GRANTS AND CONTRIBUTIONS ONLINE SERVICES

USER GUIDE:
APPLICATIONS AND PROJECT MANAGEMENT

SEPTEMBER 2018
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**IMPORTANT THINGS TO REMEMBER**

- **Web browsers**: The Grants and Contributions Online System (GCOS) are compatible with the following Web browsers: Windows Internet Explorer 9, Mozilla Firefox and Apple Safari. Users who opt to use Google Chrome could experience some difficulties.

- **Timeout feature**: After approximately 15 minutes of account inactivity, a warning message will be displayed informing you that the session is about to expire.

- **Upload Restrictions**: Each document uploaded to the GCOS cannot exceed 15MB in size; however there is no limit to how many documents can be uploaded.

- **Contact Us**: You can submit technical and non-technical questions to the GCOS team by clicking the Contact Us located under Help and Support.

- **Automated correspondence**: You should add the following e-mail address to your contacts: no-reply-aucune-reponse@hrsdc-rhdcc.gc.ca to prevent e-mails from being sent to the junk/trash folder.

- **Creation of a GCOS account**: If you need help creating a GCOS account:
  - Consult the User Guide: Account Registration
  - Send an email to the GCOS team at NA-GCOS-SELS-C-GD@hrsdc-rhdcc.gc.ca or
  - Contact the Employer Contact Center at 1-800-367-5693

- **Help text**: To clarify a question, click on 🔄 located at the end of the question. For program-specific questions, click the Program Applicant Guide under Help and Support.
1. **GETTING STARTED**

You are required to go through a series of screens before being directed to the Welcome screen:

- Enter username and password to access GCOS.
- Click Continue
- Click your organization’s name
- Click Gs&Cs Online Services

From the Welcome screen (Figure 1), you are able to:

- Access your list of applications and projects
- Add an application for funding
- Convert to Online
- Apply on a call for proposal

**Figure 1 – Welcome Screen**

![Welcome Screen](image)

**Applications and Projects**

The “Applications and Projects” screen displays a complete list of the organization’s applications for funding and projects, as well as the status of each.

The functions are dependent on the status of the application or project.

- Active
- Draft
- Pending
- Submitted

**Convert to Online**

If you wish to manage your project online, click on “Convert your existing project to GCOS”

**Open Call For Proposal**

**NF - Test CFP**

- **CFP Identifier / Applicant Guide:** NF - Test CFP
- **Program:** Youth - Summer Work Experience
- **CFP Closing Date:** June 30, 2020 12:00:00 AM EDT
- **CFP Time remaining:** 7041 13h 26m

**Youth – Summer Work Experience**

- **CFP Identifier / Applicant Guide:** CFP: HQ.SW-GR-2017.47
- **Program:** Youth - Summer Work Experience
- **CFP Closing Date:** December 31, 2019 12:00:00 AM EST
- **CFP Time remaining:** 2714 14h 29m
1.1 View List of Applications and Projects

To access the Applications and Projects screen (Figure 2) click View List of Applications and Projects on the Welcome Screen (Figure 1). The screen displays a list of the organization’s applications for funding and projects as well as their status. The functions are dependent on the status of the application or project. You can filter your results by Program, by Status or by who created the application.

Figure 2 – Applications and Projects screen
1.1.1 **STATUS**
The current Status of each application or project is indicated in the status field on the Applications and Projects screen (Figure 2):

- **Active:** Department approved your application and you can submit project management documents
- **Amendment in progress:** changes to the agreement are in process (activities and/or budget). This status will remain until the agreement signature process is completed. The amendment is performed by the department.
- **Draft:** you are in the process of developing the application
- **Pending Signatories:** more signatories are required to sign the application before submitting to the Department
- **Pending Re-Submission:** application requires modifications. A departmental representative will contact you regarding the information required. Once you complete the modification, you will need to re-submit the application to the Department
- **Ready to Sign:** the authorized representatives of the organization need to sign the Agreement
- **Rejected:** the Department rejected the application
- **Submitted:** you successfully submitted the application to the Department
- **Submission failed:** you must re-submit the application due to a system error
- **Under Assessment:** the Department is assessing your application
- **Withdrawn:** you or the Department withdrew the application
- **Closed:** project is no longer active

The functions are dependent on the status of the application or project.

1.2 **ADD AN APPLICATION FOR FUNDING**
Click Add an Application for Funding on the Welcome screen (Figure 1) to apply on a program that has continuous intake as the intake method. This will direct you to the Program Selection screen (Figure 3).
1.3 **Convert to Online**

Please note that this section only applies to projects that have not been submitted through GCOS. You can convert your project as soon as your project has an agreement ready to be signed.

1.3.1 **To Access the Convert to GCOS Function**

You need to go through a series of screens before converting your project:

- Enter your username and password to access [GCOS](#).
- Click Continue.
- Click on your organization name.
- Click on Gs&Cs Online Services.
- Click Convert your existing project to GCOS.
- Enter your project number listed in your acknowledgement letter.
- Click Convert (Figure 4).

**Figure 4 – Convert to Online**

1.4 **Apply on a Call for Proposal**

All the open calls for proposals are displayed under the Open Call for Proposal section of the Welcome Screen (Figure 1). Clicking Apply will bring you to the Program Selection screen (Figure 5). To apply to the Canada Summer Jobs Call for proposal, visit the [CSJ User guides](#).

- Program Group and Program are pre-filled.
- Enter a brief and descriptive title.
- A link to the Applicant guide is available to help answer program specific questions.
- Click Next to create your application.
- Click Back to home to return to the Welcome screen.
1.5 Copy & Edit an Existing Application

You can Copy and Edit the content of a previously created application to create a new one.

- Enter your username and password in GCOS and click Continue
- Click your Organization’s name
- Click Gs&Cs Online Services
- Click View List of Applications and Projects
- Retrieve the application or project you wish to copy
- Click Copy and Edit (Figure 6)
- Click Yes (Figure 7)
- Some of the screens are pre-filled
- Review the application and make the necessary modifications
- Refer to section 2.16 Review and Submit application to submit your new application

IMPORTANT: You will not be able to use the Copy and Edit function on a converted project.
Figure 6 – Copy & Edit an Existing Application

**Projet / Project 3.1**

<table>
<thead>
<tr>
<th>Status</th>
<th>Submitted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tracking Number</td>
<td>A0000000000</td>
</tr>
<tr>
<td>Date Updated</td>
<td>February 12, 2018 8:49:11 AM</td>
</tr>
<tr>
<td>Program Group</td>
<td>Youth</td>
</tr>
<tr>
<td>Program</td>
<td>Youth - Career Focus - Project</td>
</tr>
<tr>
<td>Created By</td>
<td>GCOS, SELSC</td>
</tr>
<tr>
<td>Modified By</td>
<td>GCOS, SELSC</td>
</tr>
</tbody>
</table>

- View Application
- Withdraw
- Add Supporting Document
- Copy and Edit

Figure 7 – Copy and Edit Confirmation Screen

**Copy and Edit**

You are about to copy the Application OF - Follow-up Test. Note that the following fields: Project Title, Planned Project Start Date, Planned Project End Date, Anticipated Sources of Funding, Budget, Budget Details and Forecast of Project Expenditures will not be copied. You will need to complete these screens if required to submit the application. All screens should be reviewed prior to the submission. Do you want to continue?

Assign to: IOS_CFP_OF

- Yes
- No

Help and Support
- Program Applicant Guide
- User Guides
- Contact Us
2. Submitting an Application for Funding

If you started an application however did not finish it, you can return to this application by using the Draft Hyperlink found in the Applications and Projects section of the Welcome screen (Figure 8).

Figure 8 – Applications and Projects section of the Welcome screen

2.1 Do You Have the Rights to Create and Submit an Application?

If you are the Primary Officer of the organization, you automatically have the rights to create and submit an application. If you are a representative of the organization, you should verify if you have the required rights by following these steps:

- Enter your username and password to access GCOS.
- Click Continue
- Click your organization’s name
- Click Gs&Cs Online Services
- Click My GCOS Account in the top menu
- Click Representatives
- Identify your name
- Click View
- Ensure the “Create” and “Submit” checkboxes for application for funding are selected

If the “Create” and/or “Submit” checkboxes for application for funding are not selected, please contact the Primary Officer of your organization or an authorized representative as they will be able to delegate you the appropriate rights.

2.2 Creating a New Application

Clicking the Apply link in the Open Call for Proposal table (Figure 1) or the Add an Application for Funding link on the Welcome screen (Figure 1) will direct you to the Program Selection screen (Figure 9).

