Information Technology Enterprise Development (ITED) Registration REV00025
FIFRA Grant Database (FGD) User Guide
Environmental Protection Agency Office of Pesticide Programs

Contract: GS00Q09BGD0022
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Project Title: FIFRA Grant Database
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1 Introduction

This document represents the master user guide for Environmental Protection Agency's FIFRA Grant Database (FGD) application process located within the Central Data Exchange (CDX). This user guide addresses the following topics:

- System Requirements
- Managing Users Roles
- Grantee Functionality
- Registration Maintenance Account Manager (RMAM) Functionality
- Regional Product Officer (RPO) Functionality
- Office of Chemical Safety and Pollution Prevention (OCSPP)/Office of Enforcement and Compliance Assurance (OECA) Reviewer Functionality

1.1 CDX Help

Users should contact the CDX Helpdesk with any questions or concerns about accessing FIFRA FGD through CDX. The Helpdesk can be reached via the following channels:

- By Telephone: Person-to-person telephone support is available from 8:00 am to 6:00 pm (EST/EDT). Call our toll-free line at (888) 890-1995, (970) 494-5500 for International callers.
- By E-mail: Send e-mail to Technical Support at helpdesk@epacdx.net.

1.2 FGD Help

'Grantees' should contact their EPA regional office with FGD technical questions not covered in this guide, questions on guidance activities and the information that should be reported in FGD and review the most recent FIFRA Cooperative Agreement Guidance: https://www.epa.gov/compliance/state-oversight-resources-and-guidance-documents#fifra.

EPA regional staff should refer additional questions or concerns to the appropriate OCSPP and OECA staff contacts assigned to FGD.

2 System Requirements

To use CDX and the FGD application, the following are required:

- An e-mail account
- A supported web browser with JavaScript enabled and pop-up blockers disabled
- Internet access

2.1 Supported Browsers

For optimal performance, it is recommended that users use Google Chrome to access the FGD application. However, the following browsers are supported and can be downloaded from the provided links:

- Google Chrome 44 or above: https://www.google.com/chrome
- Mozilla Firefox 3.5 or above: https://www.mozilla.com/en-US/firefox/all-older.html
- Safari 4 or above: https://support.apple.com/kb/DL1569?viewlocale=en_US&locale=en_US

3 Managing FGD User Roles

This section describes:

- Available FGD user roles
- FGD user role structure
- Creating a CDX account and requesting access to FGD as a 'Grantee'
- Creating CDX accounts and requesting access to FGD as a 'RPO' and 'OCSPP/OECA Reviewer'
- Reviewing and approving requests for access
- Managing RMAM access

3.1 Available FGD User Roles

The FGD application has the following user roles available:

- Grantee Region 1
- Grantee Region 2
- Grantee Region 3
- Grantee Region 4
- Grantee Region 5
- Grantee Region 6
- Grantee Region 7
- Grantee Region 8
- Grantee Region 9
- Grantee Region 10
- RPO
    - Region 1-10
- OCSPP/OECA Reviewer
- RMAM

3.1.1 Grantee Roles

The 'Grantee' Region 1-10 roles are intended for the state, territory and Tribal end users who will be utilizing the FGD application to develop and report on a 'Grant Work Plan.' The 'Grantee' Region 1-10 roles have the following characteristics:

- The 'Grantee' roles are considered 'open,' which means that any users (with or without an existing CDX account) will be able to request access to the role during FGD registration.

  NOTE: While the role is 'open' and visible to everyone, this role requires approval before access to the application is granted.
- 'Grantee' roles are broken out by region, and a **user <u>must</u> select the appropriate 'Grantee' role based on their region when signing up for an account**. The FGD application uses

these roles to determine what region the 'Grantee' belongs to. For example, a 'Grantee' user, based out of Virginia, should select the 'Grantee Region 3' role when signing up for access to FGD.

- When signing up for an account, the 'Grantee' will be required to enter an 'Organization Name' or 'Organization ID.' The FGD application utilizes the name or ID to link multiple users to the same 'Grantee' organization (so that they may view the same grant data). When signing up to join an existing account, EPA strongly recommends 'Grantee' users contact the EPA regional RMAM user to receive and register with the correct 'Organization ID.' For 'Grantees' whose organization has not previously had a FIFRA STAG grant, EPA recommends organizations use their full, unabbreviated name with no punctuation.

  NOTE: When users from the same organization are requesting access to FGD using 'Organization Name,' they **must** use the exact same organization name or organization ID. Otherwise, the system will not link them together, and they will not see the same grant details. Organization name matching is case sensitive. The below example illustrates two separate organizations:

  west Virginia Department of Environmental Protection ≠ West Virginia Department of Environmental Protection

3.1.2 Regional Project Officer Role

The 'RPO' role is intended for any EPA user at the regional level. While the role title contains 'Project Officer,' this role is intended to provide access to any EPA regional person who assists in the administration, planning, implementation, or evaluation for FIFRA cooperative agreements. The 'RPO' role has the following characteristics:

- The 'RPO' role is considered 'closed,' which means that all users (with or without an existing CDX account) will **not** be able to request access to the role during FGD registration. The 'RPO' role can only be assigned to a user by a registered RMAM.
- When signing up for the role, users should associate themselves with their specific EPA region. The FGD application uses the region association to determine which 'Grantees' and grants the user should be able to review.

3.1.3 OCSPP/OECA Reviewer Role

The 'OCSPP/OECA Reviewer' role is intended for any EPA users at the Headquarters level. The 'OCSPP/OECA Reviewer' role has the following characteristics:

- The 'OCSPP/OECA Reviewer' role is considered 'closed,' which means that all users (with or without an existing CDX account) will **not** be able to request access to the role during FGD registration. The 'OCSPP/OECA Reviewer' role can only be assigned to a user by a registered RMAM.
- The 'OCSPP/OECA Reviewer' role is not associated with any particular region, but requires a region selection.
- Unlike the 'Grantee' roles, it does not matter which organization the 'OCSPP/OECA Reviewer' belongs to. However, it is recommended that users within the same organization (e.g., OCSPP) use a single 'Organization ID' for all users to simplify long term user maintenance. The 'OCSPP/OECA Reviewer' 'Organization ID' most used is [add number].

3.1.4 Registration Maintenance Account Manager Role

'RMAM' role provides users with access to the Registration Maintenance dataflow in CDX. RMAMs can access CDX end user registration data to grant and assign access rights and roles to CDX users. The 'RMAM' role has the following characteristics:

- The 'RMAM' role is a CDX specific role. As such, EPA users should reach out to the CDX Helpdesk to gain access to the role.
- The 'RMAM' role access rights are associated with a particular CDX dataflow (FGD application) and are specific to the roles within that application.
- Each EPA region should have a minimum of one RMAM. This RMAM will be responsible for managing 'Grantee' users within their region.
- There should be (at minimum) one RMAM at the national level who can oversee user management for all roles/regions.

3.2 Grantee Role Access

This section provides information for registering as a 'Grantee' user in CDX under the FGD dataflow.

3.2.1 Creating a CDX Account

Users must have a CDX account before accessing the FGD application. To register for a CDX account, click the 'Register with CDX' button on the CDX landing (see **Exhibit 3-1**).

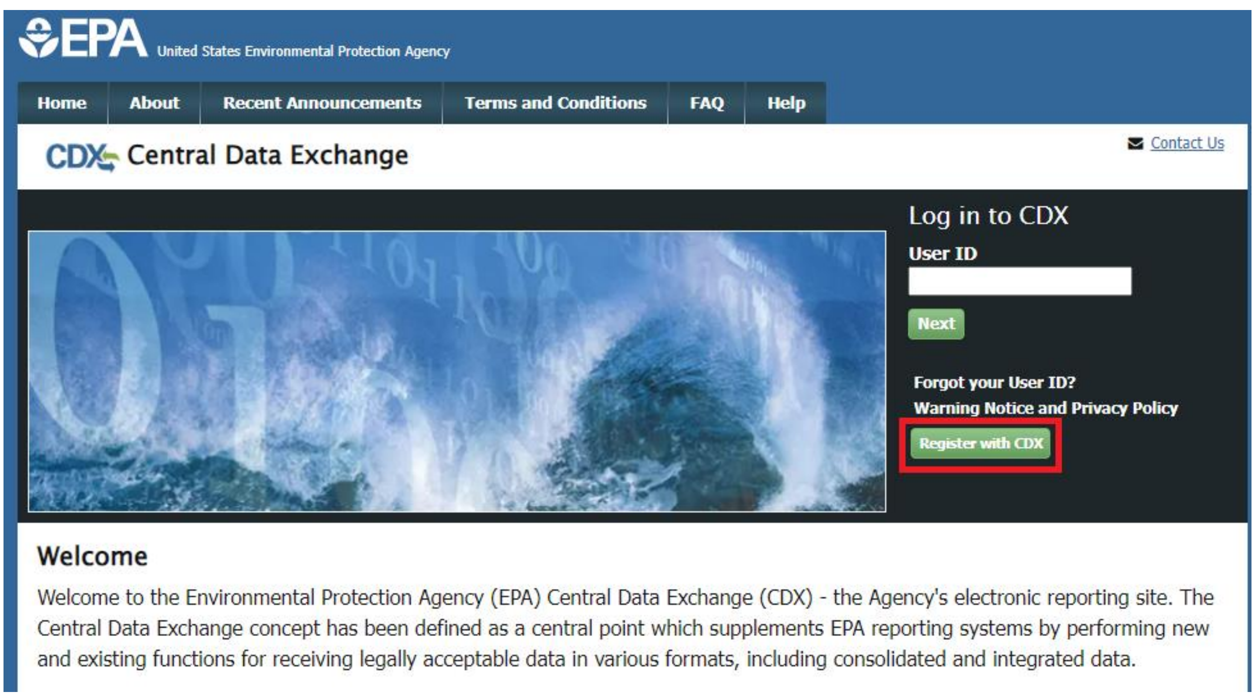


Exhibit 3-1 Register with CDX Button

Navigation: By accepting the terms and conditions (**Exhibit 3-2**), the user agrees to abide by the system requirements. The user should check the box for ‘I am this registrant. I will not share my account, and I accept the terms and conditions, above.’ sand click ‘Proceed’ to continue.

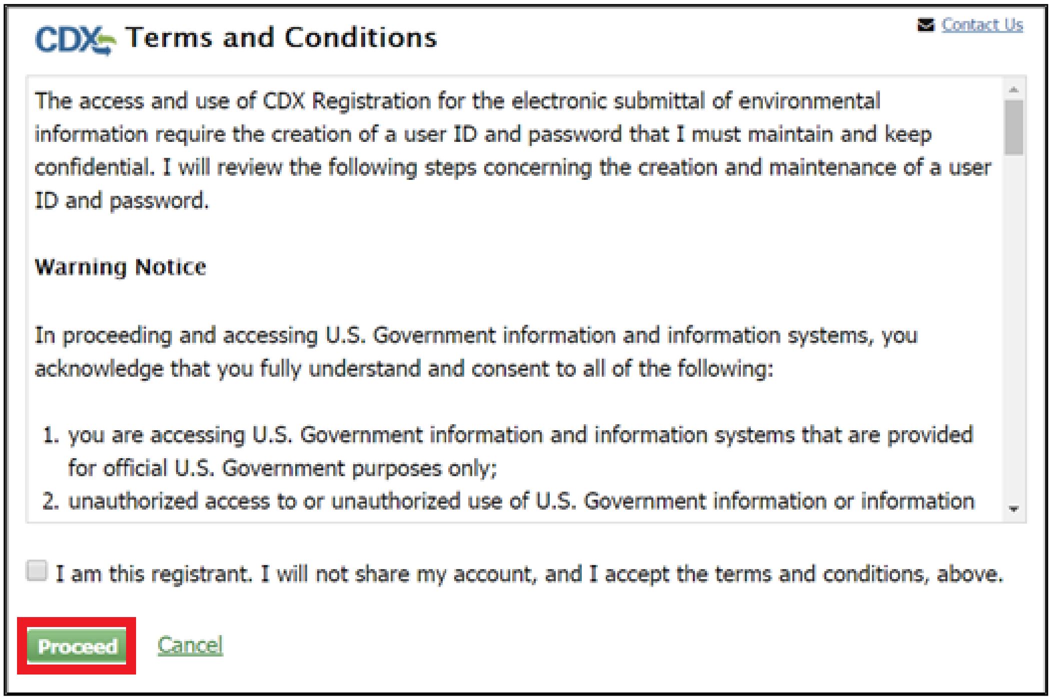


Exhibit 3-2 Terms and Conditions

Navigation: After accepting the terms and conditions, the system will prompt the user to select a program service (see **Exhibit 3-3**). Type ‘FGD’ in the ‘Active Program Services List’ search bar to filter the available selections. Select the ‘FGD Text’ box below the search bar.

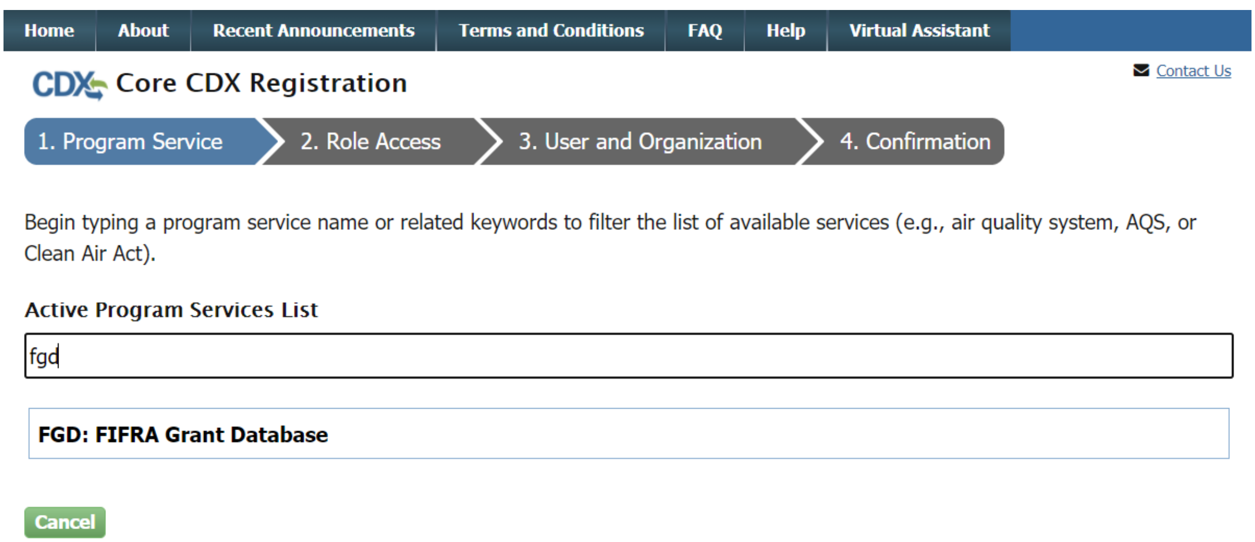


Exhibit 3-3 Program Service Selection

After selecting FGD, the user will be required to select a role from the 'Select Role' dropdown (see **Exhibit 3-4**). The available roles are as follows:

- Grantee Region 1
- Grantee Region 2
- Grantee Region 3
- Grantee Region 4
- Grantee Region 5
- Grantee Region 6
- Grantee Region 7
- Grantee Region 8
- Grantee Region 9
- Grantee Region 10

Navigation: The user should select the appropriate 'Grantee' role. The FGD application uses these roles to determine which region the 'Grantee' belongs. For example, a 'Grantee' user, based in Virginia, should select the 'Grantee for Region 3' role.

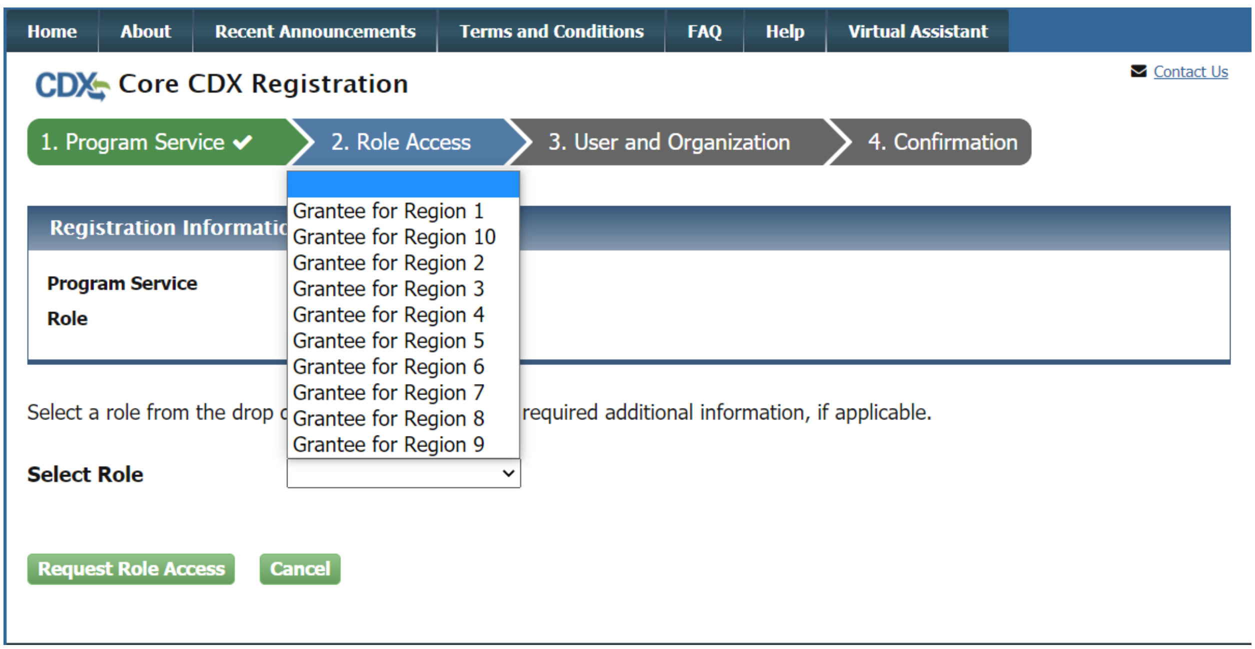


Exhibit 3-4 FGD Role Selection

Once the role has been selected, the user will be required to complete the registration by entering information into the 'User Information' screen (Exhibit 3-5Error! Reference source not found.) and 'Organization Info' screen.

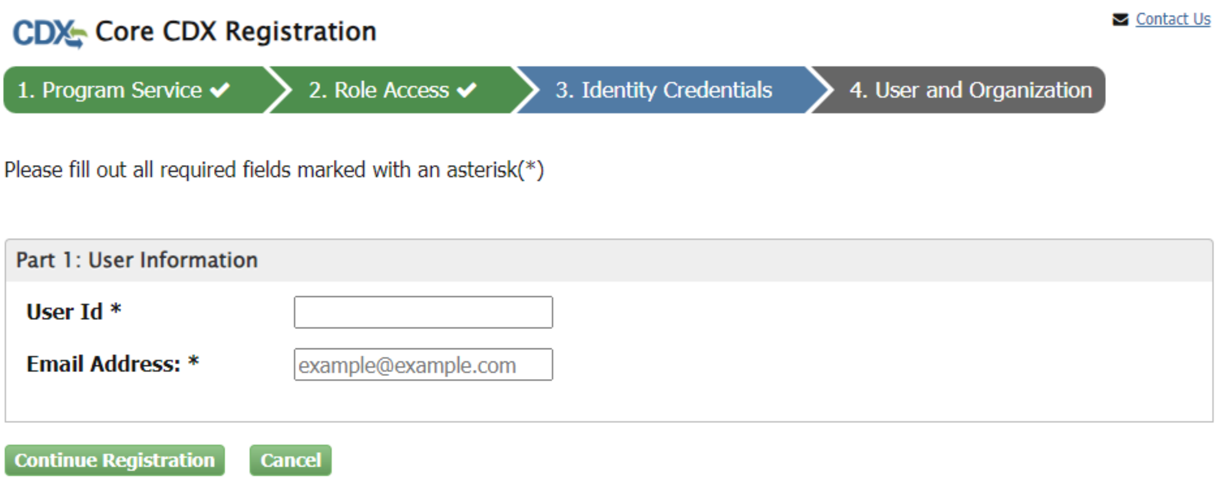


Exhibit 3-5 User ID and Email Address

Navigation: Once a user has selected a User ID and entered their email, they should click the ‘Continue Registration’ button on the bottom of the screen.

Exhibit 3-6 shows a screen capture of the screen to navigate to Login.gov. This site will be where the user creates an account or logs in if they already have their Login.gov account. Once a user lands on this screen, they should click the ‘Proceed to Login.gov’ button to continue registration.

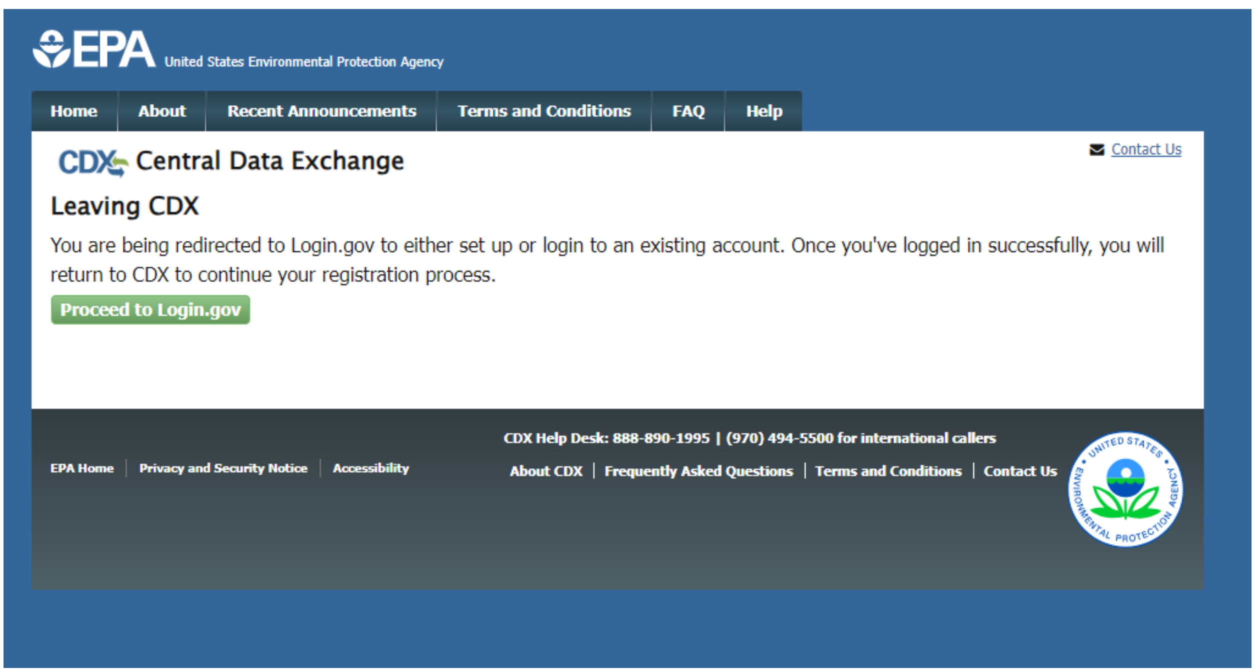


Exhibit 3-6 Proceed to Login.gov Screen

Navigation: Once a user has selected a User ID and entered their email, they should click the ‘Continue Registration’ button on the bottom of the screen.

Once the user has completed the Identity Credentials step, Login.gov will auto direct the user back to CDX Registration.

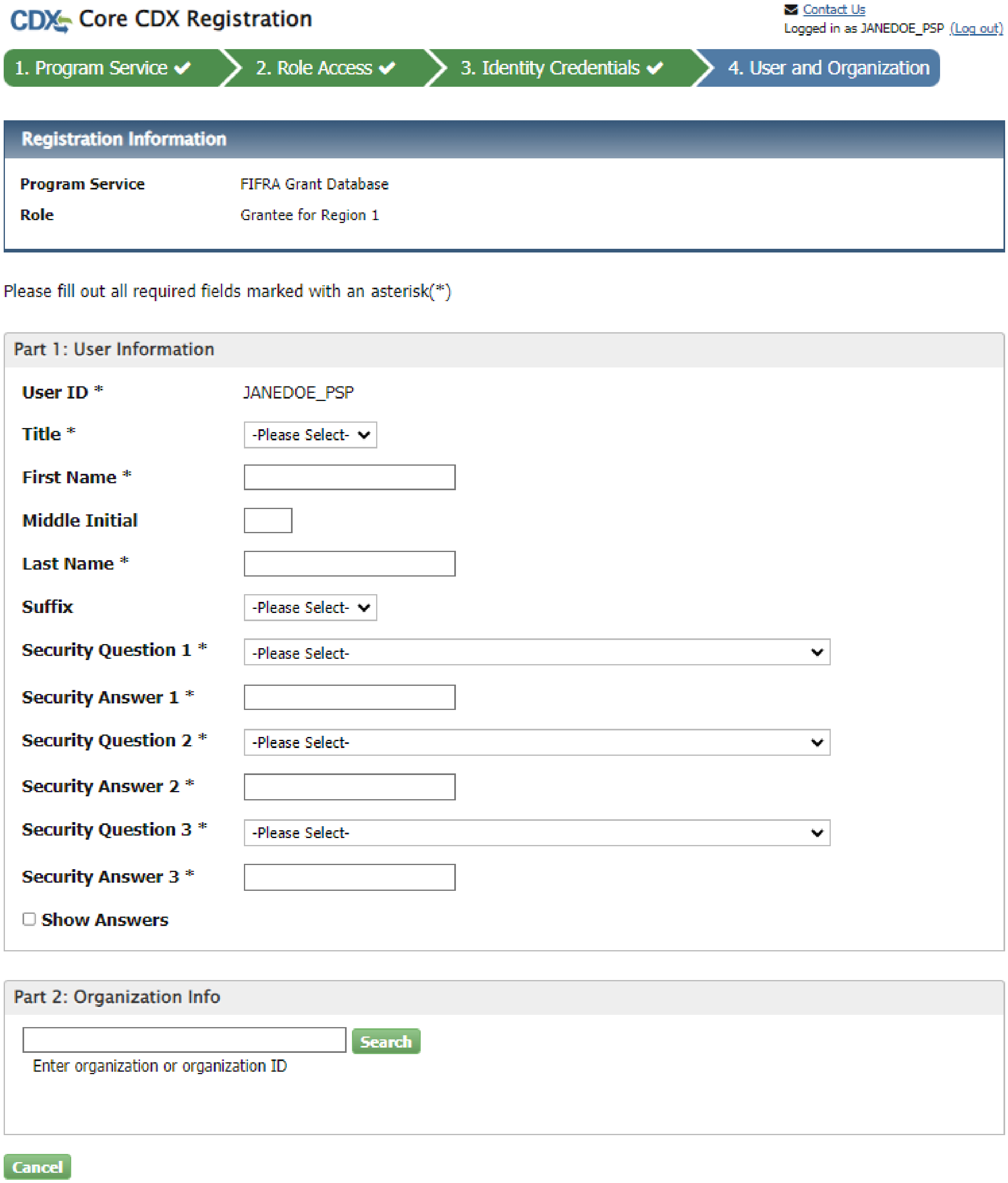
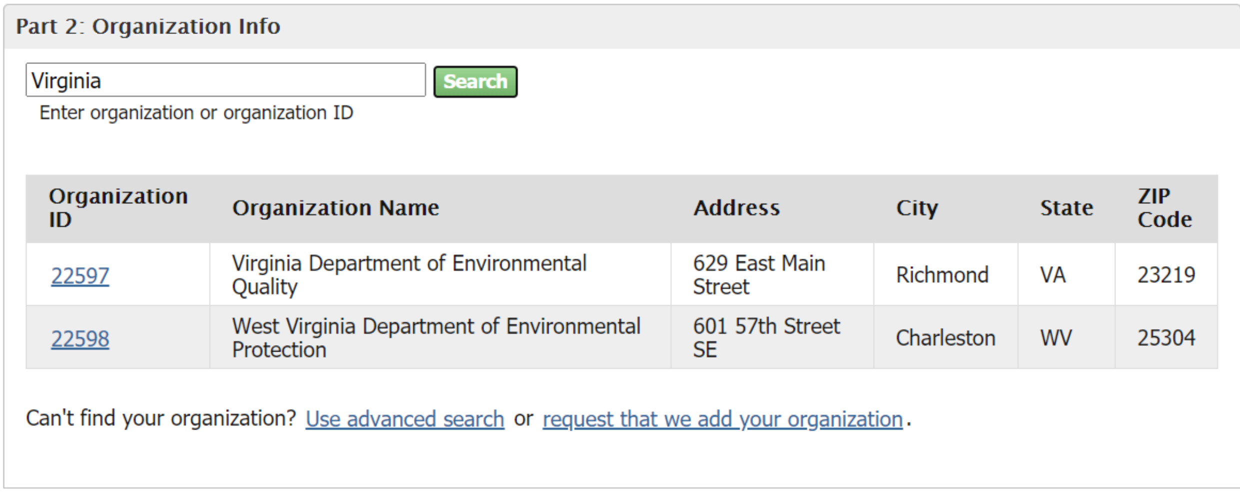


Exhibit 3-7 User Information and Organization Information Screen


Part 2: Organization Info

Virginia Search

Enter organization or organization ID

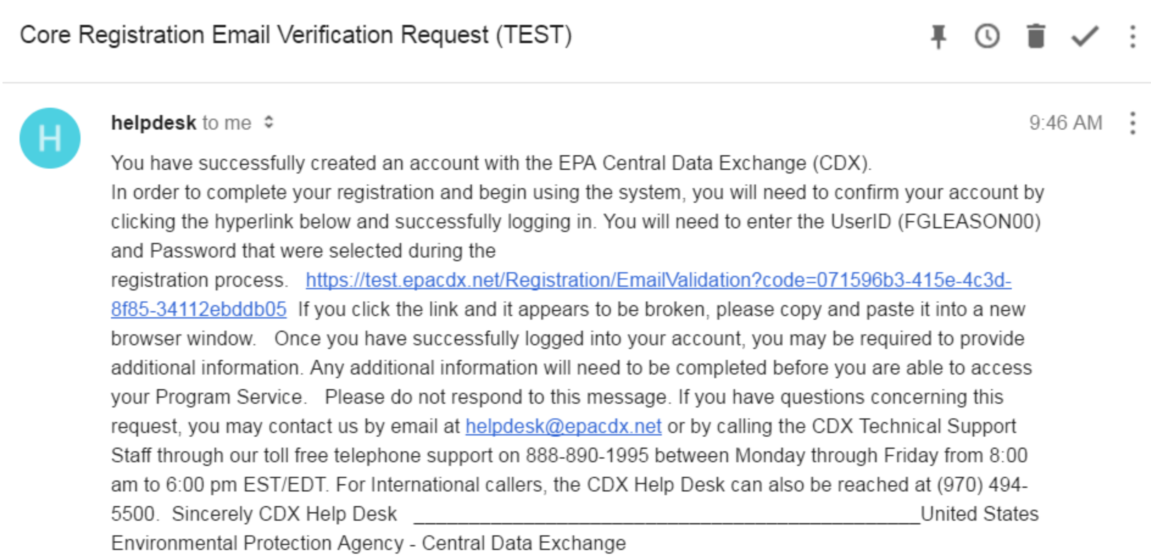
Organization ID	Organization Name	Address	City	State	ZIP Code
22597	Virginia Department of Environmental Quality	629 East Main Street	Richmond	VA	23219
22598	West Virginia Department of Environmental Protection	601 57th Street SE	Charleston	WV	25304

Can't find your organization? Use advanced search or request that we add your organization.

Exhibit 3-8 Create New Organization

After filling out the necessary details and selecting or creating an organization, the user will receive a confirmation email with additional steps to complete the registration process (**Exhibit 3-9**). Follow all steps in the confirmation email and log in to CDX to see the FGD application listed in the service tab (**Exhibit 3-10**).

NOTE: The FGD role request must be approved by a ‘RPO’ before the user can access the FGD application. Any questions regarding approval should be directed to the designated contact at the applicable regional office.


Core Registration Email Verification Request (TEST)

helpdesk to me 9:46 AM

You have successfully created an account with the EPA Central Data Exchange (CDX).
In order to complete your registration and begin using the system, you will need to confirm your account by clicking the hyperlink below and successfully logging in. You will need to enter the UserID (FGLEASON00) and Password that were selected during the registration process. https://test.epacdx.net/Registration/EmailValidation?code=071596b3-415e-4c3d-8f85-34112ebddb05 If you click the link and it appears to be broken, please copy and paste it into a new browser window. Once you have successfully logged into your account, you may be required to provide additional information. Any additional information will need to be completed before you are able to access your Program Service. Please do not respond to this message. If you have questions concerning this request, you may contact us by email at helpdesk@epacdx.net or by calling the CDX Technical Support Staff through our toll free telephone support on 888-890-1995 between Monday through Friday from 8:00 am to 6:00 pm EST/EDT. For International callers, the CDX Help Desk can also be reached at (970) 494-5500. Sincerely CDX Help Desk ____United States Environmental Protection Agency - Central Data Exchange

Exhibit 3-9 Confirmation Email

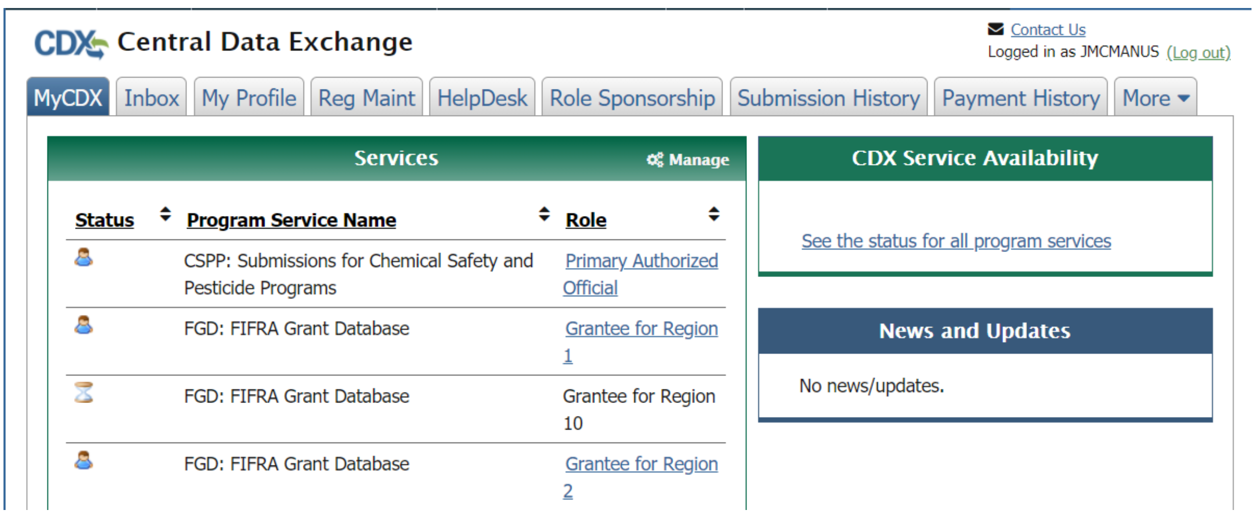


Exhibit 3-10 MyCDX Homepage

3.2.2 Adding FGD to an Existing CDX Account

If the user already has a CDX account, log in to CDX using the CDX username and password. Once logged in, the user should find the 'Add Program Service' button at the bottom of the 'MyCDX' tab (**Exhibit 3-11**).

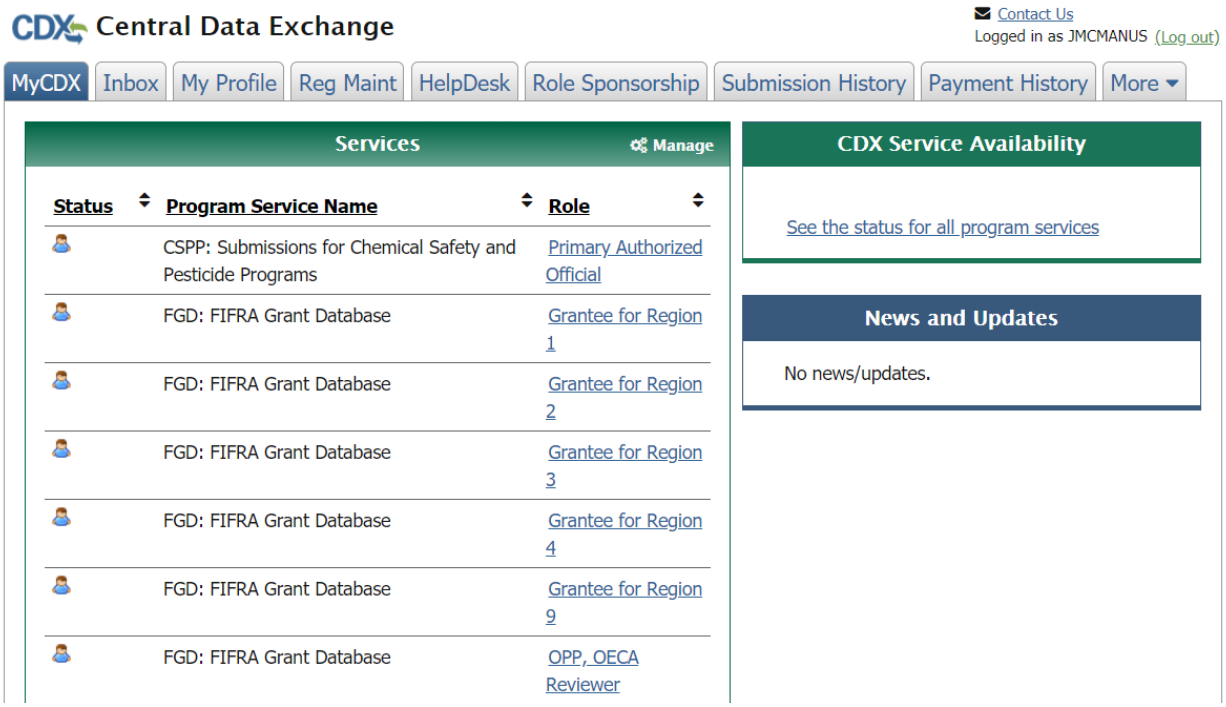


Exhibit 3-11 MyCDX Homepage

Navigation: After clicking the 'Add Program Service' button, the system will prompt the user to select a program service (**Exhibit 3-12**). Type 'FGD' in the 'Active Program Services List' search bar to filter the available selections. Select the 'FGD Text' box below the search bar.

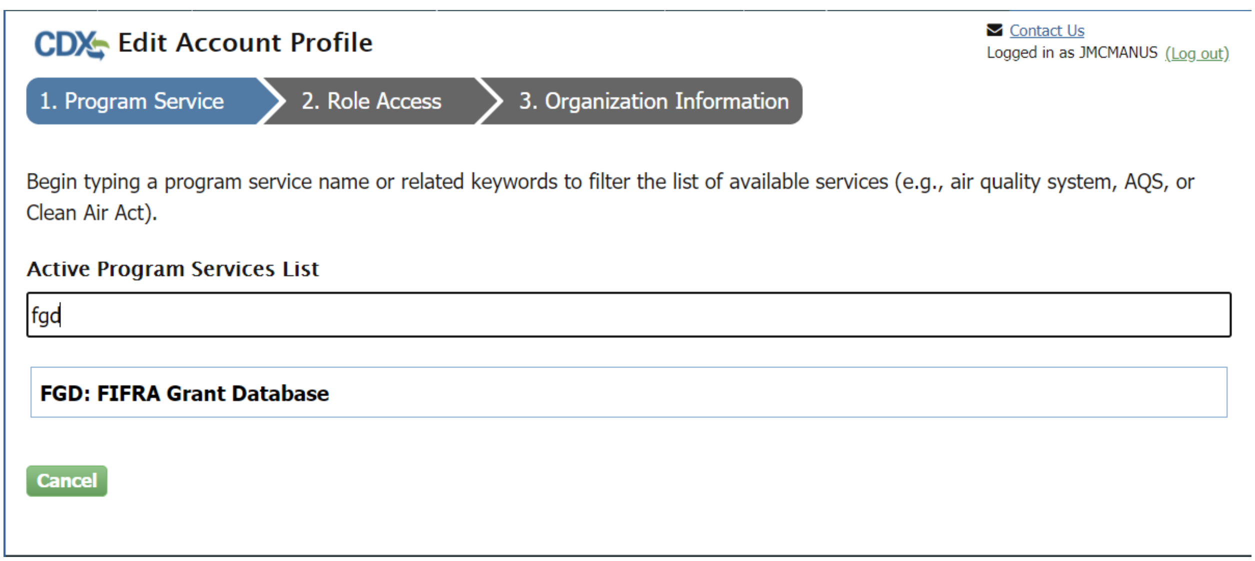


Exhibit 3-12 Program Service Selection

Navigation: After selecting FGD, the user will be required to select a role from the 'Select Role' dropdown (**Exhibit 3-13**). The available roles are as follows:

- Grantee Region 1

- Grantee Region 2
- Grantee Region 3
- Grantee Region 4
- Grantee Region 5
- Grantee Region 6
- Grantee Region 7
- Grantee Region 8
- Grantee Region 9
- Grantee Region 10

The user should select the appropriate 'Grantee' role. The FGD application uses these roles to determine which region the 'Grantee' belongs. For example, a 'Grantee' user based in Virginia should select the 'Grantee for Region 3' role.

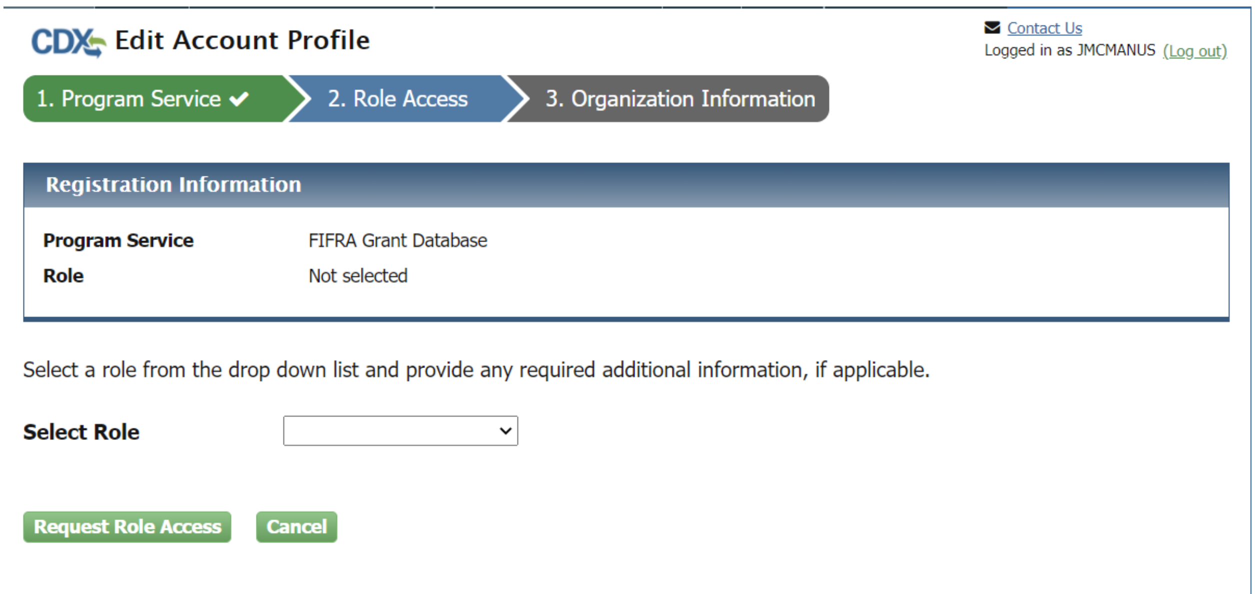


Exhibit 3-13 FGD Role Selection

Navigation: Once an applicable role has been selected, the user will be required to either use an existing organization attached to their account or create a new organization (**Exhibit 3-14**). To continue, the user must either select an existing organization or create a new one and fill out all required fields. After indicating the appropriate organization, select 'Submit Request for Access.' The user will see a FGD entry on the 'MyCDX' page, but access will be restricted pending 'RPO' approval. Any questions regarding approval should be directed to the users designated contact at the applicable regional office.

NOTE: The FGD application utilizes this organization name to link multiple users to the same 'Grantee' organization (so that they may view the same grant data.) When users from the same organization are requesting access to FGD, they **<u>must</u>** use the exact same organization name. Otherwise, the system will not link them together, and they will not see the same grant details.

NOTE: Organization name matching is case sensitive. The below example illustrates two separate organizations:

west Virginia Department of Environmental Protection ≠ West Virginia Department of Environmental Protection

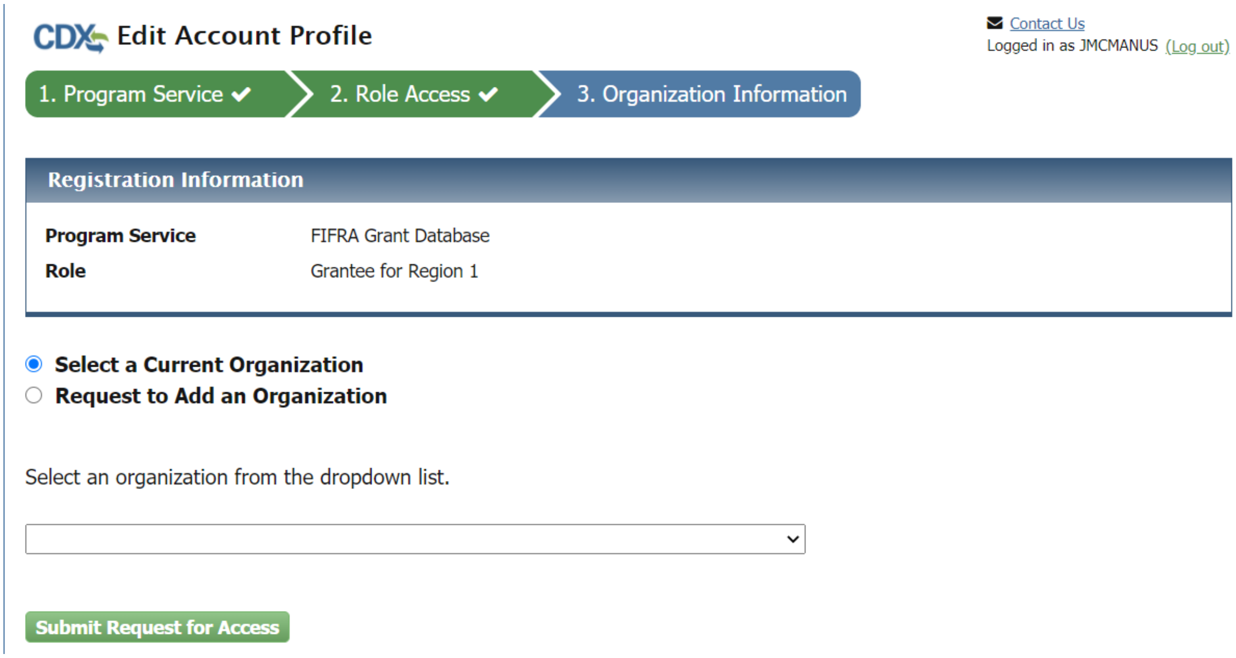


Exhibit 3-14 Edit Account Profile

3.3 RPO and OCSPP/OECA Reviewer Role Access

This section provides information for registering as a 'RPO' or 'OCSPP/OECA Reviewer' in CDX under the FGD dataflow.

