Employment and Social Development Canada
Emploi et Développement social Canada

Canada

Now and Tomorrow, Excellence in Everything We Do

GRANTS AND CONTRIBUTIONS ONLINE SERVICES (GCOS)

USER GUIDE: APPLICATIONS AND PROJECT MANAGEMENT

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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-SELSC-GD@hrsdc-rhdcc.gc.ca or
- Contact the Employer Contact Center at 1-800-367-5693
- **Help text:** To clarify a question, click on "Question mark" located at the end of the question. For program-specific questions, click the Program Applicant Guide under Help and Support.

1. Getting started

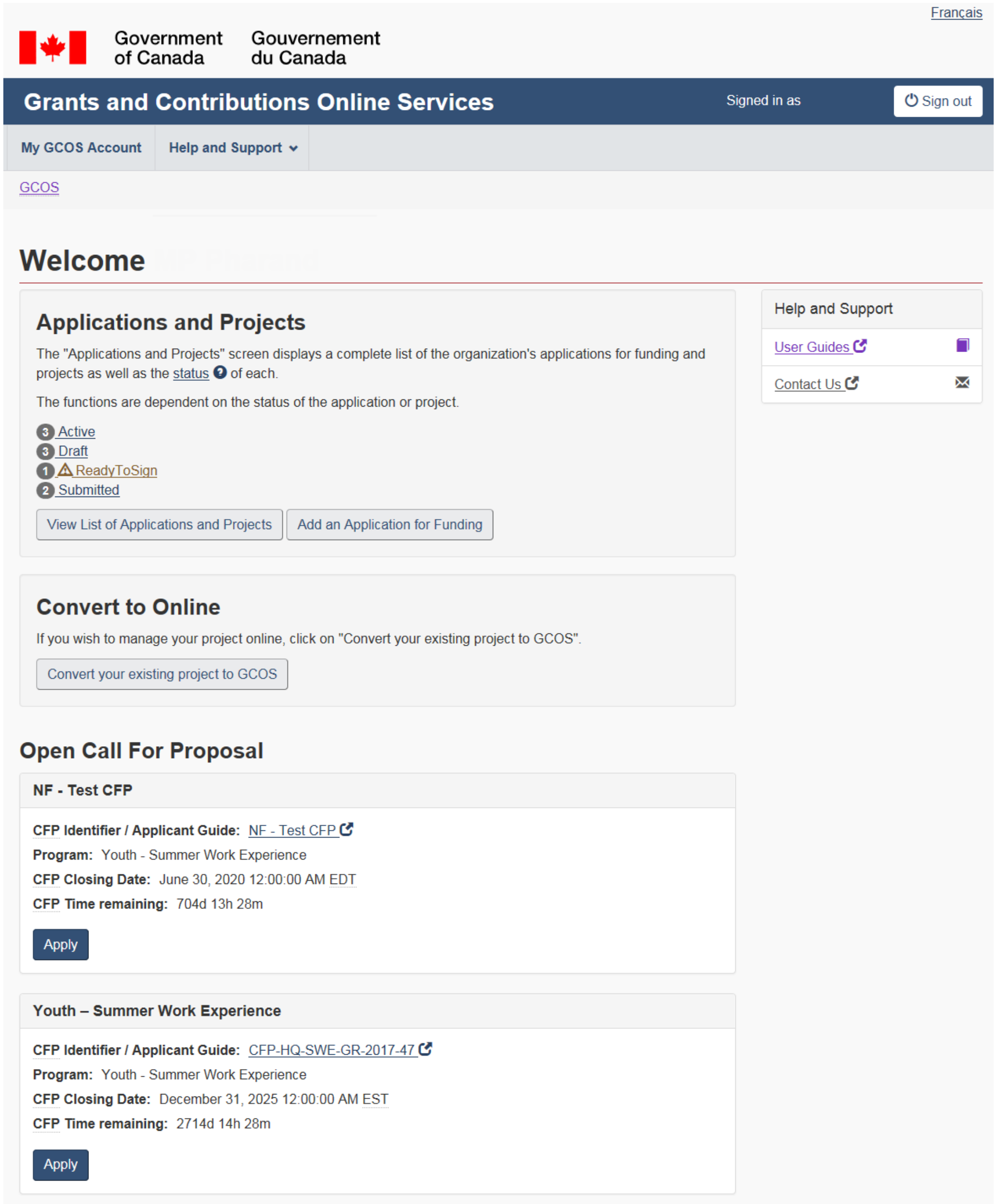
You are required to go through a series of screens before being directed to the Welcome screen:

- 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



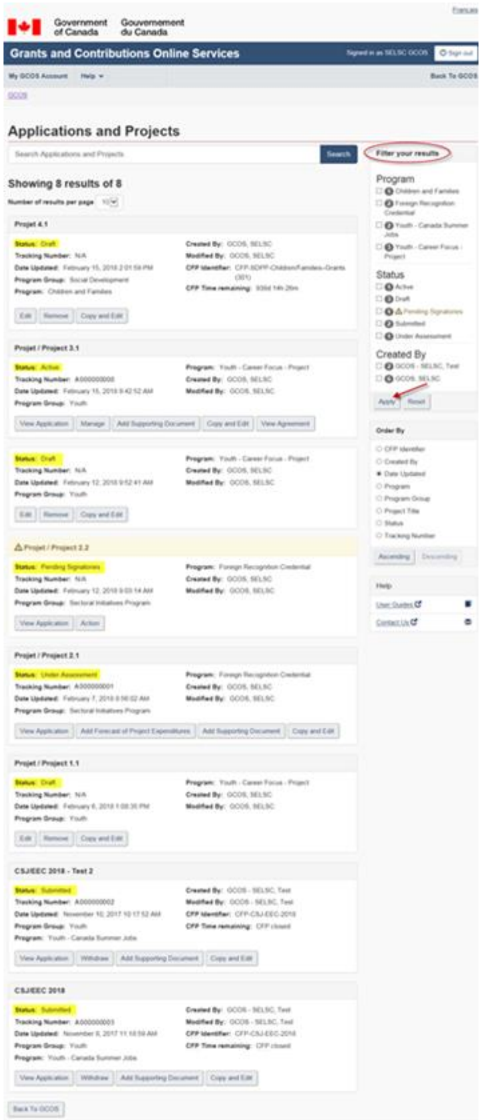
Text description of Figure 1

The welcome screen allows you to apply to a call for proposal or to a continuous intake funding program. It also permits you to access your list of existing applications and projects, and provides you with the link to convert your existing paper-based project to GCOS.

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



Text description of Figure 2
The Applications and Projects screen displays a list of the organization's applications for funding and projects as well as their status.

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):