- The Program Group and Program fields are pre-populated only if you are applying on a call for proposal
- Enter a brief and descriptive project title
- A link to the Program Guidelines will appear as you choose the program to help answer program specific questions
- Click Next which will create and allow you to complete your application
2.2.1 **SUMMARY OF APPLICATION**

The Summary of Application screen (Figure 10) is where you access and complete all the screens of your application.

On the left, a list of screens are identified by different colors (green = completed, yellow = incomplete and blue = information).

On the right, a summary of all the screens is available. If you click on the title, it brings you to the section to edit or view the information. A confirmation message displays each time you save a screen.

The Help section provides you with a quick access to: Program Guidelines, User Guide and Contact Us functionalities.
Figure 10 – Summary of Application

Program / Project 1.1

Program Selection
Program Group: Youth
Program: Youth - Skills Link
Successfully saved on August 6, 2018
Select Program

Project Identification
The Project Identification is used to capture the planned project start and end dates.
Project Identification hasn’t been completed yet
Edit Project Identification

Mailing Address
The Mailing Address is used to capture the mailing address specific to this application. All correspondence will be sent to this address, including any payments.
Mailing Address hasn’t been completed yet
Select Mailing Address

Organization Contacts
The Organization Contacts is used to capture contacts for this application.
The primary contacts hasn’t been added yet
View Organization Contacts

Organizational Capacity
The Organizational Capacity is used to capture details relevant to the organization’s capacity to properly manage this project.
Organizational Capacity hasn’t been completed yet
Edit Organizational Capacity

On This Page
Completed: ✔️ Mandatory: ☑️ Optional: ☐️
Program Selection
Project Identification
Mailing Address
Organization Contacts
Organizational Capacity
Amounts Due
Project Description
Project Details
Project Locations
Budget
Anticipated Sources of Contribution
Budget Details
Supporting Documents
Forecast of Project Expenditures
Review & Submit

Help and Support
Program Applicant Guide
User Guides
Contact Us
2.3 **PROJECT IDENTIFICATION**

Enter the planned project start and end dates on the Project Identification screen (Figure 12).

- Click Edit Project Identification (Figure 11)
- Enter Planned Project Start and End Dates
- Click Save
- Back to Application will bring you back to the summary of application screen

*Figure 11 – Summary of Application - Project Identification*

*Figure 12 – Project Identification Screen*
2.4 Mailing Address

You can select the mailing address specific to this application on the Mailing Address screen (Figure 14). All correspondence is sent to this address, including payments if the direct deposit is not activated.

- Click select Mailing Address (Figure 13)
- Select the mailing address for this application
- Click Save
- Back to Application will bring you to the Summary of the application screen

Figure 13 – Summary of Application - Mailing Address

Follow the steps below if no mailing address appears on the screen:

- Click My GCOS Account in the top menu
- Click My Organizations
- Click the organization name for which you want to add a mailing address
- Click Manage Addresses
- Click Add Address
- Once saved, the address will display on the Mailing Address screen
- To return to your application, click My Organizations in the top menu
Click the organization for which you added the mailing address
Click Gs&Cs Online Services
Click Draft or View List of Applications and Projects
Retrieve your application and click on Edit
Click Mailing address
Select the mailing address for this application
Click Save
Back to Application will bring you to the Summary of application screen

2.5 Organization Contacts
The contact person whom the department communicates with regarding the application or any consequent agreement is captured under the Organization Contacts screen (Figure 16). You may edit or remove the contacts at any time. However, there must be a main application contact at all times. You can add a new contact or you can add yourself as a contact.

Figure 15 – Summary of Application - Organization Contacts

ADD NEW CONTACT: (FIGURE 15)

- Click Add new contact
- Complete all required fields
- Click Save
- Back to Organization contact will bring you to the Organization Contacts screen (Figure 17)

ADD YOURSELF AS A CONTACT: (FIGURE 15)

- Click Add Myself as a Contact
- Ensure that the pre-filled information is correct (Figure 16)
- Select the contact type and contact address
- Click Save
- Back to Organization contact will bring you to the Organization Contacts screen
Figure 16 – Contacts Details Screen

Contact Details

* Given Name (Required)
* Surname (Required)
* Position Title (Required)
* Contact Type (Required)
* Preferred language of communication - Written (Required)
  ○ English
  ○ French
* Preferred language of communication - Spoken (Required)
  ○ English
  ○ French
* Contact Address (Required)
* Address Line 1 (Required)
Address Line 2
* City or Town (Required)
* Province or Territory (Required)
  ○ Select
* Postal Code (Required)
Country
* Telephone Number (Required)
  Area Code Telephone Num Ext Extension
Fax Number
* E-mail Address (Required)
2.6 Organizational Capacity

Details relevant to your organization’s capacity to properly manage this project are captured under the Organization Capacity screen (Figure 19).

- Click Edit Organizational Capacity (Figure 18)
- Complete required fields (Figure 19)
- Click Save
- Back to Application will bring you to the Summary of the application screen
Figure 18 – Summary of Application - Organizational Capacity

Organizational Capacity

The Organizational Capacity is used to capture details relevant to the organization's capacity to properly manage this project.

⚠️ Organizational Capacity hasn't been completed yet

Edit Organizational Capacity

Figure 19 – Organizational Capacity screen

Organizational Capacity

Please do not include sensitive information, such as a Social Insurance Number, personal finance data and medical or work history.

How many employees does your organization currently have?

Help 📢

* Has your organization undergone any important transformations in the past two (2) years?

   ○ Yes
   ○ No

Help 📢
(Required)

* Please describe how your organization has the experience and expertise to carry out the proposed project activities. If applicable, please include any past experience(s) with E1DC and the results of the project(s). (Maximum 30000 characters)

Help 📢
(Required)

Save ✅ Back To Application
2.7 Amounts Due

If your organization owes dues to the Government of Canada, you may declare it under the Amounts Due screen (Figure 21). If you have no amounts due to the Government of Canada, please do not complete this screen.

Figure 20 – Summary of Application - Amounts Due

- Click Add amount due (Figure 20)
- Complete all required fields (Figure 21)
- Click Save
- Back to Amounts Due brings you to the summary of your amounts due (Figure 22)

Figure 21 – Amounts Due Details
You may edit or remove the amounts due at any time
Back to Application will bring you to the Summary of application screen

2.8 **PROJECT DESCRIPTION**

Enter details relevant to this project under the Project Description screen (Figure 24). The Department will use this information to assess the quality of the project and funding eligibility.
• Click Edit Project Description (Figure 23)
• Complete all required fields (Figure 24)
• Click Save
• Back to Application will bring you to the Summary of application screen
2.9 **PROJECT DETAILS**

Provide further details on the project’s activities and priorities they address under the Project Details screen (Figure 26).

**Figure 25 – Summary of Application - Project Details**

- Click Edit Project Details (Figure 25)
- Answer each question by answering yes or no (Figure 26)
- Answering Yes to any of these questions will generate a text box (Figure 27) which you are required to complete
- Click Save
- Back to Application will bring you to the Summary of application screen
Figure 26 – Project Details screen

**Government of Canada**

**Grants and Contributions Online Services**

Signed in as **[Sign out]**

My GCO$ Account Help and Support

**GCOS Applications and Projects Application**

**Project Details**

Please **do not include sensitive information**, such as a Social Insurance Number, personal finance data and medical or work history.

- **Does the project include Results Measurement indicators?**
  - Yes
  - No
  - Help *(Required)*

- **Does this proposed project fit with your organization’s other activities?**
  - Yes
  - No
  - Help *(Required)*

- **Is your project designed to benefit or involve people in English or French-language minority communities?**
  - Yes
  - No
  - Help *(Required)*

- **Will any other organizations, networks or partners be involved in carrying out the project?**
  - Yes
  - No
  - Help *(Required)*

- **Does the project address the program’s national, regional or local priorities?**
  - Yes
  - No
  - Help *(Required)*

**Help and Support**

- Program Applicant Guide
- User Guides
- Contact Us

**Applicants need to verify if their proposed activities are listed under the Canadian Environmental Assessment Act, 2012 (CEAA 2012). Please visit** [Canadian Environmental Assessment Agency](https://www.ceaa-acc.ca) **to access the list of Regulations Designating Physical Activities.**

**If “No”, an environmental assessment is not required.**

- **Does your project Include activities that are listed in the Canadian Environmental Assessment Agency’s Regulations Designating Physical Activities established under the CEAA 2012?**
  - Yes
  - No
  - Help *(Required)*
2.10 PROJECT LOCATIONS

By default, your organization’s main address is displayed as the main location of the activities on the Project Locations screen (Figure 29).

