Browse to find your file, and finally choose either “Link to File” or “Display as Icon”.

This budget worksheet is also where you can provide your thoughts on your financial draw down strategy as described in Grants Policy Issuance 12-06.

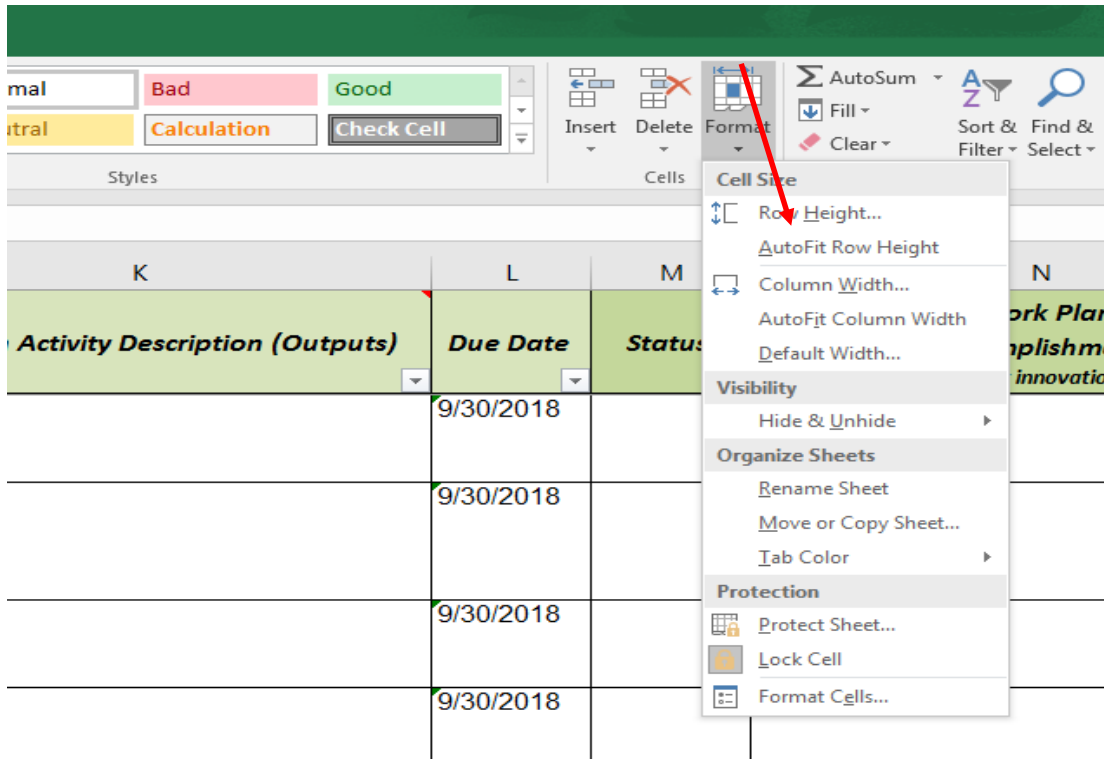
## IX. Using the Work Plan and Reports Worksheet

### A. Cell Formatting

Each cell is formatted so that text wraps within each cell, the cell should expand so that all text is visible, and the text is aligned left and at the top of the cell. However, within the Excel environment, if you copy and paste text from another source (i.e. another excel file, word document etc.) the formatting from that source will override these defaults. If you notice that the format to a particular cell is not following these rules after you’ve added information to a cell, you can navigate to the “Alignment” section of the Home ribbon in excel and adjust the formatting of the cell there.

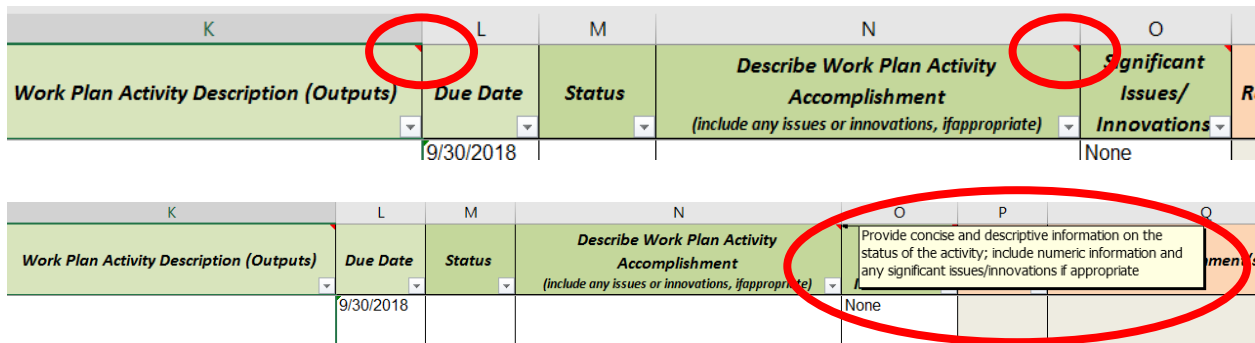


To expand the row height, click on the cell or highlight the row, go to “Cells”, then “Format”, then select “Autofit Row Height”.



## B. Red Triangles in Upper Right Hand Corner of Cells

Instructions within the Work Plan worksheet are indicated by a red triangle in the corner of the cell. Place your cursor over the triangle for the instructions to appear.



## C. Column Information and Entering Data

In general, the white areas in the body of any worksheet are meant for data entry.

Program Area (Column E): This listing is taken directly from the national FY18-21 FIFRA cooperative agreement guidance. Information in this column should not be changed.

NPM (Column F): Describes which National Program Manager the grant funding for a particular work activity comes from: OPP or OECA. Information in this column should not be changed.

Activity # (Column G): This number is unique for each row and matches the activity number from the national guidance. Do not change the “Activity Number” listed in these cells. If a row needs to be added, see the instructions below for “adding rows.”

‘18 – ‘21 Grant Guidance Activity (Column I): All of the required and pick-list activities listed here, are taken directly from the national cooperative agreement guidance. Do not change anything in this column.

Activity Type (Column J): Describes if the activity is required, pick-list, optional or inactive. For all the pick list, optional or inactive activities, the grantee will need to open the drop down list and choose either “Selected” or “Not Selected” to indicate if the grantee will be doing any work in those program areas.