3.3.1 Creating a CDX Account

The 'RPO' and 'OCSPP/OECA Reviewer' roles are considered 'closed' roles. For this reason, new CDX users, requiring these roles, will need an existing FGD RMAM to create their account. For assistance with adding these roles to an existing CDX account, please refer to **Section 3.3.2**.

The RMAM user should log in to CDX using their username and password (**Exhibit 3-15**).

Exhibit 3-15 CDX Login

Navigation: After logging in, the user should navigate to the 'Reg Maint' tab and select 'Create User Account' (**Exhibit 3-16**).

NOTE: If the logged in user does not see the 'Reg Maint' tab, this means they do not have access to the 'RMAM' role. Please refer to **Section 3.5** for assistance with requesting this role.

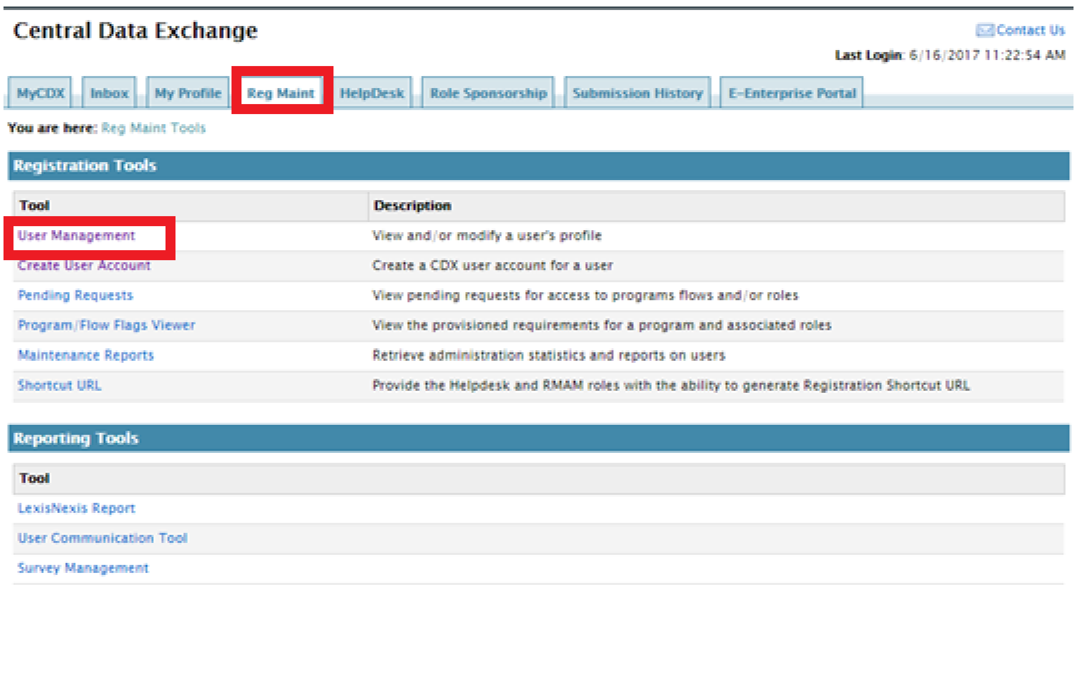


Exhibit 3-16 Registration Maintenance

Accept the terms and conditions and click 'Proceed' (Exhibit 3-17).

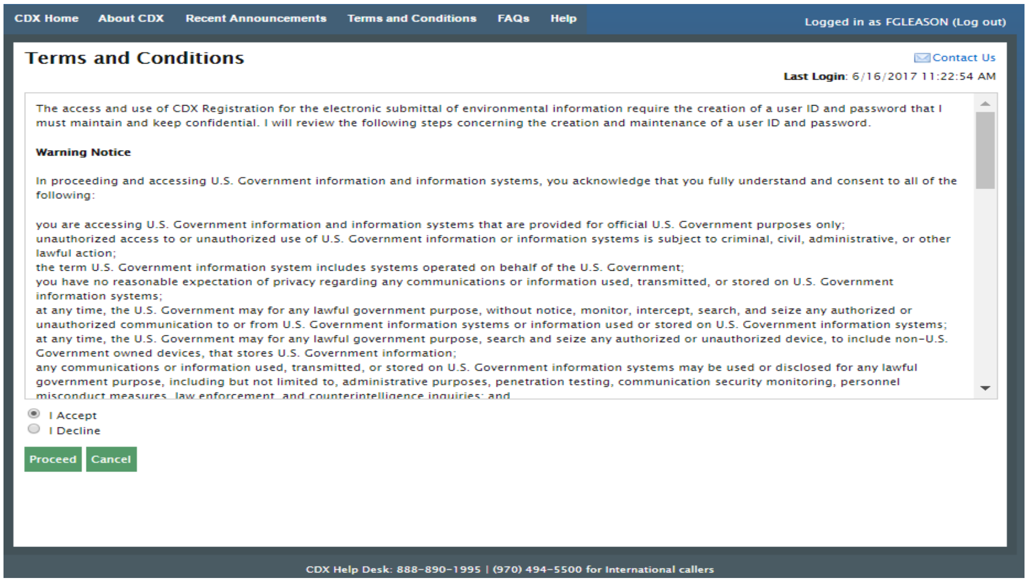


Exhibit 3-17 Terms and Conditions

Next the user should select 'FGD' from the 'Active Program Services List' (**Exhibit 3-18**.)

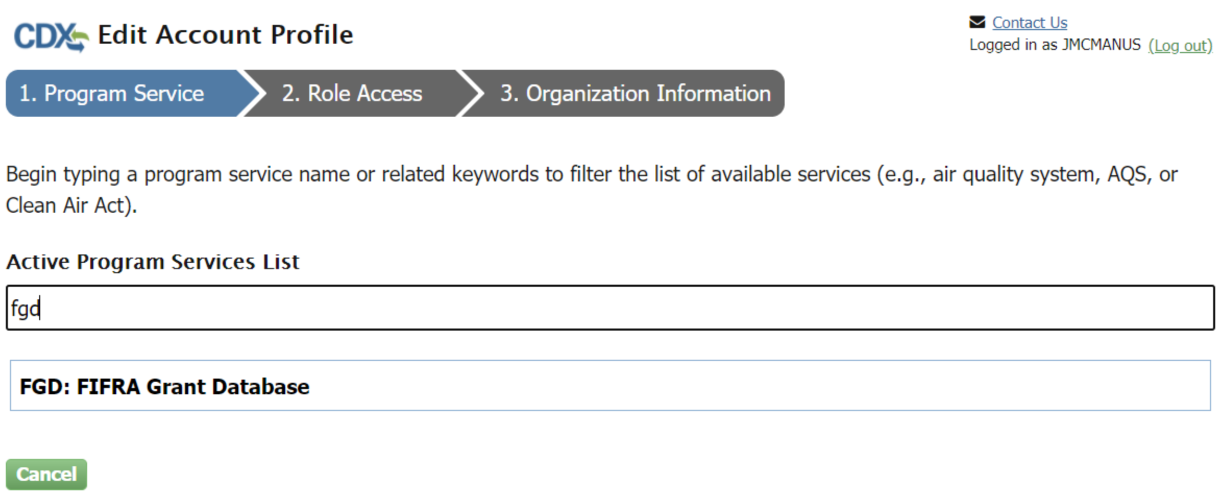


Exhibit 3-18 Active Program Service List

The user should select either the 'RPO' or 'OCSPP/OECA Reviewer' role from the 'Select Role' dropdown. If the user is creating a 'RPO' account, an EPA region must also be selected from the 'EPA Region' dropdown (**Exhibit 3-19**). Once the role has been chosen, the user should click the 'Request Role Access' button.

Exhibit 3-19 shows a screen capture if the 'Select Role' dropdown and the 'Request Role Access' button.

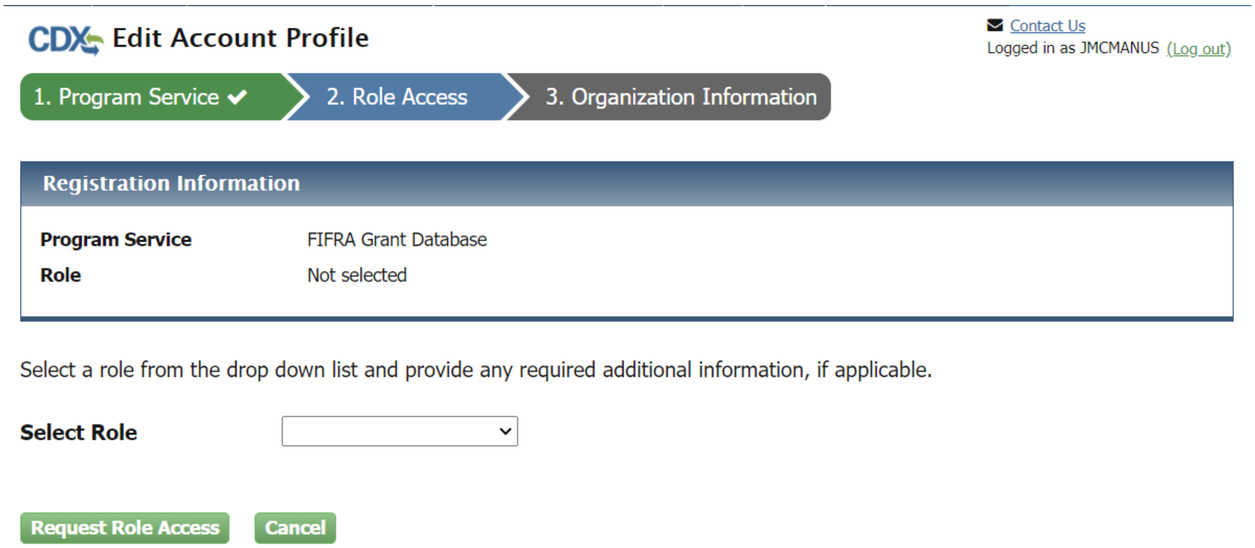


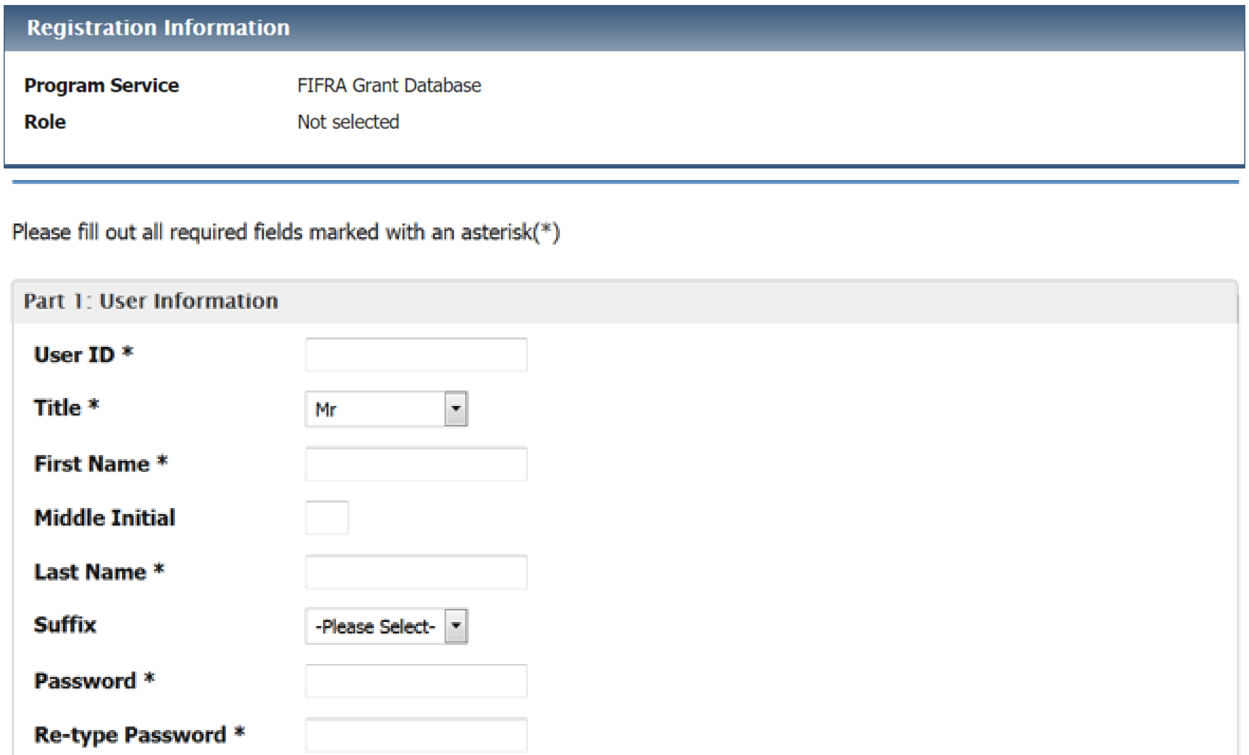
Exhibit 3-19 Program Service Role Selection and Request Role Access Button

After the user selects the role, they should fill out all required fields within the ‘User Information’ and ‘Organization Information’ sections (**Exhibit 3-20**). Required fields are denoted with an asterisk (*). When adding an organization, the user should first search for an existing organization within CDX. If the desired organization is not found, a new organization can be created by selecting the ‘Request that we Add Your Organization’ hyperlink (**Exhibit 3-21**). Once the user has filled out all required fields, click the ‘Submit Request for Access’ button at the bottom of the screen.

NOTE: To complete this process, the following information must be known for the target user:

- User ID
- Title
- First Name
- Last Name
- Email Address
- Phone Number
- Password
- Desired Organization

NOTE: It does not matter which organization the ‘RPO’ belongs. However, it is recommended that each region agree upon and use a single organization for all users to simplify long term user maintenance.



Registration Information

Program Service FIFRA Grant Database

Role Not selected

Please fill out all required fields marked with an asterisk(*)

Part 1: User Information

User ID *

Title * Mr

First Name *

Middle Initial

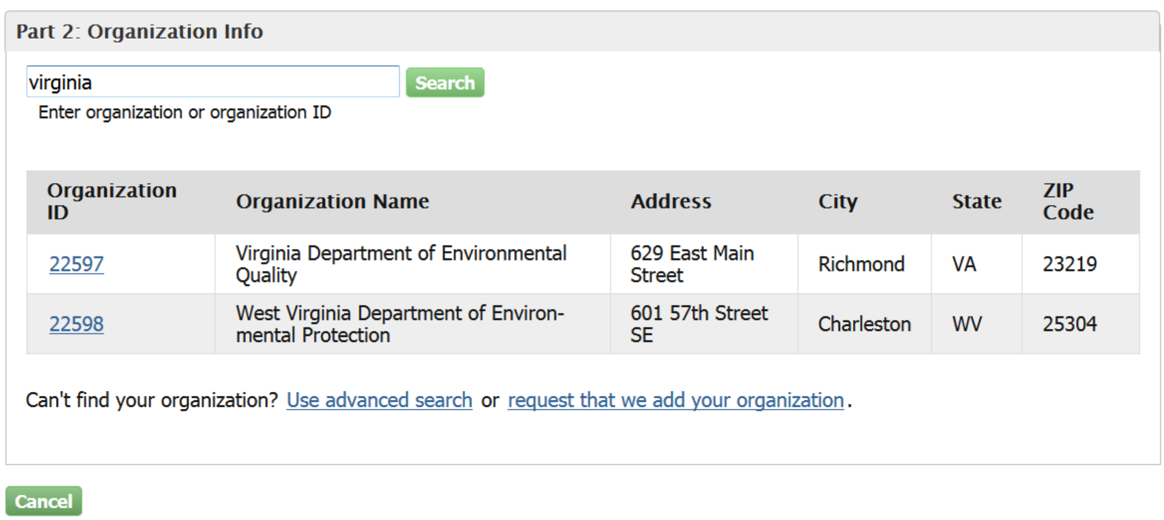
Last Name *

Suffix -Please Select-

Password *

Re-type Password *

Exhibit 3-20 User Information Entry



Part 2: Organization Info

virginia Search

Enter organization or organization ID

Organization ID	Organization Name	Address	City	State	ZIP Code
22597	Virginia Department of Environmental Quality	629 East Main Street	Richmond	VA	23219
22598	West Virginia Department of Environ-mental Protection	601 57th Street SE	Charleston	WV	25304

Can't find your organization? Use advanced search or request that we add your organization.

Cancel

Exhibit 3-21 Organization Entry and Selection

After the user enters the user and organization information, the user will receive a confirmation email at the email address provided. As a final step, the RMAM user will need to provide the user with the password used during account creation. Please advise the user to change their password after logging in.

3.3.2 Adding FGD to an Existing CDX Account

The ‘RPO’ and ‘OCSPP/OECA Reviewer’ roles are considered ‘Closed’ roles. For this reason, existing CDX users requiring these roles will need a FGD RMAM to add the roles to their account.

As a RMAM user, log in to CDX using the CDX username and password (**Exhibit 3-22**).

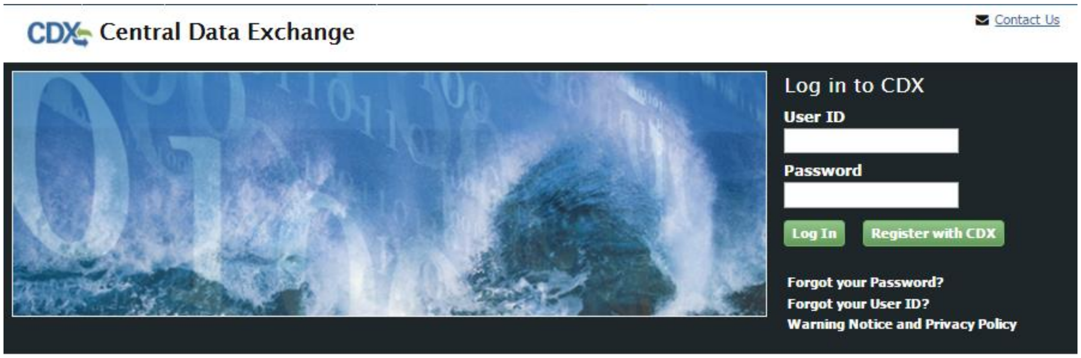


Exhibit 3-22 CDX Login

Navigate to the ‘Reg Maint’ tab and select ‘User Managment’ (**Exhibit 3-23**).

NOTE: If the user does not see the ‘Reg Maint’ tab, this means they do not have access to the ‘RMAM’ role. Please refer to **Section 3.5** for assistance with requesting this role.

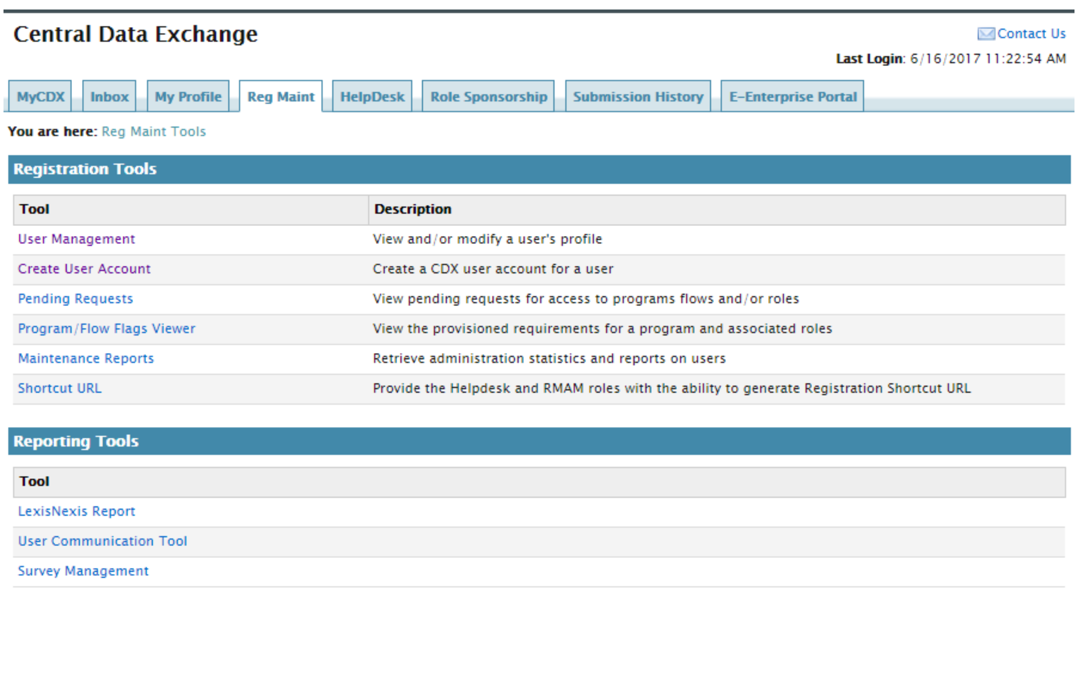


Exhibit 3-23 Registration Maintenance

Search for the target user’s account using the below criteria and click ‘Search’ (**Exhibit 3-24**).

- User ID
- First Name

- Last Name
- Email
- Phone Number
- Organization Name

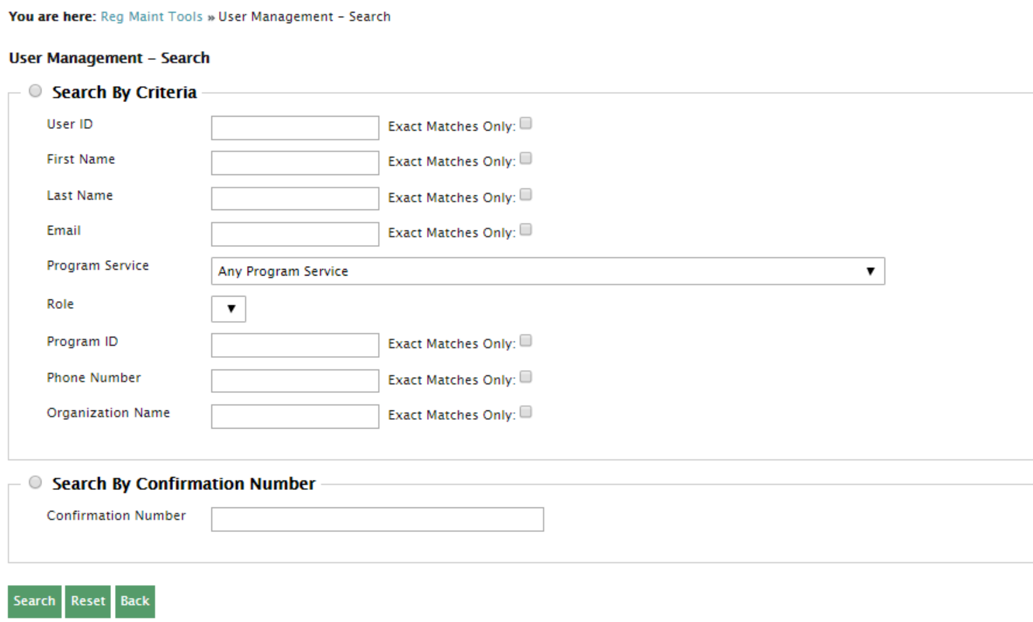


Exhibit 3-24 User Management – Search

Depending on the search criteria used, multiple results may be returned (**Exhibit 3-25**). Please be sure to select the appropriate user account, and verify with the user requesting access if necessary. To select the user's account, click on the user's name under the 'User Information' column.

Exhibit 3-25 User Management Search Results

Once the appropriate user has been selected, scroll down the page and click on the 'Add Program Service' hyperlink (**Exhibit 3-26)**. If the user needs a new organization added to their account, they must first add it by selecting 'Add Organization' (**Exhibit 3-27**).

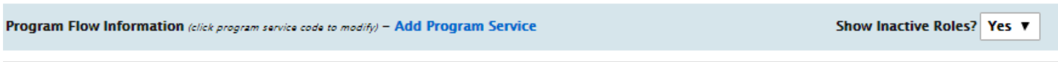


Exhibit 3-26 Add Program Service Link

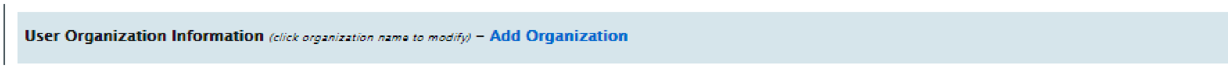


Exhibit 3-27 Add Organization Link

After selecting 'Add Program Service' and/or 'Add Organization,' the user should follow the steps outlined in **Section 3.2.1** for guidance on selecting the appropriate role and/or organization. Once the role and/or organzation has been added to the user's account, no further action is necessary.

3.4 Approving 'Grantee' Role Access

Only FGD RMAMs can approve 'Grantee' requests for application access.

As a RMAM user, log in to CDX using the CDX username (**Exhibit 3-28**).

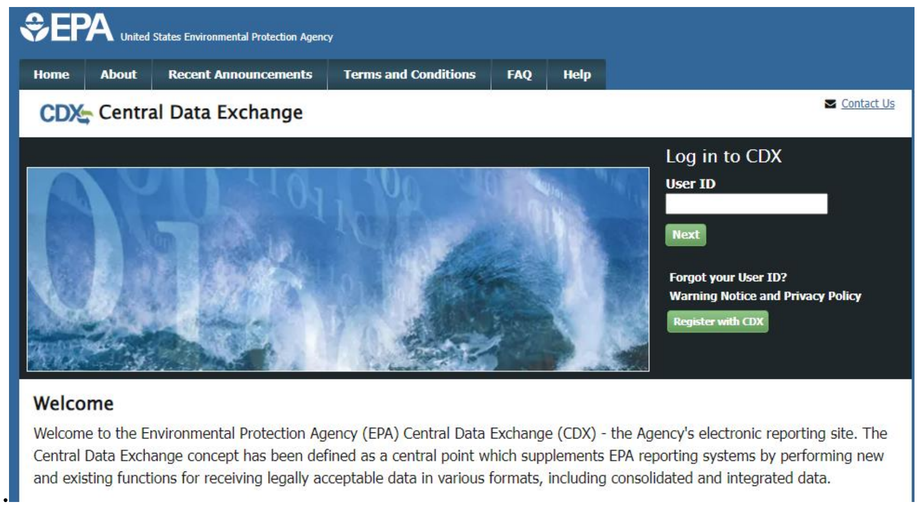


Exhibit 3-28 CDX Login

Navigate to the 'Reg Maint' tab and select 'Pending Requests' (**Exhibit 3-29**).

NOTE: If the logged in user does not see the 'Reg Maint' tab, this means they do not have access to the 'RMAM' role. Please refer to **Section 3.5** for assistance with requesting this role.

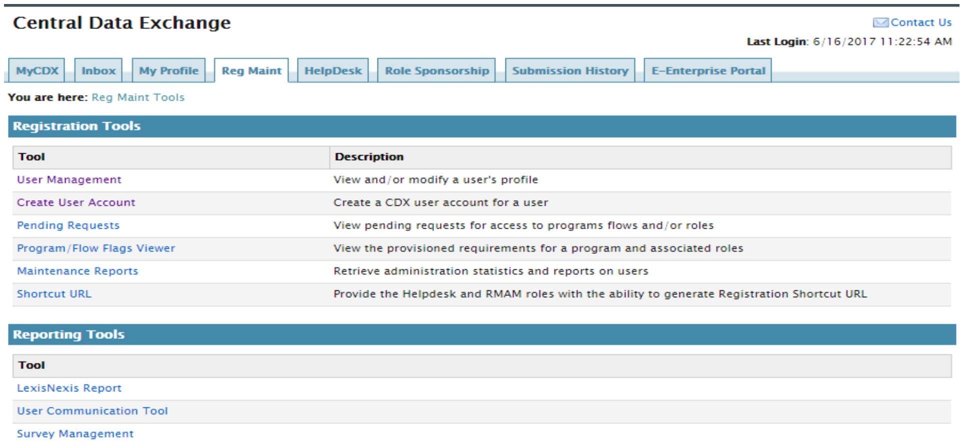


Exhibit 3-29 Registration Maintenance

The RMAM can search for the target user's account using the below criteria and click 'Search' (**Exhibit 3-30**).

- User ID
- First Name
- Last Name
- Email
- Phone Number
- Organization Name
- Program Service

NOTE: By selecting 'FGD' from the 'Program Service' dropdown and clicking 'Search,' the RMAM user can retrieve a list of all accounts that are pending approval for access to the FGD application.

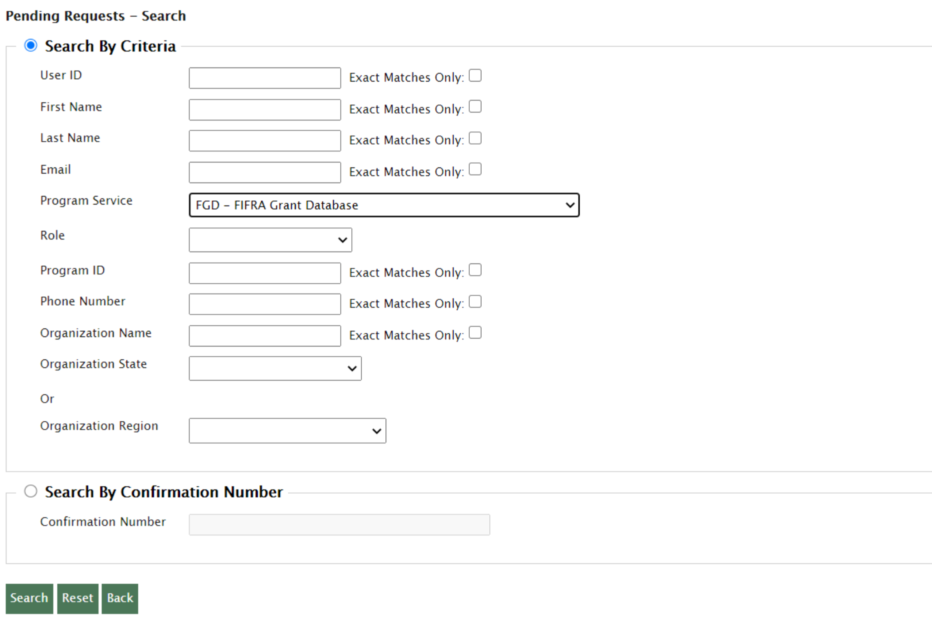


Exhibit 3-30 User Management – Search

Depending on the search criteria used, multiple results may be returned (**Exhibit 3-31**). The RMAM user should be sure to select the appropriate user account, and verify with the user requesting access if necessary. To approve the account, the RMAM user should click the 'checkbox' next to the username and click the 'Approve Selected Requests' button. The approved CDX user should now have access to the FGD application and no further action is needed.

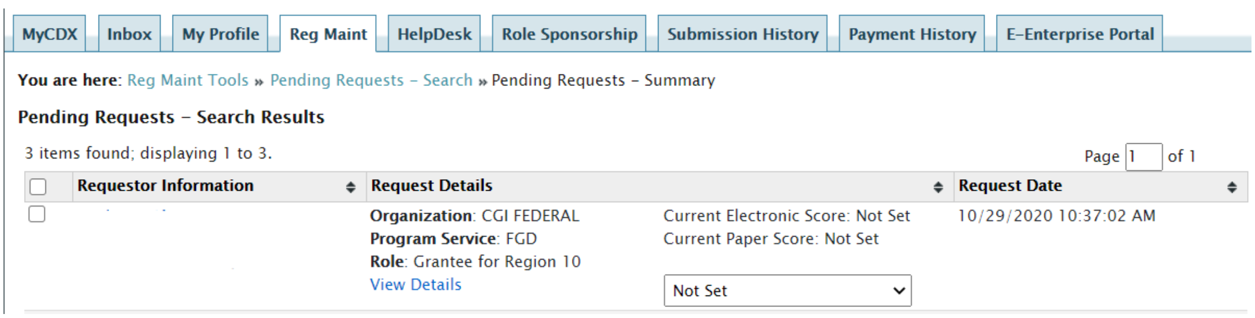


Exhibit 3-31 Pending Requests – Search Results

3.5 Requesting RMAM Access

RMAM access can only be granted by reaching out to the CDX Helpdesk via:

- By Telephone: Person-to-person telephone support is available from 8:00 am to 6:00 pm (EST/EDT). Call our toll-free line at (888) 890-1995 or (970) 494-5500 for International callers.
- By E-mail: Send e-mail to Technical Support at helpdesk@epacdx.net.

When reaching out to the Helpdesk, the following information should be provided:

- The application the user is requesting access to – FGD.

- What roles the user should be managing (i.e., a ‘RPO’ for Region 4 should have RMAM access for the ‘Grantee for Region 4’ role).

4 FGD ‘Grantee’ Role Functionality

4.1 Access FGD Application

To access the CDX homepage, the ‘Grantee’ should navigate to https://cdx.epa.gov/ (**Exhibit 4-1**). On the homepage, the ‘Grantee’ should enter a valid CDX user ID ‘Next’ button.

The user should use their Login.gov account to log into the system.

Exhibit 4-1 CDX Login Screen

Navigation: After logging in, the system will navigate the user to the ‘MyCDX’ page (**Exhibit 4-2**). This page lists the program services associated with the account, as well as the status and role(s) for those services. ‘FGD: FIFRA Grant Database’ should be visible in the services list. ‘Grantee for Region X’ (X being the region number) will appear as a blue link under the ‘Role’ column. To navigate to the FGD application, the ‘Grantee’ should select the link under the ‘Role’ column.

Exhibit 4-2 shows a screen capture of where the ‘Grantee’ can locate the link in the ‘Role’ column of the MyCDX screen.

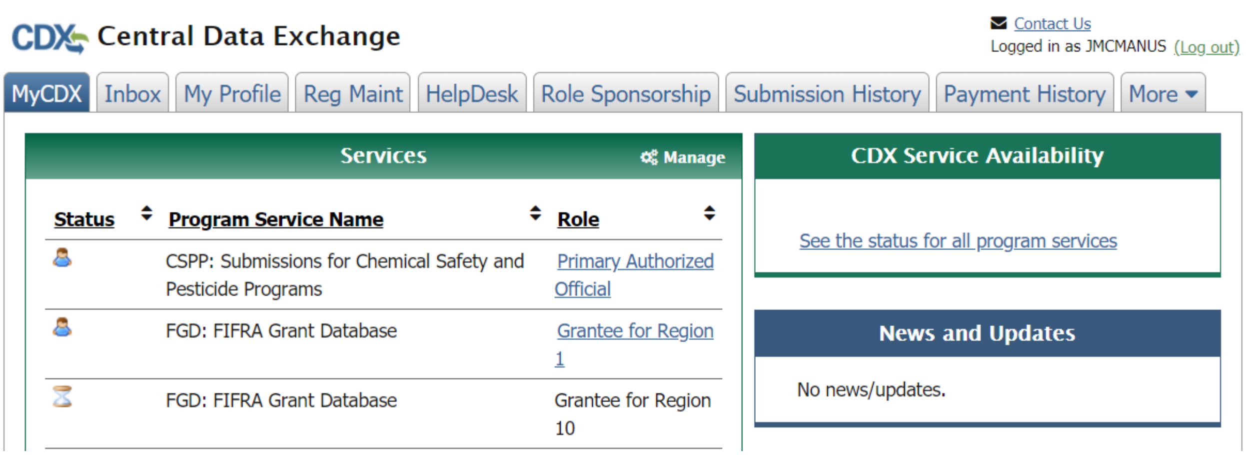


Exhibit 4-2 MyCDX Screen

4.2 FGD 'Grant Home' Screen

Navigation: The FGD 'Grant Home' screen allows 'Grantees' to add/edit grants and grant information, as well as provide documentation. 'RPOs' can also add EPA documents to this screen. The FGD home screen contains the following elements:

- **Grants:** Grants can be added and managed by users on the 'FIFRA Work Plan and Report Home' screen.

  NOTE: The 'Grant Home' screen shown in (**Exhibit 4-3**) is what a 'Grantee' with a new organization will see when accessing FGD their first time. By default, there will be no grants associated with the new organization, and a 'Grantee' will see the following text within the 'Grants' table: "No Grants Added" (please see **Section 4.3** for assistance with adding and managing grants).

  - **WARNING:** If the 'Grantee' does NOT see grants previously entered by other users from their organization, then the 'Grantee' did not register for the correct organization in CDX and they should contact their regional RMAM to assist them with registering under the correct 'Organization ID.'

- **Add Grant Button:** Clicking this button will generate the 'Add Grant' modal and will allow 'Grantees' to add grants for their organization.
- **Help Drop-Down:** There are five links under the 'Help' drop-down located on the header of the application.
  - 'User Guide' will open a PDF copy of this guide in a new browser tab.
  - 'State Oversight Resources and Guidance Documents' will open the website in a new browser tab.
  - EPA Grant Forums will open the 'Understanding, Managing, and Applying for EPA Grants' website in a new browser tab.
  - 'Pesticides in Water - POINTS' link will open the Pesticides of Interest Tracking System website in a new browser tab.
  - 'Certification and Training - CPARD' link will open the CPARD website in a new browser tab.

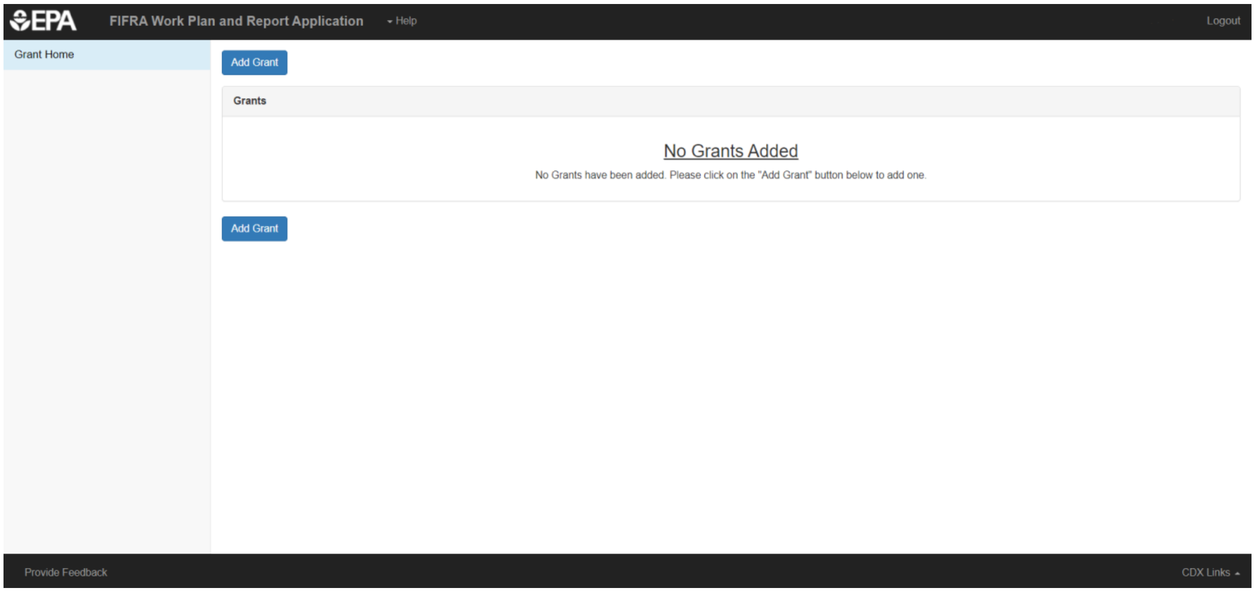


Exhibit 4-3 FIFRA Work Plan and Report - Grant Home (No Grants)

4.2.1 'Grant Home' With Grants

Once a grant has been added, it will display in the 'Grants' table (**Exhibit 4-4**) along with any identifying information. The following elements constitute the 'Grants' table:

- **EPA Grant Number:** Added from either the 'Add Grant' or 'Edit Grant' modal. This field is optional and is added by the 'Grantee' or 'RPO' from the initial award document.
- **Point of Contact:** The designated point of contact for the grant. This field is required but can be updated as needed in the 'Edit Grant' modal.
- **Agreement Type:** The type of cooperative agreement with EPA. The type can be either 'Consolidated' or 'PPG.'
- **Number of Years:** The number of years for the grant agreement (maximum five years).
- **Project Period:** Lists begin and end dates of the grant. It is based on the number of years specified and the elected start date.
- **Extended To:** Date the project period may be extended to given an extension has been approved by EPA. This is an optional field and displays 'N/A' if no extension has been added.
- **Budget Period:** Budget periods spanning the planned life of the grant, named/listed chronologically.

  NOTE: Each budget period has an associated 'Work Plan and Report.'
- **Budget Period Dates:** Lists begin and end dates for the individual budget periods within a grant project period.
- **Document Status:** The current status set for the respective budget period's 'Work Plan and Report.' See **Section 4.4.6** for details on how to set a status.

- **Review:** Allows users to access the respective budget period and alter the 'Work Plan and Report.'
- **Export:** Allows the user to export the current data save in the 'Work Plan and Report' as an Excel document. This exported Excel file will match what the user has entered and most recently saved regardless of when a status for the 'Work Plan and Report' was last set.

  NOTE: The exported Excel file does not have pre-defined formatting for column width, row height, colors, etc.

- **Grantee Documents:** Allows users to add, view, and delete documents associated with a grant or specific budget period within that grant. 'Grantee' documents, added at the budget period level, are also visible here with the 'Document Type' specifying the applicable budget period. See **Section 4.4.5** for details on how to upload documents to a budget period.
- **EPA Documents:** Allows users to view documents added by the 'RPO' for a grant or specific budget period within said grant. EPA documents, added at the budget period level, are also viewable here with the 'Document Type' specifying the applicable budget period.

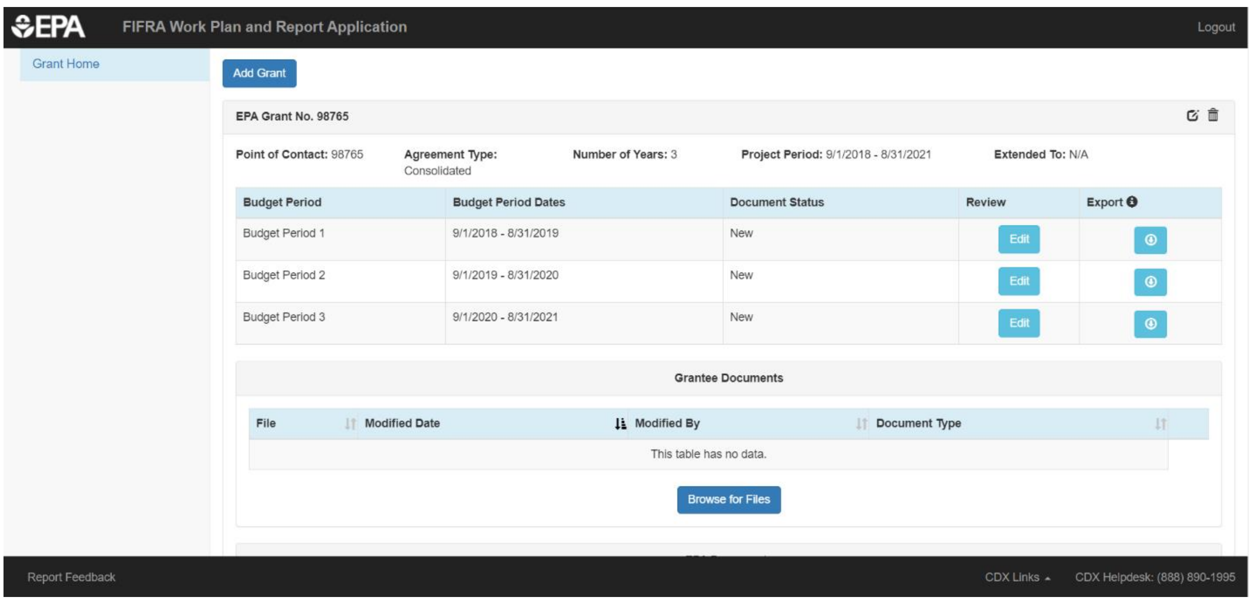


Exhibit 4-4 FIFRA Work Plan and Report - Grant Home (With Grant)

4.3 Managing Grants

Grants can be added and deleted from the 'Grant Home' screen. Grant and budget period information is also editable via this screen.

4.3.1 Creating Grants

The 'Grantee' can begin the grant creation process by clicking the 'Add Grant' button on the 'Grant Home' screen (**Exhibit 4-5**).

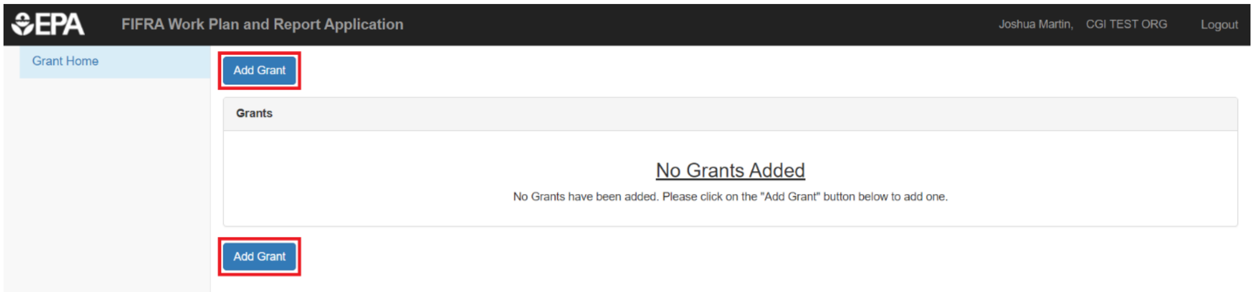


Exhibit 4-5 Add Grant Button

Once the ‘Add Grant’ button has been clicked, the application will generate the ‘Add New Grant’ modal (**Exhibit 4-6**).

The ‘Add New Grant’ modal has the following characteristics:

- **Name:** This is the point of contact for EPA ‘RPO’ to reference. This field is required but can be updated as needed in the ‘Edit Grant’ modal.
- **Grantee:** Name of the organization associated with the grant and the region to which they belong. This information is automatically populated from the CDX account of the user who created the grant and cannot be altered.