Figure 28 – Summary of Application - Project Locations

- Click Add Project location (Figure 28) which will direct you to the Location Details Screen (Figure 29)
- Complete all required fields
- Click Save
• Back to Project Locations brings you to the summary of your projects locations (Figure 30)
• You may edit or remove the proposed locations of the activities at any time. However, there can only be one main Location
• Back to Application will bring you to the Summary of application screen

2.11 **BUDGET**

Provide a detailed list of planned expenditures, broken down by expenditure category, sub-category and funding source under the Budget screen (Figure 32). The Department will use this information:
  • To determine the overall cost of this project
  • To determine whether costs are linked to the activities
  • To determine the general nature of the expenditures to be covered by all anticipated sources of funding

The Total Planned Expenditures **must also equal** the amounts displayed in the Cash and In-kind columns on the Anticipated Sources of Contribution screen.
Click Edit Budget (Figure 31)

Enter your planned expenditures by cost categories and by source of funding (Figure 32)

Click Save

Back to Application will bring you to the Summary of application screen
# Figure 32 – Budget screen

The information will be used to determine the overall cost of this project, whether costs are linked to the activity, as well as the general nature of the expenditures to be covered by all anticipated sources of funding.

Please enter your planned expenditures by cost categories. The amounts displayed in the “Total Planned Expenditures” row must also equal the amounts displayed in the “Cash” and “In-kind” columns on the “Anticipated Sources of Contribution” screen.

<table>
<thead>
<tr>
<th>Planned Expenditures</th>
<th>ESDC</th>
<th>Other - Cash</th>
<th>Other - In-kind</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Administrative Costs</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrative Costs</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>Capital Costs</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Capital Assets</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>Direct Costs</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Staff Wages</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Participant Costs</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Project Costs</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Rent</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Travel</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>Total Planned Expenditures</strong></td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

| [Save] [Back To Application] | [Help and Support] | [Program Applicant Guide] | [User Guides] | [Contact Us] |
2.12 **ANTICIPATED SOURCES OF CONTRIBUTION**

Provide details on how your project will be funded under the Anticipated Sources of Contribution screen (Figure 33). The Department will use this information to verify that the funding request conforms to any stacking limit or requirement for funding from other sources. Other sources of funding includes any source of funding you will receive (including your organization) other than the requested amount from ESDC. You may edit or remove the anticipated sources of contribution at any time, except for the Department’s contribution which can only be edited on the Budget Screen.

The ESDC Cash amount field will be populated from the amounts entered on the Budget screen. Should you have additional organizations that will contribute funds and/or in-kind contributions to this project, please add them subsequently.

The amounts displayed in the Cash and In-kind columns must equal the Total Planned Expenditures totals on the Budget screen.

**Figure 33 – Summary of Application - Anticipated Sources of Contribution**

- Click View/Add Anticipated Sources of Contribution (Figure 33)
- The ESDC amount will be populated from the amounts entered on the Budget screen
- Click Add Anticipated Sources of Contribution to enter another source of funding (Figure 34)
- Complete all required fields (Figure 35)
- Click Save
- Back to Application will bring you to the Summary of application screen
Figure 34 – Summary of Anticipated Sources of Contribution

ESDC’s funding programs generally encourage and/or require applicants to seek cash and/or in-kind contributions for their proposed project from other sources of funding. Each program has a "stacking limit", that is, a maximum permitted amount of combined funding from federal, provincial, territorial and municipal governments for any one project or initiative. Contributions to the project cannot exceed 100% of eligible expenditures.

ESDC uses the information provided in this section to verify that your funding request conforms to any stacking limit or requirement for funding from other sources.

The ESDC Cash amount field will be populated from the amounts entered on the Budget screen. Should you have additional organizations that will contribute funds and/or in-kind contributions to this project, please add them subsequently.

Source Type: ESDC
Cash: 30500
Confirmed Cash: No
Confirmed In-kind: No

Filter your results

Source Type
ESDC
Cash
Between 30500
And 30500
In-kind
Between 0
And 0

Add Anticipated Sources of Contribution Back To Application
• Back To Anticipated Sources of Contributions brings you to the summary of your Anticipated Sources of Contributions (Figure 36)
Figure 36 – Summary of Anticipated Sources of Contribution

ESDC's funding programs generally encourage and/or require applicants to seek cash and/or in-kind contributions from other sources of funding. Each program has a "stacking limit", that is, a maximum permitted amount of combined funding from federal, provincial, territorial and municipal governments for any one project or initiative. Contributions to the project cannot exceed 100% of eligible expenditures.

ESDC uses the information provided in this section to verify that your funding request conforms to any stacking limit or requirement for funding from other sources.

The ESDC Cash amount field will be populated from the amounts entered on the Budget screen. Should you have additional organizations that will contribute funds and/or in-kind contributions to this project, please add them subsequently.

- Back to Application will bring you to the Summary of application screen
2.13 **Budget Details**

Specify details on costs for this project under the Budget Details screen (Figure 38).

**Figure 37 – Summary of Application - Budget Details**

- Click Edit Budget Details (Figure 37)
- Complete all required fields (Figure 38)
- Click Save
- Back to Application will bring you to the Summary of application screen

**Figure 38 – Budget Details screen**
2.14 SUPPORTING DOCUMENTS

View, add and manage documents uploaded as supporting documentation for this application (i.e. the Budget Detail Template) under the Supporting Documents screen (Figure 40). All documents are scanned by an anti-virus application before being submitted to the Department. If a virus is found, the document in question will not be submitted to the Department.

Figure 39 – Summary of Application - Supporting Documents

- Click Add Supporting Document (Figure 39)

Figure 40 – Supporting Documents screen
• Click Add will direct you to the Document Details screen (Figure 41) which will allow you to browse the files on your computer.
• Enter the Document Title, Choose the Document Type and click on browse to find your file, once your file is uploaded, Click on Save
• Back to Supporting Documents will bring you to the Supporting Documents screen (Figure 40)

Figure 41 – Document Details Screen

If the document has already been uploaded in your organization’s account, click Select/Unselect which will direct you to the Select Supporting Documents screen (Figure 42). To upload a supporting document to the organization’s account:
• Click My GCOS Account
• Click Organization Identification
• Click Add Supporting Documents
• Enter the Document Title, Choose the Document Type and click on browse to find your file, once your file uploaded, Click on Save
• Once saved, the document will appear on the Select Supporting Documents screen (Figure 42).

To return to your current application and add the organization’s supporting document
• Click GCOS
• Click Draft under the Applications and Projects Section
• Identify your application and Click Edit
• Click Add Supporting Document
• Click Select/Unselect which will direct you to the Select Supporting Documents screen (Figure 42)
• Click select to indicate which document you would like to add to your supporting documents for this application
• Click Save
• Back to Supporting Documents will bring you to the Supporting Documents screen (Figure 40)
Figure 42 – Select Supporting Documents screen

- You may view or remove the supporting documents at any time
- Back to Application will bring you to the summary of application screen
2.15 **Forecast of Project Expenditures**

Capture the monthly financial requirements for this project under the Forecast of Project Expenditures screen (Figure 44). The Forecasted Grand Total must equal to the ESDC Project Budget Amount.

**Figure 43 – Summary of Application - Forecast of Project Expenditures**

- Click Edit Forecast of Project Expenditures (Figure 43)
- Enter the forecast of project expenditure amounts per month and per fiscal year (Figure 44)
- Click Save
- Back to Application will bring you to the Summary of application screen
Figure 44 – Forecast of Project Expenditures screen

<table>
<thead>
<tr>
<th>Project Information</th>
<th>Help and Support</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project Title:</strong> Projet / Project 1.2</td>
<td><strong>Help and Support</strong></td>
</tr>
<tr>
<td><strong>Start Date:</strong> August 9, 2018</td>
<td><strong>Program Applicant Guide</strong></td>
</tr>
<tr>
<td><strong>End Date:</strong> August 2, 2019</td>
<td><strong>User Guides</strong></td>
</tr>
</tbody>
</table>

**Forecast of Project Expenditures**

### Fiscal Year 2018-2019

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

**Forecasted Fiscal Year Total:** 0

### Fiscal Year 2019-2020

<table>
<thead>
<tr>
<th>Month</th>
<th>April 2019</th>
<th>May 2019</th>
<th>June 2019</th>
<th>July 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

**Forecasted Fiscal Year Total:** 0

**Forecasted Grand Total:** 0

**ESDC Project Budget Amount:** 30500

**Forecasted Grand Total – ESDC Project Budget Amount**

[Save] [Back To Application]
2.16 Review & Submit

The Review & Submit screen (Figure 46) provides a complete summary of all the information entered into the application. It allows you to review and, if necessary, edit information.

Figure 45 – Summary of Application – Review & Submit

- Click Review & Submit (Figure 45)

Figure 46 – Review & Submit screen (One signatory required)
Figure 47 – Review & Submit screen (multiple signatories required)

Review & Submit

You are about to submit an item to ESDC.
Please review the information provided by clicking on each of the hyperlinks available before submitting.