If there are supplemental activities or regional specific activities, they are considered optional until selected or not selected. Those activities labeled inactive are those that were removed from the national guidance. Please note that reporting on inactive program areas is only required for those grantees that have negotiated with their region to continue working on a program area that is no longer required. Grantees may choose to do this if they are continuing work that is important to their state or tribe. For the purposes of the FIFRA Template, inactive program areas will retain their unique numbers. Those are found at the end of the worksheet.

Work Plan Activity Description (Outputs) (Column K): The grantee will use this cell to briefly and succinctly describe the Work Plan activity the grantee will be conducting that corresponds to the grant guidance activity listed in Column I. **Please be as specific as possible, especially if the activity involves any metrics, locations, etc.**

Due Date (Column L): This column auto-fills with the ending date of the budget period selected from the Start worksheet. If the date is different, the grantee will need to enter the correct date. Multiple dates may be entered if separated by a comma.

Status (Column M): When reporting results on the activities that you committed to (according to the schedule you have arranged with your PO), select the current status for the corresponding activity.

Options in the drop down menu:

- Complete
- Partially complete
- Not started
- Ongoing/ As Needed

Describe Work Plan Activity Accomplishments (Column N): Use this cell to briefly and succinctly describe the activity accomplishment/status listed in Column K, as well as the reasons for partially complete/not complete/ongoing/as needed responses in Column M, particularly if projections are exceeded or not met, and the reason. **Please be as specific as possible, especially if the activity involves any significant issues or innovations, metrics, locations, etc.**

Significant Issues/Innovations (Column O): This column will be used as a means to flag activities that the grantee feels are either nationally significant issues or activities that used an innovative approach. There are four options in the drop down menu: “None” “Innovative,” “Significant Issue,” or “Both”. If anything other than “None” is selected, please explain the innovation or significant issue, or both, in column N.

EPA Review of Status (Column P): This column is completed by the EPA project officer/technical contact and indicates the Region’s concurrence or disagreement with the status reported by the grantee in Columns M and N.

EPA Comment (Column Q): This column is completed by the EPA project officer/technical contact. The PO/TC is encouraged to add any further explanation or details regarding activities in Columns N or O. The PO/TC should particularly provide explanation for any deficiencies in meeting negotiated work plan activities or inspection projections; and especially if Column P indicates disagreement; or if Column O flagged an innovative or significant issue, the PO/TC is encouraged to further explain those indications. If the PO/TC has no comments, the column can be left blank.

EPA Recommendation (Column R): This column is completed by the EPA project officer/technical contact and provides space for any recommendations the Region wants to offer. If the PO/TC does not have any recommendations, the column can be left blank.

Additional Columns: Additional columns can be added at the end of the table to add additional information.

Hidden Columns: These columns are used for creating unique identifiers for the reports function of the template.

Entity (Column A)

WPStart (Column B)

WPEnd (Column C)

Prog # (Column H): The grant guidance activity number.

## D. Adding rows

Each guidance activity is initially only given one row in the template, but it is likely that grantees will have several activities to carry out the guidance and will need additional rows.

To add rows:

Select the row number where you want to add a new row (circled in red), right-click, and select “Insert.”

13	01.02.07.0	Ensure a minimum of one employee obtains and maintains an EPA inspector's credential. Conduct FIFRA inspections with EPA credentials, according to EPA procedures and guidances.	Required	
14	01.02.08.0	Refer all inspections conducted with federal credentials to the region.	Required	

The new row will appear with some cells in orange or yellow. The colors are highlighting that a cell is either empty or a duplicate.

01.02.07.0	Ensure a minimum of one employee obtains and maintains an EPA inspector's credential. Conduct FIFRA inspections with EPA credentials, according to EPA procedures and guidances.	Required	

To complete the data in those two cells, you will select the cell directly above the blank cell and drag the data down using the small square icon in the bottom right-hand corner of the cell.

	01.02.07.0	Ens
		Er
		m
		ins
		pr

The new row will look like the surrounding cells, however the Activity Code will be unique.

01.02.07.0	Ensure a minimum of one employee obtains and maintains an EPA inspector's credential. Conduct FIFRA inspections with EPA credentials, according to EPA procedures and guidances.	Required	
01.02.07.1	Ensure a minimum of one employee obtains and maintains an EPA inspector's credential. Conduct FIFRA inspections with EPA credentials, according to EPA procedures and guidances.		

## X. Using the Outcomes Worksheet

This chart includes all the program areas listed in the national FY18-21 cooperative agreement guidance, as well as those from the inactive activities, and links them to the potential outcomes from work done in each program area and to the appropriate goal in EPA’s Strategic Plan. The grantee should adjust the outcomes as necessary to match work contained in the grantee’s Work Plan. This chart, along with the Work Plan, assists the grantee to comply with Grants Policy Issuance 11-03, which requires all Work Plans and progress reports to prominently display work commitments, a timeframe to complete the commitments and a link to EPA’s strategic goal and objective.

## XI. Using the 5700 Forms (Projections and Accomplishments)

Guidance for what data to enter into these forms can be found in Appendices 10-12 of the national FY18-21 FIFRA cooperative agreement guidance. See below for how these forms function in the template.

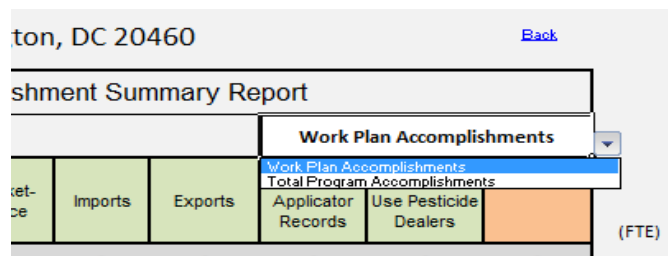
The template includes three different 5700 forms:

**5700 Main:** This is the standard 5700-33H form to be filled out by the grantee to project inspections and samples and report inspection and enforcement accomplishments.

**5700 WPS:** This is the form to report worker protection inspections, samples and enforcement actions.

**5700 CC:** This is the form to report container/containment inspections, samples and enforcement actions.

Each of the 5700 forms contains a cell in the upper right hand corner of the form for the grantee to indicate whether the grantee is reporting “Work Plan Accomplishments” or “Total Program Accomplishments”. Just click in the cell for the drop down arrow to appear, then click on the appropriate selection.