NOTE: If the information here is not correct or up-to-date, the user’s CDX profile information must be updated.

- **Agreement Type:** Type of cooperative agreement with EPA. The type can be either ‘Consolidated’ or ‘PPG.’
- **Number of Years:** The number of years for the grant agreement (maximum five years).
- **Project Period:** Lists begin and end dates of the grant. It is based on the number of years specified and the elected start date.
- **Extended To:** Date the project period may be extended to given an extension has been approved by EPA. This is an optional field and displays ‘N/A’ if no extension has been added.
- **Grant Number:** This field is optional and can be added from the initial award document by either the ‘Grantee’ or ‘RPO.’ It can be left blank if the award document has not been generated.

Once all required elements have been populated, the ‘Add Grant’ button will be enabled. The ‘Grantee’ should click the ‘Add Grant’ button to save the grant and generate the ‘Work Plan and Report’ templates for each budget period.

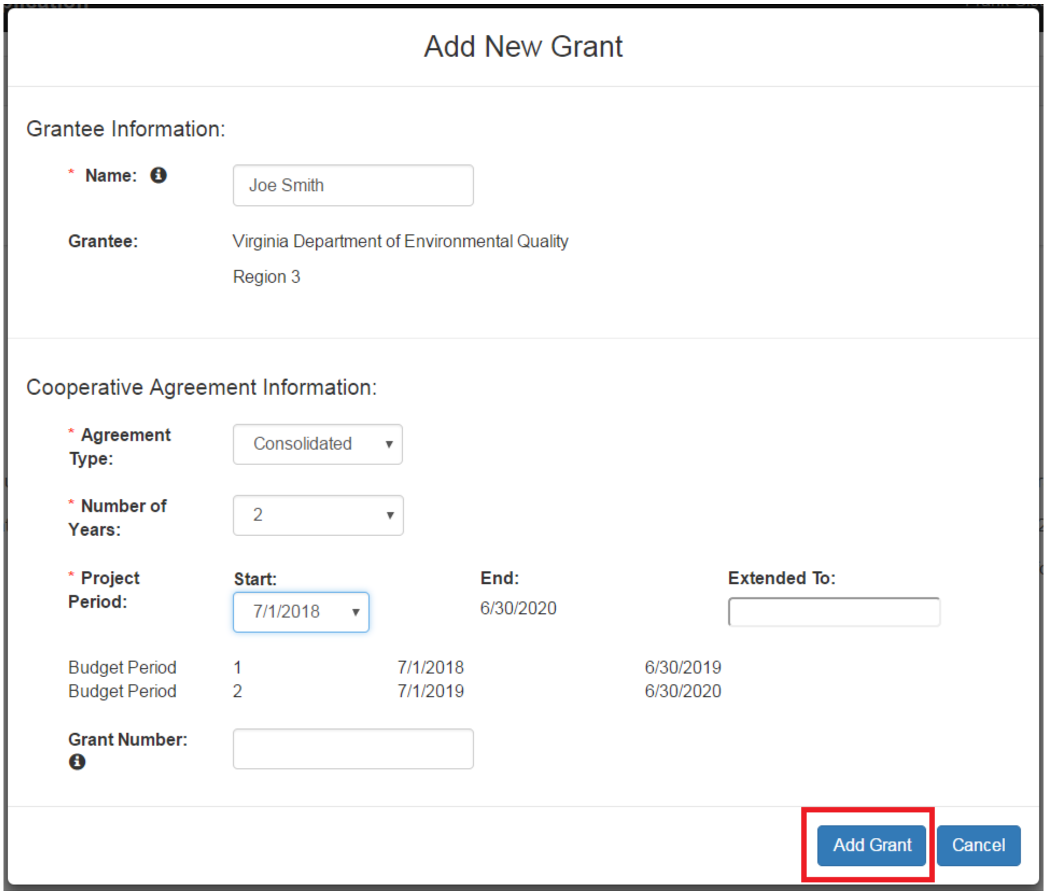


Exhibit 4-6 Add New Grant Modal

4.3.2 Editing Grants

A 'Grantee' can edit a grant by clicking the 'Edit' icon in the top right-hand corner of the grant they wish to edit (**Exhibit 4-7**). Clicking the 'Edit Grant' icon will open the 'Edit Grant' modal (**Exhibit 4-8**) to allow the 'Grantee' to make changes to the grant information such as: adding a grant number after the grant is created in the 'Grant Number' field or changing the name of the 'Grantee's' primary contact for the grant in the 'Name' field. Apart from the modal header, the 'Edit Grant' modal is identical to the 'Add Grant' modal, see **Section 4.3.1** for reference.

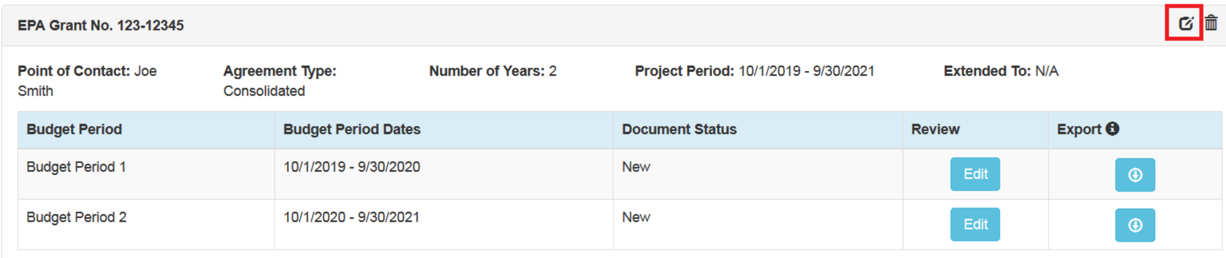


Exhibit 4-7 Edit Grant Icon

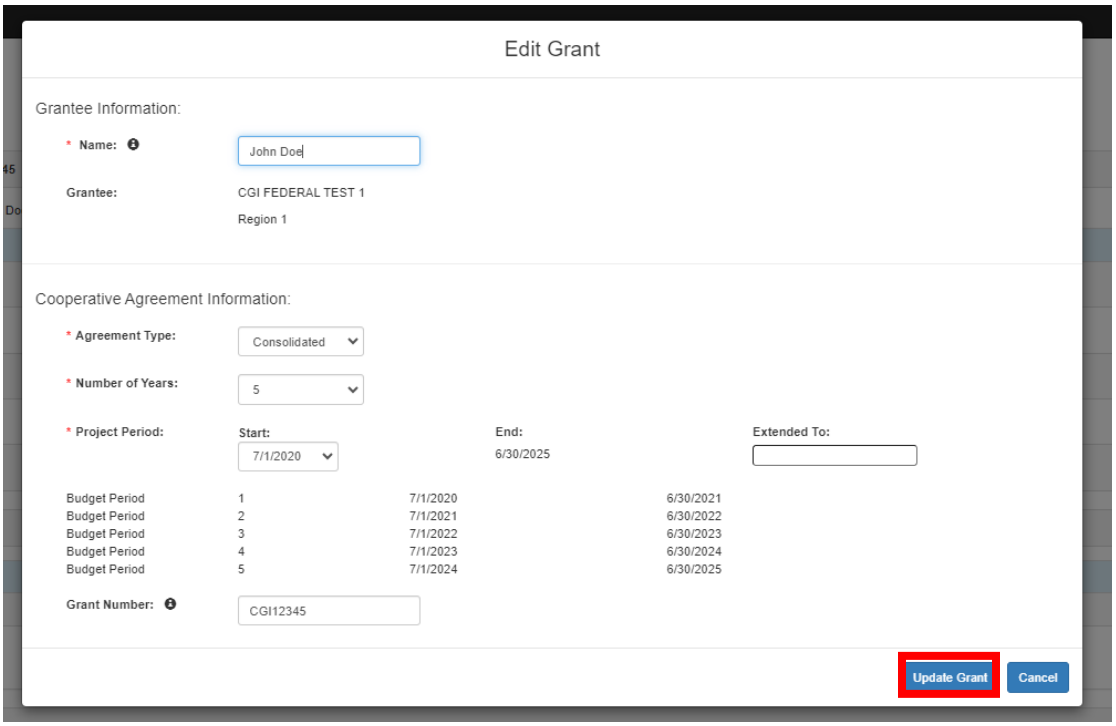


Exhibit 4-8 Edit Grant Modal

After changing all desired information, the ‘Grantee’ should click the ‘Update Grant’ button to save their edits.

4.3.3 Deleting a Grant

The ‘Grantee’ can delete a grant by clicking the ‘Trashcan’ icon in the top, right corner of the respective ‘Grant’ table (**Exhibit 4-9**). Once clicked, the application will prompt the ‘Grantee’ to confirm the deletion. If approved, the grant and all information for that grant will be deleted (**Exhibit 4-10**).

WARNING: Once a grant has been deleted, it is removed from the database and all related grant information is lost.

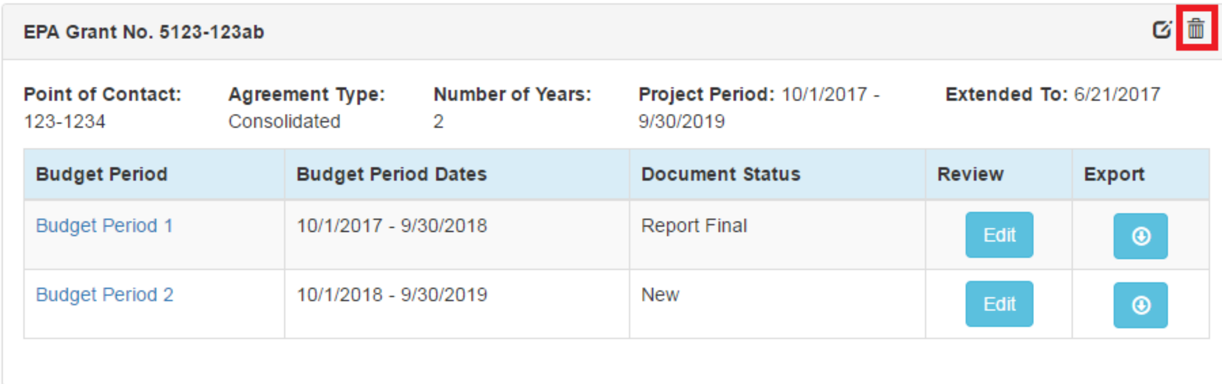


Exhibit 4-9 Delete Grant Icon

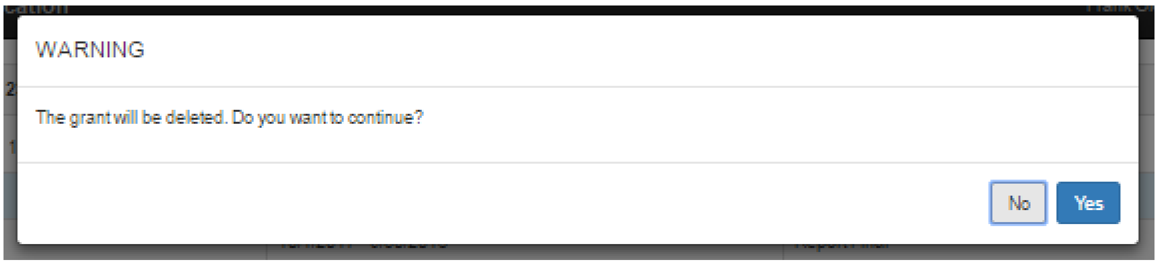


Exhibit 4-10 Warning Popup Message

4.3.4 Uploading Grant Level Documents

Navigation: Each grant has an associated document repository that can be found on the ‘Grant Home’ screen. There are two sections to the document repository: one for ‘Grantee Documents’ and one for ‘EPA Documents’ (**Exhibit 4-11**). Documents added to these tables can be associated with an entire grant or with a single budget period within the respective grant. If the document is uploaded at the grant level, the ‘Document Type’ will be ‘Grant Level.’ If the document is uploaded at the budget period level, the ‘Document Type’ will reference the associated budget period. See **Section 4.4.5** for assistance with uploading documents at the budget period level.

NOTE: ‘Grantees’ will be able to view, but not modify, documents uploaded by EPA ‘RPOs.’

To upload a grant level document, the ‘Grantee’ should select the ‘Browse for Files’ button in the ‘Grantee Documents’ section of the ‘Grant Home’ screen. Once selected, the ‘Add Attachment’ modal will display. The ‘Grantee’ should click the ‘Choose File’ button and use the local explorer window to find and upload the desired file to the application.

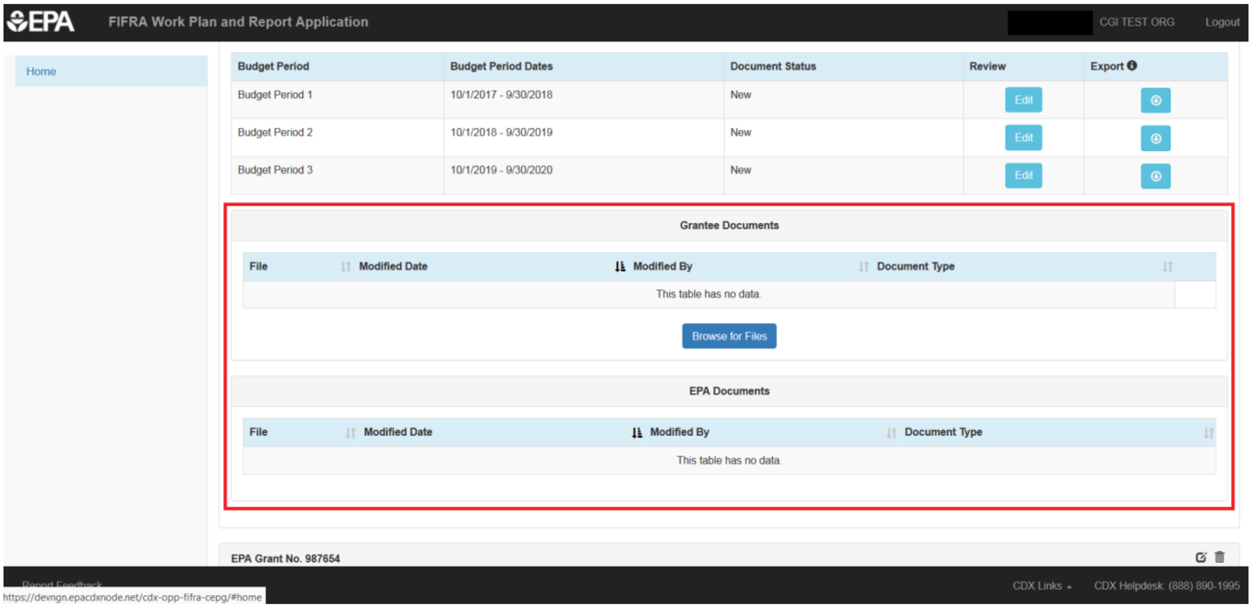


Exhibit 4-11 'Grantee' and EPA Documents Tables

Navigation: Once the file has been successfully uploaded, it will appear in the 'Grantee Documents' table. (**Exhibit 4-12**). The table will display the filename, the date it was uploaded, the name of the CDX user who uploaded the file, and the level from which the document was uploaded. For each file within the table, the following actions are available:

- **File:** Click on the filename in blue text in the 'File' column to download/view the attached file.
- **Modified Date:** The date the file was added to the grant.
- **Modified By:** The name of the user who uploaded the file to the grant.
- **Document Type:** The location in the grant from which the document was uploaded. This can be from the 'Grant Home' screen (grant level) or from the 'Work Plan and Report' screen of a specific budget period.
- **Delete:** Delete a file from the grant by clicking the 'Delete' button. This will generate a 'Warning' modal asking for confirmation before deleting.

NOTE: 'Grantees' can only delete documents added to the 'Grantee Documents' table.

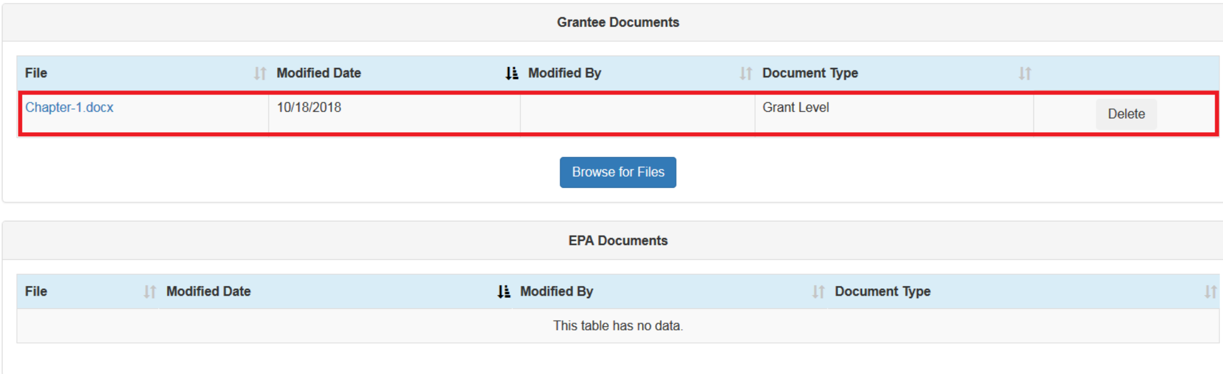


Exhibit 4-12 'Grantee' Document Added

4.4 Work Plan and Report Section

'Grantees' can add, remove, and update information for individual budget periods that fall within the grant project period. The 'Work Plan and Report' section can be accessed by clicking the 'Edit' button next to the desired budget period on the 'Grant Home' screen.

4.4.1 Accessing the Work Plan and Report Homepage

Each budget period associated with a grant has a 'Work Plan and Report' template. To access the 'Work Plan and Report' template, the 'Grantee' should click the 'Edit' button next to the budget period they wish to access (**Exhibit 4-13**). This will bring them to the respective 'Work Plan and Report' homepage for that grant/budget period.

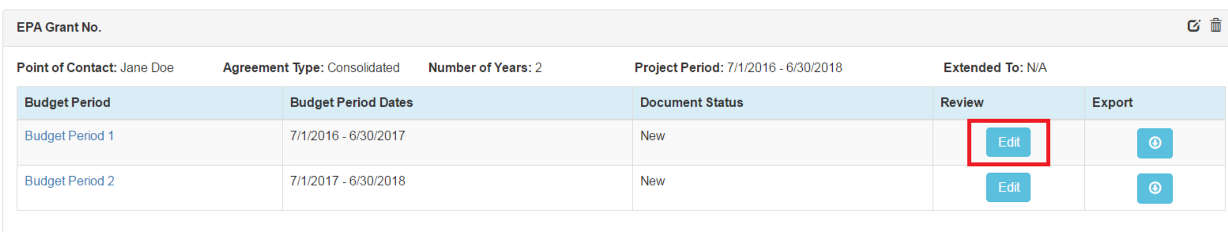


Exhibit 4-13 'Edit' Button

4.4.2 Copy Work Plan Activity Description (Outputs)

When a 'Grantee' user opens a budget period's 'Work Plan and Report' template for the first time, they have the ability to copy 'Work Plan Activity Description (Outputs)' between budget periods. Clicking the 'Edit' icon the first time for a given budget period will automatically bring up a prompt that asks the 'Grantee' if they wish to copy the previous budget period's 'Work Plan Activity Description (Outputs).' All of the following conditions must be true of the empty 'Work Plan and Report' template for a 'Grantee' to be able to copy 'Work Plan Activity Description (Outputs)' between two budget periods within the same grant:

1. Has a 'Document Status' of 'New' (**Exhibit 4-14**.)
2. Contains no changes/updates to the 'Work Plan Activity Description (Outputs)' fields on the 'Work Plan' screen.
3. Is immediately preceded by another budget period (by date).

NOTE: The preceeding budget period must be within the same grant project period.

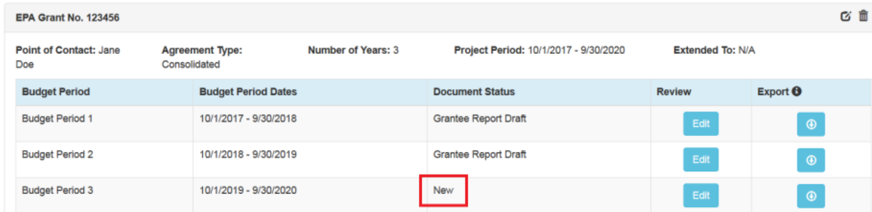


Exhibit 4-14 Document Status 'New'

NOTE: The copy method can only be performed between budget periods of the same grant not between budget periods of separate grants.

When copying is initiated, a modal is generated prompting the 'Grantee' to copy all 'Work Plan Activity Descriptions' from the previous budget period (**Exhibit 4-15**). The prompt will include the date range of the previous budget period for reference. If the previous budget period is from a separate grant, the prompt will show, but not be functional.

Navigation: Clicking 'No' inside the modal (**Exhibit 3-1**) will open the 'Work Plan and Accomplishments Home' screen for that budget period and will not copy any 'Work Plan Activity Description (Outputs)' from the previous budget period. Clicking 'Yes' inside the modal will copy all 'Work Plan Activity Description (Outputs)' from the previous budget period for the specified date range. Clicking 'Cancel' inside the modal will direct the user back to the 'Grant Home' screen.

NOTE: 'Work Plan Description (Outputs)' of the previous budget period is the only information that is copied.

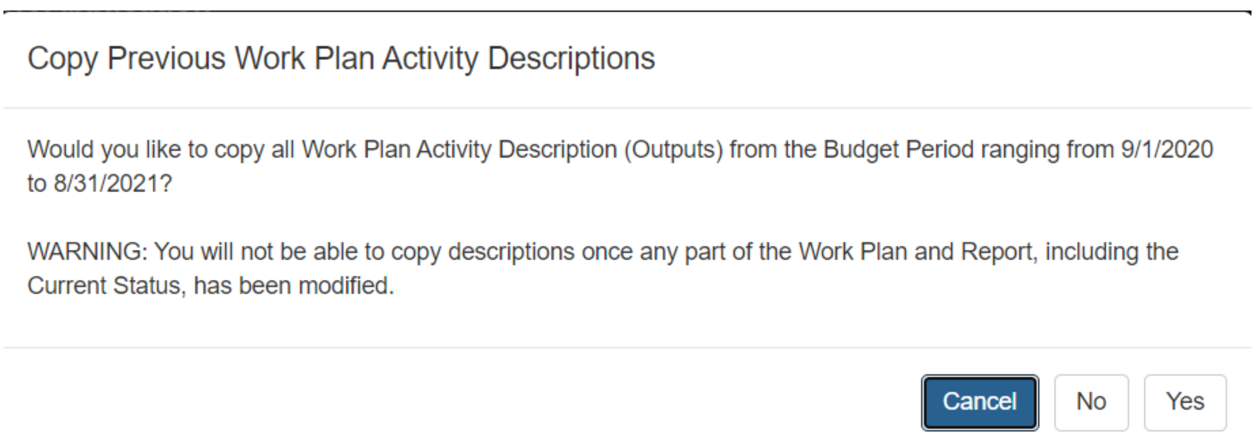


Exhibit 4-15 Copy Previous Budget Period Prompt

4.4.3 Navigation Tree

Navigation: The navigation tree is located on the left side of each screen (**Exhibit 4-16**). The bottom portion of the navigation tree contains information relevant to the specific grant the 'Grantee' is accessing.

A ‘Grantee’ can use the navigation tree to navigate between the various screens within the ‘Work Plan and Report’ section of the FGD application. The ‘Grantee’ can navigate to a specific screen by clicking the corresponding screen title within the navigation tree.

WARNING: To prevent loss of work, all entered data must be saved before navigating between sections of the navigation tree. If a user navigates away from a section without selecting ‘Yes’ from the ‘Save Changes’ prompt, closes the browser window, ends their CDX session, or their CDX session times out, then any changes made since navigating to the form will be lost.

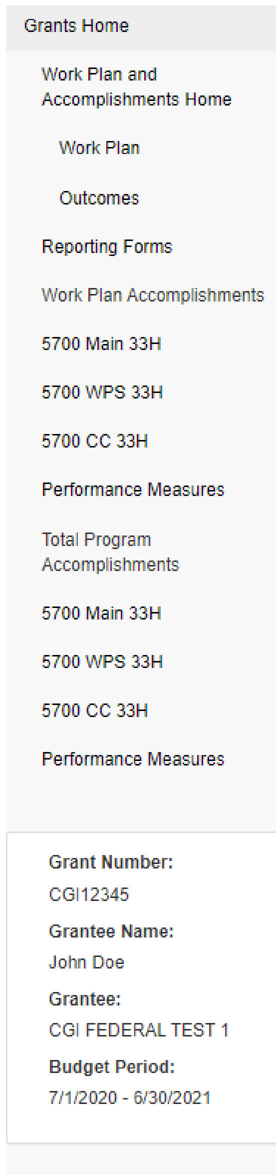


Exhibit 4-16 Navigation Tree (All sections added)

4.4.4 ‘Work Plan and Accomplishments’ Homepage

The ‘Work Plan and Report’ homepage is the portal for managing the ‘Work Plan and Report’ template for a given budget period. The page is broken out into the following two key elements (**Exhibit 4-17**):

- Grant/Budget Period Details
- Document Repository

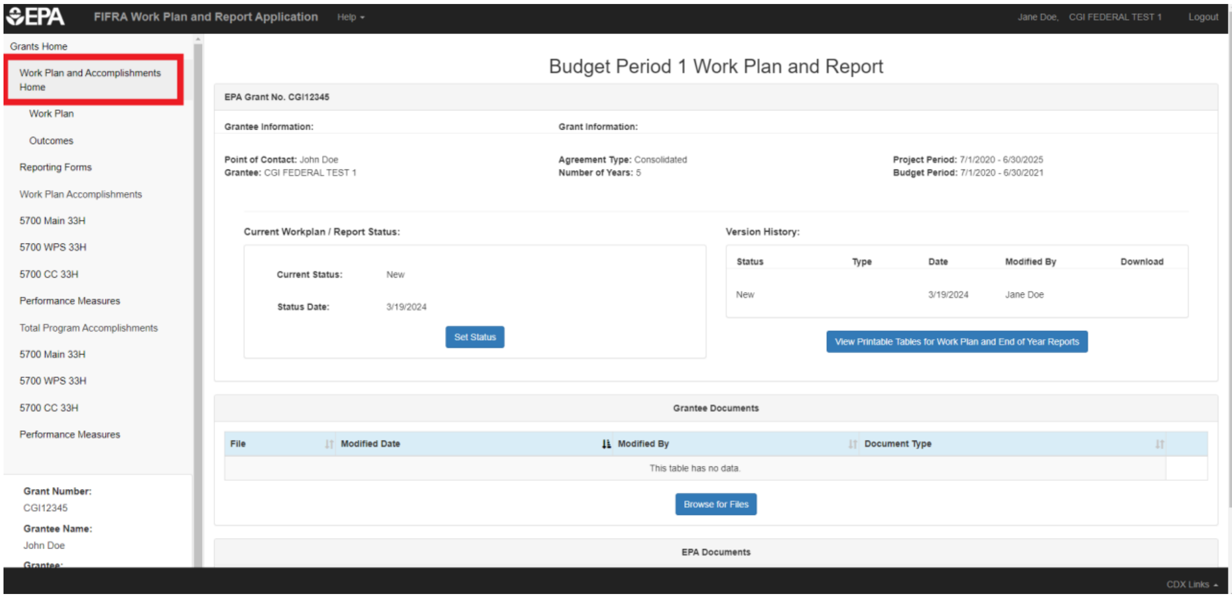


Exhibit 4-17 Work Plan and Accomplishments Homepage

The 'Grant Information' section of the 'Budget Period Work Plan and Report' screen, contains relevant information related to the budget period under the grant the 'Grantee' is accessing. For information regarding the elements displayed on-screen, refer to **Section 4.2.1**.

Additional sections are as follows:

- **Current Work Plan/Report Status:** The 'Current Work Plan/Report Status' information of the 'Work Plan and Report' along with the date the current status was set is displayed in this table. See **Section 4.4.6** for details on how to set a status.
- **Version History:** The first version in the 'Version History' table will show the status 'New,' the date, and the 'Grantee' user that created the 'Work Plan and Report.' Once a status has been changed from 'New,' the application will continue track that version of the document in the table. The table displays the date the status was set, the user who modified the status, and also provides the ability to download each modified version of the document (except the first version with the 'New' status). See **Section 4.4.10** for assistance with downloading documents.

  NOTE: The 'Version History' table does **not** show when the 'Work Plan and Report' was last saved or modified.

4.4.5 Upload Budget Period Level Documents

Navigation: Each budget period has an associated document repository. There are two sections to this document repository: one for 'Grantee Documents' and one for 'EPA Documents' (**Exhibit 4-18**). Documents added here are associated with a single budget period within the respective grant. When a document is uploaded from the 'Work Plan and Report' screen, it is added to the 'Table On' screen, as well as the table on the 'Grant Home' screen. Documents uploaded at the budget period level have a 'Document Type' designating the associated budget period from which it was uploaded. Documents uploaded at the grant level have a 'Document Type' name of 'Grant Level,' referencing that it was uploaded from the 'Grant Home' screen, and that it applies to the entire grant. See **Section 4.3.4** to learn more about uploading grant level documents.

NOTE: 'Grantees' will be able to view, but not modify, documents uploaded by EPA 'RPOs.'

To upload a budget period level document, select the 'Browse for Files' button in the 'Grantee Documents' section of the 'Work Plan and Report' homepage. Once selected, the 'Add Attachment' modal will display. Select the 'Choose File' button and use the local explorer window to find and upload a file to the budget period.

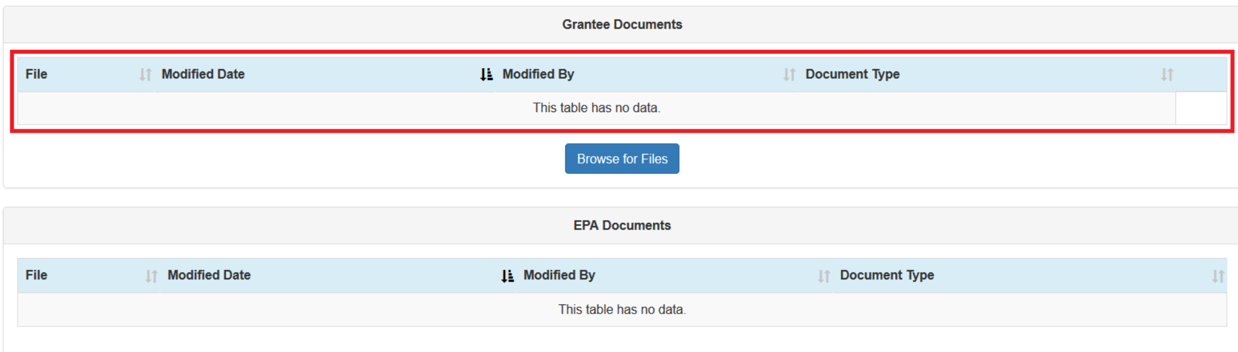


Exhibit 4-18 'Grantee' Documents Table

Navigation: Once the file has been successfully uploaded, it will appear in the 'Grantee Documents' table on the 'Work Plan and Report' homepage of the respective budget period (**Exhibit 4-19**). It will also appear in the 'Grantee Documents' table of the 'Grant Home' screen. The tables will display the filename, the date it was uploaded, the name of the CDX user who uploaded the file, and the level from where the document was uploaded. For each file within the table, the following actions are available:

- **File:** Click the filename in blue text in the 'File' column to download/view the attached file.
- **Modified Date:** The date the file was added.
- **Modified By:** The name of the registered CDX user who uploaded the file to the grant.
- **Document Type:** The location in the grant from where the document was uploaded. This can be from the 'Grant Home' screen (grant level) or from the 'Work Plan and Report' screen of the respective budget period.
- **Delete:** Deletes a file from all locations within the grant.

  NOTE: 'Grantees' can only delete documents added to the 'Grantee Documents' table.

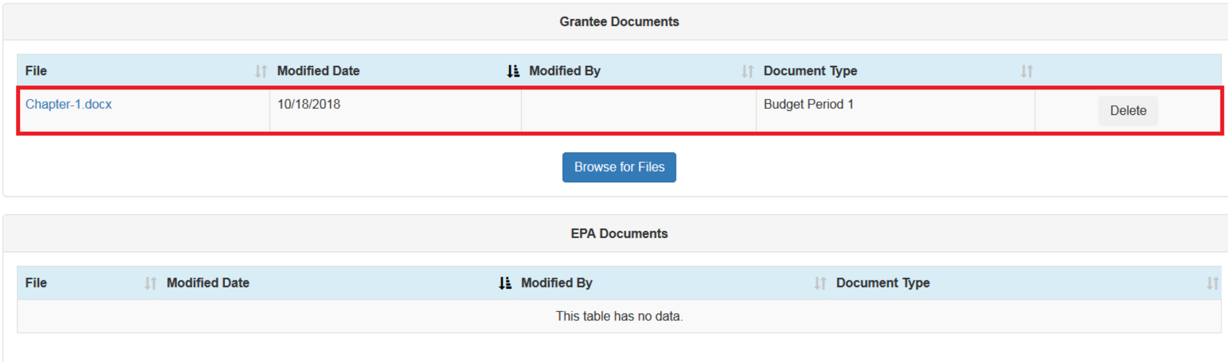


Exhibit 4-19 Attached Document

4.4.6 Setting a Status

To set a status for the budget period's 'Work Plan and Report' template, the 'Grantee' must be on the 'Work Plan and Report' homepage for the respective budget period. See **Section 4.4.1** for reference. Once the 'Grantee' has navigated to the 'Work Plan and Report' homepage, click the 'Set Status' button under the 'Current Work Plan/Report Status' section (**Exhibit 4-20**).

NOTE: 'Grantees' must change the status from 'New' to any of the statuses listed below to allow the 'RPO' or the 'OCSPP/OECA Reviewer' roles to review a 'Grantee's Work Plan and Accomplishments.'

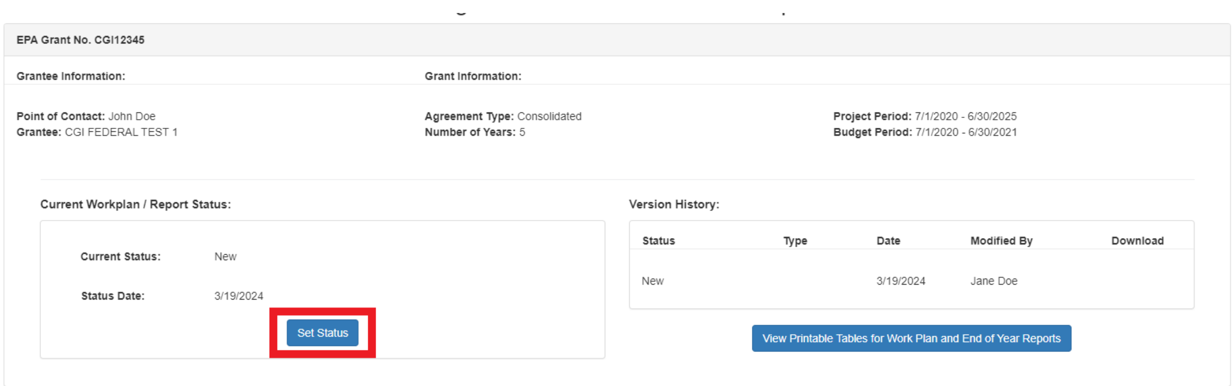


Exhibit 4-20 Set Status

Once 'Set Status' is selected, the application will generate the 'Set Status' modal (**Exhibit 4-21**). The 'Set Status' modal has the following fields:

- **Set Status:** This is a required drop-down selection. The available statuses are listed and defined on the next page **Exhibit 4-22**.
  - **Type of Report:** This is displayed only when selecting a 'Report' status in the 'Set Status.'
- **Status Date:** This field displays the current date.

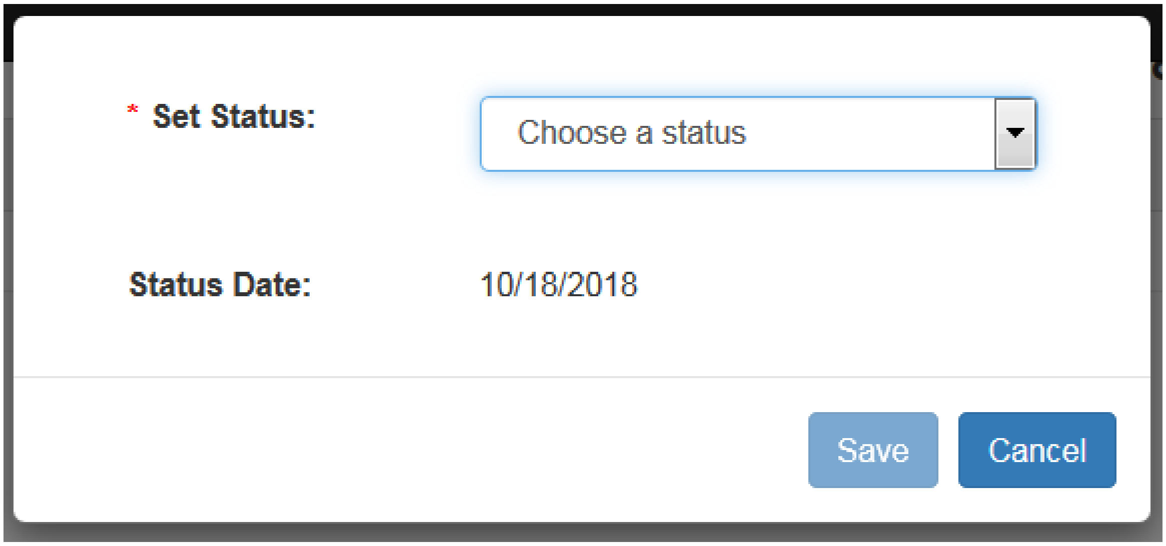


Exhibit 4-21 Set Status Modal

To set a status, click the ‘Set Status’ dropdown (**Exhibit 4-22**) and select one of the available statuses. The statuses available to ‘Grantees’ and their intended uses are the following:

- **Work Plan Draft**: This status lets EPA know that the ‘Work Plan’ is in a ‘Draft’ state. The status may be used when the ‘Grantee’ has completed their initial ‘Work Plan Draft’ and throughout negotiation of the ‘Work Plan’ while the ‘Grantee’ may make changes.
- **Work Plan Final**: This status lets EPA know that the ‘Work Plan’ is in a ‘Final’ state indicating that that the ‘Grantee’ and EPA agree on the final ‘Work Plan.’
- **Work Plan Final Amended**: This status can be used before the ‘Grantee’ begins reporting end-of-year accomplishments and when a ‘Grantee’ is needed to renegotiate an approved ‘Work Plan’ during the implementation period.
- **Grantee Report Draft**: This status lets EPA know that interim reporting or end-of-year reporting is in progress.
- **Grantee Report Final:** This status lets EPA know that ‘Grantee’ reporting is complete and that the ‘Grantee Report’ is in a ‘Final’ state and ready for EPA’s review.
- **Grantee Report Final Amended:** This status lets EPA know that the ‘Work Plan’ has been edited after the ‘Grantee’ had uploaded it to grants.gov.

NOTE: ‘Grantee’ users can change a status set by an ‘RPO’ user (i.e., ‘EPA Report Draft,’ ‘EPA Report Final,’ or ‘EPA Report Final Amended,’) back to a ‘Grantee’ user status.

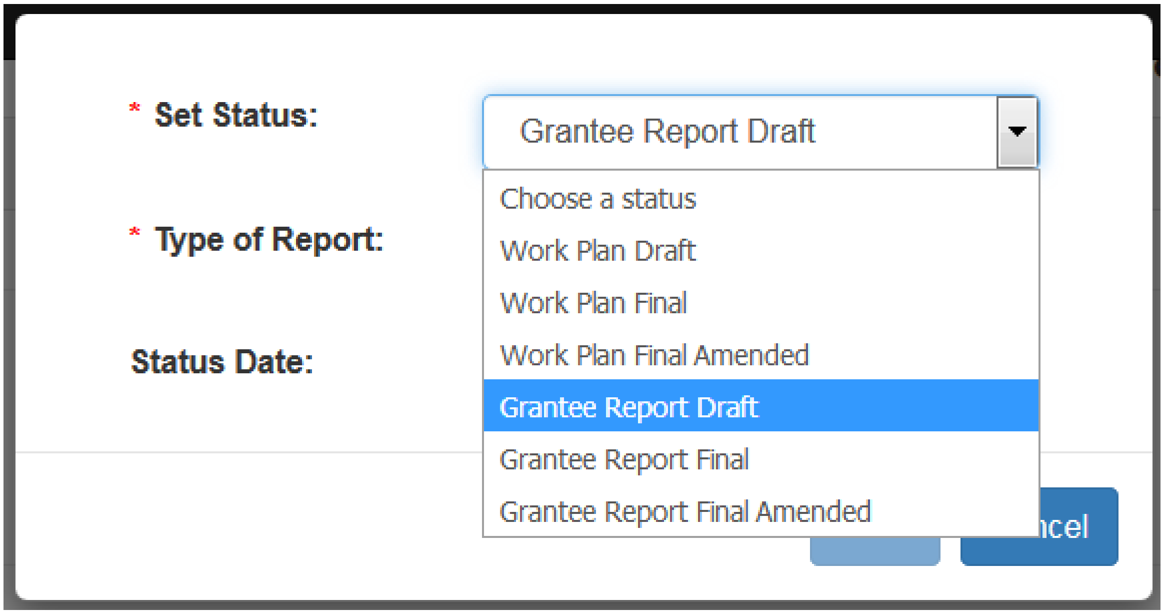


Exhibit 4-22 Set Status Pick List

If any of the ‘Report’ statuses are selected, the user will also be required to select the ‘Type of Report’ the status is associated with from the generated ‘Type of Report’ dropdown (**Exhibit 4-23**). The following ‘Report Types’ are available:

- Q1
- Q2-Mid-Year
- Q3
- Q4-Final

NOTE: ‘Grantees’ minimum reporting frequency will reflect what they have negotiated with the EPA regional office. The ‘Report Types’ should align with the reporting period(s) for which data has been provided on 5700 forms. See **Section 4.4.9.2** for setting up reporting periods on 5700 forms.

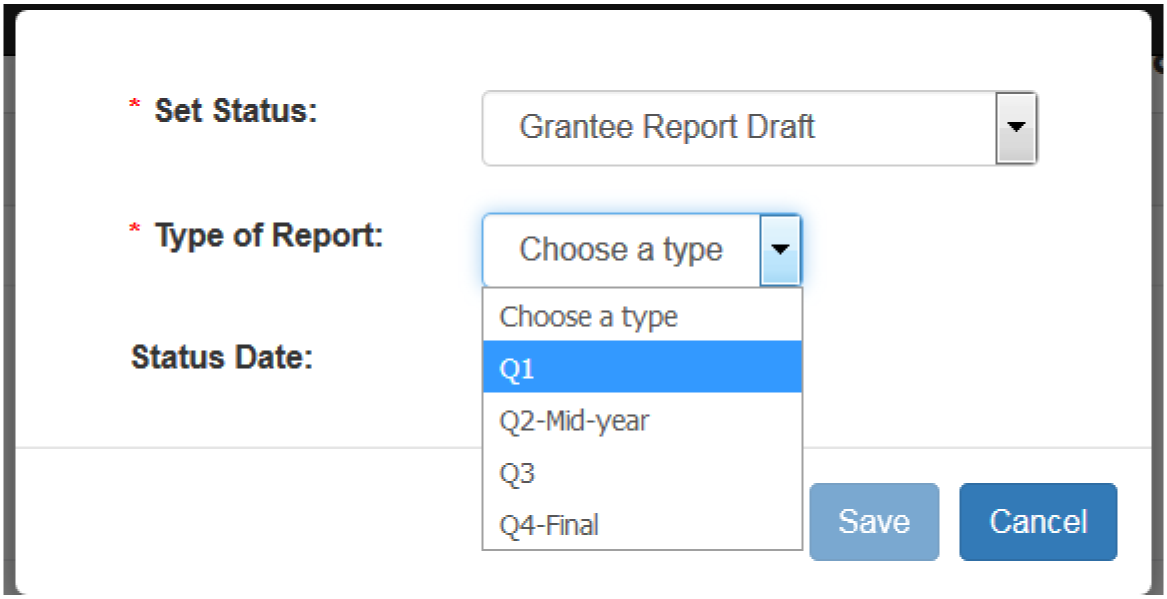


Exhibit 4-23 Type of Report Dropdown

Navigation: Once all required fields are populated, the 'Save' button will become enabled. Click 'Save' to close the modal and set the status. The status will update in the 'Current Workplan/Report Status' section on the 'Work Plan and Report' homepage (**Exhibit 4-24**), as well as in the 'Document Status' column of the respective grant on the 'Grant Home' screen (**Exhibit 4-25**). The status update will also be visible in the 'Version History' section on the 'Work Plan and Report' screen for future reference.

NOTE: Once a status is set, it cannot be deleted. The 'Grantee' should make sure they are ready to set the status before saving.

NOTE: There is no EPA notification feature associated with setting a status. If review of the 'Work Plan and Report' template is time sensitive, please reach out to the respective 'RPO.'