Signatories

Number of signatures required: 2

The following representatives have the authority to submit an application for funding:

<table>
<thead>
<tr>
<th>Test Name 1</th>
<th>Has not signed yet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test Name 2</td>
<td>Has not signed yet</td>
</tr>
<tr>
<td>Test Name 3</td>
<td>Has not signed yet</td>
</tr>
<tr>
<td>Test Name 4</td>
<td>Has not signed yet</td>
</tr>
</tbody>
</table>

Next  Back To Application
Review & Submit screen (Figure 46 and 47) provides a summary of all the information entered into the application.

- Click Expand all or a specific section, to view and if necessary, edit sections of your application
- Click Print to review the online version of your application (opens in a new window)
- Click Next to Submit your application (Figure 46 and 47)
- You will be directed to the Declaration screen (Figures 48 and 49). In order for an application to be considered complete, it must be completed by the official representative(s) in accordance with the organization's by-laws or other constituting documents.

The first paragraph displays how many signatures are required to submit an application. If the number of signatories is incorrect, follow the next steps:

- Click My GCOS Account in the top menu
- Click Organization Identification
- Click Edit Organization Identification
- Scroll down to the Signatories Section, change the number of signatories required to submit an application
- Click save

To return to your current application:

- Click GCOS
- Click Draft under the Applications and Projects Section
- Identify your application and Click Edit
- Click Review & Submit
- Click Next
  - The number of signatories will be updated on the Declaration Screen

**IMPORTANT:** If you do not have the rights to sign an agreement, the Submit button will not be available.
2.16.1 **One Signatory Required**

- Check the boxes to certify your authority (Figure 48)
- Click Submit
- Once you successfully submit the application, a confirmation number (i.e. tracking number) is displayed (Figure 51). That confirmation number is sent to your email address and is displayed on the Applications and Projects screen (Figure 2).
Figure 49 – Declaration screen (multiple signatories required)

**Declaration**

Your organization has indicated that two (2) signatures are required to submit an application for funding through Grants and Contributions Online Services (GCOS). Currently four (4) representatives have the authority to submit an application for funding. **If the number of representatives is less than the number of signatures required**, please refer to the [User Guide](#) on how to invite representatives and on how to assign them function-specific rights.

If the number of required signatories displayed above is incorrect, you can change it by clicking on “Organization Identification” under the “My GCOS Account” button.

**Declaration**

- The person(s) submitting this form certify(ies) the following
  *(Required)*

  □ A: I certify that I have the capacity and that I am authorized to sign and submit this Application on behalf of the Organization named in Part 1;
  □ B: I certify that the information provided in this Application and supporting documentation is true, accurate, and complete to the best of my knowledge, and
  □ C: I certify that the Organization and any person lobbying on its behalf is in compliance with the [Lobbying Act](#), R.S.C., 1985, c. 44 (4th Supp.) and that no commissions or contingency fees have or will be paid directly or indirectly to any person for negotiating or securing this request for funding.

By clicking "Submit" you

- acknowledge having read the above declarations and being in agreement with their content,
- are hereby signing the application form that will be submitted to ESDC

**Advise the following signatories by e-mail that an action is required**

<table>
<thead>
<tr>
<th>Test Name</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Test Name 1</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>No</td>
</tr>
<tr>
<td>Test Name 2</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>No</td>
</tr>
<tr>
<td>Test Name 3</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>No</td>
</tr>
</tbody>
</table>
2.16.2 **MULTIPLE SIGNATORIES REQUIRED**

- Check the boxes to certify your authority (Figure 49)
- A list of the representative(s) that have the delegated right to submit an application is displayed. You have the option to notify them by email advising them that an action is required.
- They will need to retrieve the application in their account which will have a status of Pending Signatories
- Click Action
- Click Review & Submit
- Click Review and Submit
- Click Next
- Click submit
- Once the application is signed successfully, the "Signature Confirmation” Screen is displayed (Figure 50). The last representative to sign the application will obtain The "Confirmation” Screen with a confirmation number (Figure 51). That confirmation number will be sent to them by email and will also be displayed on the “Applications and Projects” screen (Figure 2).

![Figure 50 – Signature Confirmation screen](image)

![Figure 51 – Confirmation screen](image)
Please Note: If you have signed the Application and the status is “Pending Signatories”, more than one signatory is required and the other representative has yet to sign. Note that if you have already signed, you will no longer see the “Submit” button.

3. Signing an Agreement

Following the approval of your application, each representative of your organization with the rights to sign an agreement will receive an email from the Department. This email will inform them that a funding agreement is ready to be signed electronically.

3.1 Do You Have the Rights to Sign an Agreement?

If you are the Primary Officer of the organization, you automatically have the rights to sign an agreement. If you are a representative of the organization, you should verify if you have the required rights by following these steps:

- Enter your username and password to access GCOS
- Click Continue
- Click your organization’s name
- Click Gs&Cs Online Services
- Click My GCOS Account at the top of the screen
- Click Representatives
- Identify your name
- Click View
- Ensure the Submit checkbox for Agreement is selected

If the Submit checkbox for Agreement is not selected, please contact the Primary Officer of your organization or an authorized representative as they will be able to delegate you the appropriate rights.

3.2 Access the Agreement

- Enter your username and password to access GCOS
- Click Continue
- Click your organization’s name
- Click Gs&Cs Online Services
- Click ReadyToSign (Figure 52)
- Click Sign agreement (Figure 53)

Figure 52 – Welcome screen – Applications and Projects
Figure 53 – View List of Applications and Projects Screen

Applications and Projects

Showing 1 result of 10

Number of results per page

Project / Project 1.1

Status: ReadyToSign
Tracking Number: A600123456
Date Updated: June 4, 2018 9:14:02 AM
Program Group: Youth
Program: Youth - Career Focus - Project

View Application  Sign Agreement  Add Supporting Document  Copy and Edit

Back To GCOS
3.3 Agreement

The Agreement screen (Figure 54) allows you to view and sign the agreement.

- Click Sign Agreement (Figure 54), which will direct you to the Review & Sign screen (Figure 55)

Figure 54 – Agreements Screen
3.4 Review & Sign

The Review & Sign screen (Figure 55) allows you to sign the agreement electronically. It is important to read the agreement, by clicking the Link to Document Hyperlink, prior to signing it. You must have the latest free downloadable Adobe Acrobat Reader software to view the agreement.

The Review & Sign screen allows you to request direct deposit as the payment method for this project. For more information on direct deposit, please consult section 4 of this User Guide.

Under the Signatories section, if more than one signature is required by your organization to sign an agreement, you can view the number of signatures required and view how many signatures have been captured to date.

If the number of signatories is incorrect, follow the next steps:
- Click My GCOS Account in the top menu
- Click Organization Identification
- Click Edit Organization Identification
- Change the number of signatories required to submit an agreement
- Once saved, the number of signatories is updated on the Review & Sign screen

To return to signing your agreement, follow the next steps:
- Click GCOS
- Click ReadyToSign under the Applications and Projects Section
- Identify your Project and Click Sign Agreement
- Click Sign Agreement
3.4.1 **SING THE AGREEMENT**

Clicking Sign Agreement on the Review & Sign screen will direct you to the Certification - Authority to Sign screen (Figures 56 and 57). An agreement is valid when signed by the official representative(s) in accordance with your organization's by-laws or other constituting documents.
3.4.1.1 **ONE SIGNATORY REQUIRED**

- Check certification boxes
- Click Next
- Answer the Security Question (Figure 58)
- Click I Accept
- Once you successfully sign the agreement, a confirmation number is displayed (Figure 60)
3.4.1.2  **MULTIPLE SIGNATORIES REQUIRED**

- Check certification boxes
- A table is displayed with the representative(s) that have been delegated the right to sign an agreement. You have the option to notify them by email
- Click Next
- Answer the Security Question (Figure 58)
- Click I Accept
- Once you successfully signed the agreement, the Signature Confirmation screen will be displayed. (Figure 59) The last representative to sign the agreement will obtain the Confirmation screen (Figure 60) and an email with the confirmation number.
Figure 58 – Security Question/Acceptance of Agreement

Prior to submitting your signed Agreement to ESDC, you must successfully answer your security question in order to validate your identity.

"What is the first name of your mother's oldest sibling? (Required)

By clicking "I Accept", you are signing the Agreement and you are agreeing on behalf of your organization to be bound by the Agreement.

I Accept Back To Review & Sign

Figure 59 – Signature Confirmation Screen

Thank you! Your signature has been captured. The submission to ESDC will only be possible once the required number of signatures has been captured. You can view how many signatures are required in the "GCOS Organization Identification" section under the "GCOS" menu at the top of the screen.

An e-mail was sent only to the identified signatories to enable the submission of the item to ESDC.