The screenshot shows a portion of a 5700 form titled "Summary Report". At the top right, there is a "Back" link. Below the title, there is a dropdown menu currently set to "Work Plan Accomplishments". The dropdown menu is open, showing two options: "Work Plan Accomplishments" (highlighted in blue) and "Total Program Accomplishments". Below the dropdown, there is a table with columns for "Imports", "Exports", "Applicator Records", and "Use Pesticide Dealers". The "Applicator Records" and "Use Pesticide Dealers" columns are highlighted in orange. To the right of the table, there is a label "(FTE)".

Each of these three forms has a main summary form and 4 quarterly forms appended below the summary. All of the quarterly forms for each 5700 area currently “expanded”, leaving them visible at the bottom of each summary form in sequential order. If you will not use all the quarters or want to “collapse” them, you will first need to “unprotect” the worksheet. To do this, go to Review>(Changes) and select Unprotect Sheet. To collapse (or expand) a particular quarter, click on the minus (or plus) sign to the left of the quarterly forms.

**Screen shot of 5700 Main with Q1 visible:**

The screenshot shows the Microsoft Excel interface with the 'Review' tab selected. The 'Unprotect Sheet' button is highlighted with a red circle. The spreadsheet contains a table of enforcement actions with columns for various categories and values. A summary section for Q1 is also visible, including a table for 'Enforcement Accomplishments This Reporting Year' and a 'Pesticide Enforcement Cooperative Agreement Output Summary' table.

Category	Value	Value	Value	Value	Value	Value	Value	Value	Value	Value	Value	Value	Value
License/Certificate Revocation	0	0	0	0	0	0	0	0	0	0	0	0	0
License/Certificate Conditioning or Modification	0	0	0	0	0	0	0	0	0	0	0	0	0
Number of Warnings Issued	0	0	0	0	0	0	0	0	0	0	0	0	0
Stop-Sale, Seizure, Quarantine or Embargo	0	0	0	0	0	0	0	0	0	0	0	0	0
Cases Forwarded to EPA for Action	0	0	0	0	0	0	0	0	0	0	0	0	0
Other Enforcement Actions	0	0	0	0	0	0	0	0	0	0	0	0	0
Number of Cases Assessed Fines	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Number of Actions	0	0	0	0	0	0	0	0	0	0	0	0	0
% of Inspections Resulting in Actions													
Percent of Total Actions													

< Summary (Projections and Accomplishments for )												
State/Tribe:		Reporting Period:		#N/A		Work Plan Accomplishments						
Enforcement Accomplishments This Reporting Year	Agricultural		Nonagricultural		Experimental Use Permit	Producing Establishment	Market-place	Imports	Exports	Certified Applicator Records	Restricted Use Pesticide Dealers	TOTAL
	Use	For Cause	Use	For Cause								
Pesticide Enforcement Cooperative Agreement Output Summary												
Total Inspections Conducted												0
Federal Facilities												
Samples Collected												
Physical Documentary												
Civil Complaints Issued												
Criminal Actions Referred												
Administrative Hearings Conducted												
License/Certificate Suspension												
License/Certificate Revocation												
License/Certificate Conditioning or Modification												
Number of Warnings Issued												
Stop-Sale, Seizure, Quarantine or Embargo												
Cases Forwarded to EPA for Action												
Other Enforcement Actions												
Number of Cases Assessed Fines												
< Q1 (No Inspections)												
State/Tribe:		Reporting Period:		#N/A		#N/A		Work Plan Accomplishments				

When done, you may protect the sheet again to prevent accidental deletion of information. No password is required to protect the sheet, just select OK. The data entry cells of worksheets remain editable when a sheet is protected.

Any numbers entered in the quarterly report forms will automatically tabulate data in the main form, regardless of the number of quarterly forms used.

# Screen shot of the 5700 Main summary form and Quarter 1:

United States **Environmental Protection Agency** Washington, DC 20460 [Back](#)

### Pesticides Enforcement Cooperative Agreement Projections & Accomplishment Summary Report

State/Tribe:	Reporting Period:				Work Plan Accomplishments							
	Agricultural		Nonagricultural		EUP	PEI	Market-place	Imports	Exports	Certified Applicator Records	Restricted Use Pesticide Dealers	TOTAL
	Use	For Cause	Use	For Cause								
<b>Projected:</b>	(Hrs)	0	0	0	0	0	0	0	0	0	0	0
Inspections												0
Samples												0
<b>Accomplished:</b>		0	0	0	0	0	0	0	0	0	0	0
Inspections: ( )		0	0	0	0	0	0	0	0	0	0	0
Federal Facilities		0	0	0	0	0	0	0	0	0	0	0
Samples = 0	Physical	0	0	0	0	0	0	0	0	0	0	0
	Documentary	0	0	0	0	0	0	0	0	0	0	0
<b>(Accomplished) - (Projected)</b>		0	0	0	0	0	0	0	0	0	0	0
Inspections		0	0	0	0	0	0	0	0	0	0	0
Samples		0	0	0	0	0	0	0	0	0	0	0
<b>Pesticide Enforcement Actions Taken</b>												
Civil Complaints Issued		0	0	0	0	0	0	0	0	0	0	0
Criminal Actions Referred		0	0	0	0	0	0	0	0	0	0	0
Administrative Hearings Conducted		0	0	0	0	0	0	0	0	0	0	0
License/Certificate Suspension		0	0	0	0	0	0	0	0	0	0	0
License/Certificate Revocation		0	0	0	0	0	0	0	0	0	0	0
License/Certificate Conditioning or Modification		0	0	0	0	0	0	0	0	0	0	0
Number of Warnings Issued		0	0	0	0	0	0	0	0	0	0	0
Stop-Sale, Seizure, Quarantine or Embargo		0	0	0	0	0	0	0	0	0	0	0
Cases Forwarded to EPA for Action		0	0	0	0	0	0	0	0	0	0	0
Other Enforcement Actions		0	0	0	0	0	0	0	0	0	0	0
Number of Cases Assessed Fines		0	0	0	0	0	0	0	0	0	0	0
Total Number of Actions		0	0	0	0	0	0	0	0	0	0	0
% of Inspections Resulting in Actions												
< Summary (Projections and Accomplishments for )												
<b>Q1</b>	State/Tribe:	Reporting Period:				#N/A		Work Plan Accomplishments				
Enforcement Accomplishments This Reporting Year	Agricultural		Nonagricultural		Experimental Use Permit	Producing Establishment	Market-place	Imports	Exports	Certified Applicator Records	Restricted Use Pesticide Dealers	TOTAL
	Use	For Cause	Use	For Cause								
Pesticide Enforcement Cooperative Agreement Output Summary												
Total Inspections Conducted												0
Federal Facilities												
Samples Collected	Physical											
	Documentary											
Civil Complaints Issued												
Criminal Actions Referred												
Administrative Hearings Conducted												
License/Certificate Suspension												
License/Certificate Revocation												
License/Certificate Conditioning or Modification												
Number of Warnings Issued												
Stop-Sale, Seizure, Quarantine or Embargo												
Cases Forwarded to EPA for Action												
Other Enforcement Actions												
Number of Cases Assessed Fines												
< Q1 (0 Inspections)												
<b>Q2</b>	State/Tribe:	Reporting Period:				#N/A		Work Plan Accomplishments				
Enforcement Accomplishments This Reporting Year	Agricultural		Nonagricultural		Experimental Use Permit	Producing Establishment	Market-place	Imports	Exports	Certified Applicator Records	Restricted Use Pesticide Dealers	TOTAL
	Use	For Cause	Use	For Cause								
Pesticide Enforcement Cooperative Agreement Output Summary												
Total Inspections Conducted												0