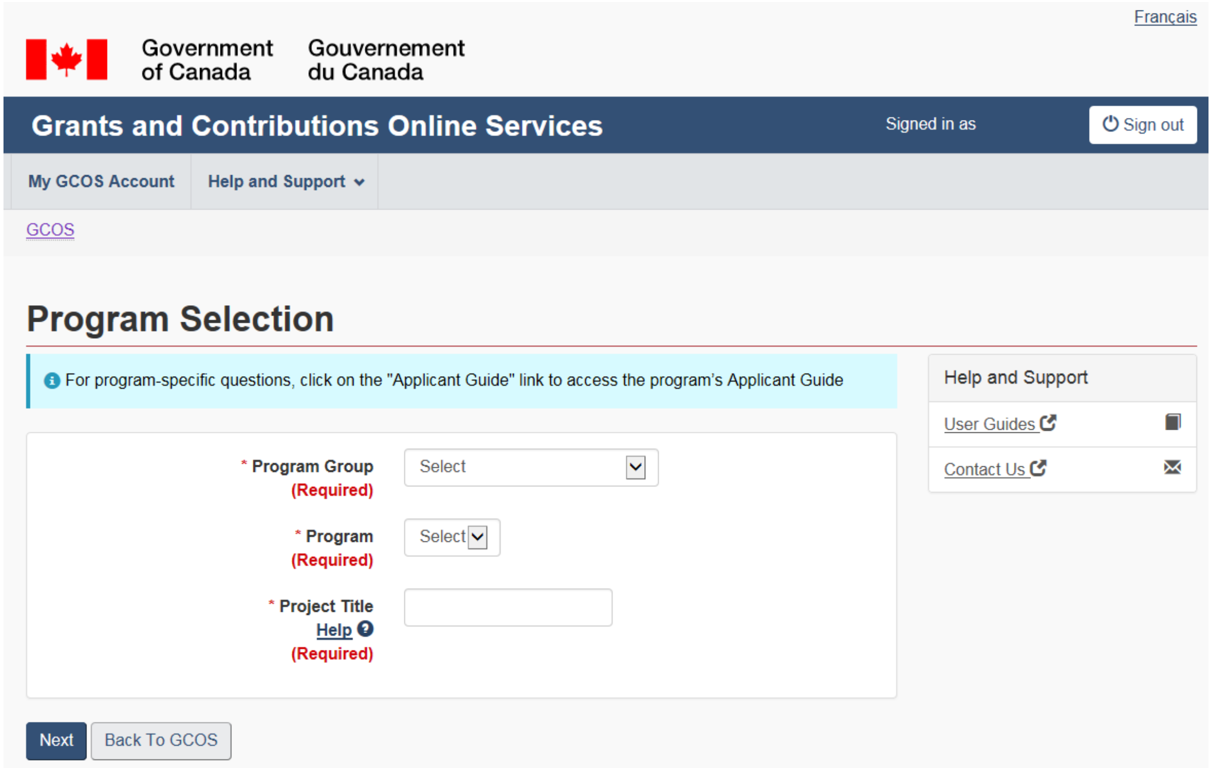
- Active: Department approved your application and you can submit project management documents
- Amendment in progress: changes to the agreement are in process (activities and/or budget). This status will remain until the agreement signature process is completed. The amendment is performed by the department.
- 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).

Figure 3 – Program selection screen – Continuous intake



Text description of Figure 3
The Program Selection screen displays the basic information regarding your application.

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.

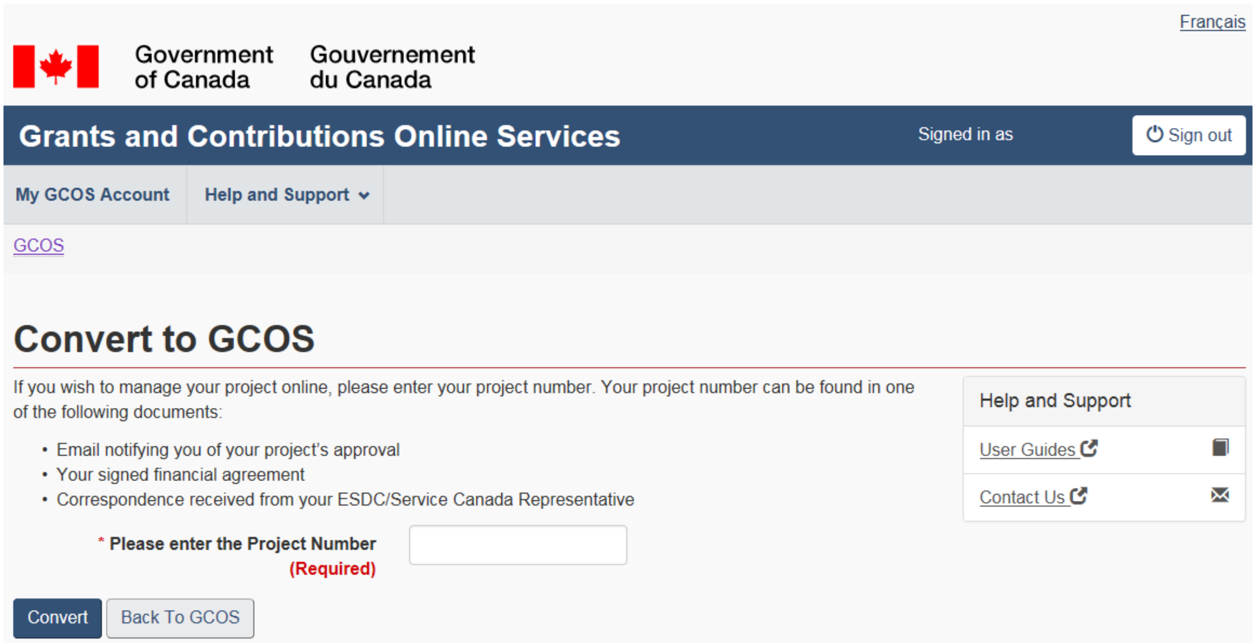
1.3.1 To Access the Convert to GCOS Function