Return
3.5 How to view the Signed Agreement

In order to view a copy of the signed agreement, follow the steps below:

- Enter your username and password to access GCOS
- Click Continue
- Click your organization’s name
- Click Gs & Cs Online Services
- Click View List of Applications and Projects under the Applications and Projects section
- Identify your Project from the list
- Click View Agreement (Figure 61)
- Identify the Agreement you would like to view, and click View (Figure 62)
4. **SUBMITTING A DIRECT DEPOSIT REQUEST**

You are able to submit a direct deposit request at any time during the project’s lifecycle. If you haven’t signed your agreement, you must submit a direct deposit request on the Review & Sign screen.

4.1 **DO YOU HAVE THE RIGHTS TO CREATE AND SUBMIT A DIRECT DEPOSIT REQUEST?**

If you are the Primary Officer of the organization, you automatically have the rights to create and submit a direct deposit request. If you are a representative of the organization, you should verify if you have the required rights by following these steps:

- Enter your username and password to access GCOS
- Click Continue
- Click your organization’s name
- Click Gs&Cs Online Services
- Click My GCOS Account in the top menu
- Click Representatives
- Identify your name
- Click View
- Ensure the “Create” and “Submit” checkboxes for direct deposit are selected
If the “Create” and/or “Submit” checkboxes for direct deposit are not selected, please contact the Primary Officer of your organization or an authorized representative as they will be able to delegate you the appropriate rights.

4.2 **HOW TO ACCESS THE DIRECT DEPOSIT REQUEST**

- Enter your username and password to access [GCOS](#)
- Click Continue
- Click your organization’s name
- Click on Gs&Cs Online Services
- Click View List of Applications and Projects
- Identify your project
- Click Manage
- Click Select Direct Deposit (Figure 63)

*Figure 63 – Summary of Project - Direct Deposit*
4.3 Select Direct Deposit Account

To select the direct deposit account you wish to associate to your project use the Select Direct Deposit Account Screen (Figure 64). The drop-down menu is blank if no account was added to your organization CGOS Account.

Figure 64 – Select Direct Deposit Account

To add a direct deposit account **that will be associated to your organization’s profile**, follow these steps:

- Click My GCOS Account in the top menu
- Click Organization Identification
- Click Add Direct Deposit (Figure 65)
- Click Yes, I Agree.
  
  Please note that if you disagree with the Privacy Notice Statement, you will not be able to add a direct deposit account.
- Complete all mandatory fields. (Figure 66). A void cheque or a direct deposit document from your financial institution is required in the Supporting document field
- Once saved, the account will be available in the Select Account drop-down menu on the Select Direct Deposit Account screen (Figure 64).

To add a direct deposit account **for this project only**, follow these steps:

- Click Add New Direct Deposit (Figure 64)
- Click Yes, I Agree.
  
  Please note that if you disagree with the Privacy Notice Statement, you will not be able to add a direct deposit account.
Complete all mandatory fields (Figure 66). A void cheque or a direct deposit document from your financial institution is required in the Supporting document field.

Once saved, the account will be available in the Select Account drop-down menu on the Select Direct Deposit Account screen (Figure 64).

Figure 65 – Organization Identification - Add Direct Deposit

Figure 66 – Add Direct Deposit Account
- Select the Direct Deposit Account from the drop down menu (Figure 64)
- Click Save
- Click Review & Submit
- Click Next (Figure 67)
- Complete the certification screen and Click Submit (Figure 68). In order for a direct deposit request to be eligible, it must be completed by the official representative(s) in accordance with your organization's by-laws or other constituting documents.
- Once you successfully submitted your Direct Deposit, a confirmation number is displayed (Figure 69).

Figure 67 –Review & Submit Direct Deposit Request

Figure 68 –Certification screen - Direct Deposit Request
5. **PROJECT MANAGEMENT**

**Project Management**: Manages claims, FPEs, activity reports, supporting documents and participant information. You are able to create, modify, submit and view project management items once the Department has approved your Application for Funding and the funding agreement is signed.

5.1 **HOW TO ACCESS THE PROJECT MANAGEMENT MODULE**

- Enter your username and password to access GCOS
- Click Continue
- Click your organization’s name
- Click on Gs&Cs Online Services
- Under the section Applications and Projects you can either click Active or you can click View List of Applications and Projects (Figure 70)
- Identify your project and Click Manage (Figure 71)
5.2 Manage PROJECT SUMMARY

The Manage Project Summary screen (Figure 72) is where you access and complete all the project management items.

On the right, a summary of all the screens is available. If you click on the title, it brings you to the section to edit or view the information. A confirmation message displays each time you save a screen.

The Help section provides you a quick access to: Program Guidelines, User Guides and Contact Us functionality.
Figure 72 – Manage Project Summary Screen

Project Information
- Project Number: 0121549578
- Project Title: Project / Project 1.1
- Start Date: August 6, 2019
- End Date: July 31, 2019
- EXDC Contribution: 500
- Payment Method: Advance
- Claim Reporting Frequency: Trimester
- Converted on August 7, 2019

Application
- Program Group: Youth
- Program: Youth - Career Focus - Project
- Tracking Number: A000123456

Agreement Information
- Final Agreement signed on August 7, 2018

Direct Deposit
- Submitted on August 29, 2018

Claims
- The Claims are used to capture expenses incurred.

Forecast of Project Expenditures
- The Forecast of Project Expenditures is used to capture anticipated agreement expenses requirements for future periods and is mandatory on all new projects using an advance payment frequency.

Activity Report
- The Activity report is used to capture the overall project progress against the project's objectives, the activities conducted to achieve the outcomes, and the possible issues which could affect the success of the project.

Participant Information
- The Participant Information is used to capture information about the participants that will be pertaining in the project.

Supporting Documents
- The Supporting Documents is used to upload files supporting documentation for your project.

Help and Support
- Program Applicant Guide
- User Guide
- Contact Us
5.3 CLAIMS

Report expenses under the Claims screen (Figure 74). Submit claims either quarterly or monthly as identified in the project information section of the Manage Project Screen or in your signed agreement. The claim uses the same cost categories structure as your agreement.

**Figure 73 – Manage Project Summary - Claims**

To add a claim, follow the steps below:

- Click Add Claim (Figure 73)
- Complete all required fields (Figure 74)
- Click Save
- Click Supporting Documents to add files that support the claim you are submitting
- Click Review & Submit
- Click Next (Figure 75)
- Complete the Declaration screen and Click Submit (Figure 76)
- Once you have successfully submitted your claim, a confirmation number is displayed (Figure 77)
## Figure 74 – Expenditures Screen

### Expenditures Information

- **Project Number:** 0123456789
- **Project Title:** Project Title 1
- **Start Date:** August 1, 2023
- **End Date:** July 31, 2023

- **ESDC Contribution:** $1000
- **Payment Method:** Advances
- **Claim Reporting Frequency:** Each Quarter

### Planned Expenditures

<table>
<thead>
<tr>
<th>Cost Category</th>
<th>ESDC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Costs</td>
<td>0</td>
</tr>
<tr>
<td>Capital Costs</td>
<td>0</td>
</tr>
<tr>
<td>Direct Costs</td>
<td>0</td>
</tr>
<tr>
<td>Total Planned Expenditures</td>
<td>0</td>
</tr>
</tbody>
</table>

Notes:
- *Claim Period From* (Required)
- *Claim Period To* (Required)

Important: The following is a generic listing of possible eligible project cost categories. Only include amounts under the eligible cost categories for which you are entitled as per the Agreement.
Figure 75 – Claim – Review & Submit Screen

Figure 76 – Claim – Declaration Screen
The Return Button will bring you to the Claims Summary Screen (Figure 78)

Back to Manage will bring you to the Manage Project Summary Screen
5.3.1 HOW TO VIEW A SUBMITTED CLAIM
The View function on the Claims Summary Screen (Figure 78) will direct you to the Expenditures screen. You will be able to view the submitted claim in read-only format.

Figure 79 – View Claim

5.3.2 HOW TO WITHDRAW A CLAIM
You can withdraw a submitted claim up until the Department begins processing the claim. To withdraw a claim after that point, you will need to contact your assigned program delivery staff.

- Click Withdraw (Figure 80) which will direct you to the Withdraw Claim screen (see Figure 81)
- Click Withdraw to confirm that the claim will be withdrawn
Figure 80 – Claims Summary Screen - Withdraw a claim

Figure 81 – Withdraw claim confirmation screen
5.3.3 **How to Remove a Claim**

You can remove a claim that you haven't submitted to ESDC or that has a status of Withdrawn.