Enter data in the projection rows or in the quarterly forms only

↑



# Screen shot of the 5700 WPS summary form and Quarters 1 and 2:

[Back](#)

United States  
**Environmental Protection Agency**  
 Washington, DC 20460

**Pesticides Enforcement Cooperative Agreement Accomplishment Report (WPS)**

State/Tribe:	Year:	Reporting Period:		Work Plan Accomplishments			
Enforcement Accomplishments This Reporting Year		WPS Tier I		WPS Tier II		Inspections at Facilities Claiming Family	Violations During WPS Inspections # of Violations
		Use	For Cause	Use	For Cause		
Total Inspections Conducted		0	0	0	0	0	0
Samples Collected	Physical	0	0	0	0	0	1 Pesticide Safety Training 0
	Documentary	0	0	0	0	0	
Civil Complaints Issued		0	0	0	0	0	3 Notice of Application 0
Criminal Actions Referred		0	0	0	0	0	4 Entry Restrictions 0
Administrative Hearings Conducted		0	0	0	0	0	5 Personal Protective Equipment 0
License/Certificate Suspension		0	0	0	0	0	6 Mix/Loading, Application Equip & Applications 0
License/Certificate Revocation		0	0	0	0	0	7 Decontamination 0
License/Certificate Conditioning or Modification		0	0	0	0	0	8 Emergency Assistance 0
Number of Warnings Issued		0	0	0	0	0	9 Information Exchange 0
Stop-Sale, Seizure, Quarantine or Embargo		0	0	0	0	0	10 Retaliation 0
Cases Forwarded to EPA for Action		0	0	0	0	0	<b>Total Violations 0</b>
Other Enforcement Actions		0	0	0	0	0	
Number of Cases Assessed Fines		0	0	0	0	0	
* This column is a subset of the WPS Tier I and WPS Tier II Columns combined to collect data on inspections conducted at facilities claiming the Immediate Family Exemption							
<b>&lt; Summary</b>							
Q1 State/Tribe:	Year:	Reporting Period:		#N/A	Work Plan Accomplishments		
Enforcement Accomplishments This Reporting Year		WPS Tier I		WPS Tier II		Inspections at Facilities Claiming Family	Violations During WPS Inspections # of Violations
		Use	For Cause	Use	For Cause		
Total Inspections Conducted						0	1 Pesticide Safety Training
Samples Collected	Physical					0	2 Central Posting
	Documentary					0	3 Notice of Application
Civil Complaints Issued							4 Entry Restrictions
Criminal Actions Referred							5 Personal Protective Equipment
Administrative Hearings Conducted							6 Mix/Loading, Application Equip & Applications
License/Certificate Suspension							7 Decontamination
License/Certificate Revocation							8 Emergency Assistance
License/Certificate Conditioning or Modification							9 Information Exchange
Number of Warnings Issued							10 Retaliation
Stop-Sale, Seizure, Quarantine or Embargo							<b>Total Violations 0</b>
Cases Forwarded to EPA for Action							
Other Enforcement Actions							
Number of Cases Assessed Fines							
<b>&lt; Q1</b>							
Q2 State/Tribe:	Year:	Reporting Period:		#N/A	#N/A	Work Plan Accomplishments	
Enforcement Accomplishments This Reporting Year		WPS Tier I		WPS Tier II		Inspections at Facilities Claiming Family	Violations During WPS Inspections # of Violations
		Use	For Cause	Use	For Cause		
Total Inspections Conducted							1 Pesticide Safety Training
Samples Collected	Physical						2 Central Posting
	Documentary						3 Notice of Application
Civil Complaints Issued							4 Entry Restrictions
Criminal Actions Referred							5 Personal Protective Equipment
Administrative Hearings Conducted							6 Mix/Loading, Application Equip & Applications
License/Certificate Suspension							7 Decontamination
License/Certificate Revocation							8 Emergency Assistance
License/Certificate Conditioning or Modification							9 Information Exchange
Number of Warnings Issued							10 Retaliation
Stop-Sale, Seizure, Quarantine or Embargo							
Cases Forwarded to EPA for Action							
Other Enforcement Actions							
Number of Cases Assessed Fines							

Enter data in the quarterly forms only

Ready Start Narrative Budget Work Plan Outcomes 5700 WPS 5700 WPS 5700 CC ES Perf Meas Status Prog Area Sig Act Type Rec 90%



Screen shot of 5700 CC summary form with Q1-4 collapsed:

Data Entry

Data is only entered in the quarterly forms, and is then automatically summarized in the main form. Do not use the summary form for data entry. There is one exception. The grantee will project inspections and samples in the two rows outlined in red in the 5700 Main form. This is the only data entry that will happen on any 5700 summary form.