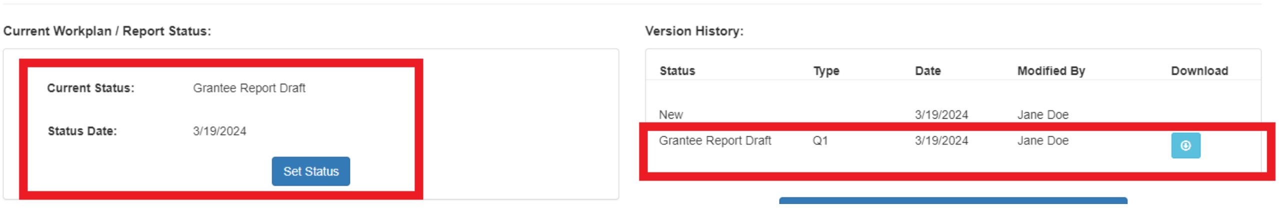


Exhibit 4-24 Work Plan and Report Status Update

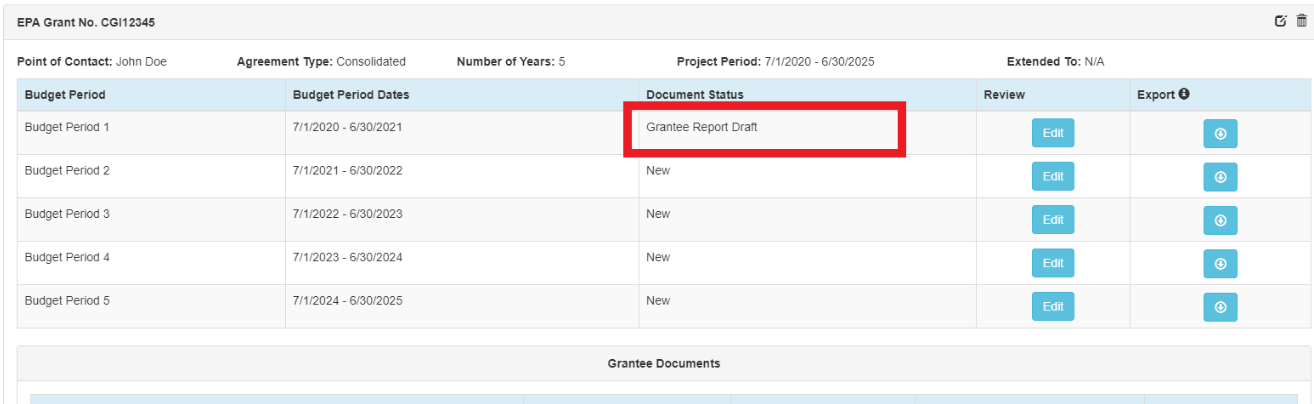


Exhibit 4-25 Document Status Update

4.4.7 Work Plan Section

Navigation: The ‘Work Plan’ section for a budget period is accessible by clicking on the ‘Work Plan’ link in the navigation tree (**Exhibit 4-26**). This link can be found under the ‘Work Plan and Accomplishments Home’ link.

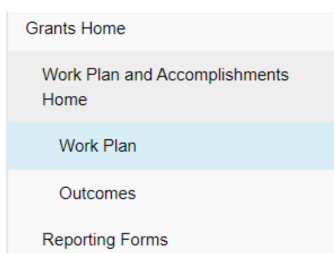


Exhibit 4-26 Work Plan Navigation Link

The ‘Work Plan’ section contains the following three tabs:

- **Activities:** The ‘Activities’ tab allows ‘Grantee’ users to provide descriptions of work the ‘Grantee’ intends to complete during the budget period under ‘Work Plan Activity Description (Outputs).’ Also under this tab, ‘Grantee’ users add Picklist and Optional activities to show on the ‘Grantee’ or ‘EPA Report.’ When selected, the Activity will display on the respective report under the corresponding program area, with the ‘Work Plan Activity Description, Accomplishment, and Comment’ text boxes displayed.

  NOTE: For meeting obligations of their grant, the current FIFRA Cooperative Agreement Guidance instructs ‘Grantees’ to select one OCSPP-funded Picklist program area and one OECA-funded Picklist program area. As such, ‘Grantee’ users should add all activities under a respective, selected Picklist program area to their ‘Work Plan.’

- **Grantee Report**: The ‘Grantee Report’ tab allows ‘Grantees’ to insert and save text in the ‘Work Plan Activity Description (Outputs)’ and ‘Describe Work Plan Activity Accomplishment’ text boxes (see more in **Exhibit 4-32** and **Exhibit 4-33**).
- **EPA Report:** The ‘EPA Report’ tab allows for ‘RPO’ users to provide comments and recommendations to the ‘Grantee’ on the proposed ‘Work Plan Activities’ and the ‘Grantee’s’ reported accomplishments (see more in **Exhibit 4-34**).

Navigation: Each of the three ‘Report’ tabs of the ‘Work Plan’ follow a similar format. The page within each ‘Report’ tab is broken out into four additional tabs based on which program areas and Activities are required for reporting. Each of the four additional tabs contain a series of expandable program areas. Each Program Area contains at least one card with each card containing details for a specific ‘Grant Guidance Activity.’ These ‘Grant Guidance Activities’ are split into the four additional tabs on the ‘Work Plan’ under ‘Required,’ ‘Picklist,’ ‘Optional/Inactive,’ and ‘All Required & Added.’ While each ‘Work Plan’ tab will have slightly different ‘Program Areas and Activities,’ some fields will remain across all tabs and will provide identifying details associated with the respective ‘Grant Guidance Activity’ (**Exhibit 4-27**). For further details on the elements associated with ‘Work Plans,’ refer to **Sections 4.4.7.1, 4.4.7.2, and 4.4.7.3**.

NOTE: Depending on the number of guidance activities, this page may take a few moments to load.

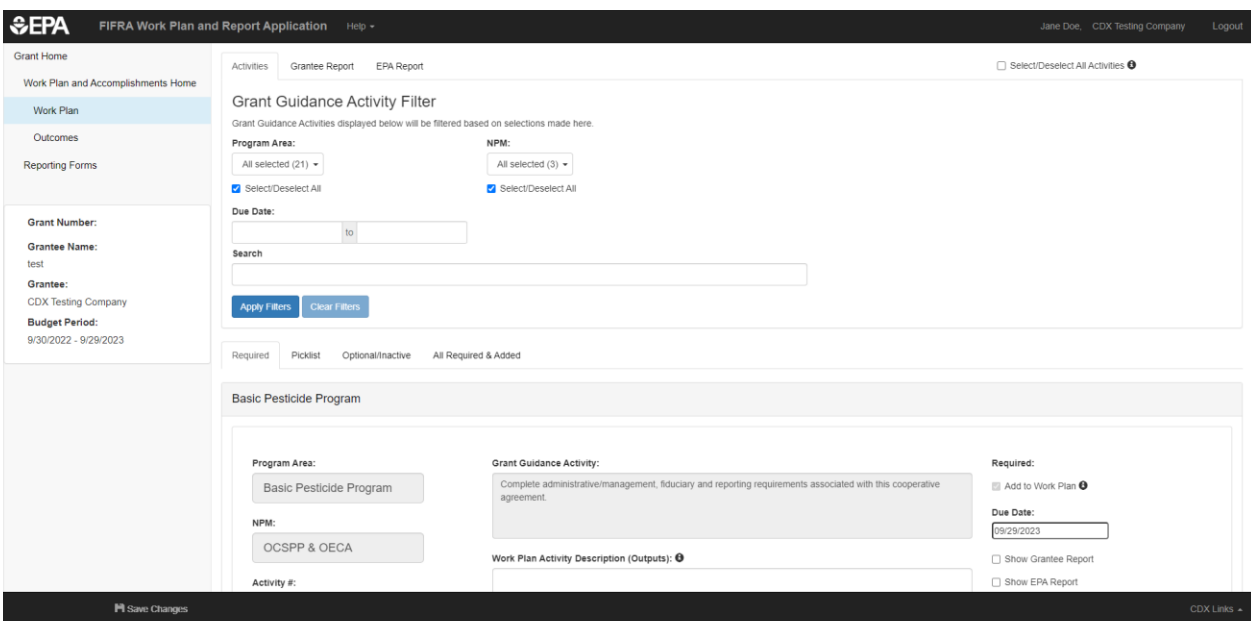


Exhibit 4-27 Work Plan Activities Tab

If a ‘Grant Guidance Activity’ has been modified within the last year, a banner will display warning the user that the ‘Activity’ has been modified **(Exhibit 4-26).** By clicking the ‘Accept Changes’ button, the user acknowledges that the activity has been updated and the banner for that activity will no longer display.

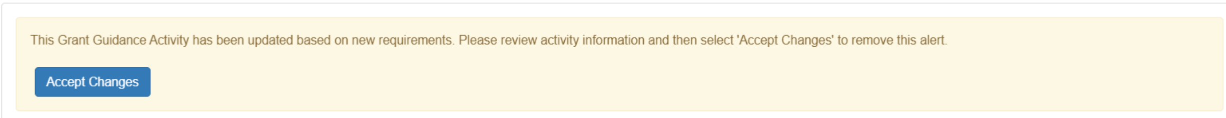


Exhibit 4-28 Modified Grant Guidance Activity Warning

While moving through the ‘Work Plan’ section, be sure to save all changes before navigating away. As a ‘Grantee,’ the ‘Save Changes’ link is available in the application footer. (**Exhibit 4-29**).

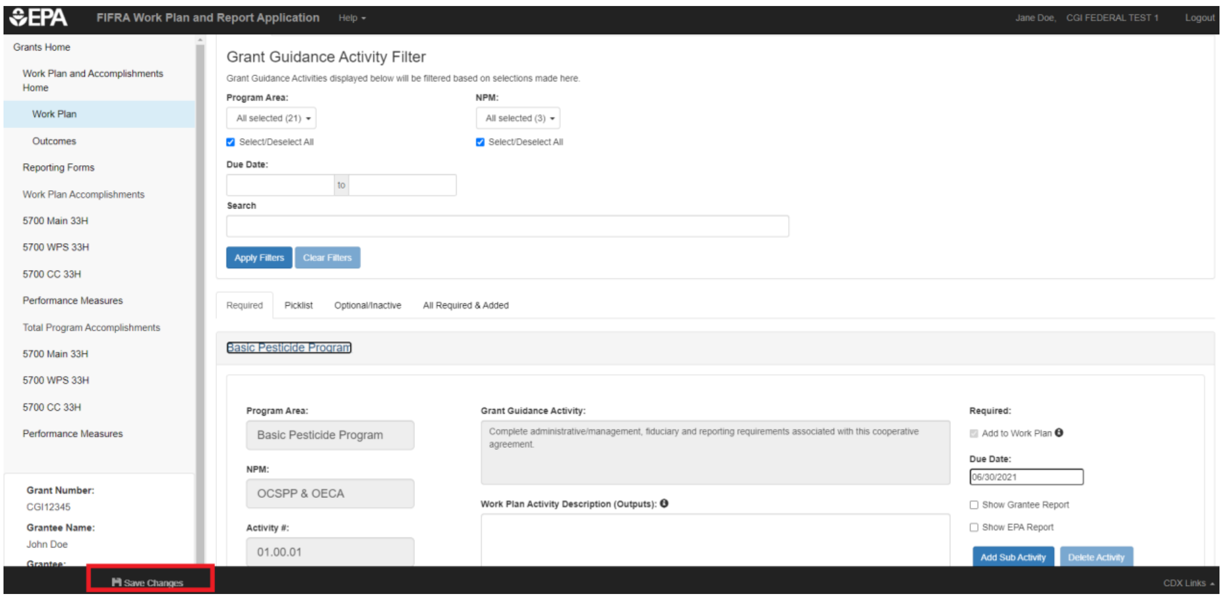


Exhibit 4-29 Work Plan ‘Save Changes’ Link

Navigation: If information is added to the ‘Work Plan’ section and an attempt is made to leave the section before performing a save, a ‘Warning’ modal is generated that states, ‘You are about to leave the current page. Would you like to save your changes?’ This is to prevent immediate loss of any work (**Exhibit 4-30**). Clicking ‘Cancel’ in the modal will direct the ‘Grantee’ back to the current screen without performing a save. Clicking ‘Yes’ in the modal will navigate the ‘Grantee’ away from the current screen and save any changes that have been made on that screen. Clicking ‘No’ will navigate the ‘Grantee’ away from the current screen and discard any changes that have been made on that screen.

WARNING: Before navigating away from the ‘Work Plan,’ ‘Grantee’ users must do one of the following to ensure their changes are saved: (1) click on the ‘Save Changes’ link in the application footer (**Exhibit 4-52)**;or (2) select ‘Yes’ in the pop-up window that appears when a different area of the report is selected from the navigation tree. If a user navigates away from the form without selecting ‘Yes’ from the ‘Save Changes’ prompt, closes the browser window, ends their CDX session, or their CDX session times out, then any changes made since navigating to the form will be lost.

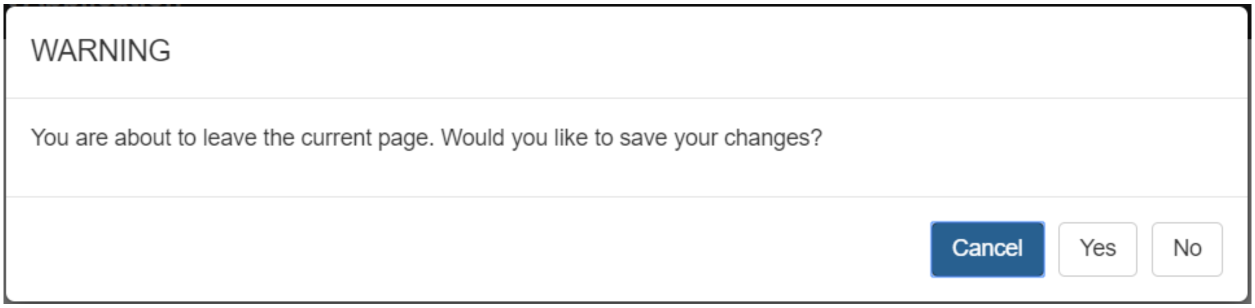


Exhibit 4-30 Save 'Warning' Modal

4.4.7.1 'Activities' Tab

After selecting the 'Work Plan' link in the navigation tree, the application will navigate the 'Grantee' to the 'Work Plan Activities' tab (**Exhibit 4-31**). The 'Activities' tab allows the 'Grantee' to fill out the 'Work Plan Activity Description (Outputs)' (**Exhibit 4-31**) for EPA's 'Grant Guidance Activities.' Once selected, a set of fields are shown, which are collectively referred to as an activity's 'card.' Each 'card' within the 'Work Plan Activities' tab contains the following fields:

- **Program Area:** This is a disabled field and is linked to the program area for the parent activity.
- **National Program Manager (NPM):** This is a disabled field and is linked to the NPM for the parent activity.
- **Activity #:** This is a disabled number based on the parent activity.
- **Grant Guidance Activity:** This is a disabled field that provides the details for the guidance activity established by EPA.
- **Work Plan Activity Description (Outputs):** This is an 'Open Text' field where the 'Grantee' should briefly describe the 'Work Plan Activity' being conducted corresponding to the respective 'Grant Guidance Activity' for that budget period. The user should be as specific as possible, especially if the activity involves any metrics, locations, etc.

  NOTE: 'Grantees' can copy 'Work Plan Activity Descriptions' from the previous budget period. See **Section 4.4.2** for instructions on how to copy 'Work Plan Activity Descriptions.'
- **Status:** The status text in the upper, right corner of every 'Grant Guidance Activity' card identifies if the particular 'Work Plan Activity' is 'Required,' 'Optional,' 'Picklist,' or 'Inactive.'

  NOTE: 'Grant Guidance Activities' with a 'Required' status are designated as being in use by default; unchecking the 'Selected' checkbox is not permitted.
- **Add to Work Plan Checkbox: Active checkbox on the 'Activities' tab for all non-required guidance activities. To add a Picklist or Optional guidance activity to the Work Plan, check this box.** If the 'Add to Work Plan' checkbox is checked, this indicates the activity is in use and the 'Grantee' can enter and save text for the activities. The editable areas will remain inactive until checked. When checked, the 'Grantee' will be able to enter

and save text and this activity will be included in the 'Printable Work Plan Report.' See **Section 4.4.10**. When checked, this activity will show in the 'All Required and Added' tab. To keep the activity out of the report, simply uncheck the box.

NOTE: For meeting obligations of their grant, the current FIFRA Cooperative Agreement Guidance instructs 'Grantees' to select one OCSPP-funded Picklist Program Area and one OECA-funded Picklist Program Area. As such, 'Grantee' users should add all activities under a respective, selected Picklist Program Area to their 'Work Plan.' **Due Date:** By default, the due date is set to the last day of the budget period. If necessary, this date is editable and can be changed by the user.

- **Show 'Grantee' Report:** Selecting the checkbox next to 'Show Grantee Report,' allows the user to expand the guidance activity card to review associated 'Grantee' reports 'Describe Work Plan Activity Accomplishment' section.

  NOTE: To add and save accomplishment descriptions, users must use the 'Grantee Report' tab.

- **Show EPA Report:** Selecting the checkbox next to 'Show EPA Report' allows the user to expand the guidance activity card to review associated 'EPA Reports.'

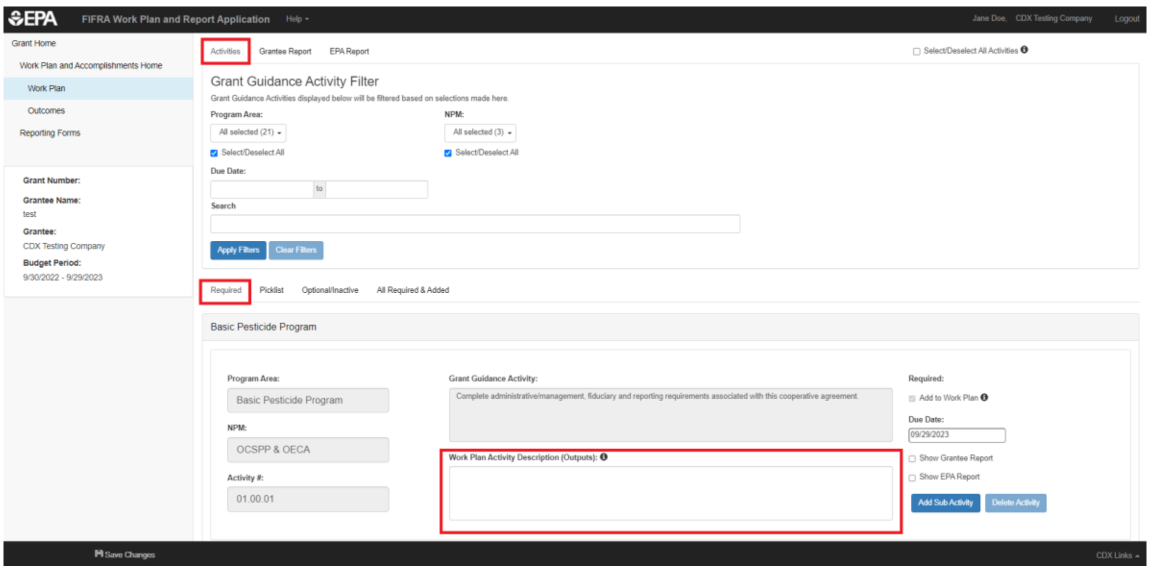


Exhibit 4-31 'Work Plan Activities' Tab

4.4.7.2 'Grantee Report' Tab

Navigation: To access the 'Grantee Report' section of the 'Work Plan,' select the 'Grantee Report' tab at the top of the screen (Exhibit 4-32).

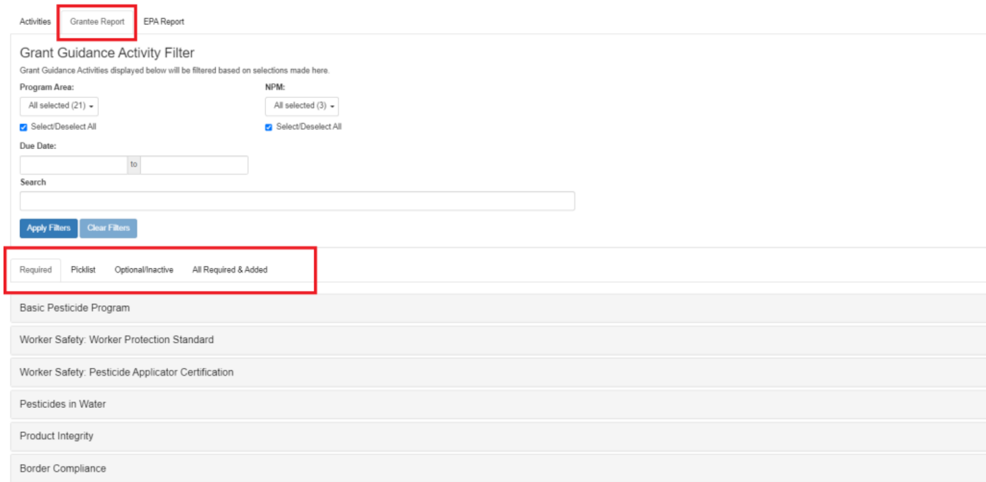


Exhibit 4-32 'Grantee' Report Tab

The 'Work Plan Grantee Report' allows the 'Grantee' to describe the accomplishments of the respective 'Work Plan Activity' provided in **Section 4.4.7.1** (**Exhibit 4-33**). In addition to the basic information outlined in **Section 4.4.7**, cards on the 'Grantee Report' tab have the following fields:

- **Describe Work Plan Activity Accomplishment:** This Free-Text' field should be used to briefly describe the activity accomplishment/status listed, as well as any associated description/reasoning. Please see Appendix 1 of the FIFRA Cooperative Agreement Guidance for descriptions of what 'Grantees' should report.
- **Status:** When reporting results on activities, 'Grantee' users select the current status for the corresponding activity that is required or has been added to the 'Work Plan.' The available statuses are 'Complete,' 'Partially Complete,' 'Not Started,' and 'Ongoing/As Needed.'
- **Significant Issues/Innovations:** This dropdown is used as a means to flag activities that the 'Grantee' feels are either significant issues or entail an innovative approach. The options for this dropdown are 'Innovative,' 'Significant Issue,' and 'Both.'
- **Due Date:** By default, the due date is set to the last day of the budget period. If necessary, this date is editable from either the 'Activities' or 'Grantee Report' tabs.
- **Show Activities:** By selecting the checkbox next to 'Show Activities,' the 'Grantee' is able to expand the 'Grantee Report' card to review associated activity descriptions.
- **Show EPA Report:** By selecting the checkbox next to 'Show EPA Report,' the 'Grantee' is able to expand the 'Grantee Report' card to review associated 'EPA Report.'

WARNING: Before navigating away from the 'Work Plan,' 'Grantee' users must do one of the following to ensure their changes are saved: (1) click on the 'Save Changes' link in the application footer (**Exhibit 4-52)**; or (2) select 'Yes' in the pop-up window that appears when a different area of the report is selected from the navigation tree. If a user navigates away from the form without selecting 'Yes' from the 'Save Changes' prompt, closes the browser window, ends their CDX session, or their CDX session times out, then any changes made since navigating to the form will be lost.

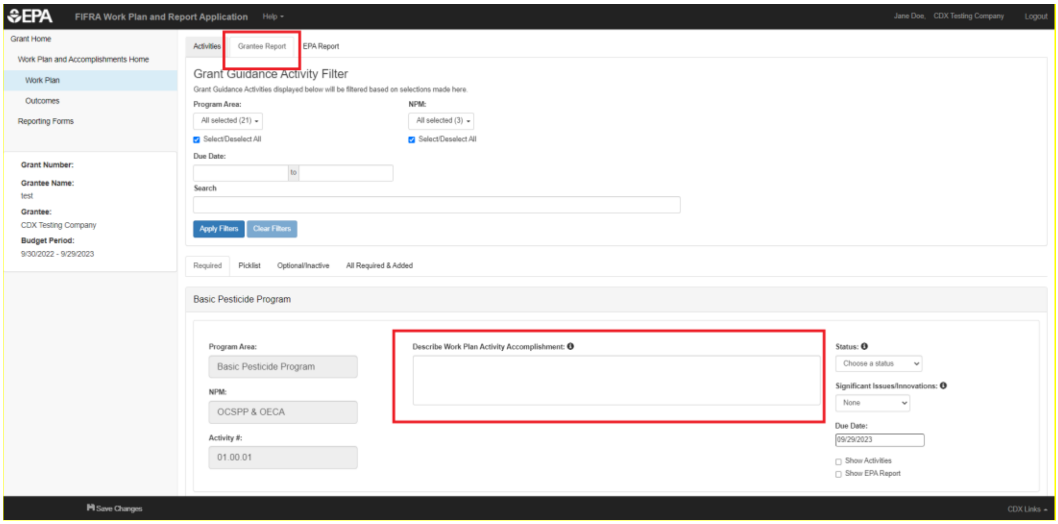


Exhibit 4-33 Work Plan Activity Accomplishment

4.4.7.3 EPA Report Tab

Once EPA's 'RPO' has had a chance to review the 'Work Plan Activities' and 'Grantee Report' information, they will be able to provide 'EPA Comments' and 'EPA Recommendations' in the respective fields for each activity (**Exhibit 4-34**). In addition to the basic information outlined in **Section 4.4.7**, cards on the 'EPA Report' tab have the following fields:

- **EPA Comments:** This field is only accessible to 'RPO' users. Comments are to the respective guidance activity or sub-activity. If applicable to the division of EPA personnel reviewing the 'Work Plan,' two sets of EPA comment boxes are provided to incorporate feedback from EPA personnel in Land, Chemicals and Redevelopment Divisions (LCRDs) and Enforcement and Compliance Assurance Divisions (ECADs).
- **EPA Recommendations:** This field is only accessible to 'RPO' users. Recommendations are to the respective guidance activity or sub-activity. If applicable to the division of EPA personnel reviewing the 'Work Plan,' two sets of EPA comment boxes are provided to incorporate feedback from EPA personnel in LCRDs and ECADs.
- **EPA Review of Status:** This field is only accessible to 'RPO' users and applies to the respective activity. The available statuses are 'Complete,' 'Partially Complete,' 'Not Started,' and 'Ongoing/As Needed.'
- **Due Date:** By default, the due date is set to the last day of the budget period. If necessary, this date is editable from either the 'Activities' or 'Grantee Report' tabs.
- **Show Activities:** By selecting the checkbox next to 'Show Activities,' the user is able to expand the 'EPA Report' card to review associated activity descriptions.
- **Show 'Grantee' Report:** By selecting the checkbox next to 'Show Grantee Report,' the user is able to expand the 'EPA Report' card to review the associated 'Grantee Report.'

Navigation: To access the 'EPA Report' tab, select the 'EPA Report' tab at the top of the 'Work Plan' page.

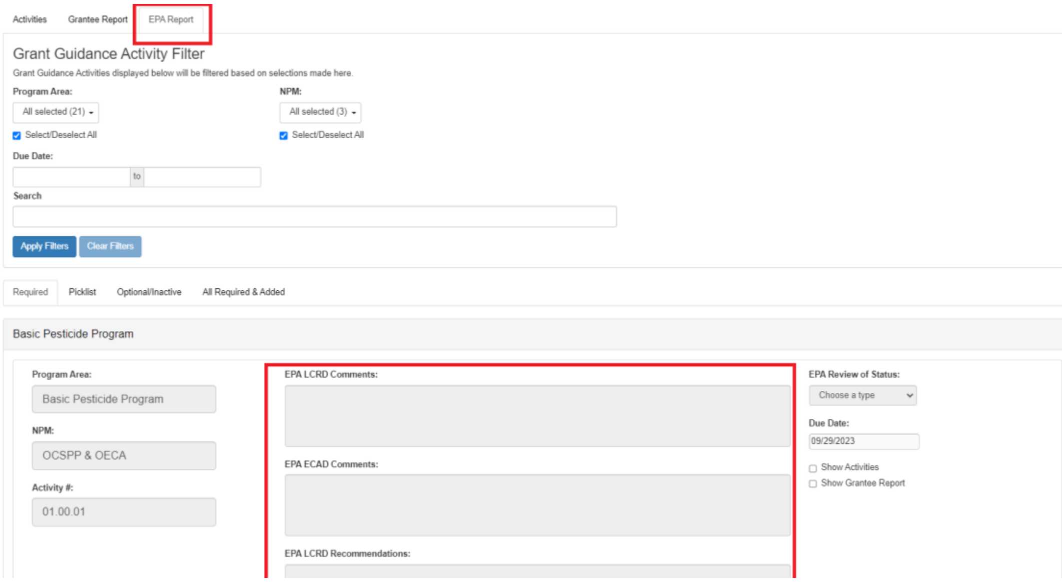


Exhibit 4-34 EPA Report Tab

4.4.7.4 Work Plan Grant Guidance Activity Filter

Navigation: The 'Grant Guidance Activity Filter,' located at the top of the 'Work Plan' section of the application, allows the user to manage and customize all 'Grant Guidance Activities.' This tool is available for the 'Activities,' 'Grantee Report,' and 'EPA Report' tabs. A drop-down filter is provided to narrow down by specific 'Program Area,' 'Activity Type,' 'NPM,' 'Selected Activities Only,' 'Activity #,' and 'Due Date' fields. A search bar is also available in order to find certain key words located within any of the fields.

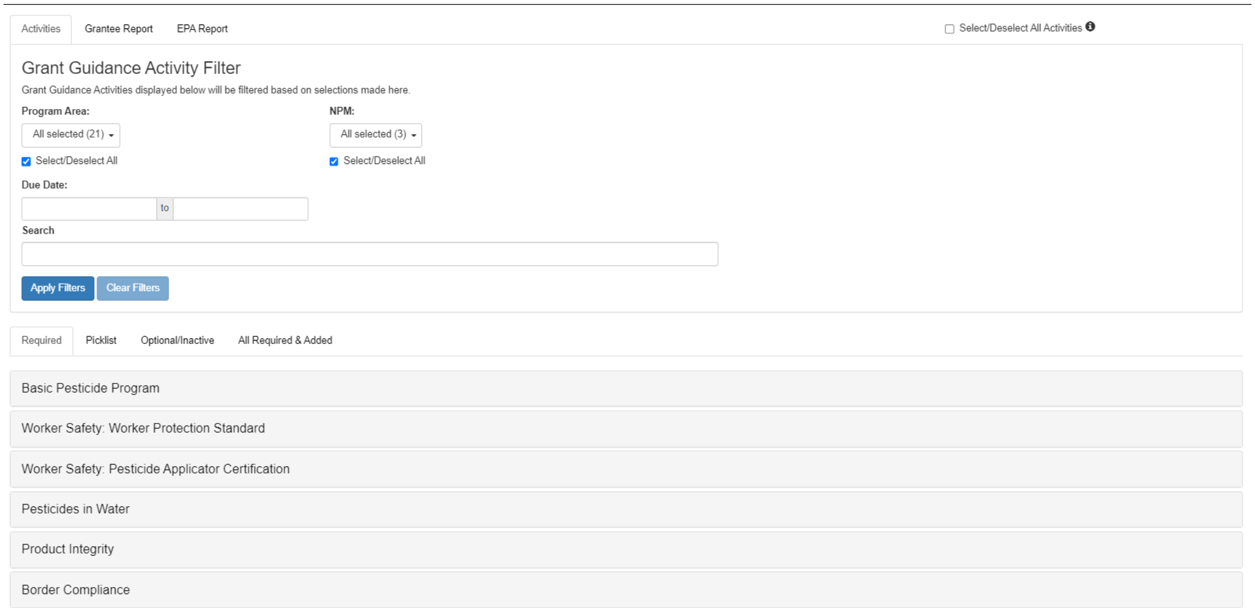


Exhibit 4-35 Grant Guidance Activity Filter and Search

Navigation: All the selections for all drop-menus are checked, by default, to make all 'Grant Guidance Activities' on the 'Work Plan' screen available for viewing.

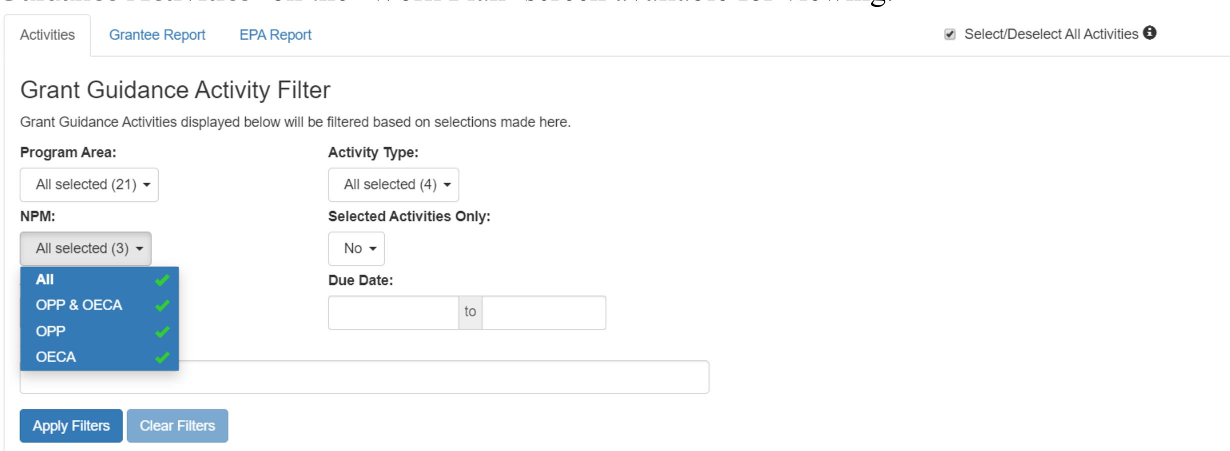


Exhibit 4-36 Grant Guidance Activity Filter – All Activities

Filter selections can be made by clicking on the respective drop-down menu and checking or unchecking which selections should be in view. A selection with a checkmark denotes that the selection will be viewable when filtering is applied, given there are no conflicts with other applied filters. Clicking on a selection with a checkmark will remove the checkmark. Any activities on the 'Work Plan' screen associated with unchecked selections in the drop-down menu will be removed from view when filtering is applied.

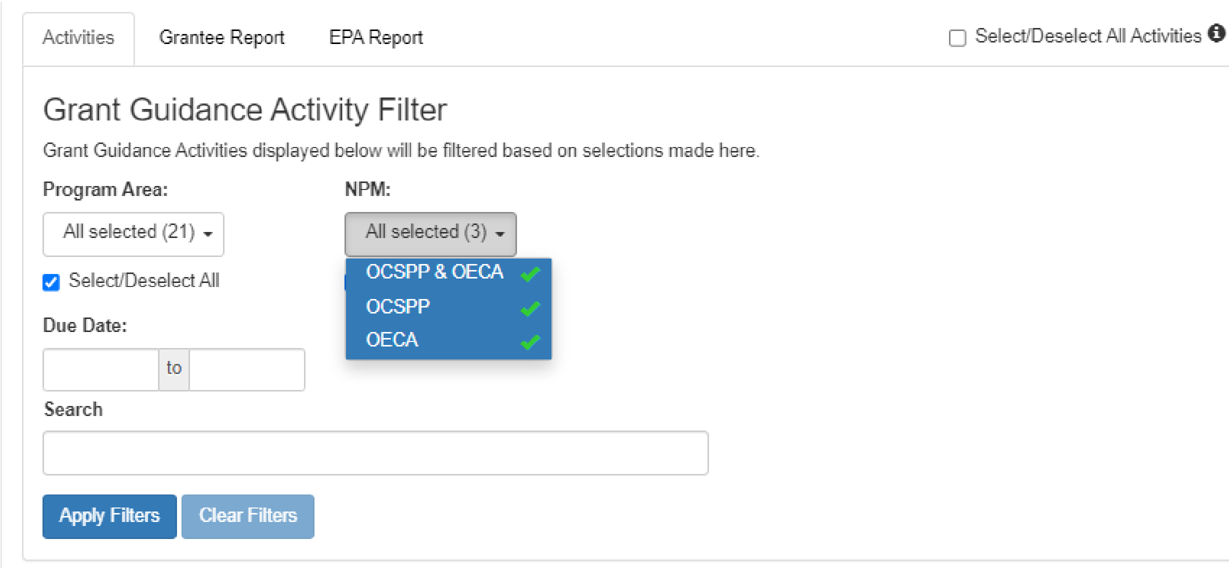


Exhibit 4-37 Grant Guidance Activity Filter – Checking/Unchecking Selections

Navigation: Once a filter has been applied, clearing all filters can be done by clicking the 'Clear Filters' button to the right of the 'Apply Filters' button. The 'Clear Filters' button is only activated after a filter has been applied to the 'Work Plan' screen. Clearing filters will return the 'Work Plan' screen to its default state, where all available 'Grant Guidance Activities' are viewable.

NOTE: Navigating to another section on the navigation tree will also clear any filters that have been set.

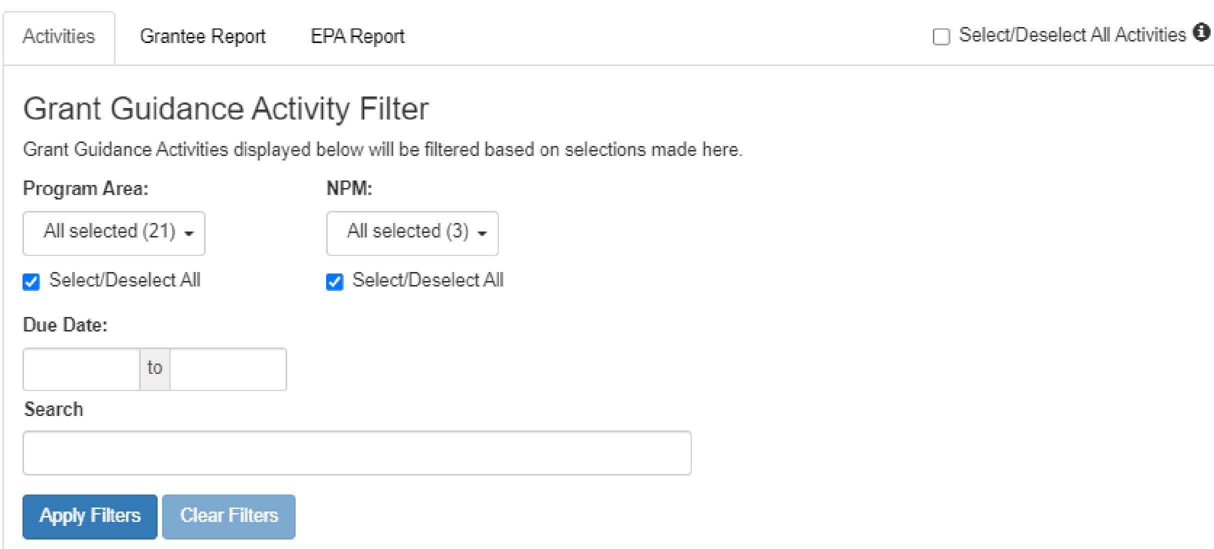


Exhibit 4-38 Grant Guidance Activity Filter – Clear Filters

Navigation: Entering an alphanumeric string in the 'Search' field and clicking the 'Apply Filters' button also allows filtering by the entered string on the 'Work Plan' screen. When a string is entered into the field and a filter is applied, any 'Grant Guidance Activities,' not containing the entered string, will be removed from view on the 'Work Plan' screen. This will also have the effect of highlighting that string anywhere it is located for the activities that have not been filtered out of view.

Exhibit 4-39 shows a screen capture of the 'Grant Guidance Activity Filter – Search' area of the 'Work Plan' screen.

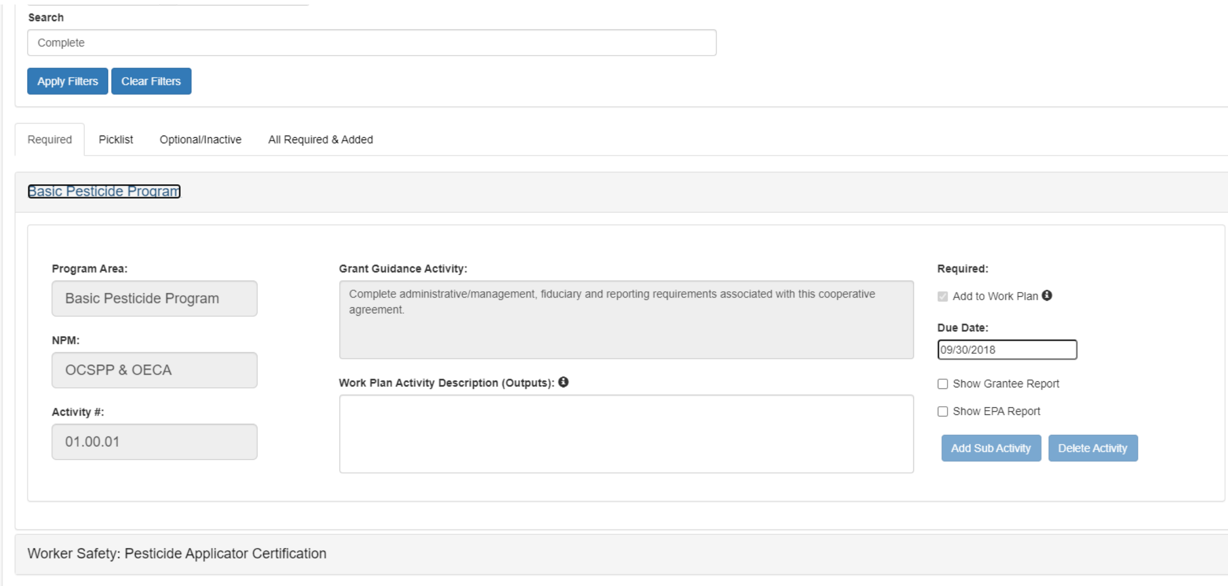


Exhibit 4-39 Grant Guidance Activity Filter - Search

4.4.8 Work Plan Outcomes and Goals

Navigation: The 'Work Plan Outcomes and Goals' section is accessible by clicking on the 'Outcomes' link in the navigation tree (**Exhibit 4-40**).

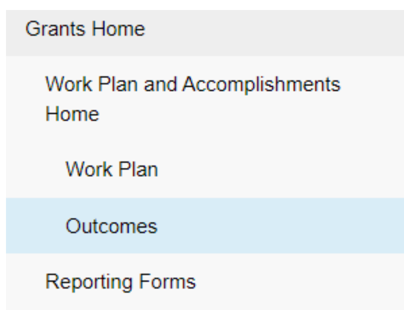


Exhibit 4-40 Outcomes Navigation Link

The 'Outcomes' page is separated into the following key elements (**Exhibit 4-41**):

- **Program Areas:** Identifies the program area to which the outcome is associated.
- **EPA Program Outcome:** Identifies EPA's expected outcome for the program area.
- **Grantee Outcome:** 'Free-text' field for the 'Grantee' user to identify outcomes and goals in the respective program areas, showing how the 'Grantees' efforts align to the 'EPA Program Outcomes' and 'EPA Goals.'

  NOTE: 'Grantee Outcomes' must be entered by the 'Grantee' every year. They do not copy into a new budget period.

- **EPA Goal:** Outlines EPA's goal for the program area.

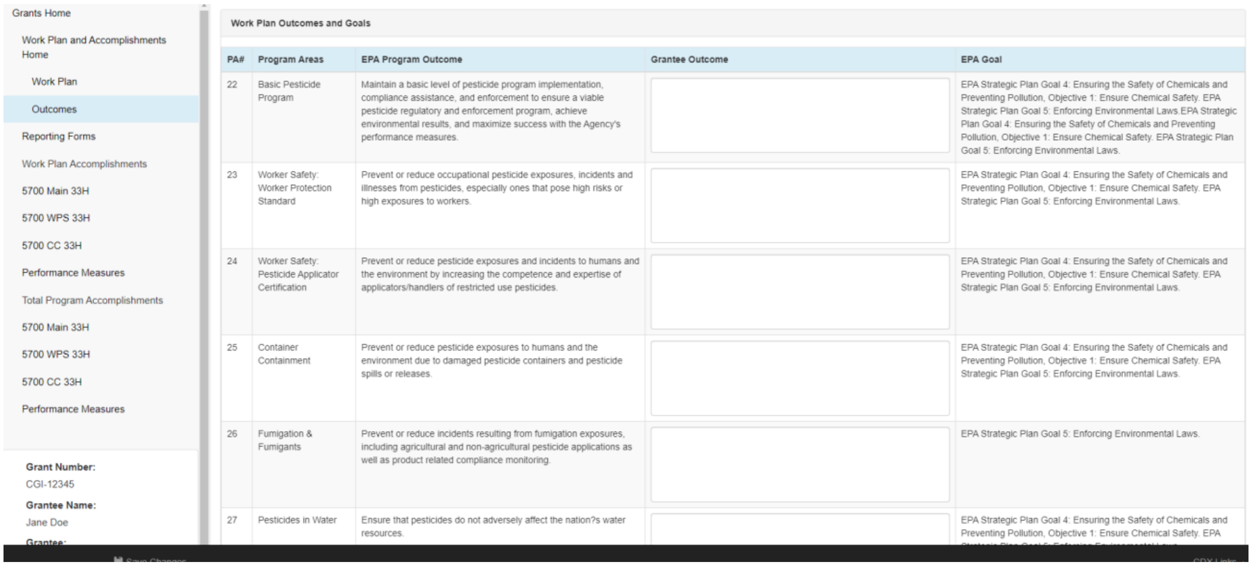


Exhibit 4-41 Work Plan Outcomes and Goals

Navigation: While working through the 'Work Plan Outcomes and Goals' page, be sure to save all changes before navigating away. (**Exhibit 4-42**). This can be done by using the 'Save Changes' link in the application footer, just like saving in the 'Work Plan' section of the grant budget period.

WARNING: Before navigating away from the 'Work Plan Outcomes and Goals' page, 'Grantee' users must do one of the following to ensure their changes are saved: (1) click on the 'Save Changes' link in the application footer (**Exhibit 4-52);**or (2) select 'Yes' in the pop-up window that appears when a different area of the report is selected from the navigation tree. If a user navigates away from the form without selecting 'Yes' from the 'Save Changes' prompt, closes the browser window, ends their CDX session, or their CDX session times out, then any changes made since navigating to the form will be lost.

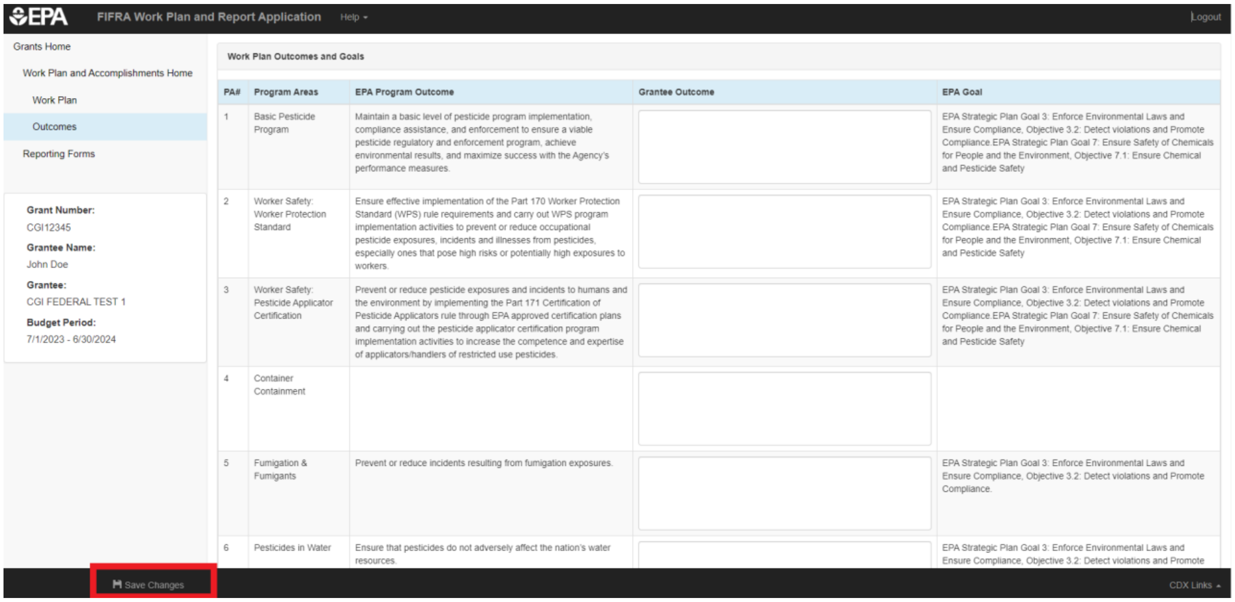


Exhibit 4-42 Work Plan Outcomes and Goals 'Save Changes' Link

4.4.9 Reporting Forms

When a 'Work Plan and Report' is first created for a specific budget period within a grant, there are no associated reporting forms. For the purposes of the FGD application, the reporting form types are:

- 5700 Main
- 5700 WPS
- 5700 CC
- Performance Measures

4.4.9.1 Work Plan vs. Total Program Accomplishments Reports

Navigation: Reporting forms can either be associated with 'Work Plan Accomplishments' or 'Total Program Accomplishments.' 'Grantees' reporting only those accomplishments completed using EPA grant funds, should select 'Work Plan Accomplishments.' 'Grantees' reporting accomplishments completed with EPA grant funds and a 'Grantee's' own funds should select 'Total Program Accomplishments.' Only 'Grantees' wishing to report both types of accomplishment reporting should select both. If a 'Grantee' selects 'Both,' then both sets of forms should be completed.