- Click Remove (Figure 82) which will direct you to the Remove Claim screen (see Figure 83)
- Click Remove to confirm that the claim will no longer be displayed in your account

---

**Figure 82 – Claims Summary Screen – Remove a Claim**

![Claims Summary Screen](image)

**Figure 83 – Remove Claim**

![Remove Claim](image)
5.4 **Forecast of Project Expenditures (FPE)**

The FPE tracks anticipated agreement expenses requirement for future periods and is mandatory on all new projects using an advance payment frequency. You complete the FPE to:

- estimate expenditures you expect to incur for your project; and
- Revise future estimates (if required).

**Note:** If you are on progress payments the FPE screen will not be available.

**Figure 84 – Manage Project Summary - Forecast of Project Expenditures**

The Forecast of Project Expenditures is used to capture anticipated agreement expenses requirements for future periods and is mandatory on all new projects using an advance payment frequency.

To add an FPE, follow the steps below:

- Click Add Forecast of Project Expenditures (Figure 84)
- Complete all required fields (Figure 85)
- Click Save
- Click Supporting Documents to add files that support the claim you are submitting
- Click Review & Submit
- Click Next (Figure 86)
- Complete the Declaration screen and Click Submit (Figure 87)
- Once you have successfully submitted your claim, a confirmation number is displayed (Figure 88)
Figure 85 – Forecast of Project Expenditures Screen

**Forecast of Project Expenditures**

<table>
<thead>
<tr>
<th>Project Information</th>
<th>Help and Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Number: 012345678</td>
<td></td>
</tr>
<tr>
<td>Project Title: Project / Project 1.1</td>
<td></td>
</tr>
<tr>
<td>Start Date: August 6, 2018</td>
<td></td>
</tr>
<tr>
<td>End Date: July 31, 2019</td>
<td></td>
</tr>
<tr>
<td>ESDC Contribution: 5000</td>
<td></td>
</tr>
<tr>
<td>Payment Method: Advances</td>
<td></td>
</tr>
<tr>
<td>Claim Reporting Frequency: Fixed Quarter</td>
<td></td>
</tr>
</tbody>
</table>

**Fiscal Year 2018-2019**

<table>
<thead>
<tr>
<th>Month</th>
<th>August 2018</th>
<th>September 2018</th>
<th>October 2018</th>
<th>November 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2500</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

**Forecasted Fiscal Year Total: 2500**

**Fiscal Year 2019-2020**

<table>
<thead>
<tr>
<th>Month</th>
<th>April 2019</th>
<th>May 2019</th>
<th>June 2019</th>
<th>July 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2500</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

**Forecasted Fiscal Year Total: 2500**

<table>
<thead>
<tr>
<th>Forecasted Grand Total: 5000</th>
</tr>
</thead>
<tbody>
<tr>
<td>ESDC Project Budget Amount 5000</td>
</tr>
</tbody>
</table>

**Forecasted Grand Total ≤ ESDC Project Budget Amount**

| Save | Review & Submit | Back To Forecast of Project Expenditures |
Figure 86 – Forecast of Project Expenditures – Review & Submit Screen

Figure 87 – Forecast of Project Expenditures – Declaration Screen
The Return Button will bring you to the Forecast of Project Expenditures Summary Screen (Figure 89)

Back to Manage will bring you to the Manage Project Summary Screen
5.4.1 How to View a Submitted Forecast of Project Expenditure (FPE)

The View function on the Forecast of Project Expenditure Summary Screen (Figure 90) will direct you to view the submitted FPE in read-only format.

Figure 90 – View Forecast of Project Expenditure

5.4.2 How to Withdraw a Forecast of Project Expenditure (FPE)

You can withdraw a submitted FPE up until it is reviewed by the Department. To withdraw an FPE after that point, you will need to contact your assigned program delivery staff.

- Click Withdraw (Figure 91) which will direct you to the Withdraw Forecast of Project Expenditure screen (see Figure 92)
- Click Withdraw to confirm that the FPE will be withdrawn
Figure 91 – Forecast of Project Expenditure Summary Screen - Withdraw an FPE

![Forecast of Project Expenditures Screen]

- Status: Submitted
- Date Updated: August 29, 2018, 1:18:21 PM
- Tracking Number: M600123456

Figure 92 – Withdraw Forecast of Project Expenditure confirmation screen

![Withdraw Forecast of Project Expenditures Screen]

- Status: Submitted
- Date Updated: August 29, 2018, 1:18:21 PM
- Tracking Number: M600123456

⚠ Please confirm that the following Forecast of Project Expenditures will be withdrawn.

Withdraw
5.4.3 **HOW TO REMOVE A FORECAST OF PROJECT EXPENDITURE**

You can remove a Forecast of Project Expenditure you haven't submitted to ESDC or that has a status of Withdrawn.

- Click Remove (Figure 93) which will direct you to the Remove Forecast of Project Expenditure screen (see Figure 94)
- Click Remove to confirm that the FPE will no longer be displayed in your account

---

**Figure 93 – Forecast of Project Expenditure Summary Screen – Remove a FPE**

**Figure 94 – Remove Forecast of Project Expenditures**
5.5 Activity Reports

The activity report summarizes the overall project progress against:
- The project’s objectives
- The activities conducted to achieve the outcomes
- The possible issues which could affect the success of the project

Overall, the activity report:
- streamlines project reporting
- improves accountability
- provides an overview of the project’s overall performance
- Helps determine what your organization plans to achieve and what you’ve achieved in your project.

It is mandatory that you complete the activity report for all contribution projects (excluding Canada Summer Jobs).

5.5.1 How to Add an Activity Report

Figure 95 – Manage Project Summary - Activity Report

- Click Add Activity Report (Figure 95) on the Manage Project Summary Screen
- You will see Edit buttons for the following Screens (Figure 96):
  - Report on Progress
  - Amendment
  - Success Stories / Lessons Learned
  - Additional Information
  - Other Information
  - Review & Submit
- Complete each section, ensuring all required fields are completed and that you click save on every screen
- Click Review & Submit
- Click Next (Figure 97)
- Complete the Declaration and Click Submit (Figure 98)
- Once your Claim has been successfully submitted, a confirmation number will be displayed (Figure 99)
Figure 97 – Review & Submit - Activity Report

Review & Submit

Expand all | Collapse all | Print

► Report on Progress
► Amendment
► Success Stories / Lessons Learned
► Additional Information as per program specific requirements
► Other Information

Next | Back To Activity Report

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Figure 98 – Declaration Screen - Activity Report

Declaration

Your organization has indicated that one (1) signature is required to submit an activity report through Grants and Contributions Online Services (GCOS). Currently, one (1) representative has the authority to submit an activity report. If the number of representatives is less than the number of signatures required, please refer to the User Guide for information on how to invite representatives and how to assign them function-specific rights.

If the number of required signatures displayed above is incorrect, you can change it by clicking on “Organization Identification” under the “My GCOS Account” button.

Declaration

* By clicking the 'Submit' button below, you certify that
(Required)

☐ A. the information provided in the previous screens with respect to the Activity Report is true, accurate and complete, and
☐ B. you have authority to submit this Activity Report as required under the Terms and Conditions of the Funding Agreement it relates to.

Submit | Back To Review & Submit
The Return Button will bring you to the Activity Report Summary Screen (Figure 100).

Back to Manage will bring you to the Manage Project Summary Screen.
5.5.2 How to View Activity Report

The View function on the Activity Report Summary Screen (Figure 101) will direct you to view the submitted Activity Report in read-only format.

Figure 101 – View Activity Report

5.5.3 How to Withdraw an Activity Report

You can withdraw a submitted Activity Report up until the Department begins processing the Activity report. To withdraw an FPE after that point, you will need to contact your assigned program delivery staff.

- Click Withdraw (Figure 102) which will direct you to the Withdraw Activity Report screen (Figure 103)
- Click Withdraw to confirm that the Activity Report will be withdrawn
5.5.4 How to remove an Activity Report
You can remove an Activity Report you haven’t submitted to ESDC or that has a status of Withdrawn.

- Click Remove (Figure 104) which will direct you to the Remove Activity Report screen (Figure 105)
- Click Remove to confirm that the Activity Report will no longer be displayed in your account

**Figure 104 – Activity Report Summary Screen – Remove Activity Report**

**Figure 105 – Remove Activity Report**

### 5.6 SUPPORTING DOCUMENTS
You can submit supporting documentation no matter the status of your application. The Supporting Documents screen allows you to view, add and manage files uploaded as supporting documentation for your Application for Funding or a project.

- Follow the steps outlined in section 2.14 of this User Guide to Add a supporting document

5.7 PARTICIPANT INFORMATION

When your project has a status: Active on the Applications and Projects screen, you are able to submit a Participant.