State/Tribe: ADEC		FFY 17		Reporting Period: 10/1/2016 9/30/2017		Work Plan Accomplishments							
Enforcement Projections & Accomplishments		Agricultural		Nonagricultural		EUP	PEI	Market-place	Imports	Exports	Certified Applicator Records	Restricted Use Pesticide Dealers	TOTAL
		Use	For Cause	Use	For Cause								
<b>Projected:</b> (Hrs)		0	0	0	0	0	0	0	0	0	0	0	0
Inspections													0
Samples													0
<b>Accomplished:</b>		0	0	0	0	0	0	0	0	0	0	0	0

**Example of what a 5700 Main Projections Form might look like as part of the work plan:**

United States Environmental Protection Agency Washington, DC 20460														Back
Pesticides Enforcement Cooperative Agreement Projections & Accomplishment Summary Report														
State/Tribe: VDACS		FFY 16		Reporting Period: 10/1/2015 9/30/2016		Work Plan Accomplishments								
Enforcement Projections & Accomplishments		Agricultural		Nonagricultural		EUP	PEI	Market-place	Imports	Exports	Certified Applicator Records	Restricted Use Pesticide Dealers	TOTAL	
		Use	For Cause	Use	For Cause									
<b>Projected:</b>		(Hrs) 400	400	300	400	300	300	100	200	200	100	100	2800	(FTE) 1.35
Inspections		20	20	20	20	20	20	20	20	20	20	20	220	
Samples		5	5	5	5	5	5	5	5	5	5	5	55	
<b>Accomplished:</b>		0	0	0	0	0	0	0	0	0	0	0	0	
Inspections ( )		0	0	0	0	0	0	0	0	0	0	0	0	0
Federal Facilities		0	0	0	0	0	0	0	0	0	0	0	0	0
Samples = 0		Physical		Documentary		0	0	0	0	0	0	0	0	0
<b>(Accomplished) - (Projected)</b>		-400	-400	-300	-400	-300	-300	-100	-200	-200	-100	-100	-2800	
Inspections		(20)	(20)	(20)	(20)	(20)	(20)	(20)	(20)	(20)	(20)	(20)	(220)	
Samples		(5)	(5)	(5)	(5)	(5)	(5)	(5)	(5)	(5)	(5)	(5)	(55)	
<b>Pesticide Enforcement Actions Taken</b>														
Civil Complaints Issued		0	0	0	0	0	0	0	0	0	0	0	0	0
Criminal Actions Referred		0	0	0	0	0	0	0	0	0	0	0	0	0
Administrative Hearings Conducted		0	0	0	0	0	0	0	0	0	0	0	0	0
License/Certificate Suspension		0	0	0	0	0	0	0	0	0	0	0	0	0
License/Certificate Revocation		0	0	0	0	0	0	0	0	0	0	0	0	0
License/Certificate Conditioning or Modification		0	0	0	0	0	0	0	0	0	0	0	0	0
Number of Warnings Issued		0	0	0	0	0	0	0	0	0	0	0	0	0
Stop-Sale, Seizure, Quarantine or Embargo		0	0	0	0	0	0	0	0	0	0	0	0	0
Cases Forwarded to EPA for Action		0	0	0	0	0	0	0	0	0	0	0	0	0
Other Enforcement Actions		0	0	0	0	0	0	0	0	0	0	0	0	0
Number of Cases Assessed Fines		0	0	0	0	0	0	0	0	0	0	0	0	0
Total Number of Actions		0	0	0	0	0	0	0	0	0	0	0	0	0
% of Inspections Resulting in Actions														

The two rows immediately above the enforcement action rows will tabulate the difference between projected inspections and samples, and accomplished projection and samples. If the accomplished number is higher than projected, the difference shows up in black font. If the accomplished number is lower than projected, the difference shows up in red font. See example below:

United States Environmental Protection Agency Washington, DC 20460														Back
Pesticides Enforcement Cooperative Agreement Projections & Accomplishment Summary Report														
State/Tribe: VDACS		FFY 16		Reporting Period: 10/1/2015 9/30/2016		Work Plan Accomplishments								
Enforcement Projections & Accomplishments		Agricultural		Nonagricultural		EUP	PEI	Market-place	Imports	Exports	Certified Applicator Records	Restricted Use Pesticide Dealers	TOTAL	
		Use	For Cause	Use	For Cause									
<b>Projected:</b>		(Hrs) 400	400	300	400	300	300	100	200	200	100	100	2800	(FTE) 1.35
Inspections		20	20	20	20	20	20	20	20	20	20	20	220	
Samples		5	5	5	5	5	5	5	5	5	5	5	55	
<b>Accomplished:</b>		700	500	525	900	200	100	125	0	0	250	175	3475	1.67
Inspections ( )		35	25	35	45	10	5	25	0	0	50	35	265	
Federal Facilities		0	0	0	0	0	0	0	0	0	0	0	0	0
Samples = 45		Physical		Documentary		5	5	5	0	0	5	5	45	
<b>(Accomplished) - (Projected)</b>		300	100	225	500	-100	-200	25	-200	-200	150	75	1675	0.32
Inspections		15	5	15	25	(10)	(15)	5	(20)	(20)	30	15	45	
Samples		0	0	0	0	0	0	0	(5)	(5)	0	0	(10)	
<b>Pesticide Enforcement Actions Taken</b>														

Grantees should report inspection and enforcement accomplishment numbers following an agreed upon schedule between the grantee and the region, but at a minimum, reporting is required annually.

- Quarterly accomplishments are entered into each of the four quarterly forms appended at the bottom left of each main page.
- Midyear accomplishments are reported in each of the second quarter (Q2) 5700 forms.
- Annual accomplishments are reported in each of the fourth quarter (Q4) 5700 forms.

## XII. Using the Performance Measures Form

Reporting on the new enforcement performance measures is mandatory beginning in FY17, using the Performance Measures tab. There are four measures that auto-populate numbers from either the 5700 Main or the 5700 WPS form. The four measures that auto-populate are indicated by a red triangle in the upper right hand corner of the data entry box. If you hover over the red triangle a pop up box will appear and tells you where the data is pulled from within the Template. For all other measures, you will need to manually enter your data in the white boxes provided. For additional information, see the [Frequently Asked Questions](#) document.