Navigation: To add reporting forms for a budget period, select the 'Reporting Forms' link in the navigation tree (**Exhibit 4-43**).

NOTE: Please review the current FIFRA Cooperative Agreement Guidance or confirm with a 'RPO' which set(s) of forms to select.

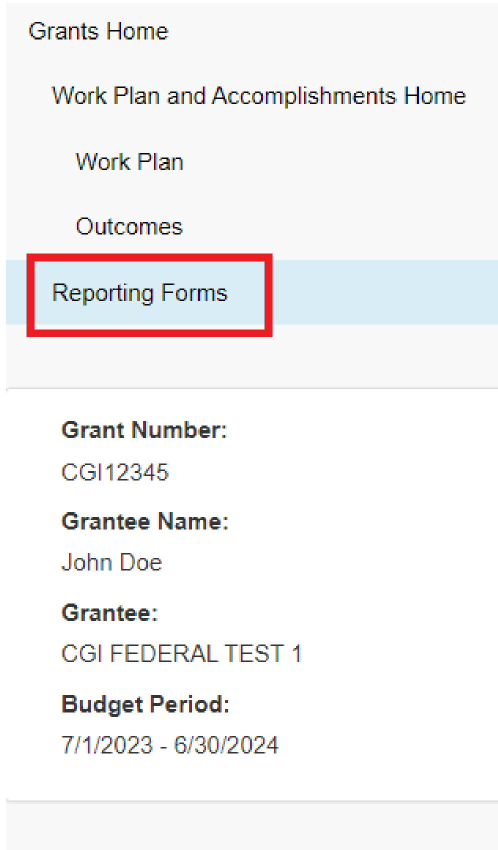


Exhibit 4-43 Reporting Forms Navigation Link

Navigation: The 'Grantee' can select the 'Reporting Forms' link in the navigation tree to navigate to the 'Reporting Forms' screen. This page features a dropdown where users can choose to add reporting forms associated with 'Work Plan Accomplishments,' 'Total Program Accomplishments,' or 'Both.' (**Exhibit 4-44).** If the 'Grantee' selects one of the options in the dropdown and clicks the 'Select' button, it will add the respective reporting form set(s) to their grant. The forms will also appear below the 'Reporting Forms' link within the navigation tree.

> **NOTE:** Once both reporting forms have been added to the same budget period, the dropdown menu will be removed from the 'Reporting Forms' screen. Once this occurs, the 'Grantee' will not be able to add any more reporting forms for the same budget period.

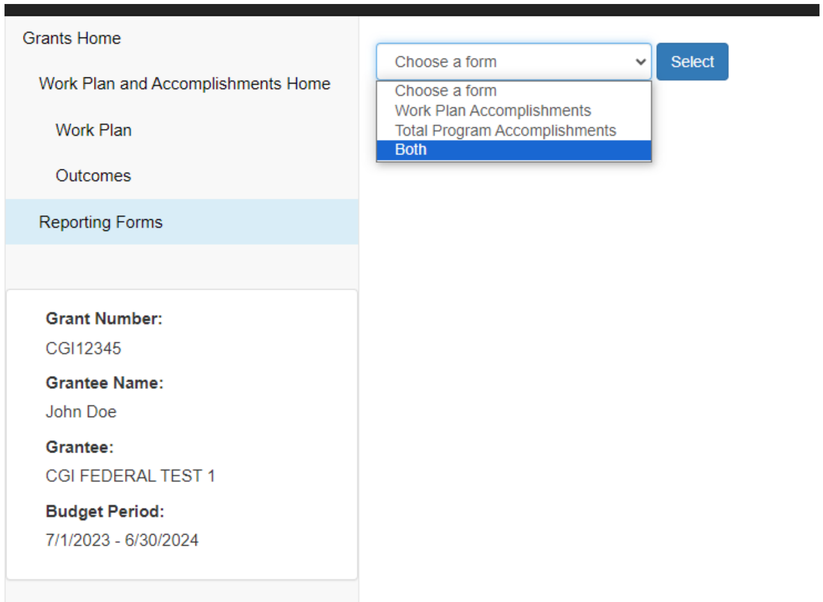


Exhibit 4-44 Reporting Forms Drop-down Menu

4.4.9.2 5700 Report Navigation

Navigation: Each of the three '5700 Reporting Forms' follow the same format for navigation. When a 'Grantee' selects the desired report from the navigation tree, they will be directed to the respective 'Summary' tab for that reporting form (**Exhibit 4-45**). Refer to **Sections 4.4.9.3, 4.4.9.4**, and **4.4.9.5** for additional details regarding adding data to each '5700 Reporting Form' type.

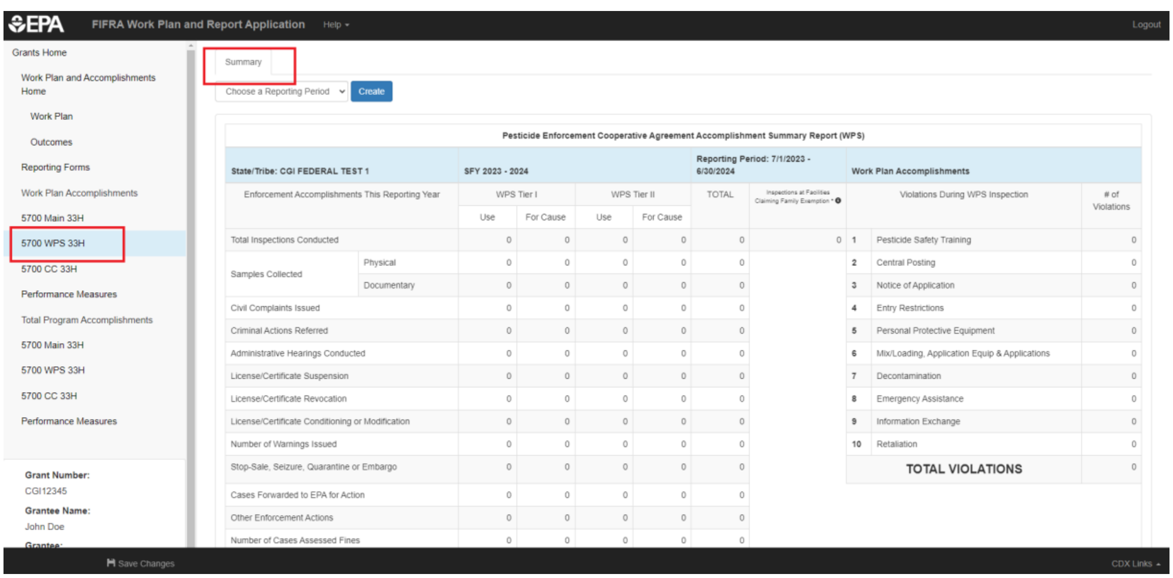


Exhibit 4-45 5700 WPS Summary Tab

Navigation: Only 'Grantee' users can enter data on forms. With the exception of the projected number of inspections and (physical) samples on the '5700 Main' forms, 'Grantees' cannot enter data on the 'Summary' screens of '5700 Reporting Forms.' The 'Summary' sections are intended to be a summary of all data entered for a form at a quarterly, bi-annual, or annual level based on reporting frequency ‘Grantees’ have agreed upon with their EPA regional office. The FGD application is designed to allow users to fill out/report on the 5700 forms quarterly, bi-annually, or annually.

The FGD application is designed to allow ‘Grantee’ users to fill out/report on the 5700 forms quarterly, bi-annually, or annually. For each ‘5700 Reporting Form,’ ‘Grantee’ users must select ‘Quarterly,’ ‘Bi-annual,’ or ‘Annual’ to create the necessary reporting tabs (**Exhibit 4-46**).

NOTE: If a ‘Grantee’ user selects the wrong reporting frequency, they can change the selection. However, any data already entered into the tabs for that form will be lost.

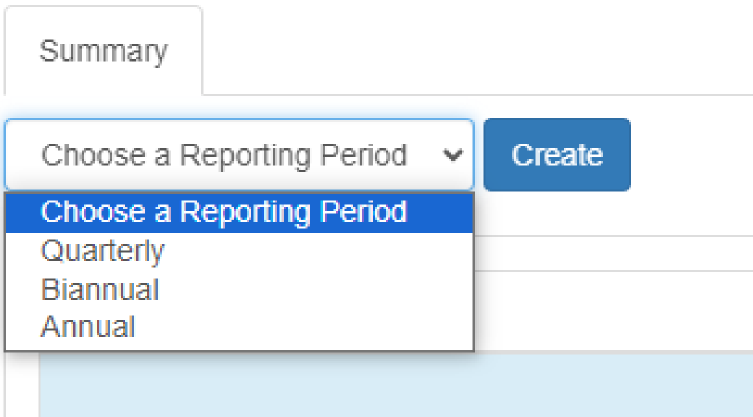


Exhibit 4-46 Add Frequency Report Tabs

Once a reporting period has selected, tabs will show up at the top of the respective ‘5700 Reporting Form’ (**Exhibit 4-47**). The ‘Grantee’ can click the tab to navigate to the appropriate screen. Within the tab, the ‘Grantee’ can enter data related to the frequency period. See **Sections 4.4.9.3, 4.4.9.4**, and **4.4.9.5** for additional details regarding each ‘5700 Reporting Form.’

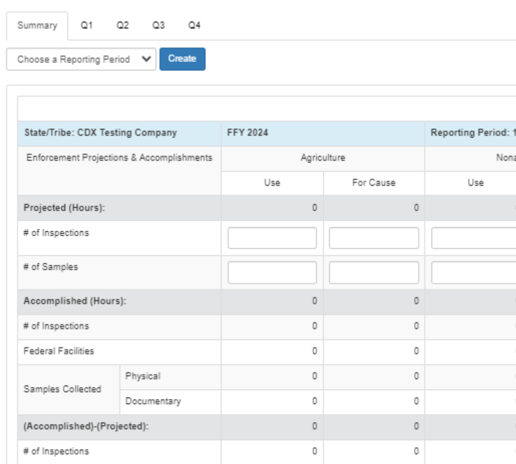


Exhibit 4-47 5700 Main Quarterly Frequency Report

4.4.9.3 5700 Main Reporting Form

The ‘5700 Main’ section is where ‘Grantees’ enter projections and accomplishments associated with either the ‘Work Plan Accomplishments’ or ‘Total Program Accomplishments.’

NOTE: Regardless of the type of reporting, projected numbers for inspections and (physical) samples on the '5700 Main Reporting Form' should only reflect work projected to be completed with EPA grant funds. To access the '5700 Main Reporting Form,' the 'Grantee' should select the '5700 Main' link from the navigation tree (**Exhibit 4-48**). If the 'Grantee' has added both 'Work Plan' and 'Total Program Accomplishments' to the grant, they should be sure to appropriately fill both sets and select the correct '5700 Main Reporting Form' from the navigation tree before entering data.

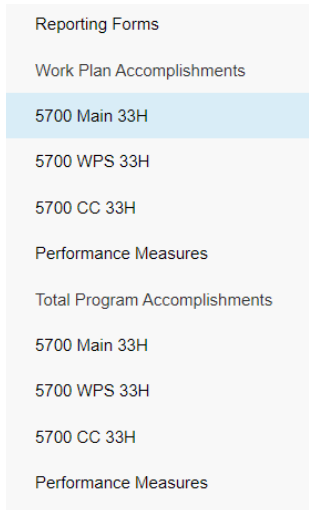


Exhibit 4-48 5700 Main Navigation Link

Navigation: Clicking on the '5700 Main' link in the navigation tree for either 'Work Plan' or 'Total Program Accomplishments' will navigate the 'Grantee' to the '5700 MainSummary' tab (**Exhibit 4-49**).

NOTE: The '5700 Main Summary' tab is the only 'Summary' section that requires projected numbers of inspections and samples. 'Grantees' can enter data into fields by selecting the field and entering numeric values.

NOTE: The application does not have any automatic validations to identify required fields, but 'Grantees' should provide data in all respective fields for which work was conducted and refer to Appendix 8 in the FIFRA Cooperative Agreement Guidance and their respective EPA regional office if they require further guidance.

Summary Q1 Q2 Q3 Q4

Choose a Reporting Period | Create

Pesticide Enforcement Cooperative Agreement Projections & Accomplishment Summary Report

State/Tribe: CDX Testing Company	FFY 2024		Reporting Period: 10/1/2023 - 9/30/2024							Work Plan Accomplishments		
Enforcement Projections & Accomplishments	Agriculture		Nonagriculture		Experimental Use Permit	Producing Establishment	Marketplace	Imports	Exports	Certified Applicator Records	Restricted Use Pesticide Dealers	TOTAL
	Use	For Cause	Use	For Cause								
Projected (Hours):	0	0	0	0	0	0	0	0	0	0	0	0
# of Inspections												0
# of Samples												0
Accomplished (Hours):	0	0	0	0	0	0	0	0	0	0	0	0
# of Inspections	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
Samples Collected – Physical	0	0	0	0	0	0	0	0	0	0	0	0
Samples Collected – Documentary	0	0	0	0	0	0	0	0	0	0	0	0
(Accomplished)-(Projected):	0	0	0	0	0	0	0	0	0	0	0	0
# of Inspections	0	0	0	0	0	0	0	0	0	0	0	0
# of Samples	0	0	0	0	0	0	0	0	0	0	0	0
Pesticide Enforcement Actions Taken:												
Civil Complaints Issued	0	0	0	0	0	0	0	0	0	0	0	0

Exhibit 4-49 5700 Main Summary Tab

Navigation: The ‘TOTAL’ and ‘FTE’ (Full Time Employee) fields will populate with information upon entering data into the associated ‘Inspections’ and ‘Samples’ fields (**Exhibit 4-50**). Once the ‘Grantee’ has finished entering projections, they should be sure to save their changes by use of the ‘Save Changes’ link in the application footer, just like saving in the ‘Work Plan’ section of the grant budget period.

Summary Q1 Q2 Q3 Q4

Choose a Reporting Period | Create

Pesticide Enforcement Cooperative Agreement Projections & Accomplishment Summary Report

State/Tribe: CDX Testing Company	FFY 2024		Reporting Period: 10/1/2023 - 9/30/2024							Work Plan Accomplishments		
Enforcement Projections & Accomplishments	Agriculture		Nonagriculture		Experimental Use Permit	Producing Establishment	Marketplace	Imports	Exports	Certified Applicator Records	Restricted Use Pesticide Dealers	TOTAL
	Use	For Cause	Use	For Cause								
Projected (Hours):	25	50	60	100	100	120	70	120	135	100	110	990
# of Inspections	1	2	3	4	5	6	7	8	9	10	11	66
# of Samples	1	2	3	4	5	6	7	8	9	10	11	66
Accomplished (Hours):	0	0	0	0	0	0	0	0	0	0	0	0
# of Inspections	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
Samples Collected – Physical	0	0	0	0	0	0	0	0	0	0	0	0

Exhibit 4-50 Projections Fields Populated

Navigation: The ‘Grantee’ can enter data into fields by selecting the field and entering numeric values.

Once a ‘Reporting Frequency’ tab has been created per the guidelines in **Section 4.4.9.2** (e.g., quarterly, bi-annual, annual) users can navigate to the tab by clicking it from the top of the respective reporting form screen (**Exhibit 4-51**). Once on the selected tab, ‘Grantees’ click the fields to enter their numeric values.

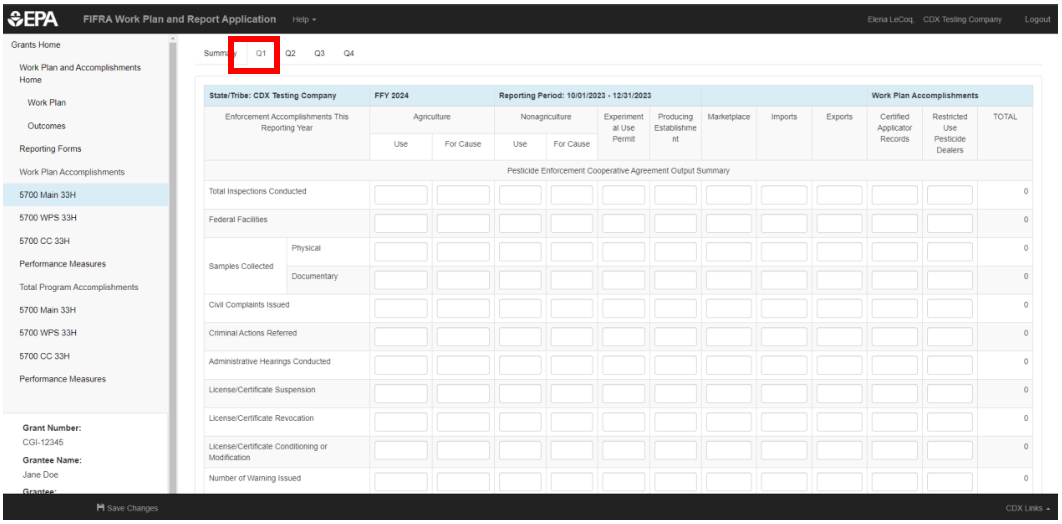


Exhibit 4-51 5700 Main Q1 Reporting Tab

After the ‘Grantee’ has finished entering information for a reporting form, they can save any changes across all tabs by using the ‘Save Changes’ link in the application footer (**Exhibit 4-52)**, just like saving in the ‘Work Plan’ section of the grant budget period. However, navigating to another section of the navigation tree without first saving will generate a ‘Warning,’ asking users if they want to save changes.

WARNING: Before navigating away from the ‘5700 Main Reporting Form,’ ‘rantee’ users must do one of the following to ensure their changes are saved: (1) click on the ‘Save Changes’ link in the application footer (**Exhibit 4-52)**;or (2) select ‘Yes’ in the pop-up window that appears when a different area of the report is selected from the navigation tree. If a user navigates away from the form without selecting ‘Yes’ from the ‘Save Changes’ prompt, closes the browser window, ends their CDX session, or their CDX session times out, then any changes made since navigating to the form will be lost.

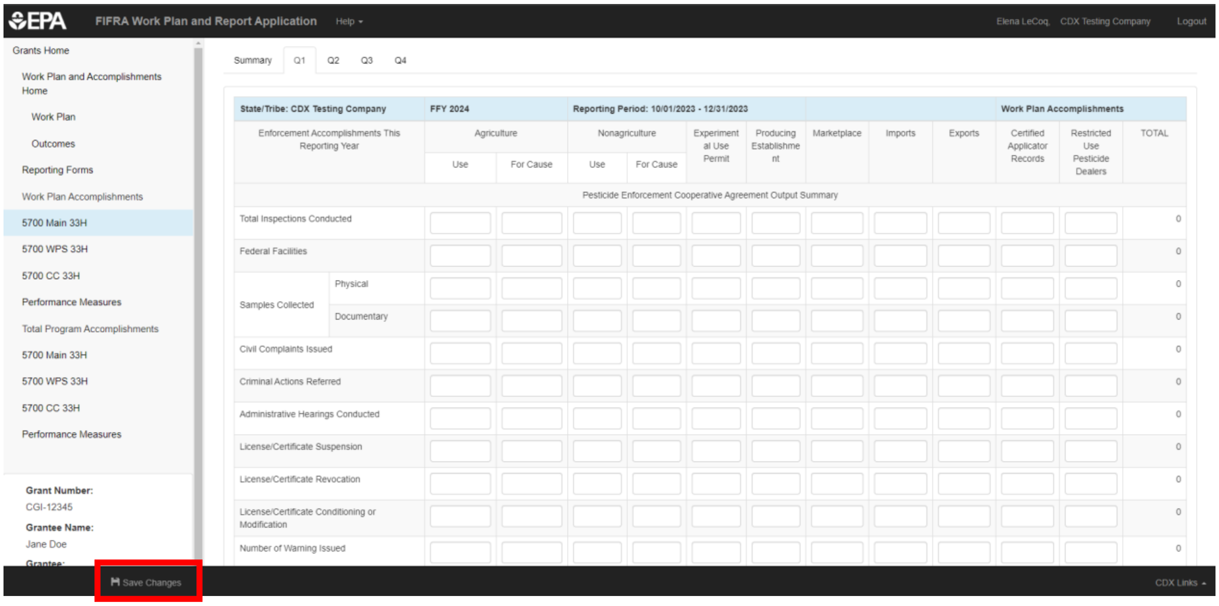


Exhibit 4-52 5700 Main 'Save Changes' Link

4.4.9.4 5700 WPS Reporting Form

Navigation: To access the '5700 WPS Reporting Form,' select the '5700 WPS' link from the navigation tree (**Exhibit 4-53**). By default, the link will navigate to the '5700 WPS Summary' tab (**Exhibit 4-54**). Data populated to the '5700 WPS Summary' tab is added from the user's elected 'Reporting Frequency' tabs, based on guidance from an EPA RPO (reference **Section 4.4.9.2**). If the 'Grantee' has added both 'Work Plan' and 'Total Program Accomplishments' to the grant, the user should appropriately fill both sets and select the correct '5700 WPS Reporting Form' from the navigation tree before entering data.

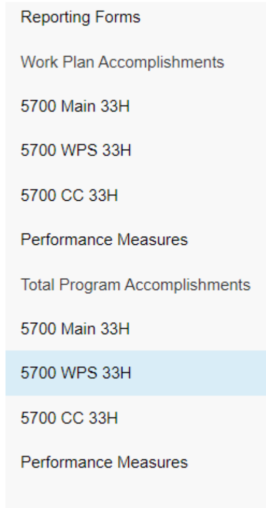


Exhibit 4-53 5700 WPS Navigation Link

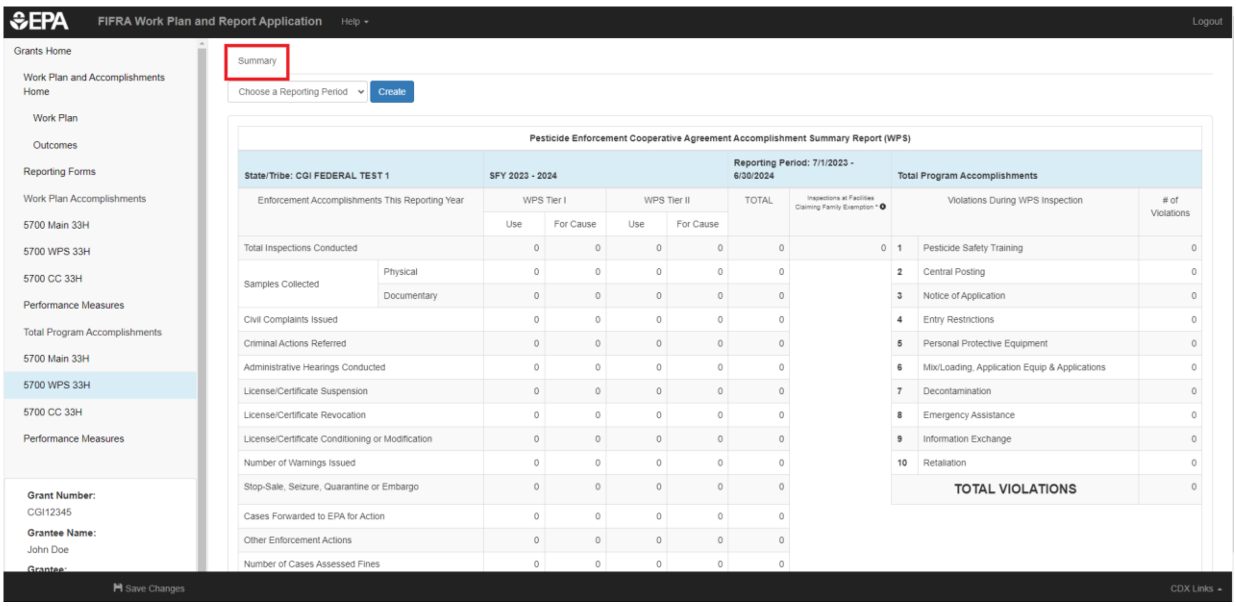


Exhibit 4-54 5700 WPS Summary Tab

Once a ‘Reporting Frequency’ tab has been created per the guidelines in **Section 4.4.9.2** (e.g., quarterly, bi-annual, annual), users can navigate to the tab by clicking on it from the top of the respective reporting form screen (**Exhibit 4-55**). For the ‘5700 WPS Reporting Form,’ users may only enter data by navigating to an ‘Associated Frequency’ tab, clicking the fields, and entering numeric values. Users should reference Appendix 9 for additional information on accurately reporting into the respective columns and rows found on the ‘5700 WPS Reporting Form.’

NOTE: The application does not have any automatic validations to identify required fields, but ‘Grantees’ should provide data in all respective fields for which work was conducted and refer to their respective EPA regional office if they require further guidance.

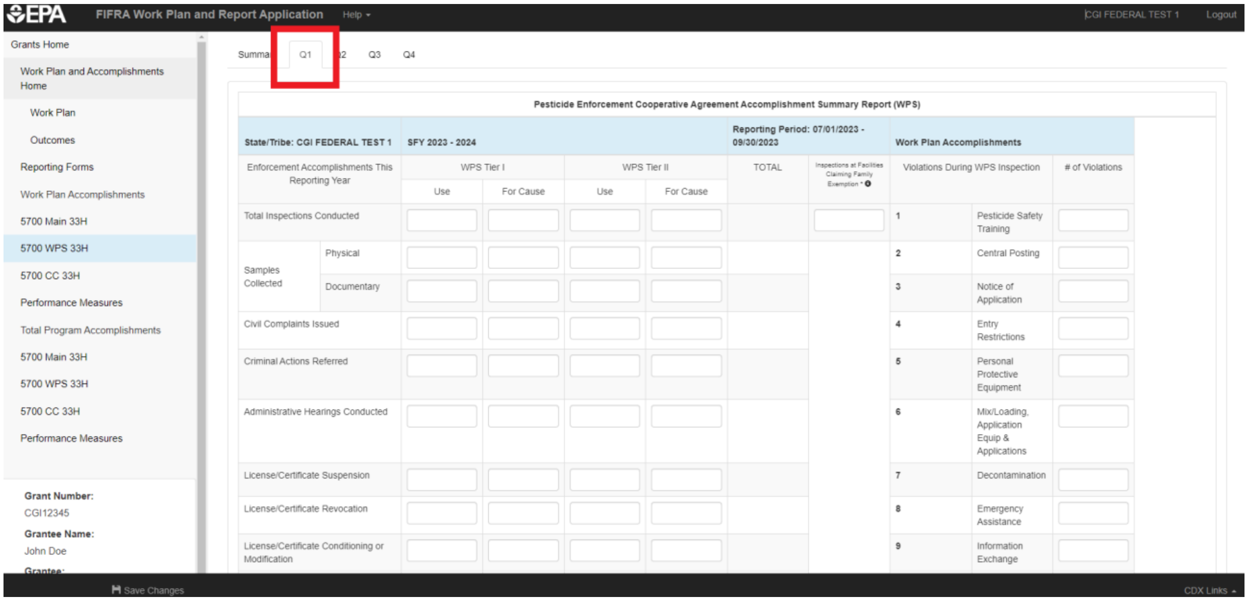


Exhibit 4-55 5700 WPS Q1 Reporting Tab

After the ‘Grantee’ has finished entering information for a reporting form, they can save any changes across all tabs by use of the ‘Save Changes’ link in the application footer (**Exhibit 4-56**), just like saving in the ‘Work Plan’ section of the grant budget period. However, navigating to another section in the navigation tree without first saving will generate a ‘Warning,’ asking users if they want to save changes.

WARNING: Before navigating away from the ‘5700 WPS Reporting Form,’ ‘Grantee’ users must do one of the following to ensure their changes are saved: (1) click on the ‘Save Changes’ link in the application footer (**Exhibit 4-52)**;or (2) select ‘Yes’ in the pop-up window that appears when a different area of the report is selected from the navigation tree. If a user navigates away from the form without selecting ‘Yes’ from the ‘Save Changes’ prompt, closes the browser window, ends their CDX session, or their CDX session times out, then any changes made since navigating to the form will be lost.

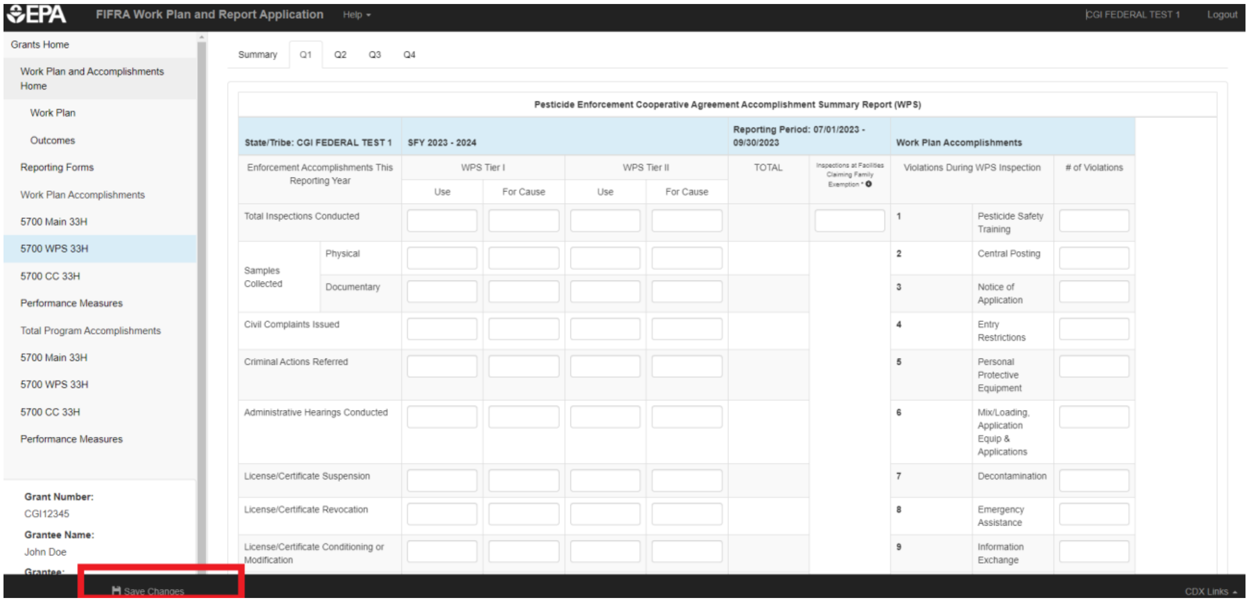


Exhibit 4-56 Reporting Forms 'Save Changes' Link

4.4.9.5 5700 CC Reporting Form

Navigation: To access the '5700 CC Reporting Form, select the '5700 CC' link from the navigation tree (**Exhibit 4-57**). By default, the link will navigate to the '5700 CC Summary' tab (**Exhibit 4-58**). Data populated to the '5700 CC Summary' tab is added from the user's elected 'Reporting Frequency' tabs, based on guidance from an EPA 'RPO.' (Refer to **Section 4.4.9.2**). If the 'Grantee' has added both 'Work Plan' and 'Total Program Accomplishments' to their grant, they should please be sure to appropriately fill both sets and select the correct '5700 CC Reporting Form' from the navigation tree before entering data.

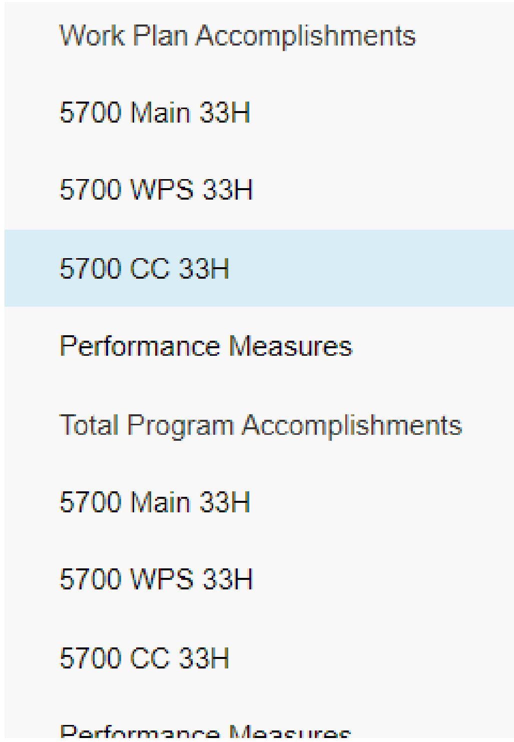


Exhibit 4-57 5700 CC Navigation Link

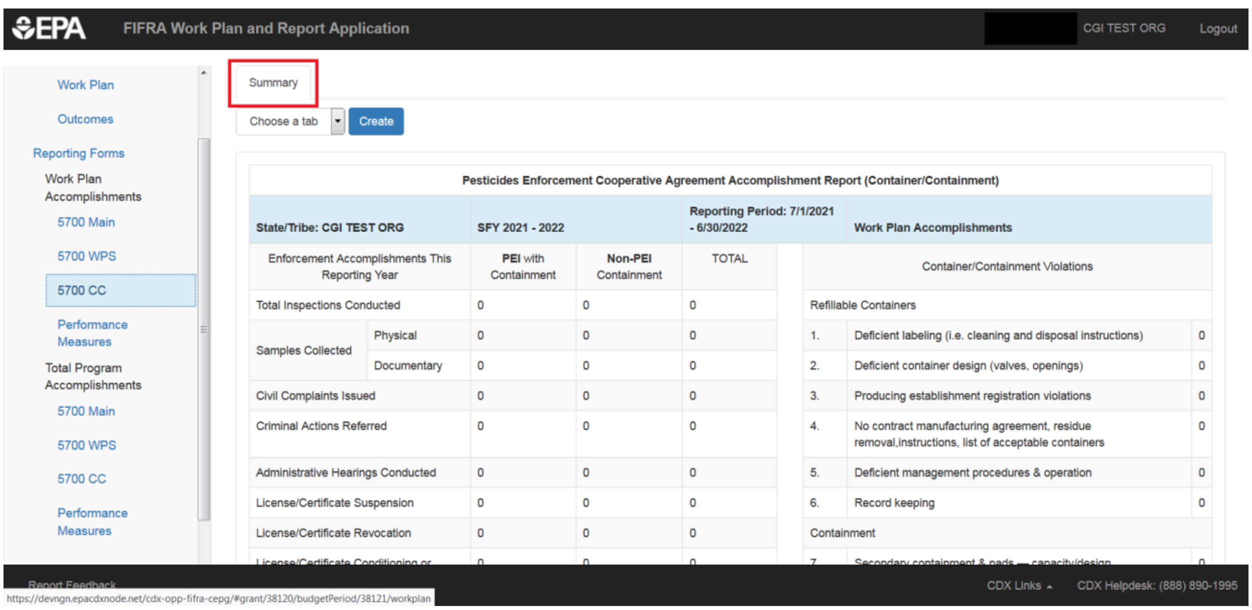


Exhibit 4-58 5700 CC Summary Tab

Navigation: Once a ‘Reporting Frequency’ tab has been created per the guidelines in **Section 4.4.9.2** (e.g., quarterly, bi-annual, annual), users can navigate to the tab by clicking on it from the top of the respective reporting form screen (**Exhibit 4-59**). For the ‘5700 CC Rreporting Form,’ users may only enter data by navigating to an ‘Associated Frequency’ tab, clicking into the fields, and entering numeric values. Users should reference Appendix 10 for additional information on accurately reporting into the respective columns and rows found on the '5700 CC Reporting Form.'

NOTE: The application does not have any automatic validations to identify required fields, but 'Grantees' should provide data in all respective fields for which work was conducted and refer to their respective EPA regional office if they require further guidance.

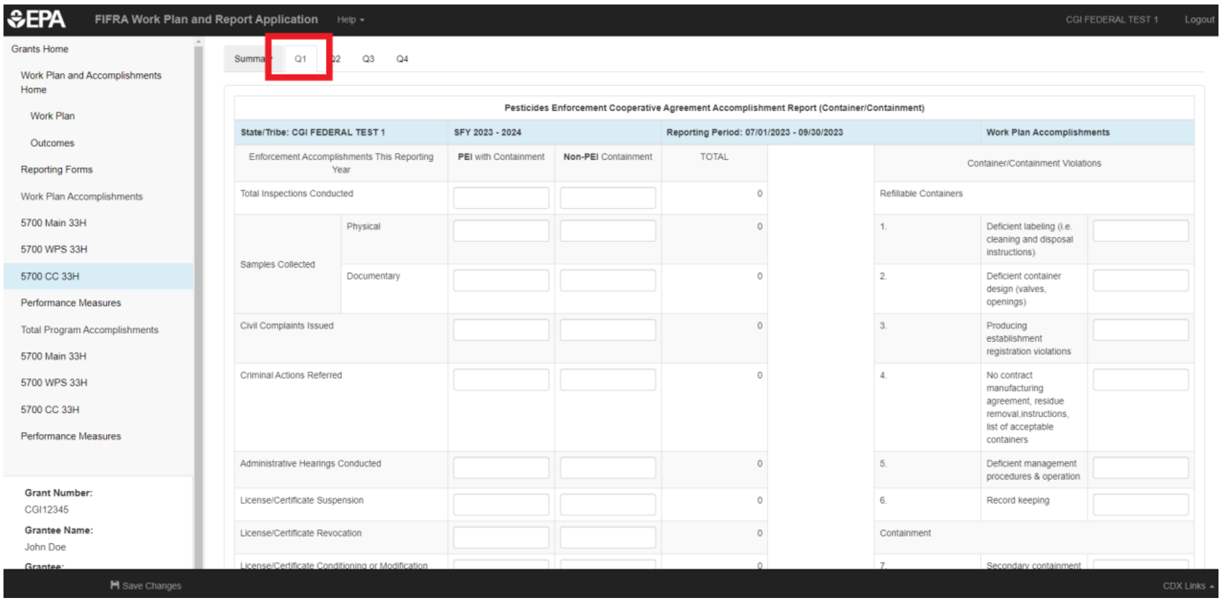


Exhibit 4-59 5700 CC Q1 Reporting Tab

Navigation: After the 'Grantee' has finished entering information for a reporting form, they can save any changes across all tabs by use of the 'Save Changes' link in the application footer (**Exhibit 4-60**), just like saving in the 'Work Plan' section of the grant budget period. However, navigating to another section in the navigation tree, without first saving, will generate a 'Warning,' asking users if they want to save changes.

WARNING: Before navigating away from the '5700 CC Reporting Form,' 'Grantee' users must do one of the following to ensure their changes are saved: (1) click on the 'Save Changes' link in the application footer (**Exhibit 4-52)**;or (2) select 'Yes' in the pop-up window that appears when a different area of the report is selected from the navigation tree. If a user navigates away from the form without selecting 'Yes' from the 'Save Changes' prompt, closes the browser window, ends their CDX session, or their CDX session times out, then any changes made since navigating to the form will be lost.

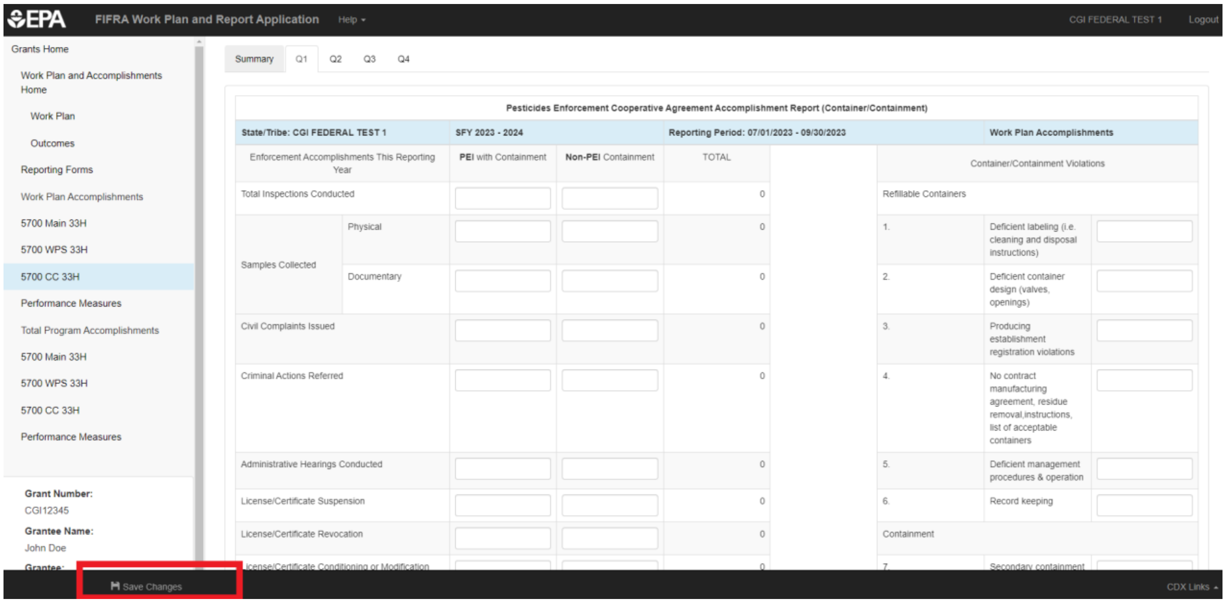


Exhibit 4-60 Reporting Forms 'Save Changes' Link

4.4.9.6 Performance Measures

The 'Performance Measures' section is where the 'Grantee' can enter data for strategic goals associated with either the 'Work Plan Accomplishments' or 'Total Program Accomplishments.'

To access the 'Performance Measures Reporting Form,' select the 'Performance Measures' link from the navigation tree (**Exhibit 4-61**). If the 'Grantee' has added both 'Work Plan' and 'Total Program Accomplishments' forms to the grant, then they should be sure to appropriately fill both sets and select the correct 'Performance Measures Reporting Form' from the navigation tree before entering data.

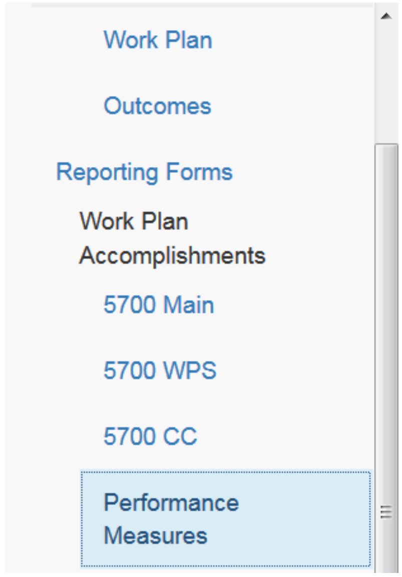


Exhibit 4-61 Performance Measures Navigation Link

Clicking the ‘Performance Measures’ link will navigate users to the respective ‘Performance Measures’ screen (**Exhibit 4-62**). Unlike the ‘5700 Reporting Forms,’ the ‘Performance Measures’ form has only a single reporting tab. The ‘Performance Measures’ screen contains the following sections:

- Strategic Goal 1: Protection of human health – occupational users
- Strategic Goal 2: Protection of human health: all people (people who get exposed to pesticides)
- Strategic Goal 3: Protection of environmental media: water, soil, and non-target species
- Strategic Goal 4: Assuring the availability of effective pesticides in the market place

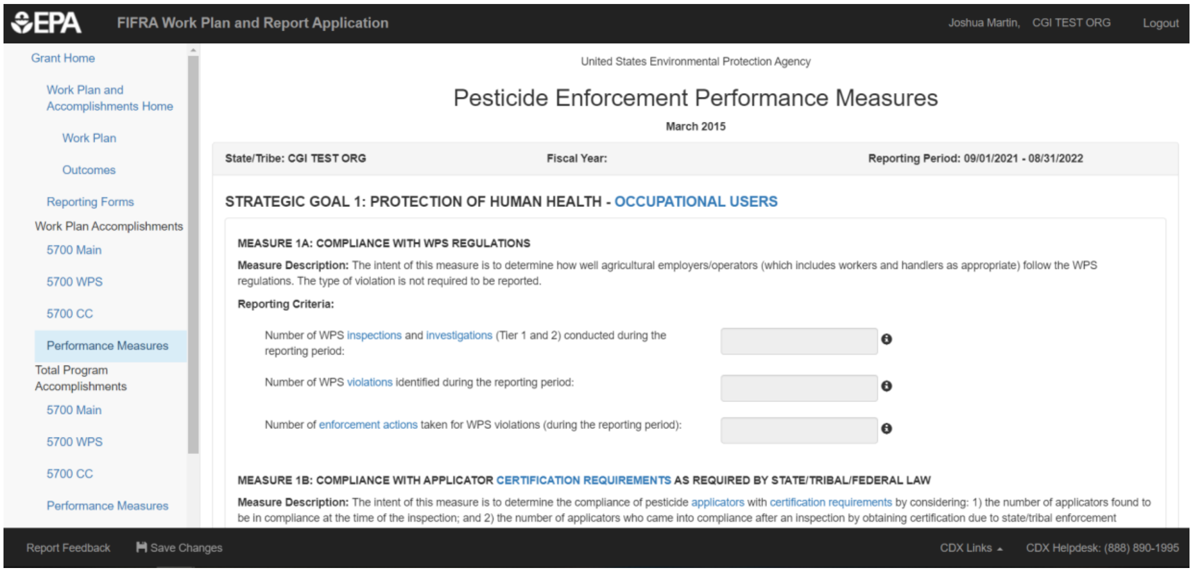


Exhibit 4-62 Performance Measures Screen

Users can enter data for performance measures by clicking in the active fields on the screen and entering numeric values.