5.7.1 DO YOU HAVE THE RIGHTS TO CREATE, SUBMIT AND VIEW A PARTICIPANT?

If you are the Primary Officer of the organization, you automatically have the rights to create, submit and view a Participant. If you are a representative of the organization, you should verify if you have the required rights by following these steps:

- Enter your username and password to access GCOS.
- Click Continue
- Click your organization’s name
- Click Gs & Cs Online Services
- Click My GCOS Account on the top menu
- Click Representatives
- Once you retrieve your name
- Click View
- Ensure the “Create”, “Submit” and/or “View” checkboxes for participants are selected.

If the Create, Submit and/or View checkboxes for participants are not selected, please contact the Primary Officer of your organization or an authorized representative as he will be able to delegate you the appropriate rights.

5.7.2 HOW TO ACCESS THE PARTICIPANT INFORMATION

- Enter your username and password to access GCOS.
- Click Continue
- Click your organization’s name
- Click Gs & Cs Online Services
- Click View List of Applications and Projects
- Retrieve your project
- Click Manage
- Click Add Participant Information to Add a New Participant (Figure 106)
- Once you’ve saved at least one Participant, Click on View Participant Information to access the list of your Participants (Figure 107)
5.7.3 PARTICIPANT INFORMATION SCREEN

Use the Participant Information screen to add, remove, view and withdraw a Participant. Once you saved at least one Participant, all the Participants relating to this project are listed on this screen (Figure 111).

5.7.4 ADDING A PARTICIPANT INFORMATION

Important: Before completing this screen, you must print the Participant consent form (EMP5605 or EMP5607) by clicking on the hyperlink (Figure 107). Ask the participant to complete the form, sign it and return it to you. You must have the latest free downloadable software Adobe Acrobat Reader to view the form. You must keep the Participant Consent Form on file for audit purposes. Once the participant has completed the form, use that information to complete the Participant Detail Screen (Figure 107).

- Complete all required fields
- Click Save
- Click Review & Submit, which will allow you to review and, if necessary, edit the Participant information
Figure 107 – Participant Details Screen

The Participant Consent Form MUST be completed and signed by the participant you are adding to the GCOS system prior to saving the information. The consent MUST be kept on file for audit purposes.

☐ * I have obtained the written consent from the participant to provide you the following information. The consent will be kept on file for audit purposes.

(Required)

- Given Name
- Initial
- Surname
- Social insurance Number (####-####)
- E-Mail Address
- Permanent Address Line 1
- Permanent Address Line 2
- City
- Province or Territory
- Postal Code
- Telephone Number

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• Click Next (Figure 108)

**Figure 108 – Participant - Review & Submit Screen**

- You must check the boxes to certify your authority before clicking Submit (Figure 109)
- Once you have successfully submitted your Participant, a confirmation number is displayed (Figure 110)
- Clicking Return will bring you to the List of Participant Information Screen (Figure 111)

**Figure 109 – Participant - Declaration Screen**
5.7.5 **HOW TO VIEW PARTICIPANT INFORMATION**

The View function on the Participant Information screen (Figure 111) will direct you to view the submitted participant information in read-only format only.

**Figure 111 – Participant Information - View**

---

**Figure 110 – Participant – Confirmation screen**
5.7.6 **HOW TO WITHDRAW AND REMOVE PARTICIPANT INFORMATION**

You can withdraw a participant that you’ve submitted to the Department. The Withdraw function can be used up until you have submitted an intervention.

- Click Withdraw (Figure 112) which will direct you to the Withdraw Participant screen (Figure 113)
- Click Withdraw to confirm that the Participant will be withdrawn

**Figure 112 – Withdraw a participant**

![Withdraw Participant Screen](image)

**Figure 113 – Withdraw a participant – Confirmation Screen**

![Confirmation Screen](image)
You can remove a Participant that you’ve submitted to ESDC, which has a status of Withdrawn or a status of Not Eligible.

- Click Remove (Figure 114) which will direct you to the Remove Participant screen (Figure 115)
- Click Remove to confirm that the Participant will no longer appear in the list of existing participants for your project

**Figure 114 – Remove a participant**
5.7.7 HOW TO MODIFY A PARTICIPANT

In order to modify participant information, you will need to follow the steps identified in section 5.7.2 to access the Participant Information section. The Modify Participant function is only available for participants with a status of Eligible. You must have the “Create” right for participants to be able to modify the record. You will be required to obtain the participant’s consent before you can modify their information. You can only modify the information that does not impact the eligibility of the participant.

The editable fields are:
- Given Name
- Surname
- E-mail address
- Address
- Telephone number

You must then Review and Submit all the information entered. You can use the Expand all button to review the information prior to submitting it to the Department. Only users that have the Submit right for Participants will be able to access this screen and complete the declaration and submit the modifications.

5.8 INTERVENTION

Once you submit the participant information and their deemed eligible, the Manage Intervention function will be accessible.

5.8.1 DO YOU HAVE THE RIGHTS TO CREATE, SUBMIT AND VIEW A PARTICIPANT?

If you are the Primary Officer of the organization, you automatically have the rights to create, submit and view a Participant. If you are a representative of the organization, you should verify if you have the required rights by following these steps:
- Enter your username and password to access GCOS.
- Click Continue
- Click your organization’s name
- Click Gs & Cs Online Services
- Click My GCOS Account on the top menu
• Click Representatives
• Once you retrieve your name
• Click View
• Ensure the “Create”, “Submit” and/or “View” checkboxes for participants are selected.

If the Create, Submit and/or View checkboxes for participants are not selected, please contact the Primary Officer of your organization or an authorized representative as he will be able to delegate you the appropriate rights.

5.8.2 HOW TO ACCESS THE INTERVENTION

• Enter your username and password to access GCOS.
• Click Continue
• Click your organization’s name
• Click Gs & Cs Online Services
• Click View List of Applications and Projects
• Retrieve your project
• Click Manage
• Click on View Participant Information to access the list of your Participants (Figure 116)
• Click on Manage Intervention (Figure 117)

Figure 116 – Manage Project Summary - Participant Information
5.8.3 **How to Add an Intervention for a Participant**

- Click on Add Intervention (Figure 118)
- Complete the Required Fields (Figure 119)
- Click Save
- Click Review & Submit
Figure 118 – Intervention Information Summary Screen

Figure 119 – Intervention Information Screen
- Click Next (Figure 120)
- You must check the boxes to certify your authority before clicking Submit (Figure 121)
- Once you have successfully submitted the Intervention, a confirmation number is displayed (Figure 122)
- Clicking Return will bring you to the Intervention Information Summary Screen

Figure 120 – Intervention – Review & Submit Screen

Figure 121 – Intervention – Declaration Screen
5.8.4 HOW TO VIEW AN INTERVENTION FOR A PARTICIPANT

The View function on the Intervention Information screen (see Figure 123) will direct you to screen to view the submitted intervention in read-only forma.
5.8.5 **How to Withdraw and Remove an Intervention for a Participant**

You can withdraw an intervention that you’ve submitted to the Department. The Withdraw function can be used up until you’ve submitted a follow-up.

- Click Withdraw (Figure 124) which will direct you to the Withdraw Intervention screen (Figure 125)
- Click Withdraw to confirm that the Intervention will be withdrawn

**Figure 124 – Withdraw an Intervention**
You can remove an intervention that you haven’t submitted to the Department or that has a status of Withdrawn

- Click Remove (Figure 126) which will direct you to the Remove Intervention screen (Figure 127)
- Click Remove to confirm that the Intervention will no longer appear in the list of existing Interventions for your participant
Figure 126 – Remove an Intervention

Figure 127 – Remove Intervention – Confirmation Screen
5.9 **Follow-Up**

Only participants that have an Eligible status and an Approved intervention will have the Manage Follow-up function.

5.9.1 **Do you Have the Rights to Create, Submit and View a Participant?**

If you are the Primary Officer of the organization, you automatically have the rights to create, submit and view a Participant. If you are a representative of the organization, you should verify if you have the required rights by following these steps:

- Enter your username and password to access GCOS.
- Click Continue
- Click your organization’s name
- Click Gs & Cs Online Services
- Click My GCOS Account on the top menu
- Click Representatives
- Once you retrieve your name
- Click View
- Ensure the “Create”, “Submit” and/or “View” checkboxes for participants are selected.

If the Create, Submit and/or View checkboxes for participants are not selected, please contact the Primary Officer of your organization or an authorized representative as he will be able to delegate you the appropriate rights.