**STRATEGIC GOAL 1: PROTECTION OF HUMAN HEALTH – OCCUPATIONAL USERS<sup>1</sup>**

**MEASURE 1A: COMPLIANCE WITH WPS REGULATIONS**

**Measure Description:** The intent of this measure is to determine how well agricultural employers/operators (which includes workers and handlers as appropriate) follow the WPS regulations. The type of violation is not required to be reported.

**Reporting Criteria:**

Number of WPS inspections <sup>2</sup> and investigations <sup>3</sup> (Tier 1 and 2) conducted during the reporting period	0	
Number of WPS violations identified <sup>4</sup> during the reporting period	0	EPM1A2
Number of enforcement actions <sup>5</sup> taken for WPS violations (during the reporting period)	0	EPM1A3

**Definitions:**

**Reporting Criteria:**

Number of inspected applicators <sup>6</sup> not meeting requirements	<input type="text"/>	EPM1B1
Number of uncertified applicators <sup>8</sup> found during those inspections that should have been certified	<input type="text"/>	EPM1B2
Number of uncertified applicators <sup>8</sup> obtaining certification, discontinued making applications where certification was required, or were brought into compliance <sup>9</sup> (during the reporting period <sup>10</sup> )	<input type="text"/>	EPM1B3

**Definitions:**

This blue box pulls the total number of Use and For Cause Tier I and Tier II Inspections from the 5700 WPS tab.

These auto-populate.

You manually enter data in the white boxes.

### **XIII. Using the Template for Multi-Year Agreements**

The template functions as a Work Plan and Reports for a one year period. For multi-year agreements you will need to prepare and save the entire workbook for each fiscal year in the project period. At the beginning of a multi-year agreement, the grantee may prepare the work plan for the first year, save that file as a Work Plan by indicating it as a Work Plan in box 7 on the START page and saving it according to the naming convention below. The grantee can then use that file as the starting point for preparing the subsequent work plans for the remaining years. For example, a grantee with a 3 year agreement will submit 3 Work Plans, one for each year of the agreement, to the regional office.

Once the grantee begins reporting accomplishments on work plan activities for the first year project period, that file is then saved as a report by indicating it as a report in box 7 on the START page and saving it according to the naming convention below. Reports are submitted to the regional office according to an agreed upon schedule between the grantee and the region. This pattern repeats itself for all years in the project period.

### **XIV. File Naming Convention**

Use of a consistent naming convention will assist with national data compilation. Please follow the suggested file naming conventions below.

#### **For Work Plans:**

##### *For States*

Fiscal year-Two letter state abbreviation-workplan-draft/final-current date

Example: FY13-AL-workplan-draft-020614

##### *For Tribes*

Fiscal year-Tribal name abbreviation-workplan-draft/final-current date

Example: FY13-ACIC-workplan-final-030414

#### **For Reports:**

##### *For States*

Fiscal year-Two letter state abbreviation-report-midyear/yearend-current date

Example: FY13-VT-report-yearend-110514

##### *For Tribes*

Fiscal year-Tribal name abbreviation-report-midyear/yearend-current date

Example: FY13-CRST-report-midyear-043014

##### *For Regional Year End Reports:*

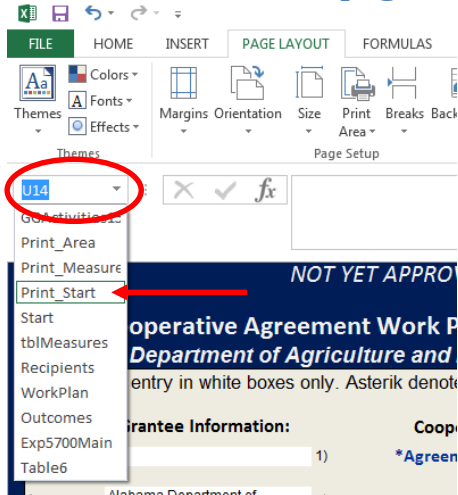
Fiscal year-Grantee Abbreviation-EPAreport-yearend-current date

Example: FY13-NYSDEC-EPAreport-yearend-021614

## XV. Printing

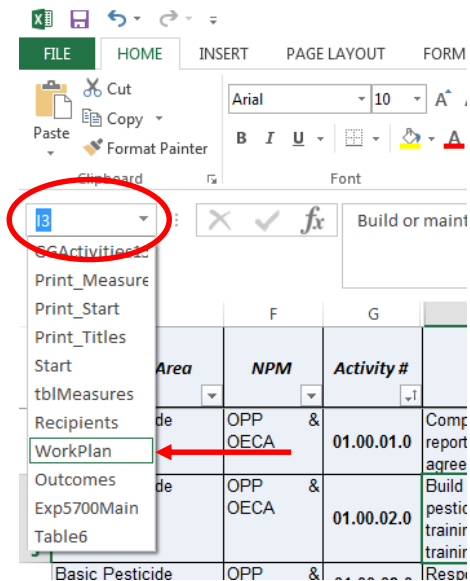
Should the need arise to print the individual worksheets, here are some tips:

### A. For the START page:



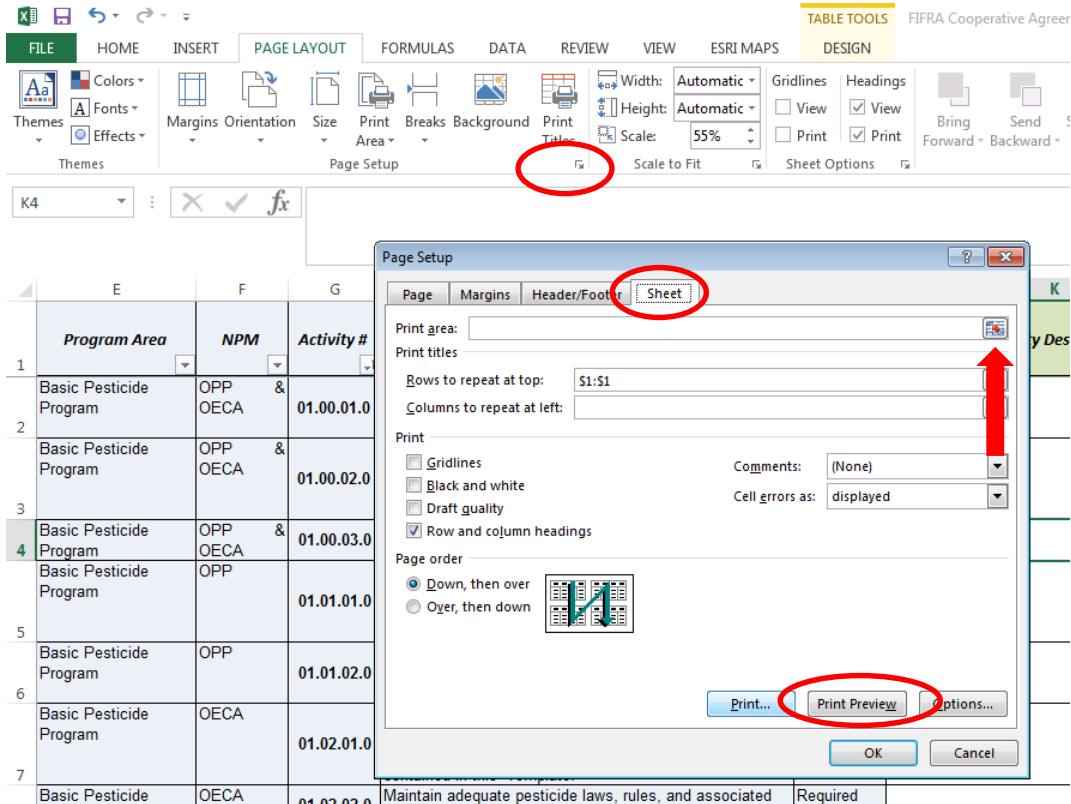
The easiest method for printing the START page is to click on the drop down arrow in the top left hand corner of the START page, right under the menu ribbon. Then click on “Print\_Start”, go to File>Print, and under “Settings” choose “Print Selection” and “Print”. This will print the START page in its entirety on one 8½” x 11” landscape page.

### B. For the Work Plan worksheet:



The Work Plan worksheets within the template have been formatted to fit on an 8½” x 11” landscape sheet of paper. Columns E through O will print on one page, with columns P through R on separate pages. The easiest method for printing the Work Plan page is to click on the drop down arrow in the top left hand corner of the Work Plan page, right under the menu ribbon. Then click on “WorkPlan”, go to File>Print. This will give you a preview of what will print. You can scroll through the pages and make any adjustments prior to printing. The Work Plan worksheet is formatted so that the column headings will print at the top of each printed page.

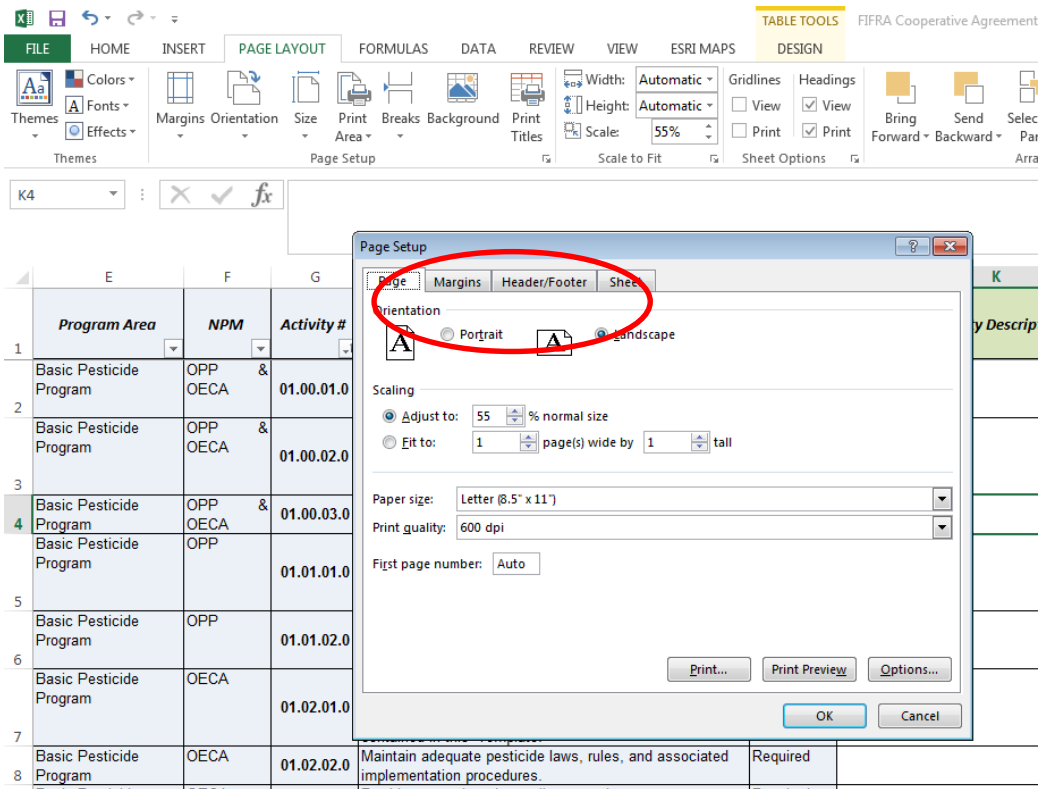
If you want to make changes to which columns will print, you will need to change that using the “Page Setup” option in the menu bar in the Work Plan worksheet.



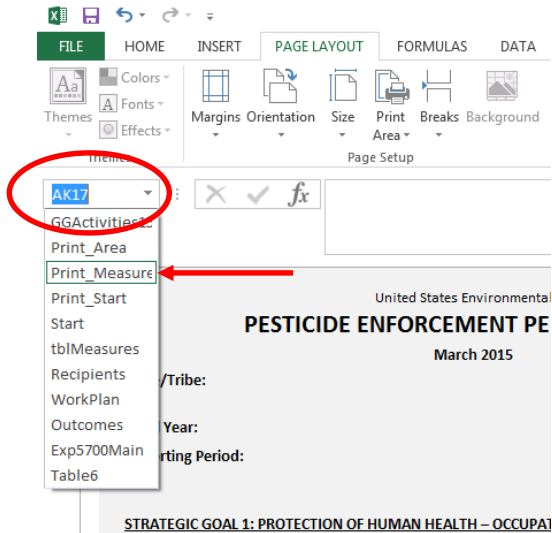
Click on the down arrow under “Page Setup”. Click on “Sheet” and then “Print Area”. Highlight the columns you want to print. You can click on “Print Preview” from this box. Make sure you select “Print Active Sheet” under “Settings” for your selection to print.

