United States Environmental Protection Agency

American Indian Environmental Office

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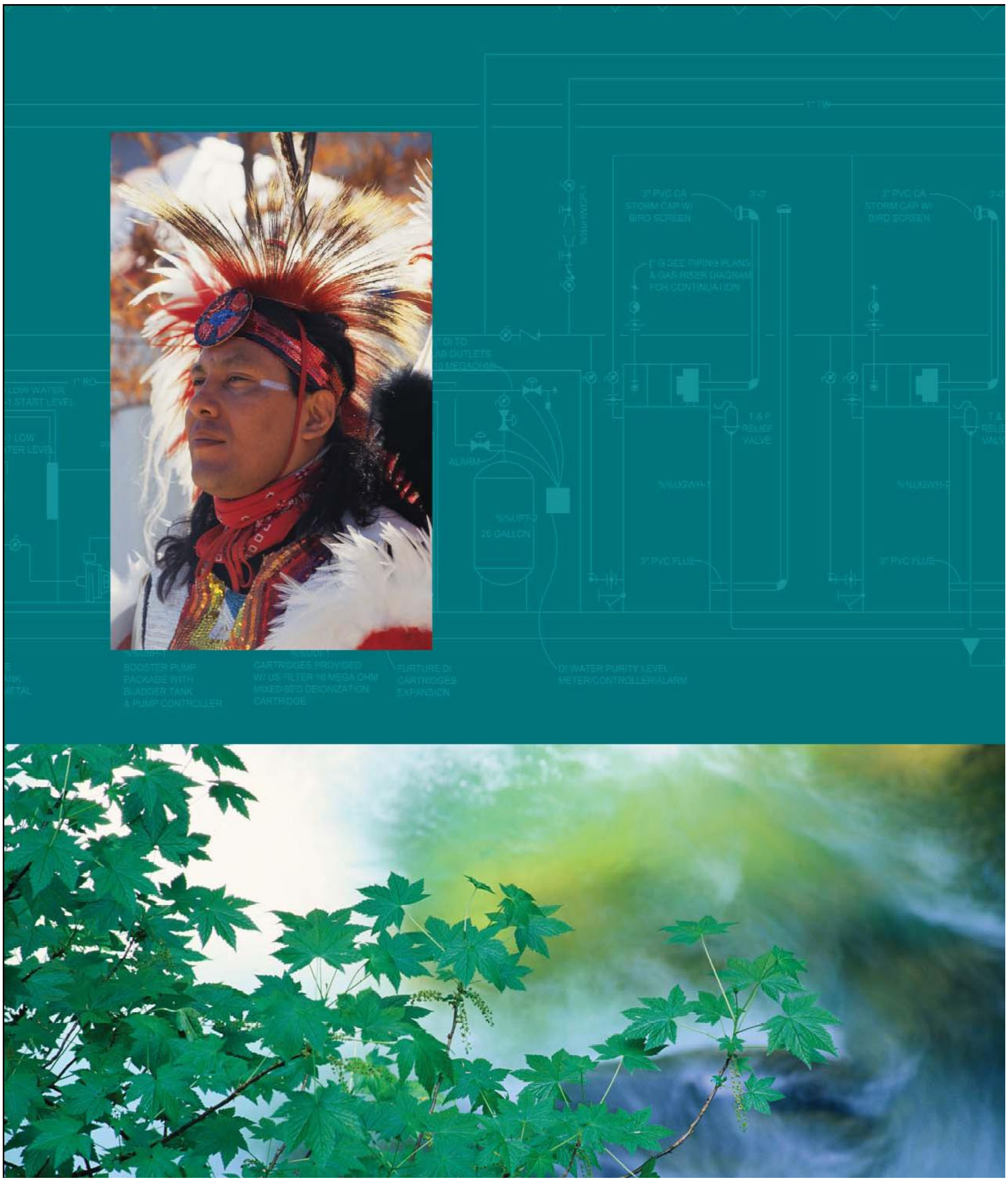
Washington, D.C. 20460



General Assistance Program (GAP) Online

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 **Login**.

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** link.
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 **Login**.

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.

1. Click the **User Profile** hyperlink on the left menu bar.
2. Enter the Project Officer's e-mail and your e-mail address.
3. Click **Save**.

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** link.
3. Enter your username into the **Username** textbox.
4. Click **Change Password**.
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 **Change** 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. Select **Logout** on the left side of the **GAP Report Home** 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** link on the left side of the page.
2. Under the **GAP Online 2.2** section, click **Create New Work Plan**.
3. The tribe name and Region identification information 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, select **Copy Data from Previous Work Plans** 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 **Save** Save to save your record.
7. Once the new work plan has been created, you can change the author listed in the **Author** textbox to a specific user name.
8. Enter an optional description of the work plan into the **Description** field.
9. Click **Save** Save to save your changes to the work plan.
10. Once the work plan has been established, you can add background information by clicking **Tribal Background** located at the top of the **Edit Work Plan** screen.
11. On the **Tribal Background** screen, click **View Detail** (for the **Narrative Background** section) to add a narrative background document and view uploaded documents.
12. To upload a narrative background document:
    a. Click **Browse**.
    b. On the **File Upload** screen, locate the narrative document you wish to upload.
    c. Once the file is located, click **Open**.

d. To add the selected file to the list of uploaded documents, click **Upload**.

13. On the **Tribal Background** screen, click **View Detail** (for the **Budget** section) to add a budget spreadsheet and view uploaded spreadsheets.