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



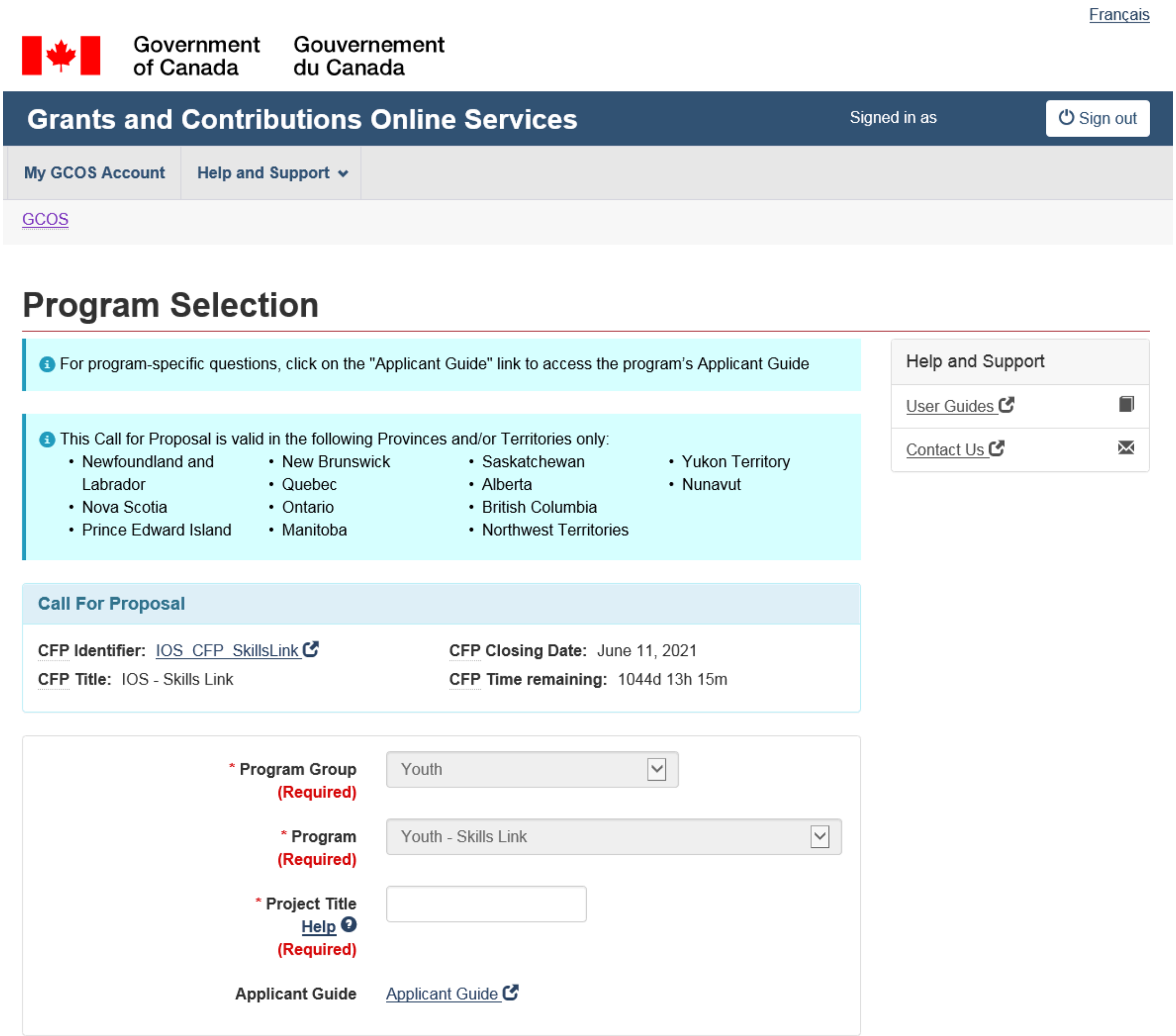
Text description of Figure 4
The Convert to GCOS screen allows you to convert your paper based project to online.