NOTE: Fields that are grayed out are populated with information based on data provided on the '5700 Reporting Forms.' Hovering over the 'i' icon to the right of a field, with their mouse pointer, will display where the information is pulled from (**Exhibit 4-63**).

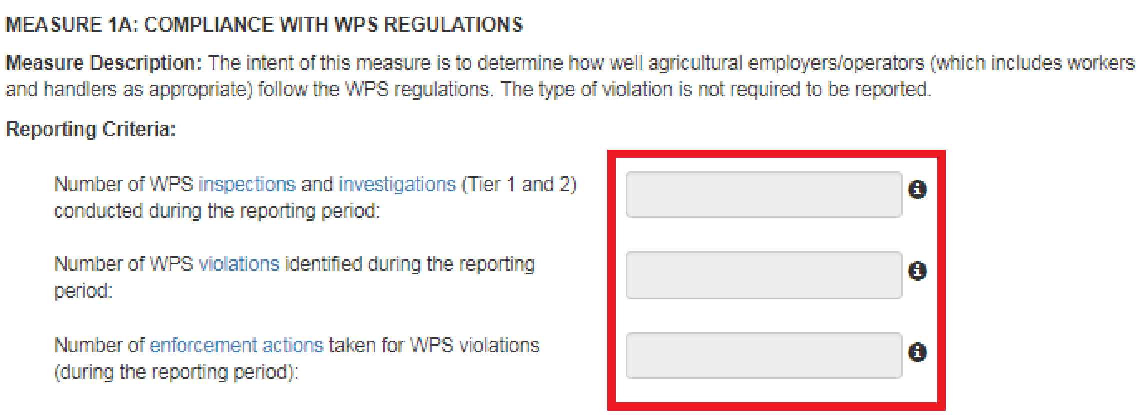


Exhibit 4-63 Performance Measures Auto Populated Fields

Blue text indicates that there is a definition or additional information associated with the term (**Exhibit 4-64**). Clicking on the text will generate a pop-up modal to provide any additional information (**Exhibit 4-65**).

NOTE: To prevent pop-up modals from being blocked by their browser, users are advised to adjust their blocker settings within the respective browser.

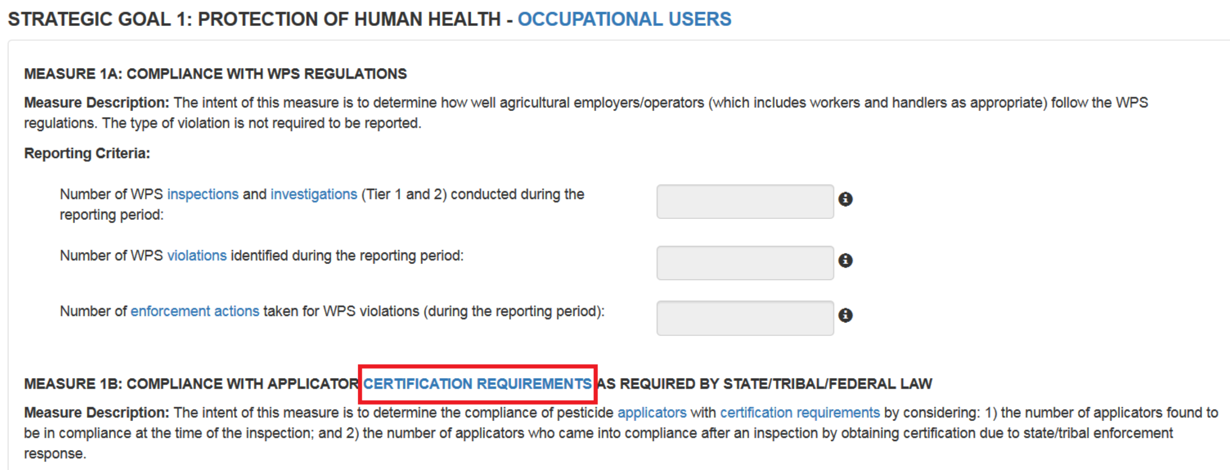


Exhibit 4-64 Informative Blue Text

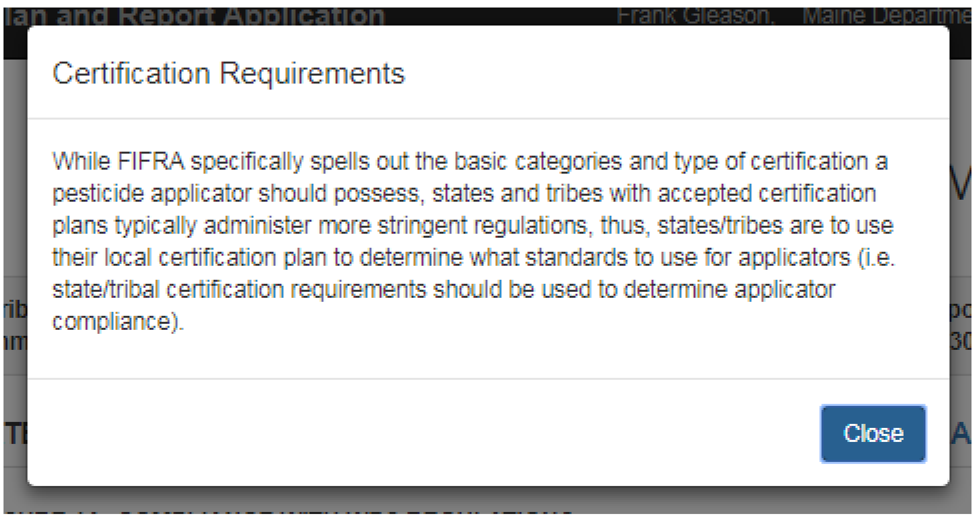


Exhibit 4-65 Informational Pop-up Modal

Navigation: When finished with entering information for 'Performance Measures,' the 'Grantee' can save any inputs/changes by scrolling to the bottom of the screen and clicking 'Save.' However, navigating to another section in the navigation tree without first saving will generate a 'Warning,' asking users if they want to save changes.

WARNING: Before navigating away from the '5700 WPS Reporting Form,' 'Grantee' users must do one of the following to ensure their changes are saved: (1) click on the 'Save Changes' link in the application footer (**Exhibit 4-52)**; or (2) select 'Yes' in the pop-up window that appears when a different area of the report is selected from the navigation tree. If a user navigates away from the form without selecting 'Yes' from the 'Save Changes' prompt, closes the browser window, ends their CDX session, or their CDX session times out, then any changes made since navigating to the form will be lost.

4.4.10 Printable Tables for Work Plan and End of Year Reports

Navigation: Following adding information outlined in **Sections 4.4.7**, **4.4.8,** and **4.4.9** above, all inputs can then be reviewed in a printable format. Information reviewable from the printable tables includes activities from the 'Work Plan' that are 'Required' activities or have been added to the ‘Work Plan’ by ‘Grantees’ (**Section 4.4.7.1** and **Exhibit 4-31**), information from the ‘Work Plan Outcomes and Goals’ (**Section 4.4.8)**, and all sections of both reporting forms (**Section 4.4.9**) for the respective budget period. It also includes any comments or recommendations made by EPA personnel with respect to a particular activity for that budget period.

From the ‘Work Plan and Accomplishments Home’ screen click the ‘View Printable Tables for Work Plan and End of Year Reports’ button (**Exhibit 4-66**). This will change the view of the ‘Work Plan and Accomplishments’ screen to the ‘All Printable Tables’ tab (**Exhibit 4-67**).

NOTE: To return to the ‘Work Plan and Report’ screen, click on the ‘Work Plan and Accomplishments Home’ tab in the navigation tree.

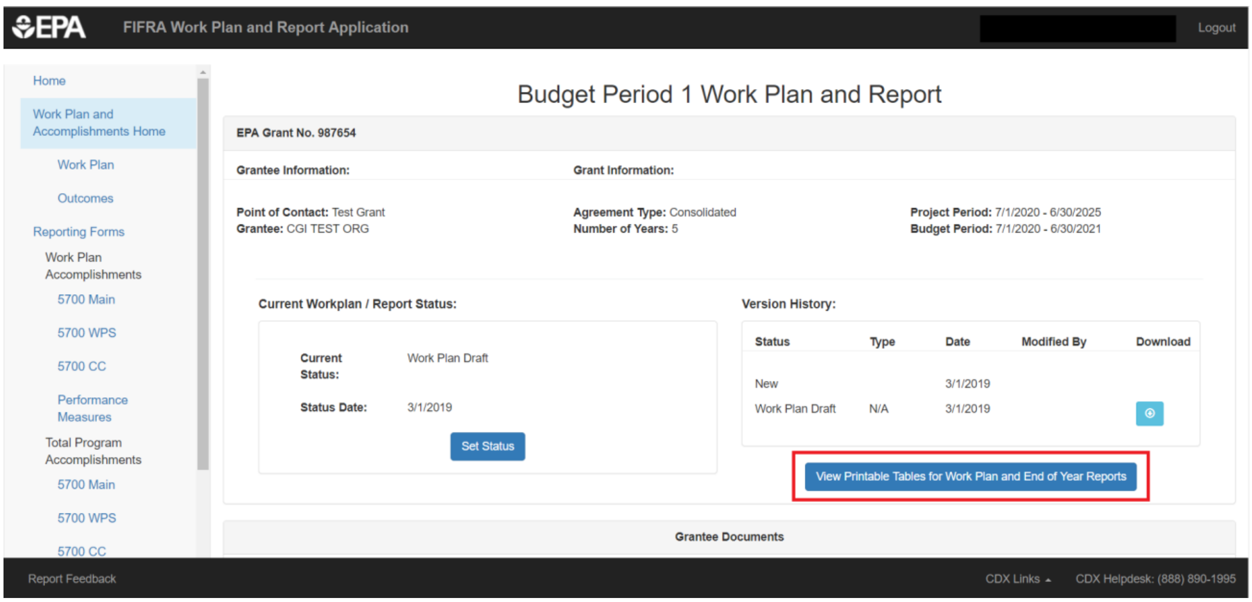


Exhibit 4-66 Work Plan and End of Year Reports Printable Tables Button

Navigation: The ‘All’ tab of the printable tables is a combination of the tables and information contained within the ‘Grantee Work Plan,’ ‘Grantee End of Year Report,’ and ‘EPA End of Year Report’ tabs. It provides a view of all entries made in the ‘Work Plan’ and ‘Outcomes’ subsections and all subsections of both reporting forms for the respective budget period. It also includes any comments or recommendations made by EPA personnel with respect to a particular activity for that budget period. To print the information provided here, right-click on the printable table while on this tab and select ‘Print’ from the generated modal. This will bring up the computer’s local print options.

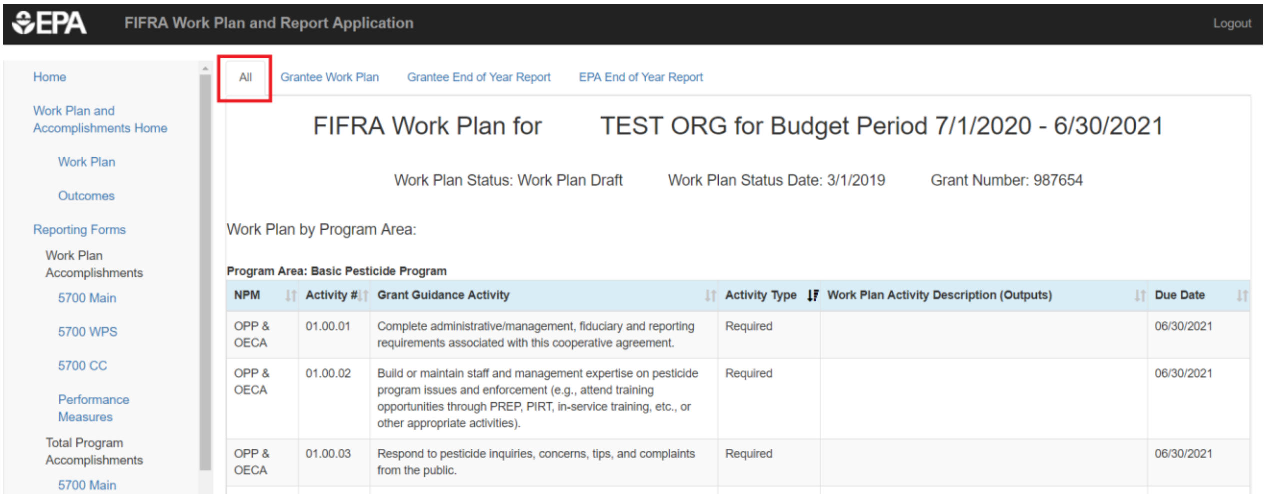


Exhibit 4-67 'All' Printable Tables View

Navigation: The 'Grantee Work Plan' tab (**Exhibit 4-68**) of the printable tables, contains information for all 'Work Plan Activity Description (Outputs)' entered by the 'Grantee' for a specific grant budget period. 'Work Plan Activity Description (Outputs)' are listed with respect to the adjacent 'Grant Guidance Activity' information and are separated into tables by program area. Activities in each 'Program Area' table can be sorted ascending or descending by column. See **Section 4.4.7.1** above for more information about adding 'Work Plan Activity Description (Outputs).'

Additionally, given 'Work Plan Accomplishments' and/or 'Total Program Accomplishments' exist for the same budget period, the '5700 Main Projections' summary data is also added to the bottom of this printable table view (**Exhibit 4-69**). See **Section 4.4.9.3** for more information on the '5700 Main Reporting Form.'

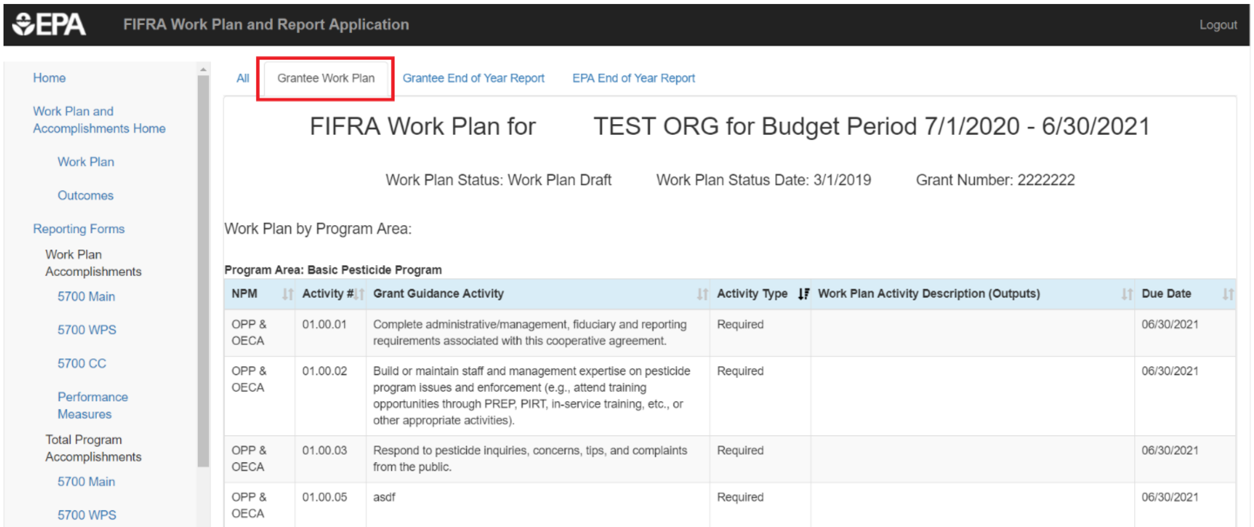


Exhibit 4-68 'Grantee Work Plan' Printable Tables View

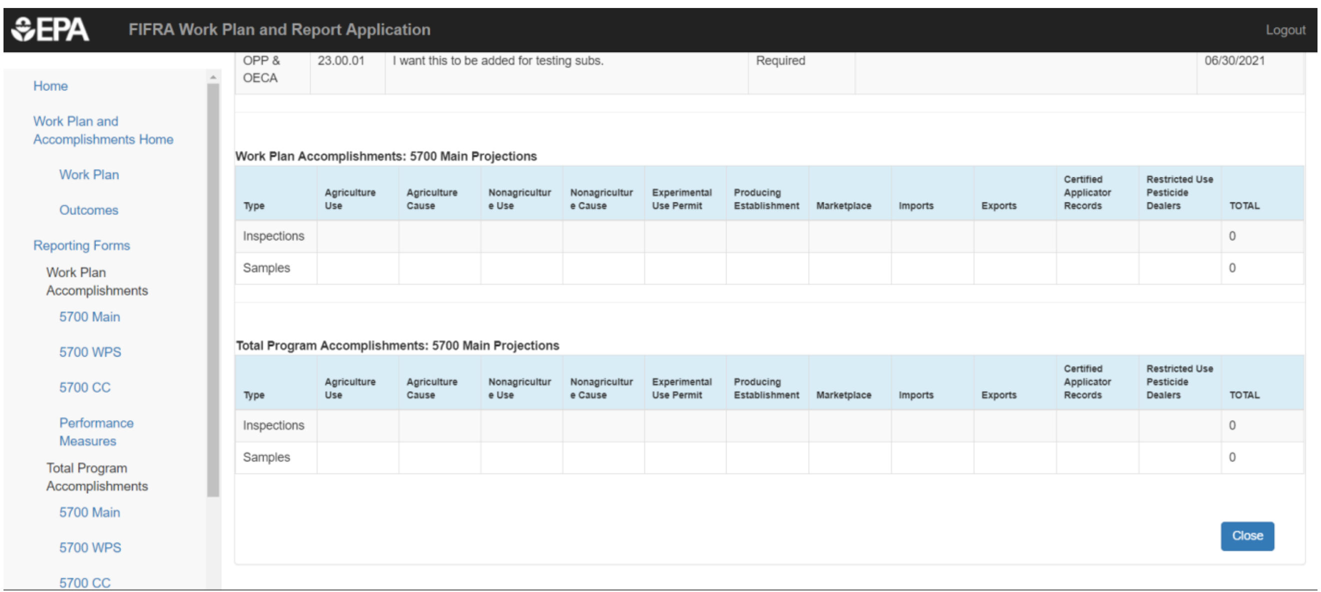


Exhibit 4-69 '5700 Main' Summary Tab Printable Tables View

The 'Grantee End of Year Report' tab (**Exhibit 4-70**) of the printable tables contains all 'Work Plan Activity Accomplishment' information entered by the 'Grantee' for a specific grant budget period. 'Work Plan Activity Accomplishment' inputs are listed with respect to the relating 'Work Plan Activity Description (Outputs)' information and are separated into tables by program area. Activities in each 'Program Area' table can be sorted ascending or descending by column. See **Section 4.4.7** above for more information about adding 'Work Plan' activity and description information.

Additionally, given 'Work Plan Accomplishments' and/or 'Total Program Accomplishments' exist for the same budget period, data tables for those reports are added to the bottom of this printable table view. See **Section 4.4.9** for more information on the reporting forms.

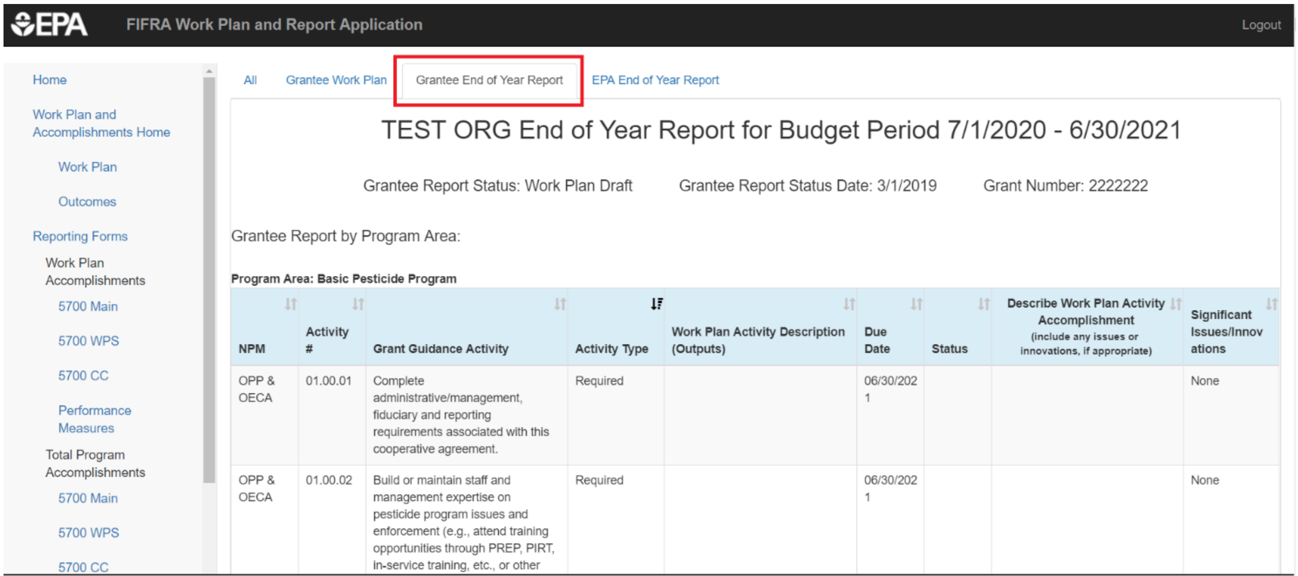


Exhibit 4-70 'Grantee End of Year Report' Printable Tables View

Navigation: The 'EPA End of Year Report' tab (**Exhibit 4-71**) of the printable tables contains all 'EPA Comments' and 'EPA Recommendations' entered by the 'RPO' for a specific grant budget period. EPA Comments and Recommendations are listed with respect to the relating 'Work Plan Activity Description (Outputs)' information and are separated into tables by program area. Columns in each 'Program Area' table, including 'EPA Comments' and 'EPA Recommendations' can be sorted ascending or descending. See **Section 4.4.7.3** above for more information about EPA Comments and Recommendations.

Additionally, given 'Work Plan Accomplishments' and/or 'Total Program Accomplishments' exist for the same budget period, data tables for those reports are added to the bottom of this printable table view. See **Section 4.4.9** for more information on the reporting forms.

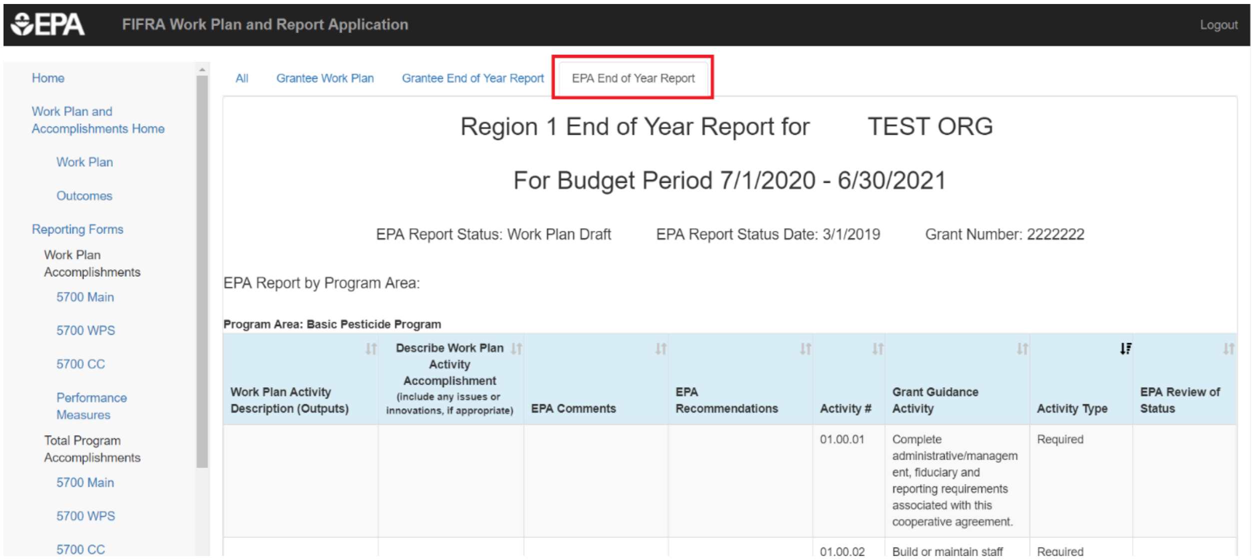


Exhibit 4-71 'EPA End of Year Report' Printable Tables View

4.5 Exporting Documents

While the intent is for the user to manage the entire lifecycle of the 'Work Plan and Report' template within the FGD application, at times it may be necessary to export the document for external review and/or submission. For this reason, the 'Work Plan and Report' template can be exported as an Excel document (**Exhibit 4-72**). The FGD application provides two methods of exporting the 'Work Plan' and 'Report' template outlined below.

NOTE: The Excel document will not contain any default formatting; it will be up to the 'Grantee' to add formatting as necessary.

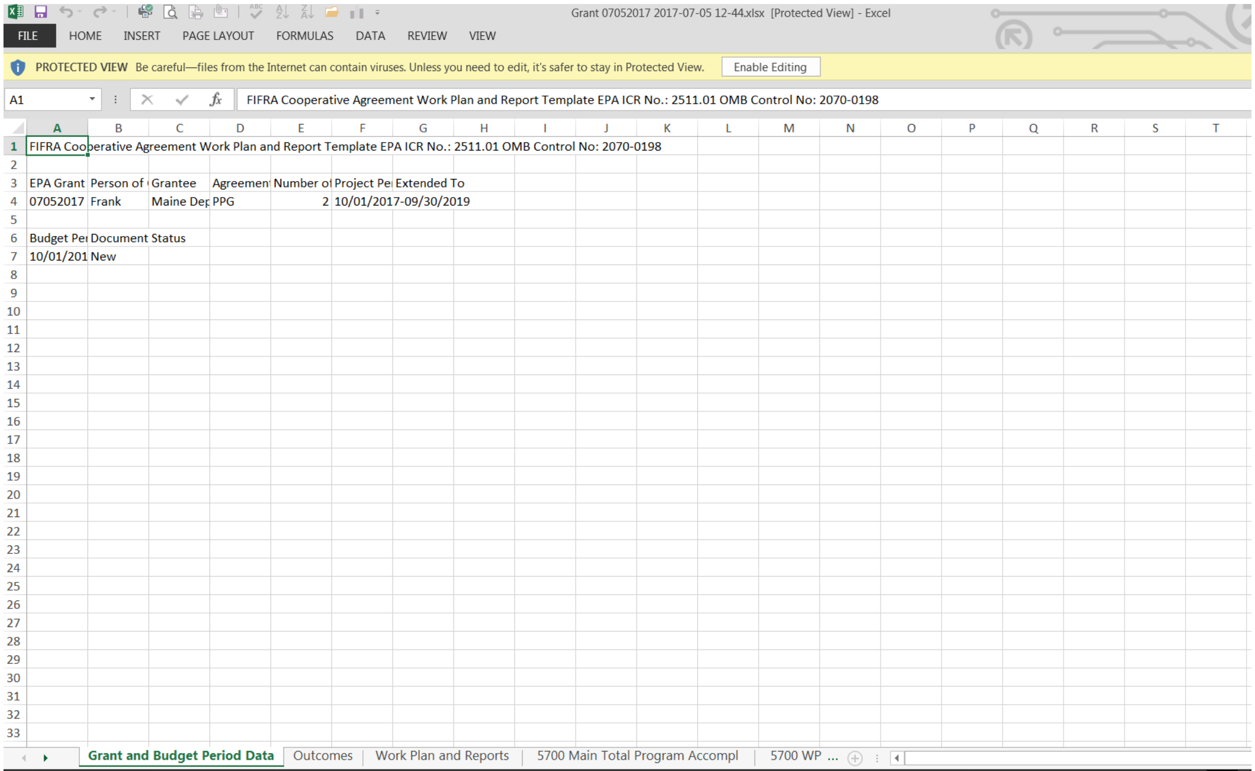
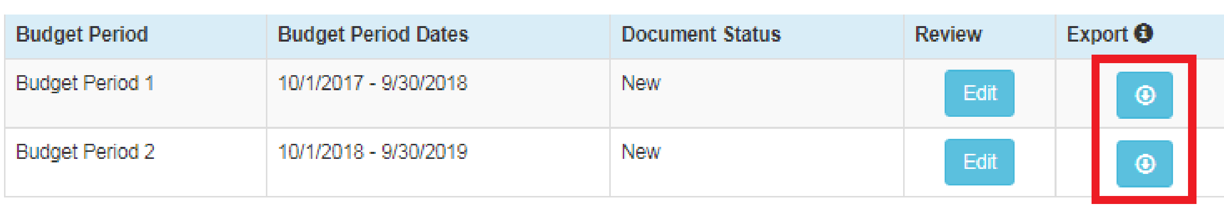


Exhibit 4-72 Work Plan and Report Excel Document

4.5.1 Work Plan and Report Export – 'Grant Home' Screen

Navigation: Method one of exporting the 'Work Plan and Report' template can be found on the 'Grant Home' screen (**Exhibit 4-73**). By clicking the desired icon in the 'Export' column of the respective Budget Period, a copy of that 'Work Plan and Report' can be downloaded and saved locally.

NOTE: Exporting a copy of the 'Work Plan and Report' template using this method will download a copy with the most recent changes made by the user and may not align with the current document status.



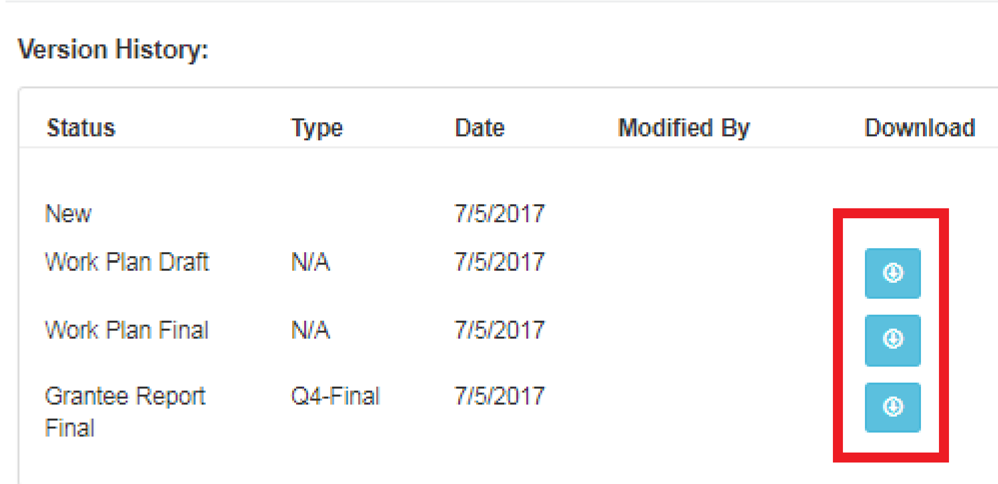
Budget Period	Budget Period Dates	Document Status	Review	Export
Budget Period 1	10/1/2017 - 9/30/2018	New	Edit	
Budget Period 2	10/1/2018 - 9/30/2019	New	Edit	

Exhibit 4-73 Export Buttons – FIFRA Work Plan and Report Homepage

4.5.2 Work Plan and Report Export – Work Plan and Report Homepage

Navigation: Method two of exporting the 'Work Plan and Report' template, can be accomplished from the respective 'Work Plan and Report' homepage (**Exhibit 4-74**). To access the 'Work Plan and Report' homepage, refer to **Section 4.4.1**. By clicking the desired icon in the 'Download' column of the respective version, a copy of that 'Work Plan and Report' will be downloaded and saved locally.

NOTE: Exporting a copy of the ‘Work Plan and Report’ template using this method will download a copy associated with the respective status. This should be considered the default method for exporting a ‘Work Plan and Report’ template to ensure that the data captured is associated with the set status.



Version History:

Status	Type	Date	Modified By	Download
New		7/5/2017		
Work Plan Draft	N/A	7/5/2017		
Work Plan Final	N/A	7/5/2017		
Grantee Report Final	Q4-Final	7/5/2017		

Exhibit 4-74 Export Buttons – Work Plan and Report Homepage

5 FGD Functionality (OCSPP/OECA Reviewer and RPO)

5.1 Access FGD Application

To access the CDX homepage, navigate to https://cdx.epa.gov/ (**Exhibit 5-1**). Once there, enter a valid User ID and password into the 'User ID' and 'Password' fields, and click the 'Next' button.

Exhibit 5-1 CDX Login Screen

After logging in, the system will navigate to the 'MyCDX Home' page (**Exhibit 5-2**). This page lists the program services in which the user is associated as well as status and role(s) for those services. If the user is registered for the FGD application, the 'FGD: FIFRA Grant Database' will be listed in the services list. 'OCSPP,' OECA Reviewer,' or 'RPO' will appear as a blue link under the 'Role' column once the user role has been approved and activated by EPA. To navigate to the FGD application, the user should click the blue link for the desired role in the 'Role' column.

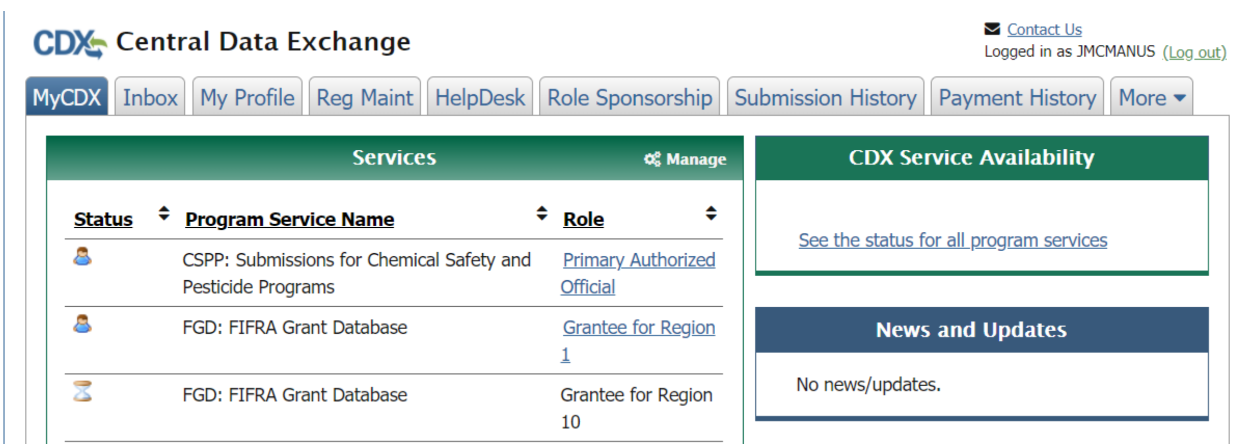


Exhibit 5-2 MyCDX Homepage

5.2 FGD RPO and OCSPP/OECA Reviewer Homepage

The 'Grant Home' screen (**Exhibit 5-3**) and (**Exhibit 5-4**) is the first screen within the FGD application. If no grants have been created by a 'Grantee' user, there will not be any grants visible to either the 'RPO' or the 'OCSPP/OECA Reviewer.' The main element on this page is the ‘Grants’ table where all grants will display based on the user role selected. Following information is displayed to the users to help identify specific grants for review:

- **Grant Number:** This number is added by the ‘Grantee’ or ‘RPO’ based in the number from the initial award document.
- **‘Grantee’ Name:** Name of the organization applying for/providing information on the grant. This information is automatically populated from the CDX account information of the respective user who created the grant.
- **Region:** The specific region with which the ‘Grantee’ is associated.
- **Project Period:** Lists the beginning and ending dates of the Grant based on Number of Years and the elected Start date.
- **Review:** Facilitates access to the respective grant.

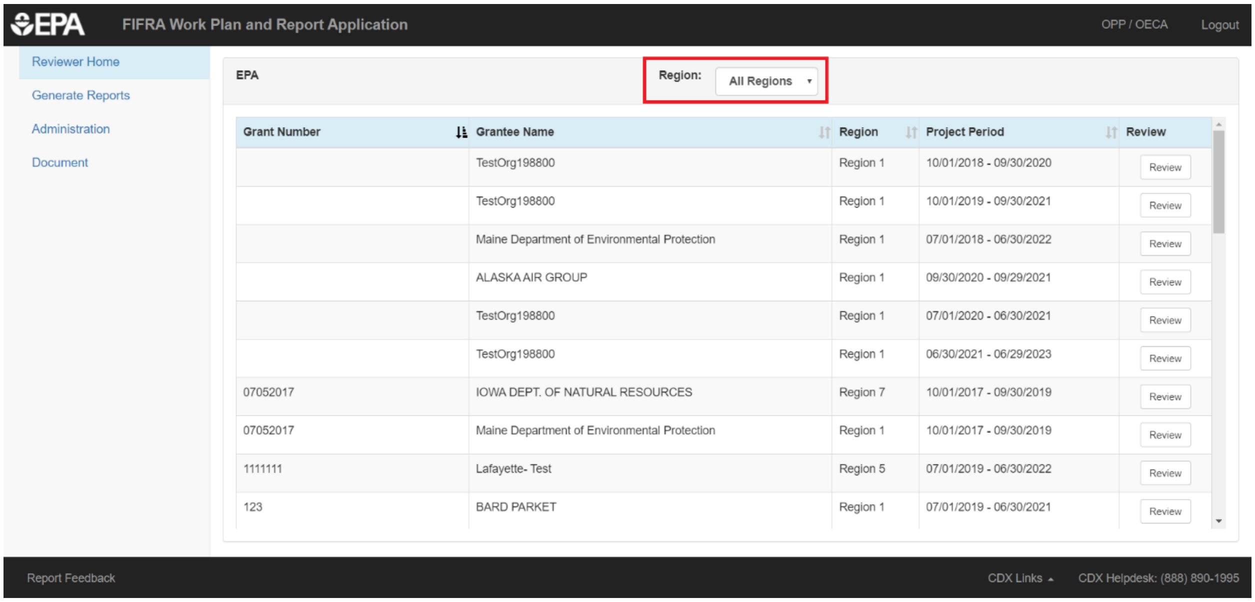


Exhibit 5-3 FIFRA Work Plan and Report Reviewer Home – OCSPP/OECA Reviewer

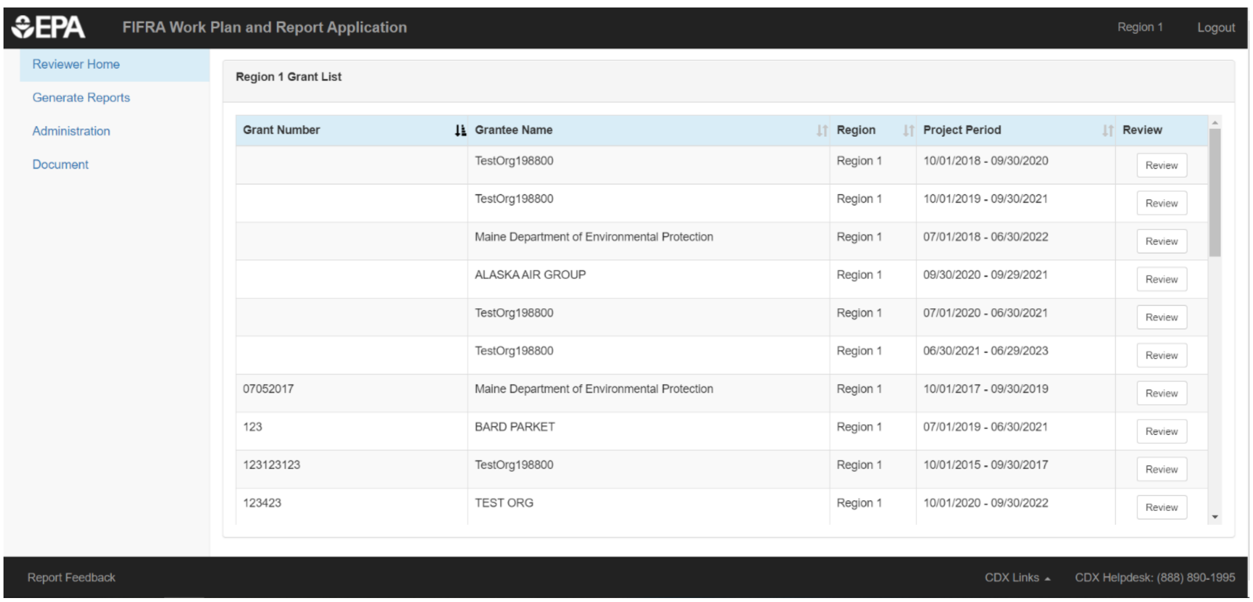


Exhibit 5-4 FIFRA Work Plan and Report Reviewer Home – RPO

In addition to the above-mentioned fields, the 'OCSPP/OECA Reviewer' role has the ability to filter the grants by region. To filter a grant, select a desired region from the dropdown picklist (**Exhibit 5-5**).

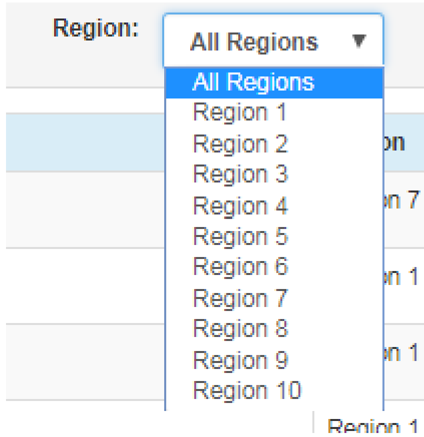


Exhibit 5-5 EPA Region Pick List

NOTE: The RPO will only see grants that fall under the same region with which they are associated. The ‘OCSPP/OECA Reviewer’ role can view all grants within all regions.

5.3 Review and Provide Feedback on the ‘Grantee Work Plan and Report’

To review a grant or grant budget period and associated information, including the ‘Work Plan and Reports’ for each budget period, click the ‘Review’ button for the respective Grant (**Exhibit 5-6**). This will navigate the user to the ‘Grant Home’ screen for that grant. Refer to **Section 4.3.4** for specific details associated with the ‘Work Plan and Reports’ of the application.

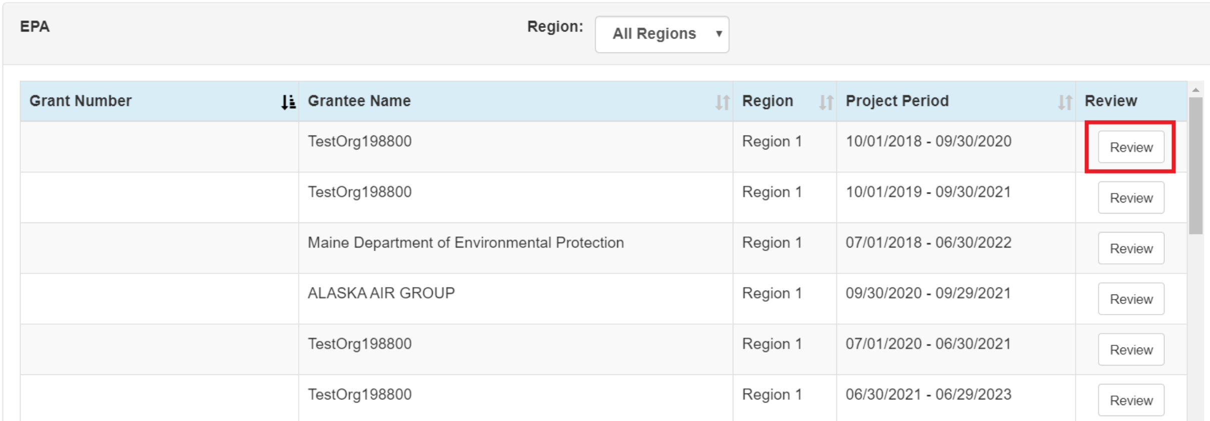


Exhibit 5-6 Review Button

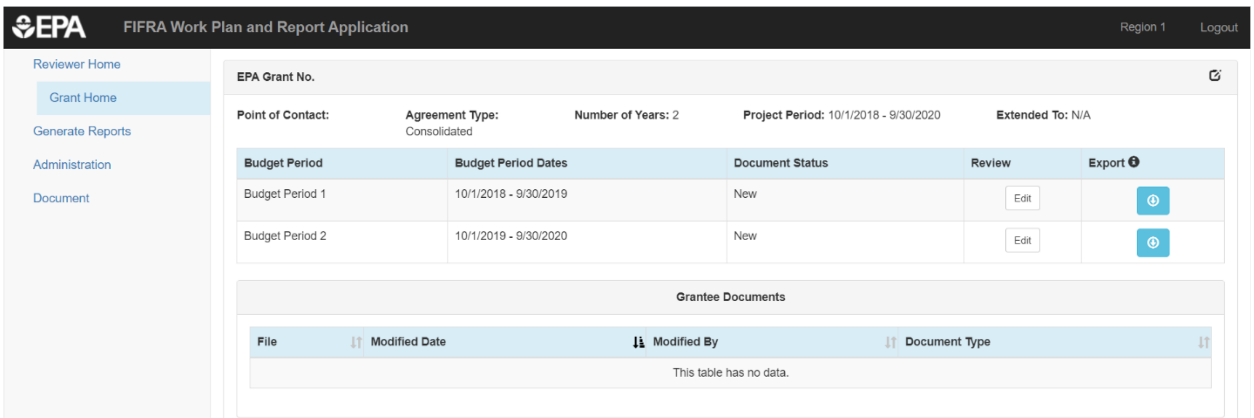


Exhibit 5-7 Reviewer – Grant Home Screen

5.3.1 Work Plan – EPA Report

Navigation: Follow the steps in **Section 5.3** to access the 'Work Plan' page of the desired grant budget period. By default, the 'Work Plan' page will display the 'Activities' tab (**Exhibit 4-31**). Access 'EPA Report' tab by selecting 'EPA Report' tab at the top of the page (**Exhibit 5-8**).

The Work Plan 'EPA Report' tab is designed to allow a 'RPO' user to provide comments, feedback, activity accomplishment statuses and activity accomplishment due dates to the 'Grantee Work Plan and Report.' Once the desired portions of the 'EPA Report' tab have been completed, click the 'Save Changes' link in the application footer to save all changes to the page.

NOTE: 'OCSPP/OECA' users can review the data in the 'Grantee Work Plan and Report,' but cannot make any changes.

WARNING: Before navigating away from the 'Work Plan,' 'RPO' users must do one of the following to ensure their changes are saved: (1) click on the 'Save Changes' link in the application footer (**Exhibit 4-52**); or (2) select 'Yes' in the pop-up window that appears when a different area of the report is selected from the navigation tree. If a user navigates away from the form without selecting 'Yes' from the 'Save Changes' prompt, closes the browser window, ends their CDX session, or their CDX session times out, then any changes made since navigating to the form will be lost. See **Section 4.4.7** for more details.