5.9.2 **How to Access the Intervention**

- Enter your username and password to access GCOS.
- Click Continue
- Click your organization’s name
- Click Gs & Cs Online Services
- Click View List of Applications and Projects
- Retrieve your project
- Click Manage
- Click on View Participant Information to access the list of your Participants (Figure 128)
- Click on Manage Follow-up (Figure 129)

*Figure 128 – Manage Project Summary - Participant Information*
5.9.3 **How to Add a Follow-up for a Participant**

- Click on Add Follow-up (Figure 130), note that you are required to submit an Initial Follow-up prior to being able to submit a 12 weeks, 6 months or 12 months follow-up.
- Complete the Required Fields (Figure 131)
- If you answer “Yes” to the question “Did the participant complete the intervention?”, you are required to complete the section “Participant Completed the Intervention(s) (Figure 132)
- If you answer “No” to the question “Did the participant complete the intervention?”, you are required to complete the section “Participant Did not Complete the Intervention(s) (Figure 133)
- Click Save
- Click Review & Submit
Figure 130 – Participant Follow-up Summary Screen

Participant Follow-up - Participant 2

A follow-up provides the outcome of the intervention for a participant, which was submitted to the Department.

A follow-up can only be submitted to the department after an intervention has been submitted. If there are outstanding interventions for a participant that have a status of "Draft", a follow-up cannot be completed or submitted until the "Draft" interventions have been actioned by either submitting it to the department or removing it.

Showing 0 result of 0

Number of results per page 10

There are currently no entries

Add Follow-up Back To Participant Information

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Figure 131 – Follow-Up Screen

Follow-up

Project Information

- Project Number: 013346078
- Project Title: Projec / Project 1.1
- Start Date: August 6, 2018
- End Date: July 31, 2019
- ESDC Contribution: 5000
- Payment Method: Advances
- Claim Reporting Frequency: Fixed Quarter

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* Indicate the follow-up type (Required)

* Did the participant complete the intervention? (Required)
  - Yes
  - No

For Work Experience/Entrepreneurship

- National Occupational Classification (NOC) (Required)
  - Search NOC

- North American Industry Classification System (NAICS) (Required)
  - Search NACS

- Small or Medium enterprise (1 - 499 employees) (Required)
  - Yes
  - No

- Green Job
  - Yes
  - No

- Type of Employer (Required)
  - Private
  - Public
  - Not-for-profit
  - Other
Figure 132 – Participant Completed the Intervention(s) – Review & Submit Screen

- **Participant is now (Required)**
  - Employed/Self-Employed
  - Unemployed
  - Return to School/Stay in School
  - Cannot be reached
  - Other (e.g. maternity leave)

- **Date of Completion (Required)**

---

Figure 133 – Participant did not complete the Intervention(s) – Follow-up Screen

- **Reason (Required)**
  - Abandoned
  - Employed/Self-employed
  - Cannot be reached
  - Return to School/Stay in School
  - Other (e.g. maternity leave)

- **Date of Early Termination (Required)**

---

- Click Next (Figure 134)
- You must check the boxes to certify your authority before clicking Submit (Figure 135)
- Once you have successfully submitted your Follow-up, a confirmation number is displayed (Figure 136)
- Clicking Return will bring you to the Follow-up Summary Screen
Figure 134 – Follow-Up – Review & Submit Screen

Figure 135 – Follow-up – Declaration Screen
5.9.4 HOW TO VIEW A FOLLOW-UP FOR A PARTICIPANT

The View function on the Participant Follow-Up screen (see Figure 137) will direct you to view the submitted intervention in read-only format.
5.9.5 How to Edit a Follow-Up

The Edit function on the Participant Follow-Up screen (see Figure 138) will direct you to view the submitted intervention and allow you to edit some information.

**Figure 138 – Participant Follow-up Summary Screen**

- Click on Edit (Figure 138)
- Complete the Required Modifications
- Click Save
- Click Review & Submit
- Click Next
- You must check the boxes to certify your authority before clicking Submit
- Once you have successfully submitted your Follow-up, a confirmation number is displayed
  Clicking Return will bring you to the Follow-up Summary Screen
5.9.6 When to do a Follow-Up

In the case of a Skills link or Career Focus project where the participant has 3 interventions:

- Individual Skills Enhancement (ISE) April 1, 20XX to April 15, 20XX
- Group-Based Employability Skills (GBES) April 16, 20XX to April 30, 20XX
- Work Experience (WE) May 1, 20XX to July 30, 20XX

When a participant completes all interventions, on August 1 we can anticipate 1 follow up that would say the participant completed the interventions (1 for all three interventions). Completion Date would be July 30.

  - In the case where that result is anything other than Employed/Self-employed or Return to school/Stay in school on August 1, a second follow up would be expected at the end of October. Completion Date would still be July 30 with the result of employment when contacted that second time.
  - This second follow up would be the last one no matter what the result would be.

When a participant completed the ISE and GBES interventions, but left their work experience on June 30, 20XX, we would expect 1 follow up after June 30, 20XX that would say that the participant did not complete the interventions (1 for all three interventions). Date of early termination would be June 30, 20XX.

  - In the case where that result is not employed on June 30, a second follow up would be expected at the end of September.
  - In the case where the result would be employed, no further follow up would be required

******************************************************************************

In the case of an Opportunities Fund (OF) project that is less than 1 year and also have interventions

- Skills for Employment (SE) April 1, 20XX to April 15, 20XX
- Enhanced Employment Assistance Services (EEAS) April 16, 20XX to April 30, 20XX
- Wage Subsidies (WS) May 1, 20XX to July 30 – 20XX

When a participant completes all interventions, on August 1 we can anticipate 1 follow up that would say the participant completed the interventions (1 for all three interventions). Completion Date would be July 30.

  - In the case where that result is anything other than Employed/Self-employed or Return to school/Stay in school on August 1, a second follow up would be expected at the end of October. Completion Date would still be July 30 with the result of employment when contacted that second time.
  - In the case where the result would be Employed/Self-employed or Return to school/Stay in school, no further follow up would be required.

When a participant completed the SE and EEAS interventions, however ended their wage subsidy on June 30, 20XX, we would expect 1 follow up after June 30, 20XX that would say that the participant did not complete the interventions (1 for all three interventions). Date of early termination would be June 30, 20XX.

  - In the case where the June 30, 20XX result is unemployed, a second follow up would be expected at the end of September.
  - In the case where the result would be Employed/Self-employed or Return to school/Stay in school, no further follow up would be required

******************************************************************************
In the case of an OF project that is multiyear and also has the interventions

- Skills for Employment (SE) April 1, 20XX to April 15, 20XX
- Wage Subsidy (WS) May 1, 20XX to July 30, 20XX

When a participant completes all interventions, on August 1 we can anticipate 1 follow up that would say the participant completed the interventions (1 for all three interventions). Completion Date would be July 30.

- In the case where that result is anything other than Employed/Self-employed or Return to school/Stay in school on August 1, a second follow up would be expected at the end of October. Completion Date would still be July 30 with the result of employment when contacted that second time. If the result is employed at the 12 weeks follow up, a 6 month follow up would be expected on January 31, 20XX and a 12 months follow up would be done on July 31, 20XX. No matter what the result is, these two follow ups are expected when they fall prior to the project end date.

- In the case where the result would be Employed/Self-employed or Return to school/Stay in school on August 1, a follow up would be done on January 31, 20XX (6 months follow-up) and a second follow up would be done on July 31, 20XX (12 months follow up). No matter what the result is, these two follow ups are expected when they fall prior to the project end date.
- Note: 6 and 12 months follow up must be completed prior to the end date of a project.
5.10 **GENERATE PARTICIPANT REPORT**

5.10.1 **DO YOU HAVE THE RIGHTS TO CREATE, SUBMIT AND VIEW A PARTICIPANT?**
If you are the Primary Officer of the organization, you automatically have the rights to create, submit and view a Participant. If you are a representative of the organization, you should verify if you have the required rights by following these steps:

- Enter your username and password to access [GCOS](http://example.com).
- Click Continue.
- Click your organization’s name.
- Click Gs & Cs Online Services.
- Click My GCOS Account on the top menu.
- Click Representatives.
- Once you retrieve your name.
- Click View.
- Ensure the “Create”, “Submit” and/or “View” checkboxes for participants are selected.

If the View checkbox for participants is not selected, please contact the Primary Officer of your organization or an authorized representative as he will be able to delegate you the appropriate rights.

5.10.2 **HOW TO ACCESS THE GENERATE PARTICIPANT REPORT**

- Enter your username and password to access [GCOS](http://example.com).
- Click Continue.
- Click your organization’s name.
- Click Gs & Cs Online Services.
- Click View List of Applications and Projects.
- Retrieve your project.
- Click Manage.
- Click Generate Report (Figure 139).

---

**Figure 139 – Generate Report**

![Participant Information](image-url)
- Click Expand all to select under each section the criteria’s you would like for your report
- Click Generate Report (Figure 140)
- A New window will open, where you will have the opportunity to export the report to an excel document by clicking on ‘Export to Excel’ and then once exported to excel, you can save it or print it.
- Back to Manage will bring you to the Manage Project Summary Screen

Figure 140 – Electronic Participant Information Report