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 (Figure5). 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

Figure 5– Program selection screen



Text description of Figure 5
The basic information of your request appears on the Program Selection screen.

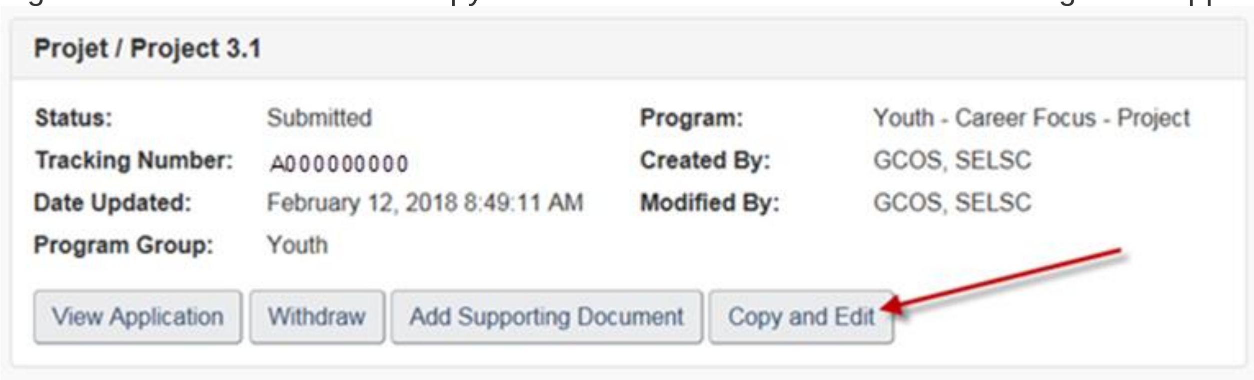
1.5 Copy & edit an existing application

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.