The Work Plan 'EPA Report' tab follows the same format as outlined in **Section 4.4.7** with the exception that the cards on the Work Plan 'EPA Report' tab have the following fields:

- **EPA Comments** – 'Free-text' field allowing the RPO to provide comments relating to the guidance activity.
- **EPA Recommendations** – 'Free-text' field allowing the RPO to provide recommendations relating to the 'Grantee' report of the guidance activity.
- **EPA Review of Status** – Dropdown allowing the RPO to set a status of the review for the given guidance activity. The available statuses are 'Complete,' 'Partially Complete,' 'Not Started,' and 'Ongoing/As Needed.'
- **Due Date** – The 'Due Date' field allows the 'RPO' users to update the due date of the Guidance Activity.

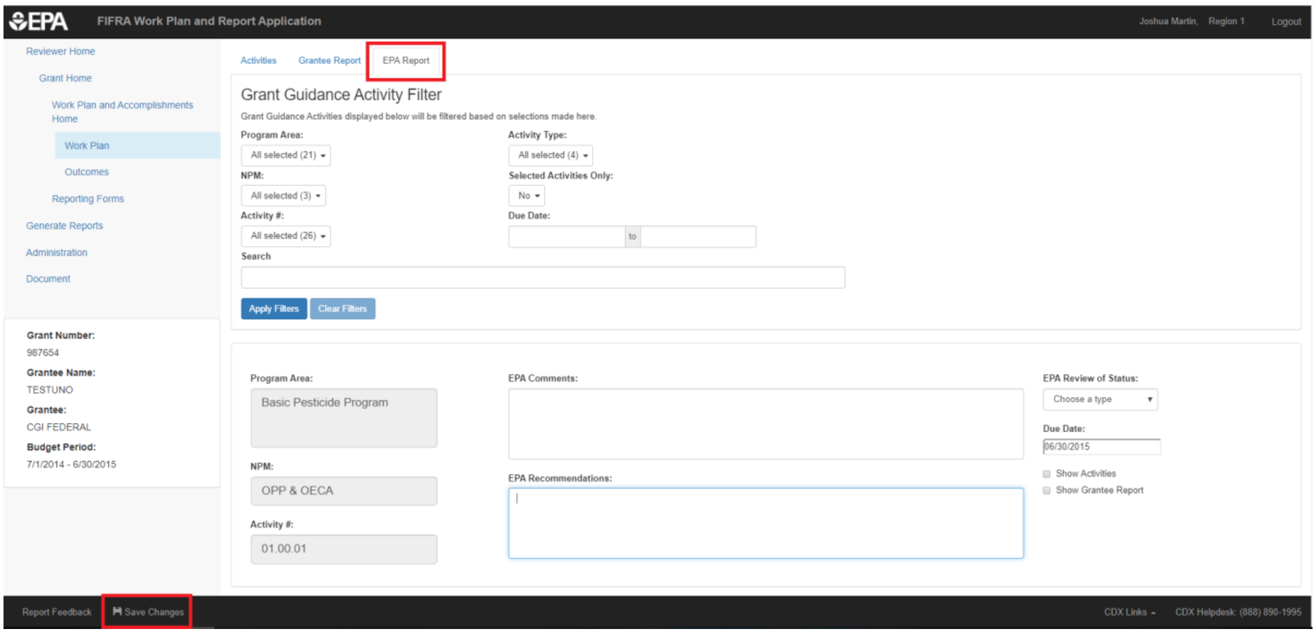


Exhibit 5-8 EPA Report Tab

Navigation: 'Regional Project Officers' and 'OCSPP/OECA Reviewers' could filter and search 'Grant Guidance Activities' across all tabs using the 'Grant Guidance Activity Filter' card located at the top of the 'Work Plan' section. For information on filtering and searching 'Grant Guidance Activities' in the 'Work Plan' section. See **Section 4.4.7.4** of the User Guide.

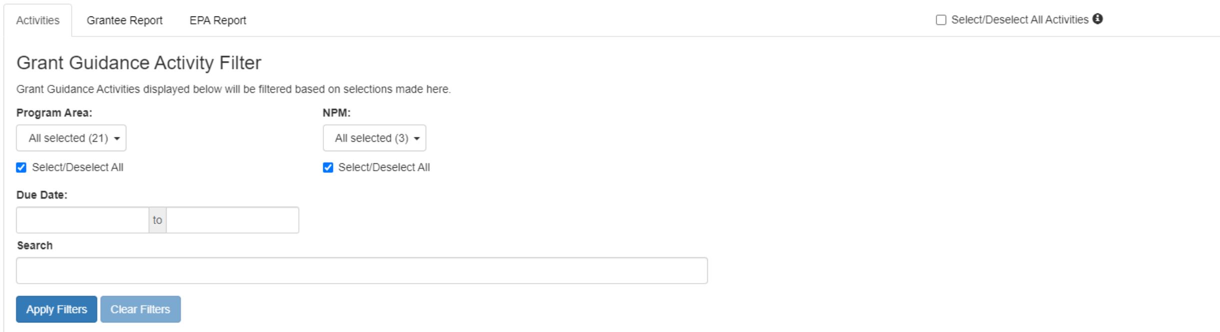


Exhibit 5-9 'Grant Guidance Activity Filter' – RPO and OCSPP/OECA Reviewer

5.3.2 Setting a Status

Navigation: To set a status for the budget period's 'Work Plan and Report' template, the user must be on the 'Work Plan and Report' homepage for the respective budget period. See **Section 4.4.1** for reference. Once the user has navigated to the 'Work Plan and Report' homepage, click the 'Set Status' button under the 'Current Work Plan/Report Status' section (**Exhibit 4-20**).

NOTE: 'RPO' users can only change a status if the 'Grantee' has changed the initial 'New' status.

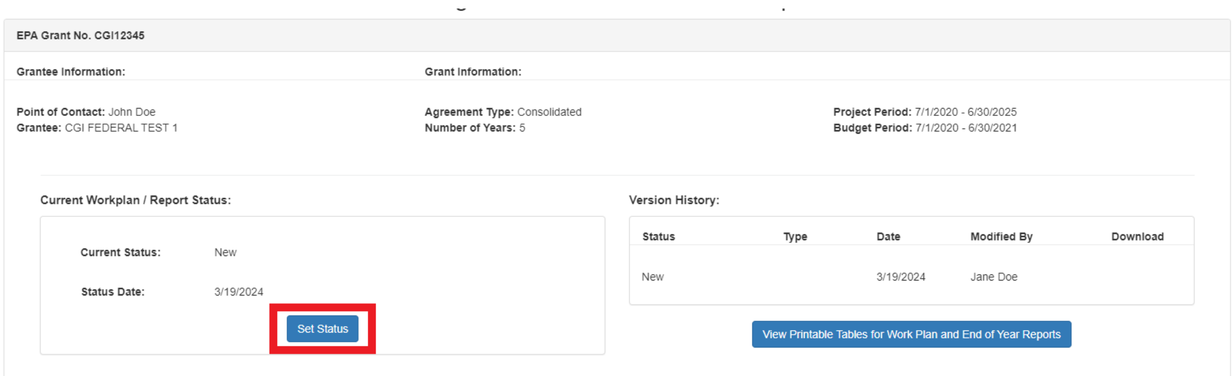


Exhibit 5-10 Set Status

Once 'Set Status' is selected, the application will generate the 'Set Status' modal (**Exhibit 4-21**). The 'Set Status' modal has the following fields:

- **Set Status**
- **Type of Report:** This is displayed only when selecting a 'Report' status in the 'Set Status' dropdown.
- **Status Date:** The current date.

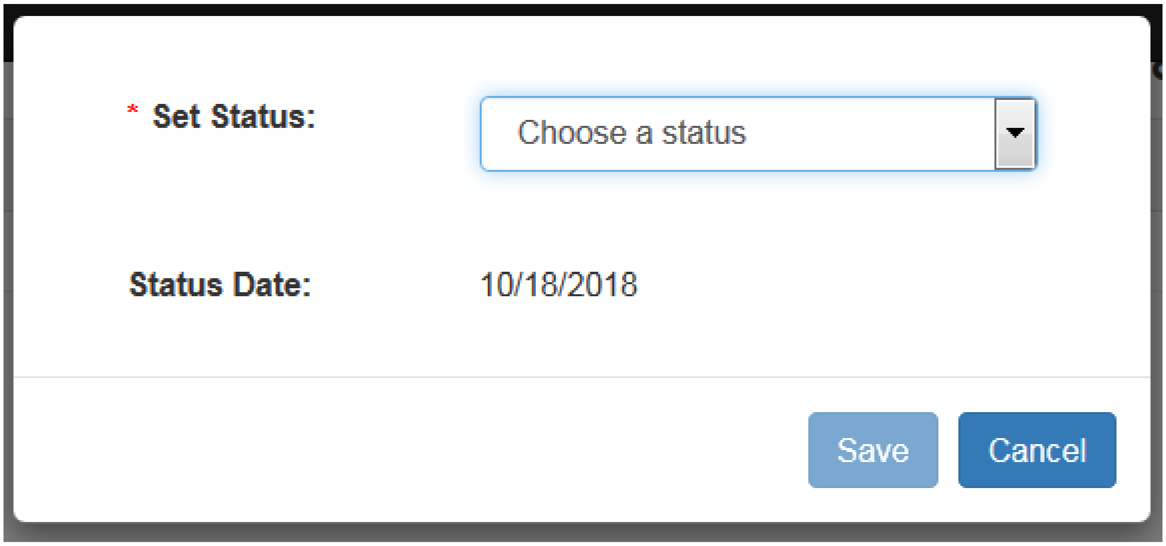


Exhibit 5-11 Set Status Modal

To set a status, click the 'Set Status' dropdown (**Exhibit 4-22**) and select one of the available statuses. The statuses available to 'RPO' users and their intended uses are the following:

- **EPA Report Draft**: This status is used by EPA personnel when their review of end-of-year reporting is in progress.
- **EPA Report Final:** This status is used by EPA personnel when their review of end-of-year reporting is complete and has been approved by management in the appropriate regional office.
- **EPA Report Final Amended:** This status is used by EPA personnel when a change to the report had to be made by the 'Grantee' after having been uploaded to grants.gov and the 'Grantee's' change(s) have been reviewed and approved again by EPA.

NOTE: 'Grantee' users are able to change a status from one set by an 'RPO' user back to one of the statuses described in Section 4.4.6.

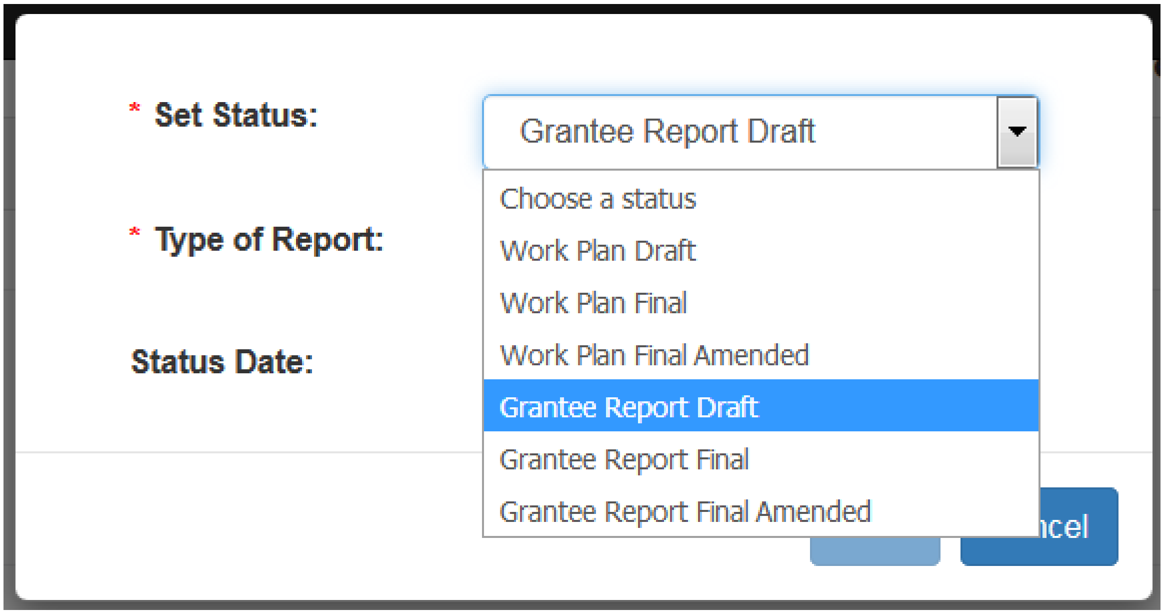


Exhibit 5-12 Set Status Pick List

If any of the ‘Report’ statuses are selected, the user will also be required to select the type of report the status is associated with from the generated ‘Type of Report’ dropdown (**Exhibit 4-23**). The following ‘Report Types’ are available:

- Q1
- Q2-Mid-Year
- Q3
- Q4-Final

NOTE: ‘Grantees’ minimum reporting frequency will reflect what they have negotiated with the EPA regional office. The ‘Report Types’ should align with the reporting period(s) for which data has been provided on 5700 forms. See **Section 4.4.9.2** for setting up reporting periods on 5700 forms.

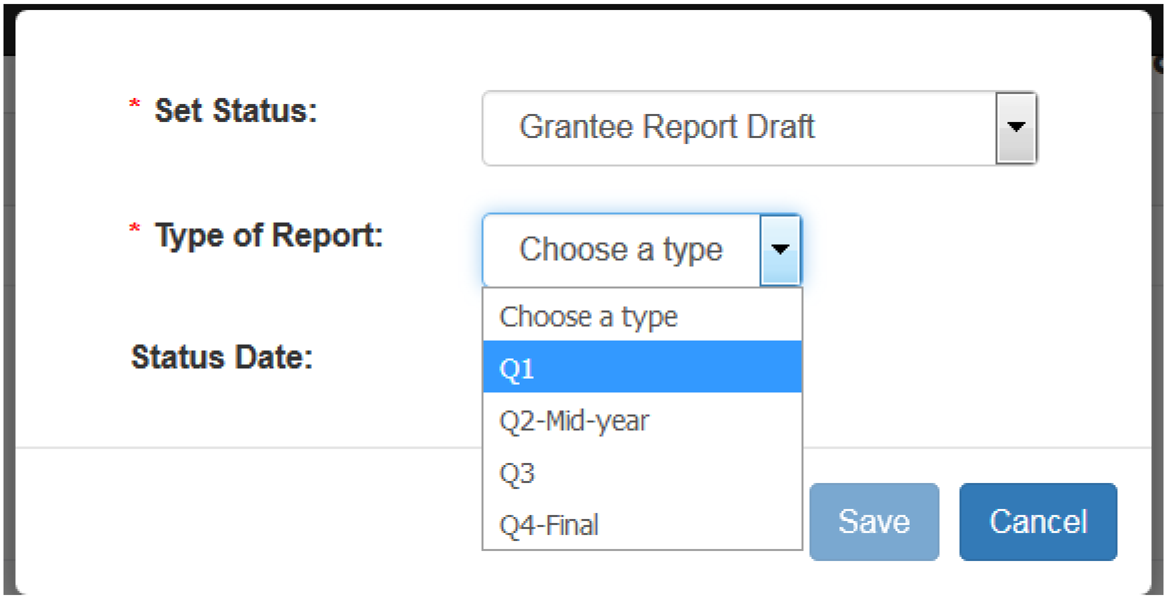


Exhibit 5-13 Type of Report Dropdown

Navigation: Once all required fields are populated, the 'Save' button will become enabled. Click 'Save' to close the modal and set the status. The status will update in the 'Current Workplan/Report Status' section on the 'Work Plan and Report' homepage (**Exhibit 4-24**), as well as in the 'Document Status' column of the respective grant on the 'Grant Home' screen (**Exhibit 4-25**). The status update will also be visible in the 'Version History' section on the 'Work Plan and Report' screen for future reference.

NOTE: Once a status is set, it cannot be deleted. The user should they are ready to set the status before saving.

NOTE: There is no EPA notification feature associated with setting a status. If it is time sensitive to inform the 'Grantee' that the review of the 'Work Plan and Report' is completed, EPA personnel should reach out to the 'Grantee' directly.

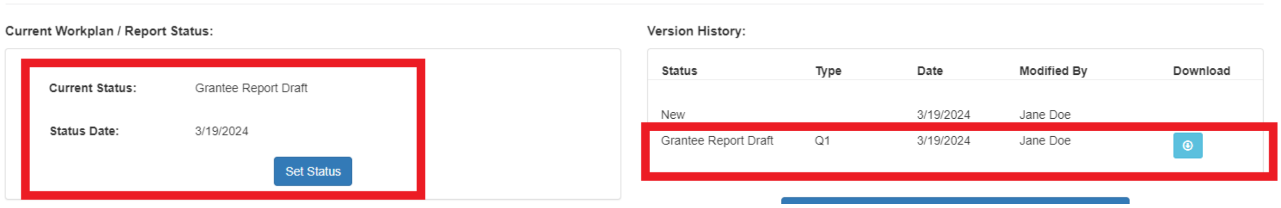


Exhibit 5-14 Work Plan and Report Status Update

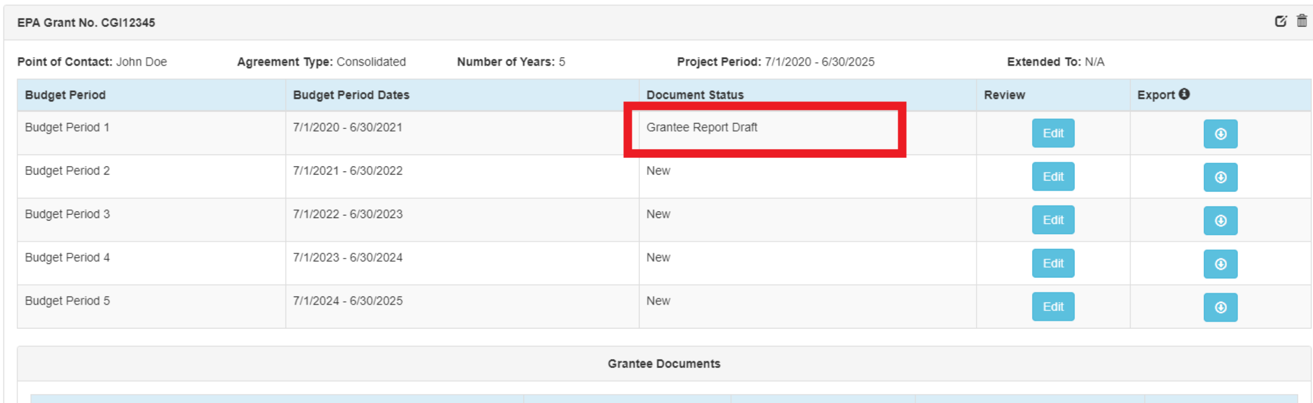


Exhibit 5-15 Document Status Update

5.3.3 Printable Tables for Work Plan and End of Year Reports

Navigation: Users can review a printable format of the information entered into the 'Work Plan Activities,' outcomes and goals and reporting forms (outlined in **Sections 4.4.7**, **4.4.8,** and **4.4.9** above). Information reviewable from the printable tables includes the following:

- 'Grantee' and EPA information provided under guidance activities that are in the 'Work Plan' because either their activity type is 'Required' or because the 'Grantee' added the activity to the 'Work Plan' (**Section 4.4.7.1**);
- Information from the 'Work Plan Outcomes and Goals' (**Section 4.4.8**); and

NOTE: Only 'Work Plan Activities' where the 'Selected' checkbox is checked are included in the 'Printable Work Plan Report' for that budget period (**Exhibit 4-31**). Only 'Grantees' have the ability to check and uncheck the 'Selected' checkbox for non-required activities in the 'Work Plan' section in order to add or remove those activities from the 'Printable Work Plan Report' for that budget period.

From the 'Work Plan and Accomplishments Home' screen, click the 'View Printable Tables for Work Plan and End of Year Reports' button (**Exhibit 5-16**). This will change the view of the 'Work Plan and Accomplishments' screen to the 'All Printable Tables' tab (**Exhibit 5-17**).

NOTE: To return to the 'Work Plan and Report' screen, click on the 'Work Plan and Accomplishments Home' tab in the navigation tree.

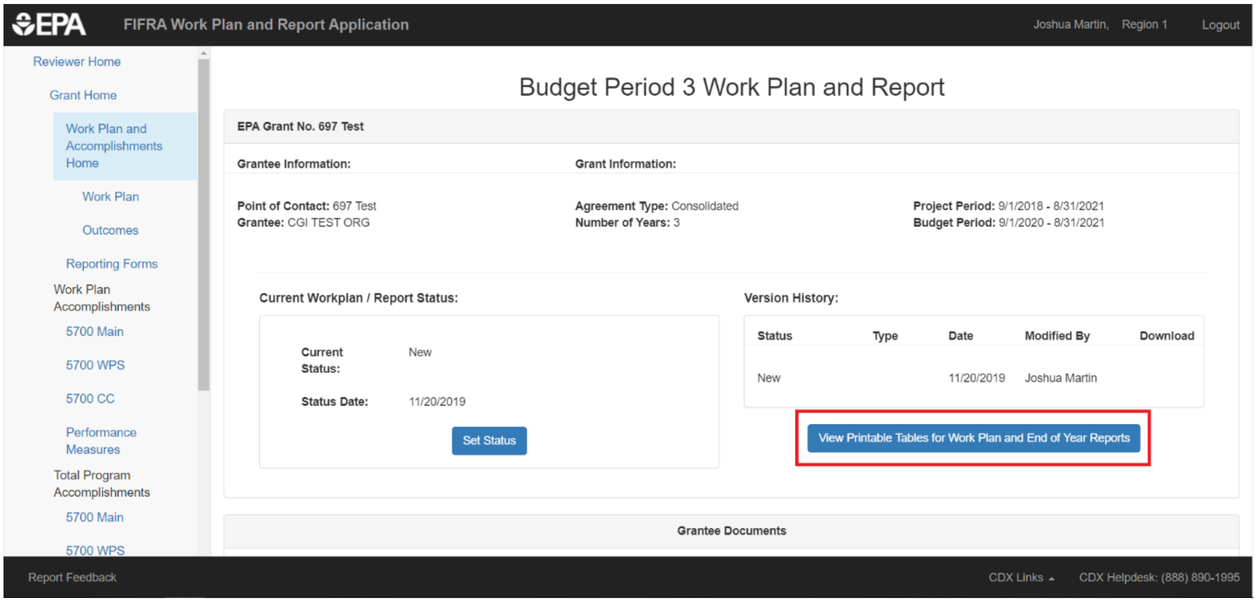


Exhibit 5-16 Work Plan and End of Year Reports Printable Tables Button

The ‘All’ tab (**Exhibit 5-17**) of the printable tables is a combination of the tables and information contained within the ‘Grantee Work Plan,’ ‘Grantee Report,’ and ‘EPA Report’ tabs. It provides a view of all entries made in the ‘Work Plan’ (**Section 4.4.7**) and ‘Outcomes’ (**Section 4.4.8**) subsections and all subsections of both reporting forms (**Section 4.4.9**). It also includes any comments or recommendations, made by the RPO (**Section 5.3.1**), with respect to a particular activity for that budget period. To print the information provided here, right-click on the printable table while on this tab and select ‘Print’ from the generated modal. This will bring up the computer’s local print options. For Google Chrome, the recommended browser when accessing FGD, optimal print settings are as follows:

- Destination: Select a local printer to load the print options.
- Pages
- Copies
- Layout
- Color
- More Settings:
  - Paper Size
  - Pages per sheet
  - Margins
  - Quality
  - Scale
  - Two-Sided: Checkbox for user to print on both sides.

Options: Checkbox for user to print the heads and footers and/or the background graphics.

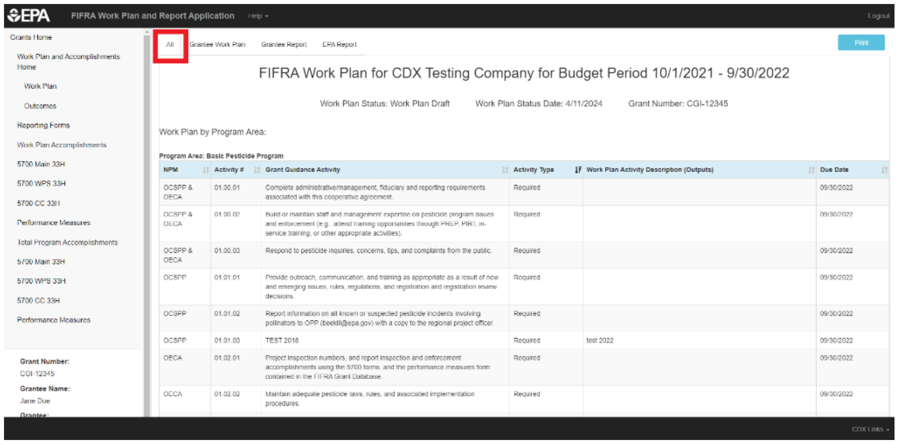


Exhibit 5-17 'All' Printable Tables View

Navigation: The 'Grantee Work Plan' tab (**Exhibit 5-18**) of the printable tables contains information for all 'Work Plan Activity Description (Outputs)' entered by the 'Grantee' for a specific grant budget period. 'Work Plan Activity Description (Outputs)' are listed with respect to the adjacent 'Grant Guidance Activity' information and are separated into tables by program area. Activities in each 'Program Area' tables can be sorted ascending or descending by column. See **Section 4.4.7.1** above for more information about adding 'Work Plan Activity Description (Outputs).'

Additionally, given 'Work Plan Accomplishments' and/or 'Total Program Accomplishments' exist for the same budget period, the '5700 Main Projections' summary data is also added to the bottom of this printable table view (**Exhibit 5-19**). See **Section 4.4.9.3** for more information on the '5700 Main Reporting Form.'

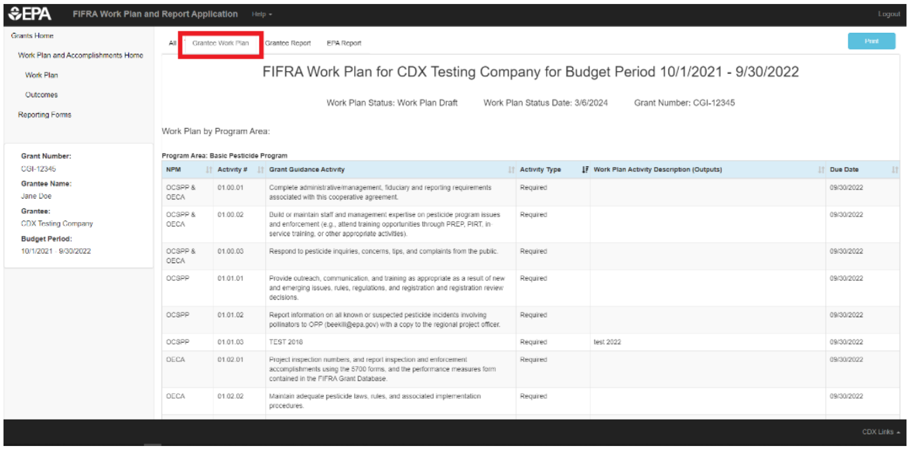


Exhibit 5-18 'Grantee Work Plan' Printable Tables View

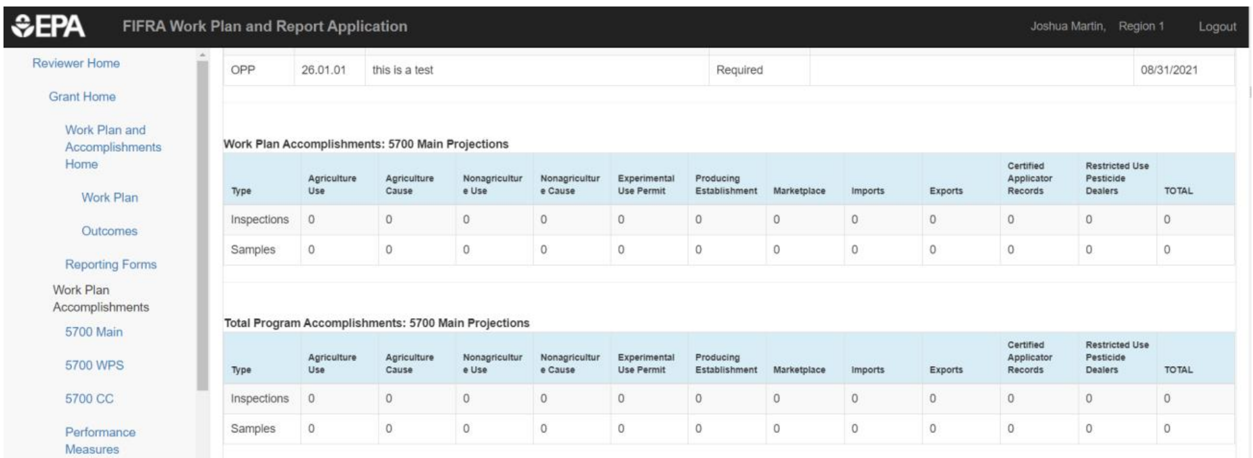


Exhibit 5-19 '5700 Main Projections' Printable Tables View

Navigation: The 'Grantee Report' tab (**Exhibit 5-20**) of the printable tables contains all 'Work Plan Activity Accomplishment' information entered by the 'Grantee' for a specific grant budget period. 'Work Plan Activity Accomplishment' inputs are listed with respect to the relating 'Work Plan Activity Description (Outputs)' information and are separated into tables by program area. Activities in each 'Program Area' table can be sorted ascending or descending by column. See **Section 4.4.7** above for more information about adding 'Work Plan Activity and Description' Information.'

Additionally, given 'Work Plan Accomplishments' and/or 'Total Program Accomplishments' exist for the same budget period, data tables for those reports are added to the bottom of this printable table view. See **Section 4.4.9** for more information on the reporting forms.

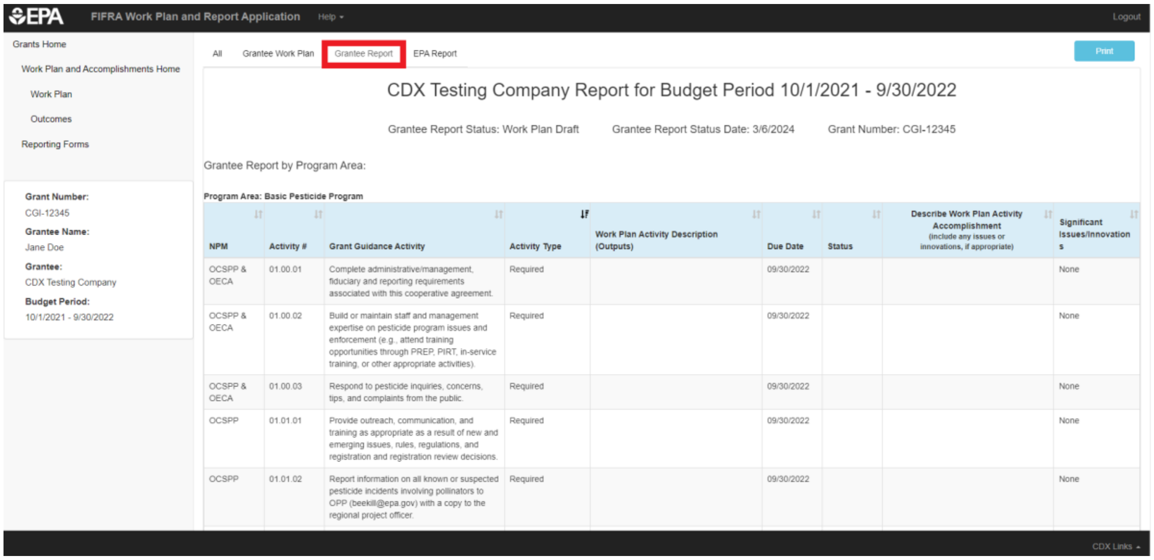


Exhibit 5-20 'Grantee Report' Printable Tables View

Navigation: The 'EPA Report' tab (**Exhibit 5-21**) of the printable tables contains all 'EPA Comments' and 'EPA Recommendations' entered by the 'RPO' for a specific grant budget period. EPA Comments and Recommendations are listed with respect to the relating 'Work Plan Activity Description (Outputs)' information and are separated into tables by program area. Columns in each 'Program Area' table, including 'EPA Comments' and 'EPA Recommendations' can be sorted ascending or descending. See **Section 4.4.7.3** above for more information about EPA comments and recommendations.

Additionally, given 'Work Plan Accomplishments' and/or 'Total Program Accomplishments' exist for the same budget period, data tables for those reports are added to the bottom of this printable table view. See **Section 4.4.9** for more information on the reporting forms.

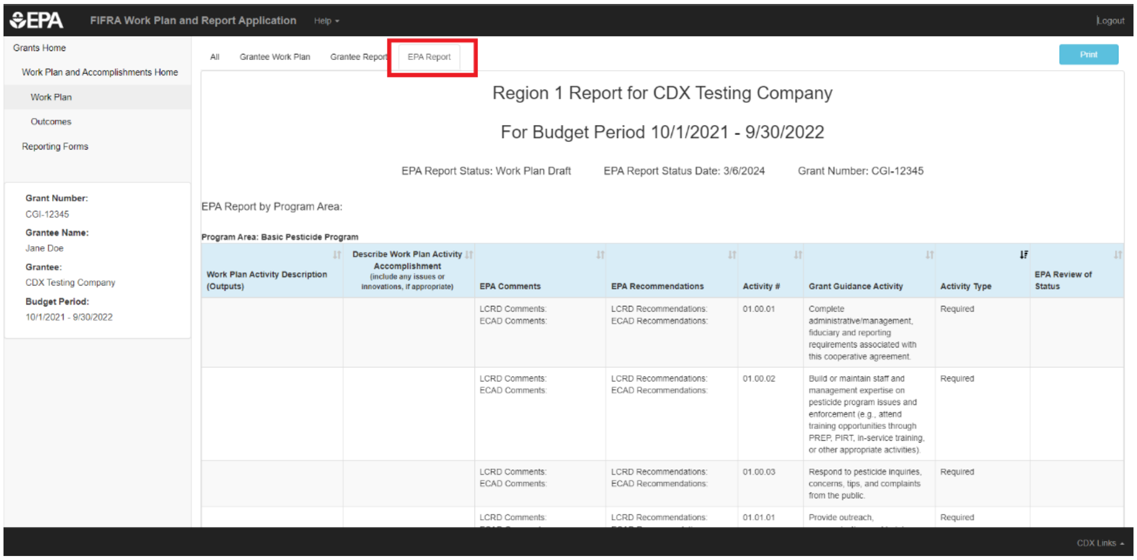


Exhibit 5-21 'EPA Report' Printable Tables View

5.4 Managing National Guidance Activities – OCSPP/OECA

Navigation: To manage 'National Guidance Activities,' select the 'Administration' link in the navigation tree (**Exhibit 5-22**).

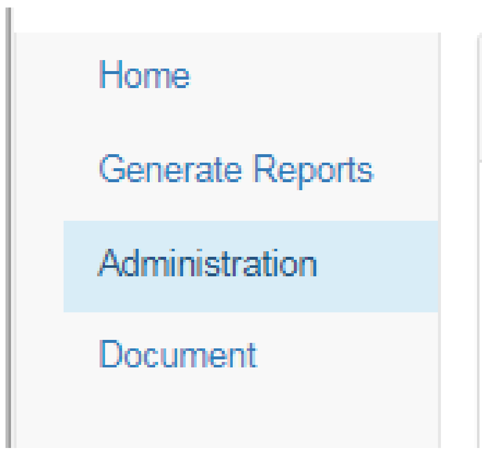


Exhibit 5-22 Administration Navigation Link

Navigation: Selecting 'Administration' in the navigation menu will open the 'Administration' page (**Exhibit 5-23**). All program areas will be listed in the 'Program Area' column. From this screen, the user will be able to create and edit guidance activities.

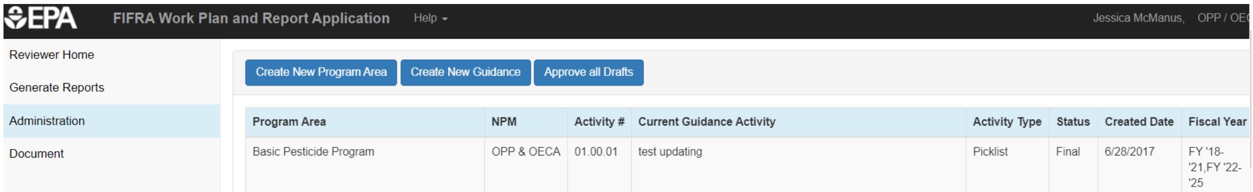


Exhibit 5-23 OECA Role Administration Screen

5.4.1 Create New Guidance Activity

To create a new guidance activity, the user should select the 'Create New Guidance' button at the top of the 'Administration' page (**Exhibit 5-24**).

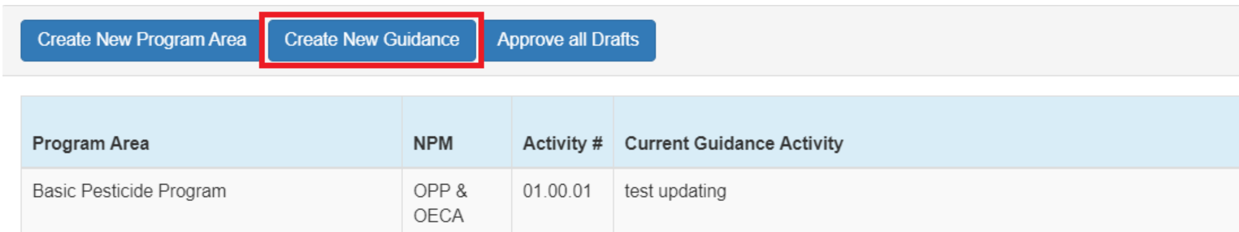


Exhibit 5-24 Create New Guidance Activity Button

Navigation: The user can click the 'Create New Guidance' button to generate the 'Add Guidance Activity' popup modal (**Exhibit 5-25**). To create a new guidance activity, the user should fill out all required fields and select 'Save.' Required fields are denoted with a red asterisk (*).

The fields associated with the 'Add Guidance Activity' modal are:

- **Program Area:** Dropdown used to identify which program area the new guidance activity is associated with.
- **NPM:** Dropdown to identify if the activity is funded through 'OCSPP,' 'OECA,' or both 'OCSPP and OECA.'
- **Activity #:** Activity numbers are three-part numbers. The first two parts of the registration number will be auto populated based on the selections made in the 'Program Area' and 'NPM' fields. The third part should be created by the user entering in a valid number in the 'Text' field.
- **Guidance Activity: '**Free-text' field to provide the guidance activity description.
- **Activity Type:** Dropdown for the user to identify the type of activity being created. The Activity types are: 'Required,' 'Picklist,' 'Optional,' 'Inactive.' See descriptions of what these activity types are and when they could be used in the current FIFRA Cooperative Agreement Guidance.
- **Status:** The Status of the Activity dictates if it will be visible to the 'Grantee' or not. By default, new activities are given a status of 'Draft' meaning that once saved, the guidance activity will still not be visible to 'Grantees.' As soon as a status is set to 'Final' the guidance activity will instantly be visible to the 'Grantees.'

- **Fiscal Year:** If the Status of the Activity is ‘Draft,’ then this field is not required. If the Status of the Activity is ‘Final,’ then this field is required, and the correct fiscal year range should be entered.

  NOTE: Fiscal year does not need to be updated between years (or FIFRA CAG guidance versions) if there is no change to the ‘Guidance Activity’ or ‘Status.’

- **Created Date:** This is populated automatically for each activity with the date that it is originally created.

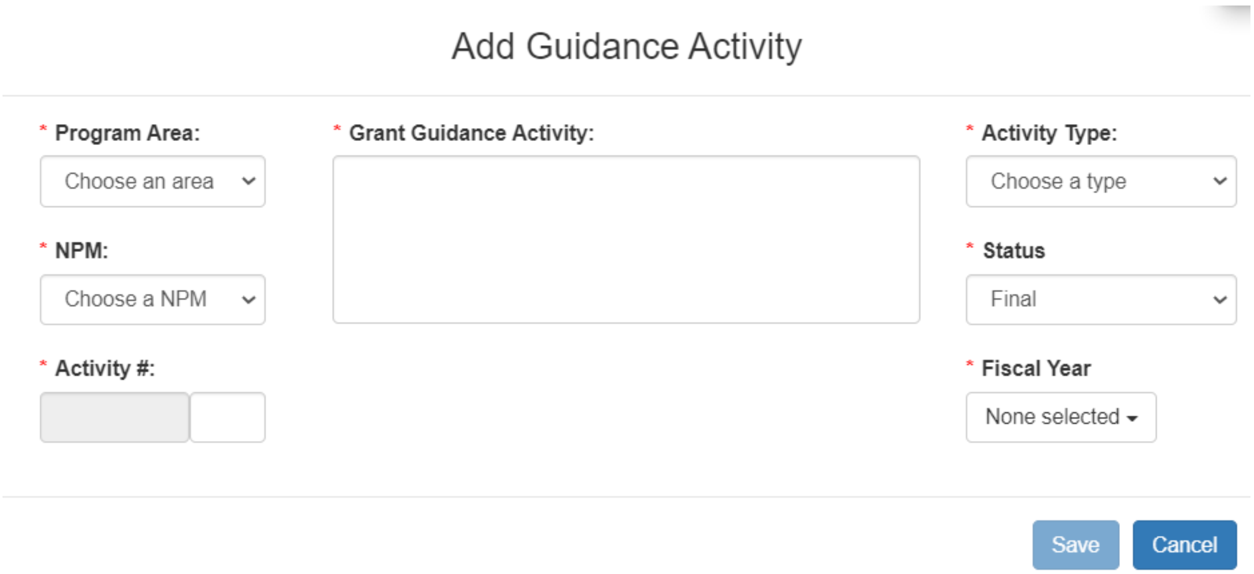
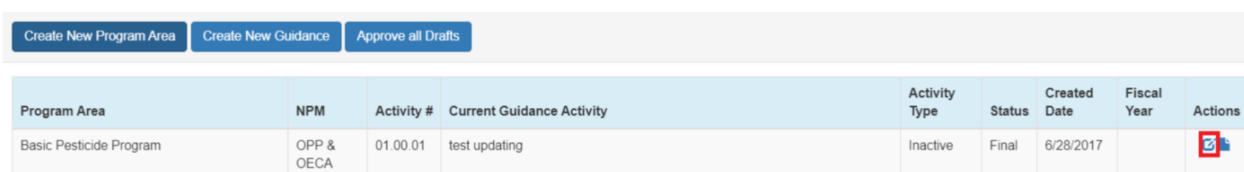


Exhibit 5-25 Add Guidance Activity Modal

5.4.2 Editing Guidance Activity

Navigation: To edit an existing guidance activity, identify the guidance activity from the list provided. Then, click the respective ‘Edit’ icon in the ‘Actions’ column of the table (**Exhibit 5-26**).


Create New Program Area | Create New Guidance | Approve all Drafts

Program Area	NPM	Activity #	Current Guidance Activity	Activity Type	Status	Created Date	Fiscal Year	Actions
Basic Pesticide Program	OPP & OECA	01.00.01	test updating	Inactive	Final	6/28/2017		

Exhibit 5-26 Guidance Activity Edit Button

Clicking the ‘Edit’ button will generate the ‘Edit Guidance Activity’ Modal (**Exhibit 5-27**). When editing a guidance activity, the only editable fields are:

- **Grant Guidance Activity:** ‘Free-text’ field to provide the ‘Guidance Activity’ description.
- **Activity Type:** Dropdown for the user to identify the type of activity being created. The Activity types are: ‘Required,’ ‘Picklist,’ ‘Optional,’ ‘Inactive.’ See descriptions of what these activity types are and when they could be used in the current FIFRA Cooperative Agreement Guidance.

- **Status:** The status of the activity dictates if it is visible to the ‘Grantee.’ By default, new activities are given a status of ‘Draft’ meaning that, once saved, the guidance activity will still not be visible to ‘Grantees.’ As soon as a status is set to ‘Final,’ the guidance activity will immediately be visible to ‘Grantees.’

  NOTE: The intent of editing existing activities is to finalize a draft activity, make slight clarifications to the language in the ‘Guidance Activity’ field or change the activity type. If broader scope changes are needed, it’s recommended to create a new guidance activity.

  NOTE: Once an activity has been set to a status of ‘Final,’ the only fields that will be available to edit are ‘Grant Guidance Activity’ and ‘Status.’

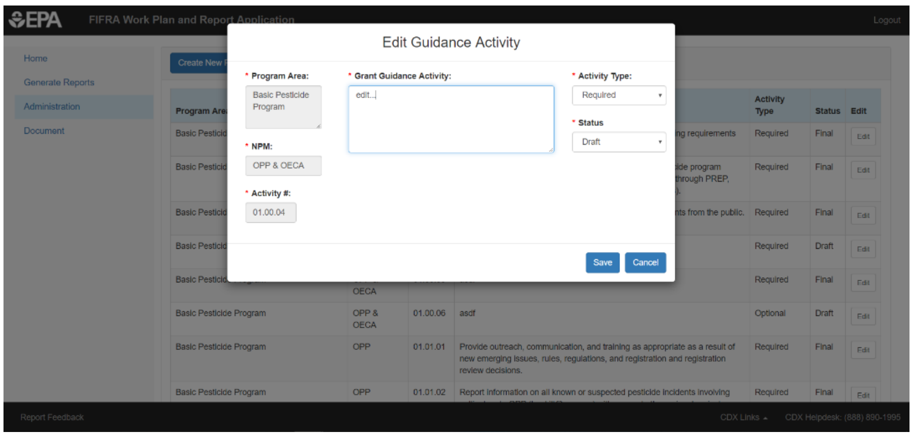


Exhibit 5-27 Edit Guidance Activity Modal

5.4.3 Audit Log

To view the audit log for a specific ‘Grant Guidance Activity,’ select the ‘View Audit Log’ icon located under the ‘Actions’ column of the table (**Exhibit 5-28**). This will allow the user to view a trail of changes from a particular guidance activity that has been updated. The audit log also displays the date and name of the user who made those changes.