You can adjust the Page, Margins, Header/Footer in this box as well.






### C. For the Performance Measures worksheet:



The easiest method for printing the Performance Measures page is to click on the drop down arrow in the top left hand corner of the Perf Meas page, right under the menu ribbon. Then click on “Print Measures”, go to File>Print and “Print”. This will print the START page in its entirety on 8½” x 11” portait oriented pages.

For additional printing resources in Excel, look for the  icon in the upper right corner of the screen. You can type Print in the prompt box after clicking on the question mark and several informative links will provide detailed printing information.

## XVI. Creating Your Own Reports

Helpful Information:

It is recommended that you print a Report (using the pivot table function) with the information needed. Then, from the report, go to View/Workbook Views and select a view to configure your report. The options that are provided are “page layout” and “page break preview”.

A report will be generated once data is filled into the Work Plan.

To create an individualized report, see: <http://office.microsoft.com/en-us/excel-help/create-or-delete-a-pivottable-or-pivotchart-report-HP010342375.aspx?CTT=5&origin=HP010342752>

## **XVII. Frequently Asked Questions**

1) I have discovered an error in or issue with the template. Whom do I contact?

For technical questions about Excel, you can call/email either Allen Demorest of EPA Region 9 ([demorest.allen@epa.gov](mailto:demorest.allen@epa.gov), 415-947-4214).

For policy/process questions that impact more broadly than just a single grantee/project officer relationship, you can call/email Sandra O'Neill of OPP ([oneill.sandra@epa.gov](mailto:oneill.sandra@epa.gov), 703-347-0141).

2) Something is *really* missing from this instructions document. Whom do I contact?

See answer to question 2 above.

3) I am confused by some of the language/abbreviations/acronyms used in the template. Where can I go for more information?

Check out the [Glossary](#) in this document, and if we missed something, let us know so we can add it.

4) What do I do with the template once it is completed? Is it automatically submitted to EPA? Who do I submit it to?

You should follow whatever established cooperative agreement application and reporting procedures you already have in place. If you are unsure of a process, contact your project officer/technical contact.

5) How do I submit amendments to my Work Plan? What if my Work Plan changes after it is approved? Do I make revisions or does the Region?

You should follow whatever established procedures you already have in place for amending your Work Plan. Discuss the process with your project officer/technical contact. Any amendments to the grantee's Work Plan must be made by grantees and then approved by the Region. Make sure you note any amendments in the Work Plan/ Report Status field (box 7) located on the right hand side of the top panel on the Start worksheet.

6) Can I attach other documents to the template? How and where do I attach the documents? Is there a specific format or program attached documents have to be in?

You can paste the content of your narrative document into the “Narrative” worksheet using two different methods. 1) To cut and paste narrative: Open the Narrative worksheet and double click on the box labeled “Microsoft Word Document” to open up Word, and then paste the narrative in that Word document, and close the document when you are done. 2) You can embed a document into the Narrative worksheet. Go to Insert> Text>Object>. You can create a new document and make changes there OR you can select an existing file (Word, PPT, PDF, etc.) and embed that into the Narrative worksheet.

For those forms and documents not included within the template, you should submit them with the template following your established procedures.

7) Will I need to submit the template with the other grant forms (SF424, SF 424A,B, SF LLL, etc.) for a new agreement?

Yes, you will need to submit the template as part of your application package. You should follow whatever established procedures you already have in place. The template incorporates your Work Plan and progress reports and does not replace the need for required grant forms.

8) Where do I obtain the 424 and other grant forms?

See the Office of Grants and Debarment website for grant forms:  
<http://www.epa.gov/ogd/forms/forms.htm>.

9) Do I have to separately send in the 5700 and other reporting forms?

No, all the required 5700 forms are included in the template and do not need to be submitted separately.

10) Which 5700-33H worksheet should the grantees use to report the mid-year and year-end numbers?

Grantees should report mid-year numbers using the Q2 5700 worksheet, and report year-end numbers using the Q4 5700 worksheet. If a grantee reports inspection and enforcement action numbers in all four quarters, they will use all four quarterly 5700 worksheets, Q1-Q4.


11) What if I completed additional activities not listed in the template but I want to include them in my EOY?

If these additional activities used discretionary funds, they can be included in the Supplemental/Special Project activity row at the end of the Work Plan worksheet. If these additional activities fit within one of the program areas, use the “Add a Row” function under the


appropriate program area in the Work Plan worksheet to describe the activity. If the activity fits neither of these parameters, describe the work in the Narrative worksheet.

12) I cannot get Excel to do what I need it to do. Help?

You can refer to this website for help: [Microsoft Excel Help](#)

Another resource is the Help function in Excel. Look for the  icon in the upper right corner of the screen. You can type questions in the prompt box after clicking on the question mark.

13) The template print is too small/large to be useable. How to I make the template larger?

Select the Zoom button in the bottom right of your screen. It should look something like the following; either click the percentage or use the scrolling bar to enlarge or shrink your screen's zoom level. 

14) I am trying to print my Work Plan as a report. How do I do that?

From the report (either standard or created), go to View/Workbook Views and select a view to configure your page as you like.

## **XVIII. Abbreviations and Glossary**

**CA** – Cooperative Agreement

**Consolidated** – A cooperative agreement having two or more different programs in one agreement (e.g. enforcement, C&T, program implementation)

**CPARD** – Certification Plan and Reporting Database

**FIFRA** – Federal Insecticide Fungicide and Rodenticide Act

**ICR** - Information Collection Request

**NPM** – National Program Manager (For example, OPP or OECA)

**OECA** – Office of Enforcement and Compliance Assurance

**OMB** – Office of Management and Budget

**OPP** – Office of Pesticide Programs

**PO/TC** – Project Officer/Technical Contact

**PPG** – Performance Partnership Grant

**POINTS** – Pesticides of Interest Tracking System