To upload a budget spreadsheet:

a. Click **Browse**.

b. On the **File Upload** screen, locate the budget spreadsheet you wish to upload.

c. Once the spreadsheet is located, click **Open**.

d. To add the selected file to the list of uploaded documents, click **Upload**.

14. The **Position Information** button 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 (see Section 3.4).

To enter a new position:

a. Click **View Detail** for the **Position Information** section.

b. Click **Add New Position**.

c. Under the **Create New Position** section, select a position category from the **Category** drop-down menu.

d. Enter a description in the **Category Description** text area.

e. Select a position title from the **Position Title** drop-down menu or enter a new position title.

f. Add the percentage paid by GAP for the new position.

g. Click **Save** to submit the new position.

3.2 Create a Work Plan Component

Once you have created a new work plan and entered Tribal Background information, you may add the work plan component(s), as necessary.

1. Once you have saved the work plan, the **Edit Work Plan** screen appears.

2. Click **View Detail** for the **Work Plan Component** section. Click **Create New Component**. The **Edit Work Plan Component** entry screen appears.

3. Scroll down the **Edit Work Plan Component** entry screen to enter component information. All required information will have an asterisk (*) next to the field name.
    a. Enter the appropriate title manually or select a pre-defined title from the drop-down list of available titles. Note: the title of the work plan component cannot be greater than 200 characters. *This is a required field for entry.*
    b. Enter a description of the work component associated with the work plan. The description gives an overview of what environmental activities the component will address. *This is a required field for entry.*
    c. Enter a description of the work component associated with the work plan. The description gives an overview of what environmental activities the component will address. *This is a required field for entry.*
    d. The **Primary Capacity Area Developed** drop-down list allows you to select a Primary Capacity Area that identifies the kind of activit*i*es that will be undertaken to fulfill the component.
    e. Enter a description into the **Long-Term Outcome** text area. *This is a required field for entry*
    f. Enter descriptions into the **Measure(s)** text field.
    g. Enter descriptions into the **Intermediate Outcomes** text fields related to this work plan component. The Intermediate Outcomes are in bulleted format. If you want to include more than two Intermediate Outcomes, click **Add More Intermediate Outcomes**. *This is a required field for entry.*
    h. Enter the appropriate amount into the **Estimated Component Cost** text field. *This is a required field for entry.*
    i. Enter the **Estimated Work Year (FTE)** associated with this Work Component. 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*
4. Click **Save Component** to save the record.
5. If there are required fields that do not have information entered in them, an error message appears. Click **OK** on the error message and enter the required information to advance to the next screen.

3.3 Add a Work Plan Component ID

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. Once you refresh the Work Plan Components page, you will see your components arranged to your preferred order.

3.4 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.

1. Once you have saved your component, you will be returned to the **Edit Work Plan Component** screen. Under the **Work Plan Commitment** section, click **New Commitment** at the bottom of the page to start entering commitments.
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 list. *This is a required field for entry.*
    c. Check off the **Positions** required to complete the commitment. The Position Titles found in this box are those you entered when you first identified the skills required for the work plan under **Tribal Background** (Section 3.1, Step 10). If you do not have all the positions listed that are needed for a commitment, go back to the Tribal Background screen to enter more positions under the **Position Information** section.
    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 **Save** to save the record.
4. A confirmation pop-up window appears. Click **OK** to submit the work plan commitment data.

3.5 Add a Work Plan Commitment ID

Work plan commitments can also 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. Once you refresh the **Work Plan Commitments** page, you will see your commitments rearranged to your preferred order.

3.6 Add Attachments and Background Information

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

To attach a document:

1. From the **Edit Work Plan** screen, click **View Detail** in the **Attachment** section.
2. Click **Browse** to select the document that you wish to attach to the work component.
3. Click **Upload** to upload the document associated with the work component.
4. If you find a document has been uploaded by mistake, or if you have another document that is more recent, you can delete the document by clicking on its corresponding **Delete** icon to remove it from your work plan.

3.7 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 **Send Work Plan to Project Office**.
2. A new pop-up browser window appears, displaying the **Sending Work Plan to Regional Project Officer** page. Pre-populated field of information specific to your tribe will appear in an editable text area.

3. Once you have entered the appropriate version number and comments, click **Confirm Sending Work Plan to Project Office**. 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** link on the left side of the page.
2. Under the **GAP Online 2.2** section, select **Edit Work Plan**.
3. Identify the work plan with a status of **Accepted**, **Review**, or **Submitted** from the list.
4. To view the work plan, select the corresponding **View Work Plan** icon under the **Action** column.
5. Once you have selected the work plan under the **Action** column, you can 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** link on the left side of the page.
2. Select **Edit Work Plan**.
3. Identify the work plan with a status of **Created** from the list of work plans.
4. To update the work plan, select the corresponding **Update Work Plan** icon under the **Action** column.
5. After the appropriate changes have been made, click **Send Work Plan to Project Office** to send 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 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 change history:

1. Select the **View History** button to view details of the changes made for the selected work plan progress report.
2. Select **View as PDF** or **View as Open Office** to view the work plan in Portable Document Format (PDF) format or in Rich Text Format. To view and edit documents using the Open Office format, you will need to download a copy of Open Office from their web site (http://www.openoffice.org/) and install it on your local machine. Please note that the download for Open Office may take a considerable amount of time.

4.4 Print Change History

A tribal user may print a work plan's change history. The **Change History** provides a useful reference for the tribal user to review the changes associated with a work plan. In particular, the change history is important if a work plan has been sent back and forth due to edits or modification, between the tribe and the EPA Regional Project Officer.

To print the change history:

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