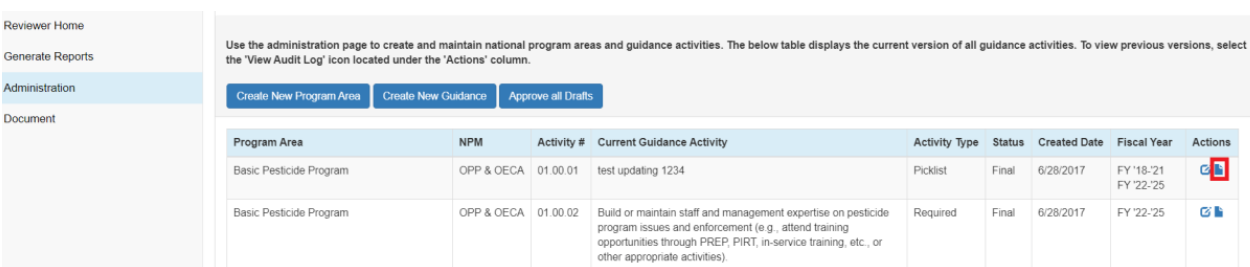


Exhibit 5-28 View Audit Log Icon

Clicking the ‘View Audit Log’ icon on the ‘Administration’ page will navigate the user to the ‘Audit Log’ screen (**Exhibit 5-30**) with the following fields:

- **Program Area:** Identifies which program area is associated with a particular guidance activity.
- **NPM:** Identifies if the activity is associated with ‘OCSPP,’ ‘OECA,’ or ‘OCSPP/OECA.’

- **Activity Number:** Activity numbers are three-part numbers. The first two parts of the registration number will be auto populated based on the selections made in the ‘Program Area’ and ‘NPM’ fields. The third part should be created by the user entering in a valid number in the ‘Text field.’

- **Grant Guidance Activity:** Provides the details for the particular guidance activity established by EPA.
  - **Activity Type:** Identifies the type of activity created. The Activity types are: ‘Required’ ‘Picklist,’ ‘Optional,’ and ‘Inactive.’
  - **Modification Date:** Identifies the date and name of user who made changes to the ‘Grant Guidance Activity.’
  - **Fiscal Year:** Displays the Fiscal Year, or Fiscal Years, that the ‘Grant Guidance Activity’ is applicable.

NOTE: The ‘Finalize’ checkbox option will not allow for any changes to the ‘Grant Guidance Activity’ text displayed for the respective fiscal year(s.) **Do NOT use the ‘Finalize’ option.**

Audit Log

The audit log shows previous versions of guidance activities. If no entries display, the current/only version exists on the Administration page.

Program Area	NPM	Activity Number	Grant Guidance Activity	Activity Type	Status	Modification Date	Fiscal Year
Regional Guidance Activity	OPP	18.01.01.02	New Grant Guidance Activity	Optional	Final	4/12/2021 (Benjamin)	FY '18

Exhibit 5-29 Audit Log Screen

5.4.4 Approve all Draft Guidance Activities

Navigation: Clicking the ‘Approve all Drafts’ button (**Exhibit 5-30**) on the ‘Administration’ page will update all ‘Grant Guidance Activities’ in the table with a status of ‘Draft’ to a status of ‘Final.’

NOTE: Once an activity has been set to a status of ‘Final,’ the only fields that will be available to edit are ‘Grant Guidance Activity’ and ‘Status.’ You will not be able to return an activity to a ‘Draft’ status.

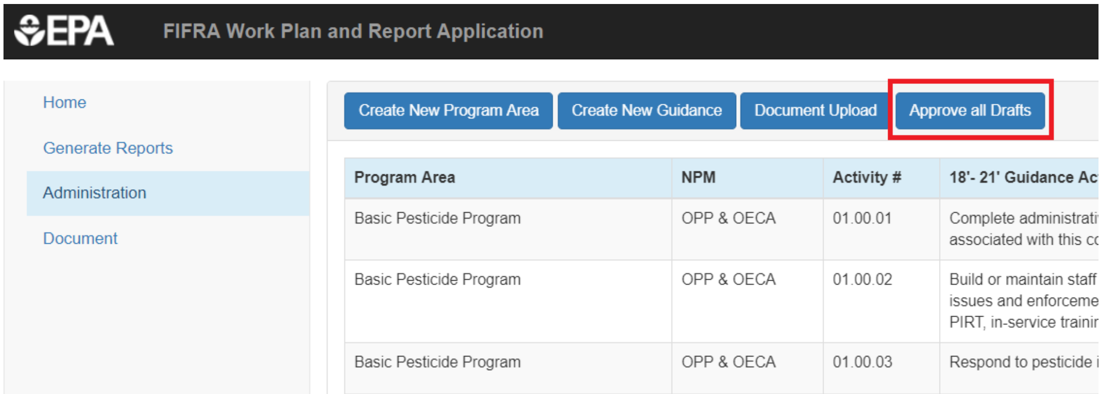


Exhibit 5-30 OECA Approve all Drafts Button

5.5 Manage Regional Guidance Activities – RPO and OECA

Navigation: To manage 'Regional Guidance Activities,' select the 'Administration' link in the navigation tree (**Exhibit 5-31**).

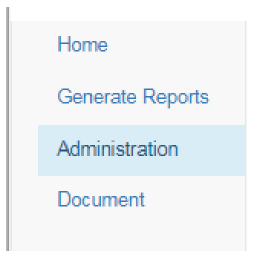


Exhibit 5-31 Administration Navigation Link

Selecting 'Administration' in the navigation tree will open the 'Administration' page (**Exhibit 5-32**). Any existing 'Regional Guidance Activities' will be listed as such in the 'Program Area' column. If the user is a 'RPO,' by default, there will be two regional specific guidance activites that act as place holders and are not editable. All regional specific guidance activities will be considered sub-activities under one of the two placeholder activities.

NOTE: Regional specific guidance activities will only ever display to 'Grantees' that fall within the region the guidance activity is created for.

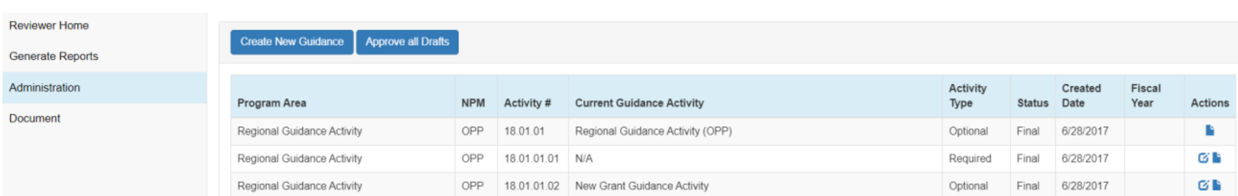


Exhibit 5-32 RPO Administration Screen

5.5.1 Create New Guidance Activity

To create a new guidance activity, click the 'Create New Guidance' button at the top of the 'Administration' page (**Exhibit 5-33**).

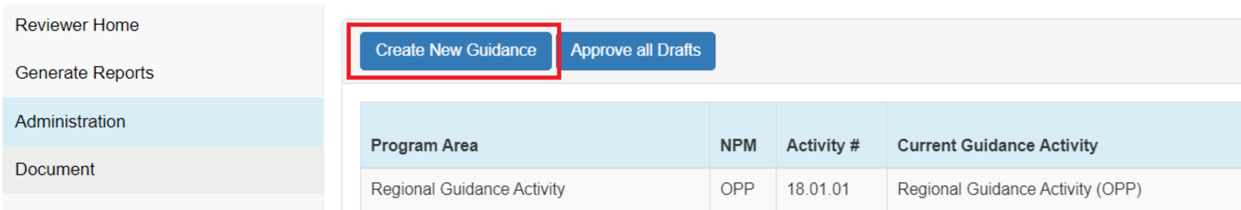


Exhibit 5-33 Create New Guidance Activity Button

Navigation: Clicking the ‘Create New Guidance’ button will generate the ‘Add Guidance Activity’ popup modal (**Exhibit 5-34**). To create a new guidance activity, fill out all required fields and click ‘Save’ inside the modal. Required fields are denoted with a red asterisk (*).

The fields associated with the ‘Add Guidance Activity’ modal are:

- **Program Area:** Will always be ‘Regional Guidance Activity.’
- **NPM:** Dropdown picklist to identify if the activity is associated with ‘OCSPP,’ ‘OECA’ or both ‘OCSPP and OECA’. EPA personnel should confirm the selection with the appropriate EPA headquarters offices(s) to ensure that the activity falls within the scope of how office funds may be allocated.
- **Activity #:** Activity numbers are three part numbers. The first two parts of the registration number will be auto populated based on the selections made in the ‘Program Area’ and ‘NPM’ fields. The third part should be created by the user entering in a valid number in the ‘Text’ field.
- **Guidance Activity: ‘**Free-text’ field to provide the ‘Guidance Activity’ description. It is recommended that EPA personnel provide broad descriptions of the Regional guidance activity so that it can be used more than once and by more than one ‘Grantee.’ ‘Grantees’ can provide specifics on the agreed-upon, planned activities in the ‘Work Plan’ in the ‘Work Plan Activity Description (Outputs)’ field (see Section 4.4.7.1).
- **Activity Type:** Dropdown for the user to identify the type of activity being created. The Activity types are: ‘Required, ‘Picklist,’ ‘Optional,’ ‘Inactive.’ See descriptions of what these activity types are and when they could be used in the current FIFRA Cooperative Agreement Guidance.
- **Status:** The Status of the Activity dictates if it will be visible to the ‘Grantee’ or not. By default, new activities are given a status of ‘Draft’ meaning that once saved, the guidance activity will still not be visible to ‘Grantees.’ As soon as a status is set to ‘Final,’ the guidance activity will immediately be visible to ‘Grantees.’

  NOTE: Once an activity has been set to a status of ‘Final,’ the only fields that will be available to edit are ‘Grant Guidance Activity’ and ‘Status.’ You will not be able to return an activity to a ‘Draft’ status.

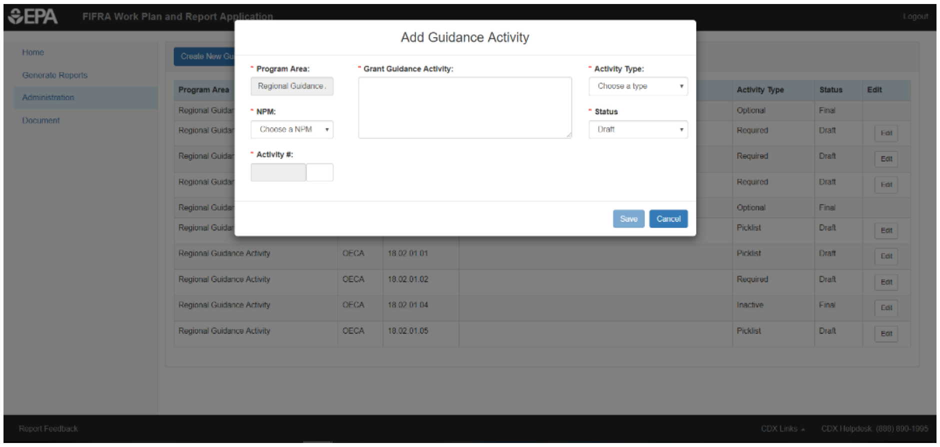


Exhibit 5-34 Add Guidance Activity Modal

5.5.2 Editing Guidance Activities

To edit an existing guidance activity, identify the guidance activity from the list and click the respective 'Edit' icon in the 'Actions' column of the table (**Exhibit 5-35**).

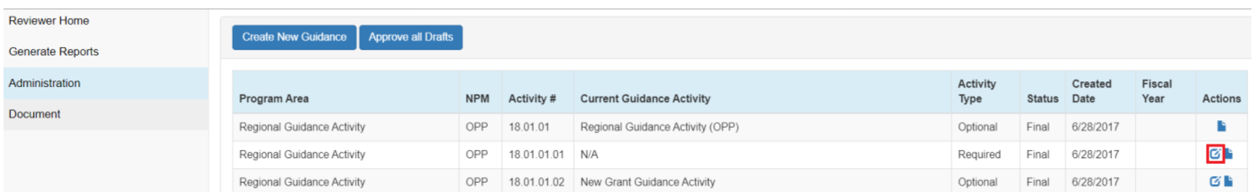


Exhibit 5-35 Guidance Activity Edit Icon

Clicking the 'Edit' icon will generate the 'Edit Guidance Activity' modal (**Exhibit 5-36**). When editing a guidance activity, the only editable fields are:

- **Guidance Activity:** 'Free-text' field to provide the guidance activity description. Since the NPM cannot be changed when editing the guidance activity, the new guidance activity described must still fall within the scope of how funds from the selected office (OCSPP or OECA) can be allocated.
- **Activity Type:** Dropdown for the user to identify the type of activity being created. The Activity types are: 'Required,' 'Picklist,' 'Optional,' 'Inactive.' See descriptions of what these activity types are and when they could be used in the current FIFRA Cooperative Agreement Guidance.
- **Status:** The status of the activity dictates if it is visible to the 'Grantee.' By default, new activities are given a status of 'Draft' meaning that, once saved, the 'Guidance Activity' will still not be visible to 'Grantees.' As soon as a status is set to 'Final,' the guidance activity will immediately be visible in the Work Plans of all 'Grantees' associated with the same region (not to all 'Grantees').
- **Fiscal Year:** The fiscal year of the activity dictates the fiscal year range (if OCSPP/OECA user) and individual fiscal year dates (if 'RPO reviewer') that the 'Grant Guidance Activity' is applicable.

NOTE: The intent of editing existing activities is to finalize a draft activity, make slight clarifications to the language in the ‘Guidance Activity’ field or change the activity type. If broader scope changes are needed, it is recommended to create a new guidance activity.

NOTE: Once an activity has been set to a status of ‘Final,’ the only fields that will be available to edit are ‘Grant Guidance Activity’ and ‘Status.’ You will not be able to return an activity to a ‘Draft’ status.

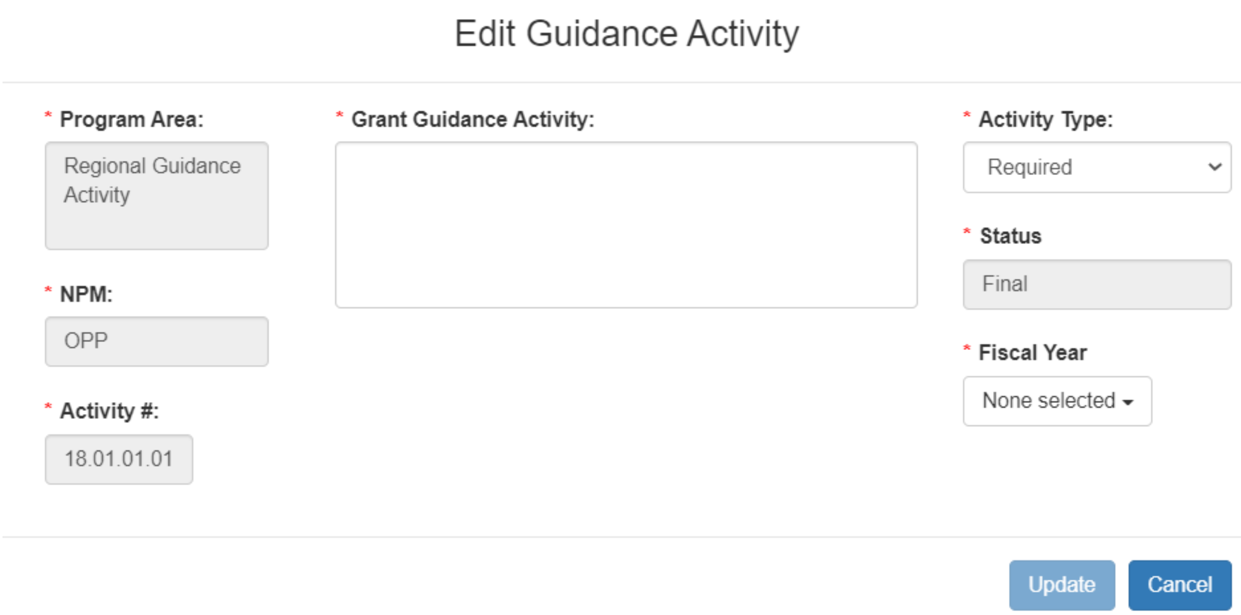


Exhibit 5-36 Edit Guidance Activity Modal

5.5.3 Audit Log

Navigation: To view the audit log for a specific ‘Grant Guidance Activity,’ select the ‘View Audit Log’ icon located under the ‘Actions’ column of the table (**Exhibit 5-37**). This will allow the user to view a trail of changes from a particular guidance activity that has been updated. The audit log also displays the date and name of the user who made those changes.

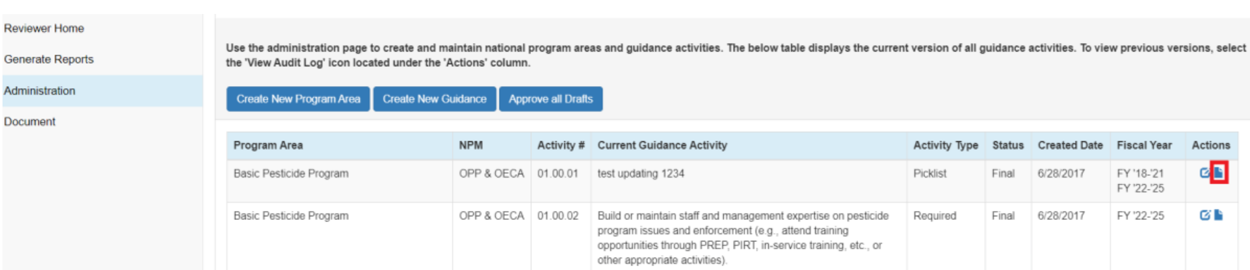


Exhibit 5-37 View Audit Log Icon

Clicking the ‘View Audit Log’ icon on the ‘Administration’ page will navigate the user to the ‘Audit Log’ screen (**Exhibit 5-29**) with the following fields:

- **Program Area:** Identifies which program area is associated with a particular guidance activity.

- **NPM:** Identifies if the activity is associated with 'OCSPP,' 'OECA,' or 'OCSPP/OECA.'
- **Activity Number:** Activity numbers are three part numbers. The first two parts of the registration number will be auto populated based on the selections made in the 'Program Area' and 'NPM' fields. The third part should be created by the user entering in a valid number in the 'Text' field.

- **Grant Guidance Activity:** Provides the details for the particular guidance activity established by EPA.
  - **Activity Type:** Identifies the type of activity created. The Activity types are: 'Required' 'Picklist,' 'Optional,' and 'Inactive.'
  - **Modification Date:** Identifies the date and name of user who made changes to the 'Grant Guidance Activity.'
  - **Fiscal Year:** Displays the Fiscal Year, or Fiscal Years, that the 'Grant Guidance Activity' is applicable.

NOTE: The 'Finalize' checkbox option will not allow for any changes to the 'Grant Guidance Activity' text displayed for the respective fiscal year(s.) **Do NOT use the 'Finalize' option.**

Audit Log

The audit log shows previous versions of guidance activities. If no entries display, the current/only version exists on the Administration page.

Program Area	NPM	Activity Number	Grant Guidance Activity	Activity Type	Status	Modification Date	Fiscal Year
Regional Guidance Activity	OPP	18.01.01.02	New Grant Guidance Activity	Optional	Final	4/12/2021 (Benjamin)	FY '18

Exhibit 5-38 Audit Log Screen

Exhibit 5-30 Audit Log Screen

5.5.4 Approve all Draft Guidance Activities

Navigation: Clicking the 'Approve all Drafts' button (**Exhibit 5-31**) on the 'Administration' page will update all 'Grant Guidance Activities' in the table with a status of 'Draft' to a status of 'Final.'

NOTE: Once an activity has been set to a status of 'Final,' the only fields that will be available to edit are 'Grant Guidance Activity' and 'Status.' You will not be able to return an activity to a 'Draft' status.

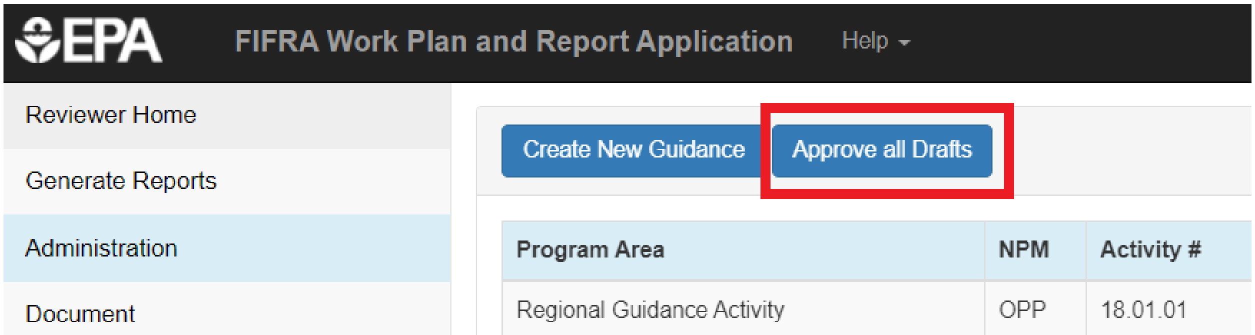


Exhibit 5-31 RPO Approve all Drafts Button

5.6 Uploading Regional Documents

'RPO' users and 'OECA Reviewers' have the ability to upload documents that apply to all grants within the geographic areas they service by use of the 'Document' screen (**Exhibit 5-32**). 'RPOs' only have the ability to upload and view documents that apply to grants within their respective regions. 'OECA Reviewers' only have the ability to upload documents that apply to 'All Regions.' However, 'OECA Reviewers' may view documents uploaded by 'RPO' users from all regions.

NOTE: If an uploaded document is deleted from the table in one place, it is deleted from all places (i.e., if a 'RPO' deletes a regional document, then it is also removed from the 'OECA Reviewer's table view and vice versa).

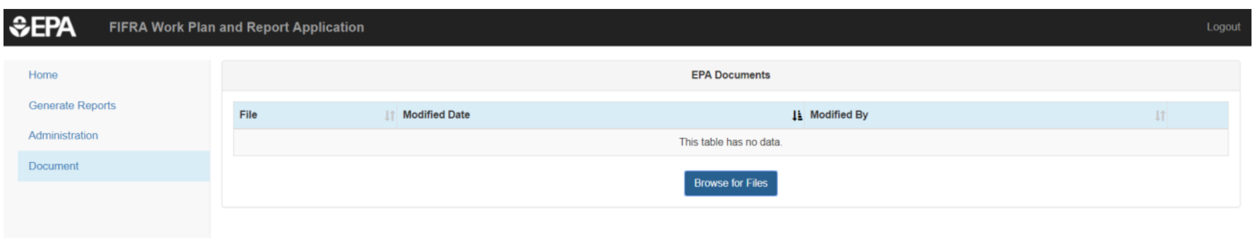


Exhibit 5-32 Document Screen

Click the 'Browse for Files' button (**Exhibit 5-33**) beneath the 'Staging' table and open the local browser window. This will allow selection of the file to be uploaded for that region.

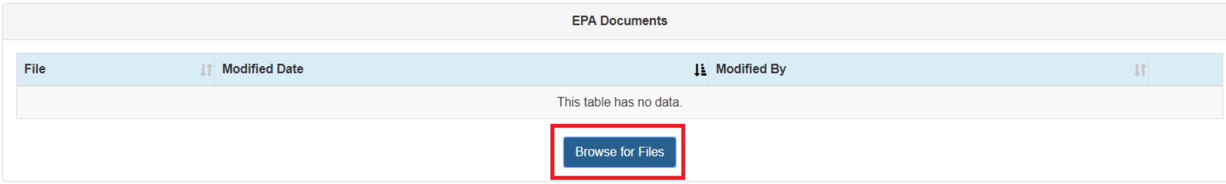


Exhibit 5-33 Browse for Document Files

5.7 Generating Data Compilation Reports

5.7.1 National Data Compilation

To generate a 'National Data Compilation,' select the 'Generate Reports' link in the navigation tree (**Exhibit 5-34**). This will open the 'Compilation' screen where the user can generate compilation reports (**Exhibit 5-34**).

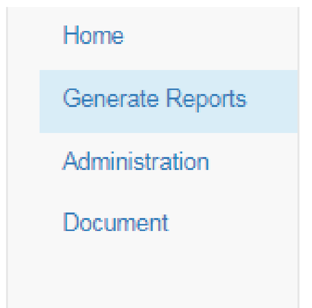


Exhibit 5-34 Generate Reports Link

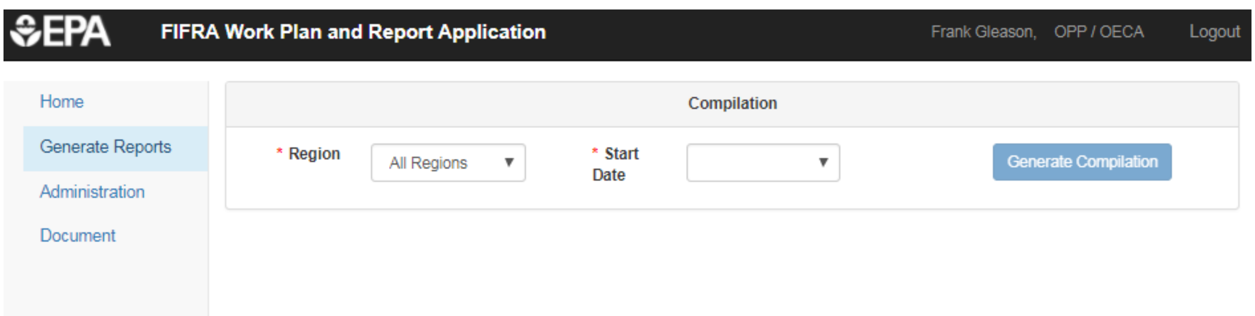


Exhibit 5-35 Generate Compilation Report Screen

By default, 'All Regions' should be selected when first landing on the 'Generate Reports' screen. Selecting data for a specified fiscal year (FY) from the 'Start Date' dropdown will activate the 'Generate Compilation' button. To generate a data compilation of all regions (national), with 'All Regions' and a 'Start Date' selected (**Exhibit 5-36**) from the respective dropdowns, click the 'Generate Compilation' button. The application will then compile a list of all grants having a Budget Period end-date that falls within the selected fiscal year. For example: If 'All Regions' and 'FY22' are selected, all budget periods in all regions with an end-date of 2022 will be included in the compilation.

NOTE: If a 'Grantee' does not have a report in FGD for the selected fiscal year, the 'Grantee' will not be included in the compiled data.

NOTE: Compiled data will include actual 'Grantees' and all test grants in FGD. To streamline annual data compilation, it is strongly recommended to delete test grants that are no longer needed (see **Section 4.3.3**).

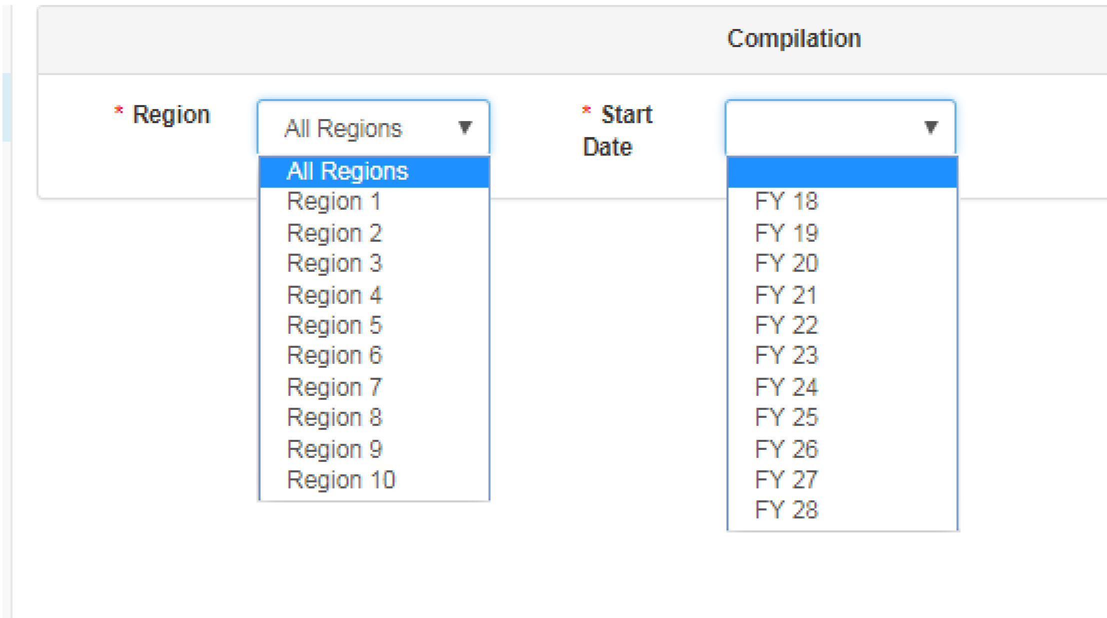
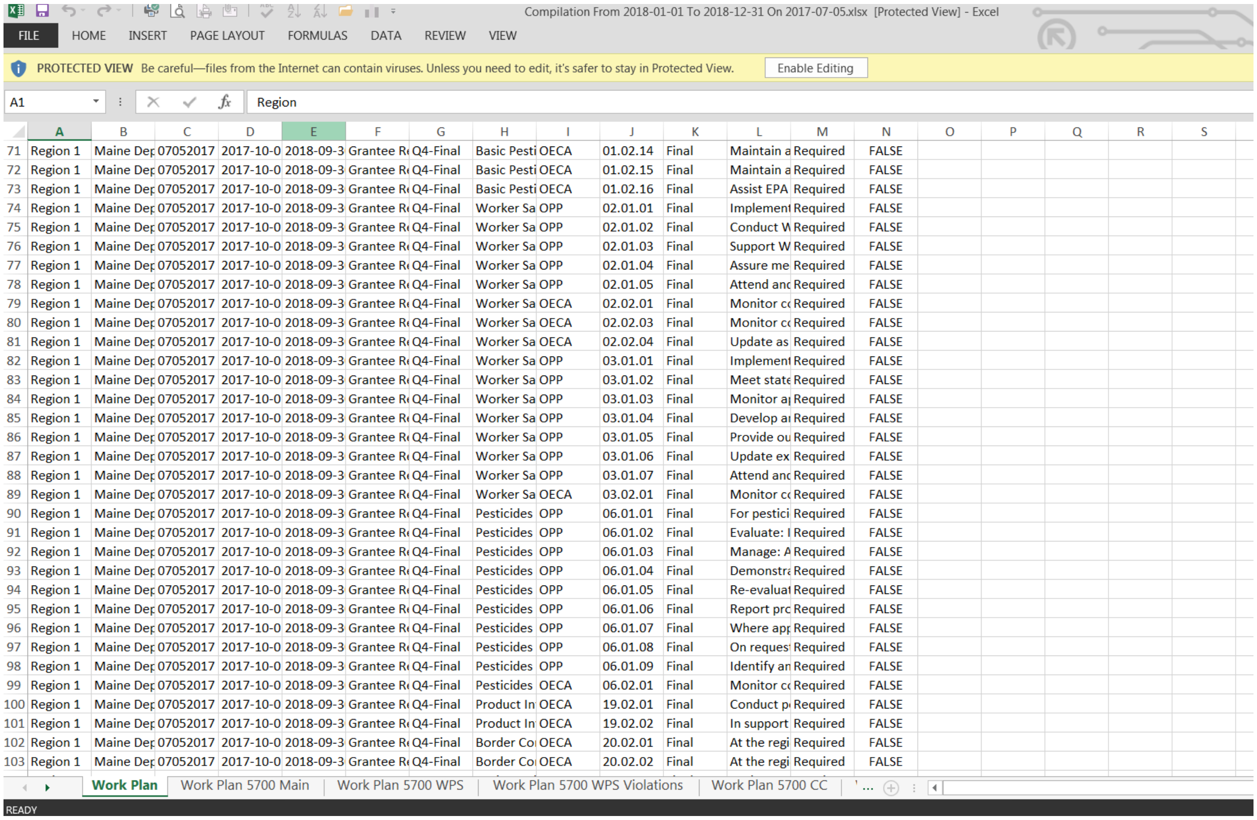


Exhibit 5-36 Region and Start Date Pick Lists

The FGD application will generate the compilation as an Excel document (**Exhibit 5-37**). The Excel document follows the same format as outlined in **Section 4.4.10** with the exception that the below fields have been added to assist the 'OCSPP/OECA Reviewer' users to filter the data.

- Region
- Grantee
- Grant Number
- Begin Date
- End Date
- Status
- Report Type



	A	B	C	D	E	F	G	H	I	J	K	L	M	N
71	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Basic Pesti	OECA	01.02.14	Final	Maintain a	Required	FALSE
72	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Basic Pesti	OECA	01.02.15	Final	Maintain a	Required	FALSE
73	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Basic Pesti	OECA	01.02.16	Final	Assist EPA	Required	FALSE
74	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Worker Sa	OPP	02.01.01	Final	Implement	Required	FALSE
75	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Worker Sa	OPP	02.01.02	Final	Conduct W	Required	FALSE
76	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Worker Sa	OPP	02.01.03	Final	Support W	Required	FALSE
77	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Worker Sa	OPP	02.01.04	Final	Assure me	Required	FALSE
78	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Worker Sa	OPP	02.01.05	Final	Attend anc	Required	FALSE
79	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Worker Sa	OECA	02.02.01	Final	Monitor cc	Required	FALSE
80	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Worker Sa	OECA	02.02.03	Final	Monitor cc	Required	FALSE
81	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Worker Sa	OECA	02.02.04	Final	Update as	Required	FALSE
82	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Worker Sa	OPP	03.01.01	Final	Implement	Required	FALSE
83	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Worker Sa	OPP	03.01.02	Final	Meet state	Required	FALSE
84	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Worker Sa	OPP	03.01.03	Final	Monitor aj	Required	FALSE
85	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Worker Sa	OPP	03.01.04	Final	Develop ai	Required	FALSE
86	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Worker Sa	OPP	03.01.05	Final	Provide ou	Required	FALSE
87	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Worker Sa	OPP	03.01.06	Final	Update ex	Required	FALSE
88	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Worker Sa	OPP	03.01.07	Final	Attend anc	Required	FALSE
89	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Worker Sa	OECA	03.02.01	Final	Monitor cc	Required	FALSE
90	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Pesticides	OPP	06.01.01	Final	For pestici	Required	FALSE
91	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Pesticides	OPP	06.01.02	Final	Evaluate: I	Required	FALSE
92	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Pesticides	OPP	06.01.03	Final	Manage: A	Required	FALSE
93	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Pesticides	OPP	06.01.04	Final	Demonstra	Required	FALSE
94	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Pesticides	OPP	06.01.05	Final	Re-evaluat	Required	FALSE
95	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Pesticides	OPP	06.01.06	Final	Report prc	Required	FALSE
96	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Pesticides	OPP	06.01.07	Final	Where apr	Required	FALSE
97	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Pesticides	OPP	06.01.08	Final	On reques	Required	FALSE
98	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Pesticides	OPP	06.01.09	Final	Identify an	Required	FALSE
99	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Pesticides	OECA	06.02.01	Final	Monitor cc	Required	FALSE
100	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Product In	OECA	19.02.01	Final	Conduct p	Required	FALSE
101	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Product In	OECA	19.02.02	Final	In support	Required	FALSE
102	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Border Co	OECA	20.02.01	Final	At the regi	Required	FALSE
103	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Border Co	OECA	20.02.02	Final	At the regi	Required	FALSE

Exhibit 5-37 National Data Compilation Excel Spreadsheet

NOTE: It is recommended that users utilize Excel's built in filtering and sorting capabilities to review the data. These options can be found under the 'DATA' tab.

5.7.2 Regional Data Compilation

Before beginning regional data compilation, regions are encouraged to contact the EPA FGD Headquarters contacts in OCSPP and OECA to confirm if the region's desired work products can be easily produced from headquarters' own data compilation efforts. To generate a 'Regional Data Compilation,' select the 'Generate Reports' link in the navigation tree. This will open the 'Compilation' screen where the 'RPO' can generate compilation reports (**Exhibit 5-39**).

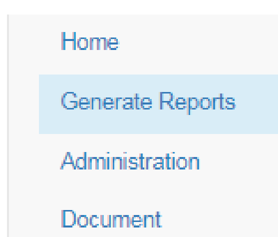


Exhibit 5-39 Generate Reports Link

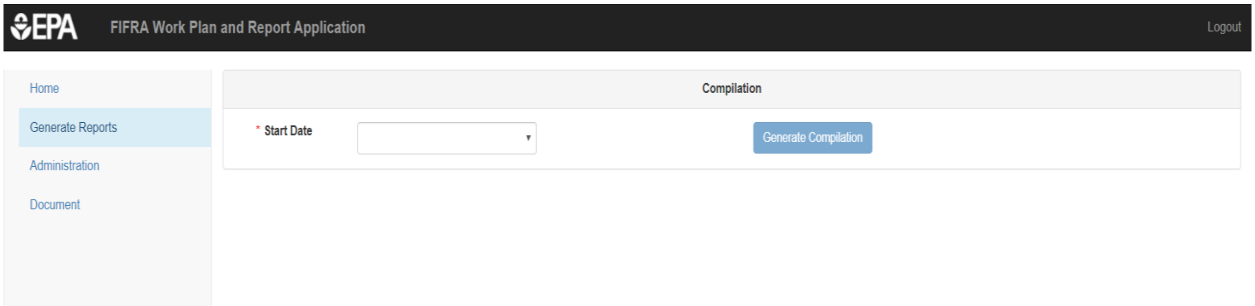


Exhibit 5-40 Generate Regional Compilation Reports Screen

To generate a data compilation, the ‘RPO’ should select a fiscal year (FY) from the ‘Start Date’ dropdown (Exhibit 5-40). The available options are: FY18 – FY28. Once a year has been selected, click the ‘Generate’ button. The application will now compile all grants that have a budget period with an end date the falls under the date selected. For example: If FY22 was selected, all budget periods that had an end date of 2022, will be included in the compilation.

NOTE: If a ‘Grantee’ does not have a report in FGD for the selected fiscal year, the ‘Grantee’ will not be included in the compiled data.

NOTE: Compiled data will include actual ‘Grantees’ and all test grants in FGD. To streamline annual data compilation, it is strongly recommended to delete test grants that are no longer needed (see **Section 4.3.3**).

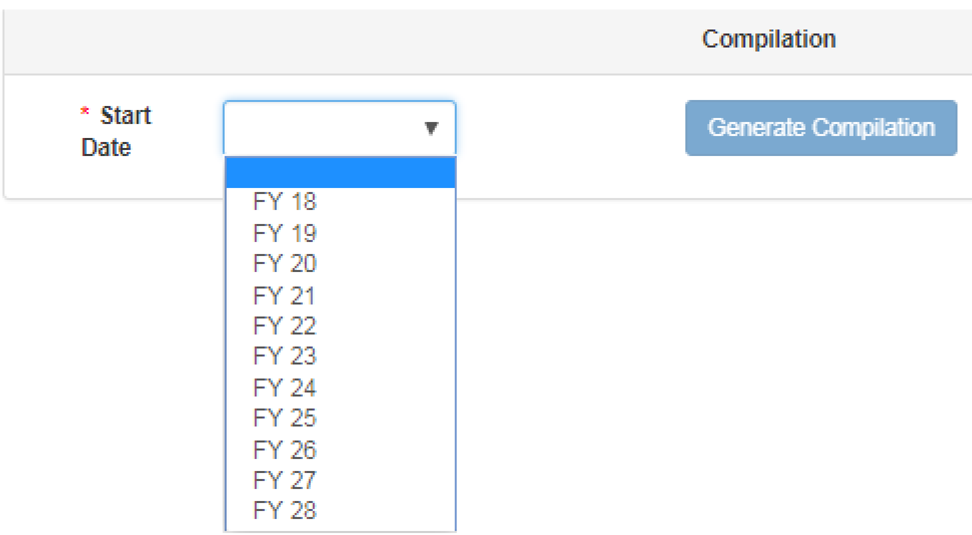
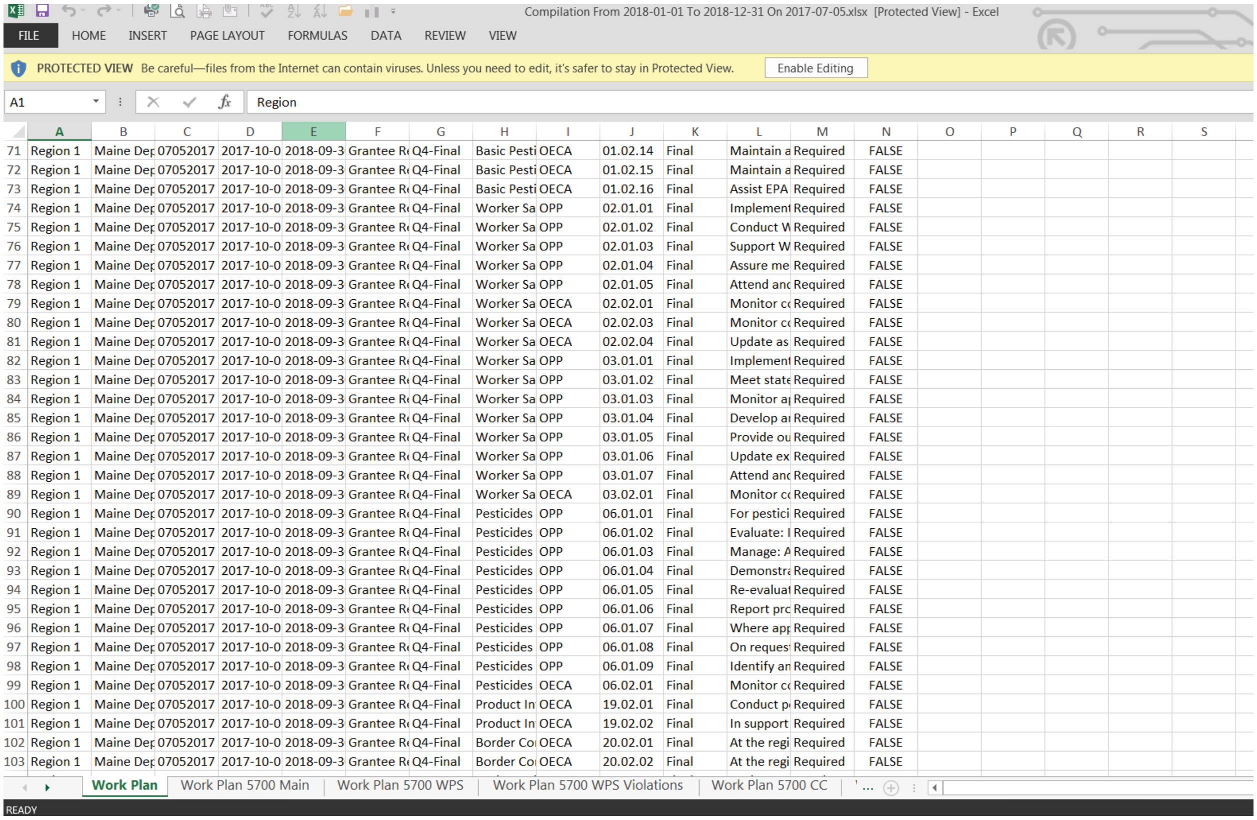


Exhibit 5-40 Start Date Pick List

The FGD application will generate the compilation as an Excel document **(Exhibit 5-41**). The Excel document follows the same format as outlined in **Section 4.4.10,** with the exception that the below fields have been added to assist the ‘RPO’ users to filter the data.

- Region
- Grantee
- Grant Number
- Begin Date

- End Date
- Status
- Report Type


Compilation From 2018-01-01 To 2018-12-31 On 2017-07-05.xlsx [Protected View] - Excel

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. Enable Editing

A1 Region

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
71	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Basic Pesti	OECA	01.02.14	Final	Maintain a	Required	FALSE
72	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Basic Pesti	OECA	01.02.15	Final	Maintain a	Required	FALSE
73	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Basic Pesti	OECA	01.02.16	Final	Assist EPA	Required	FALSE
74	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Worker Sa	OPP	02.01.01	Final	Implement	Required	FALSE
75	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Worker Sa	OPP	02.01.02	Final	Conduct W	Required	FALSE
76	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Worker Sa	OPP	02.01.03	Final	Support W	Required	FALSE
77	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Worker Sa	OPP	02.01.04	Final	Assure me	Required	FALSE
78	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Worker Sa	OPP	02.01.05	Final	Attend and	Required	FALSE
79	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Worker Sa	OECA	02.02.01	Final	Monitor cc	Required	FALSE
80	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Worker Sa	OECA	02.02.03	Final	Monitor cc	Required	FALSE
81	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Worker Sa	OECA	02.02.04	Final	Update as	Required	FALSE
82	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Worker Sa	OPP	03.01.01	Final	Implement	Required	FALSE
83	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Worker Sa	OPP	03.01.02	Final	Meet state	Required	FALSE
84	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Worker Sa	OPP	03.01.03	Final	Monitor a	Required	FALSE
85	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Worker Sa	OPP	03.01.04	Final	Develop a	Required	FALSE
86	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Worker Sa	OPP	03.01.05	Final	Provide ou	Required	FALSE
87	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Worker Sa	OPP	03.01.06	Final	Update ex	Required	FALSE
88	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Worker Sa	OPP	03.01.07	Final	Attend and	Required	FALSE
89	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Worker Sa	OECA	03.02.01	Final	Monitor cc	Required	FALSE
90	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Pesticides	OPP	06.01.01	Final	For pestici	Required	FALSE
91	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Pesticides	OPP	06.01.02	Final	Evaluate: I	Required	FALSE
92	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Pesticides	OPP	06.01.03	Final	Manage: A	Required	FALSE
93	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Pesticides	OPP	06.01.04	Final	Demonstra	Required	FALSE
94	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Pesticides	OPP	06.01.05	Final	Re-evaluat	Required	FALSE
95	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Pesticides	OPP	06.01.06	Final	Report prc	Required	FALSE
96	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Pesticides	OPP	06.01.07	Final	Where app	Required	FALSE
97	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Pesticides	OPP	06.01.08	Final	On reques	Required	FALSE
98	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Pesticides	OPP	06.01.09	Final	Identify an	Required	FALSE
99	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Pesticides	OECA	06.02.01	Final	Monitor cc	Required	FALSE
100	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Product In	OECA	19.02.01	Final	Conduct p	Required	FALSE
101	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Product In	OECA	19.02.02	Final	In support	Required	FALSE
102	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Border Co	OECA	20.02.01	Final	At the regi	Required	FALSE
103	Region 1	Maine Dep	07052017	2017-10-0	2018-09-3	Grantee R	Q4-Final	Border Co	OECA	20.02.02	Final	At the regi	Required	FALSE

Work Plan | Work Plan 5700 Main | Work Plan 5700 WPS | Work Plan 5700 WPS Violations | Work Plan 5700 CC

READY

Exhibit 5-41 Regional Data Compilation Excel Spreadsheet

NOTE: It is recommended that user utilize Excel's built-in filtering and sorting capabilities to review the data. These options can be found under the 'DATA' tab.

5.8 Exporting Individual Grantee Work Plan and Report

To export an individual 'Grantee Work Plan and Report,' refer to '**Work Plan and Report Section 4.4.**