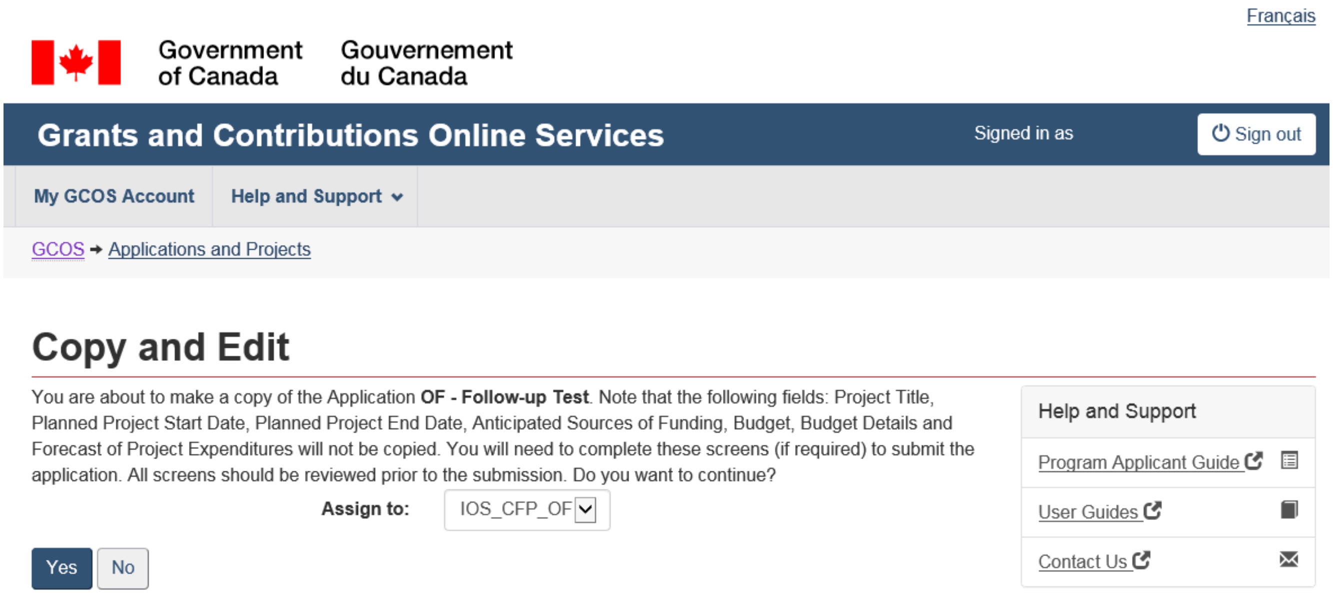
Figure 6 – Copy & edit an existing application



Text description of Figure 6

The Copy and Edit button allows you to Copy and Edit the content of a previously created application to create a new one.

Figure 7 – Copy and edit confirmation screen



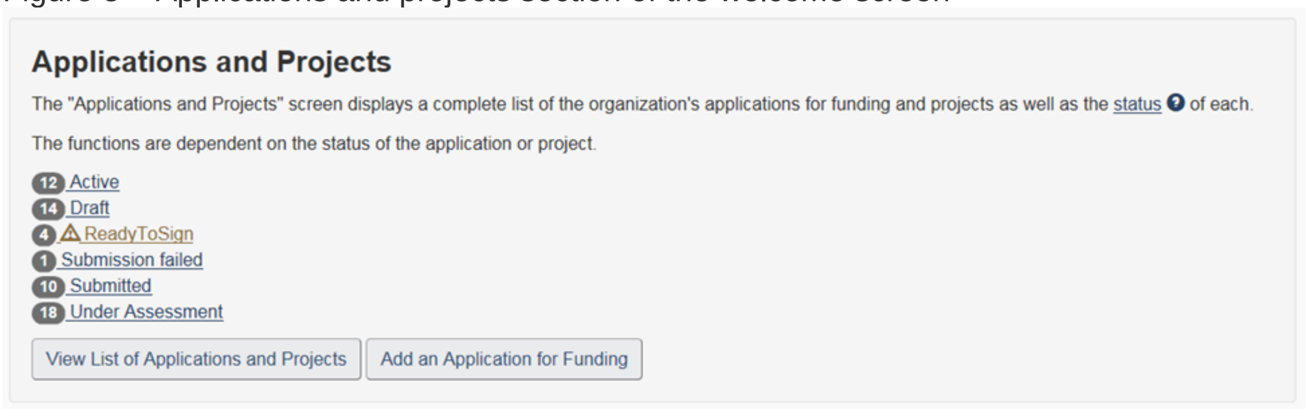
Text description of Figure 7

The Copy and Edit Confirmation screen confirms that you are about to make a copy of a specific application.

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



Text description of Figure 8

The Applications and Projects section of the welcome screen provides you with the amount of applications and project you have per status, permits you to view your list of applications and Projects and permits you to add an application for funding.

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

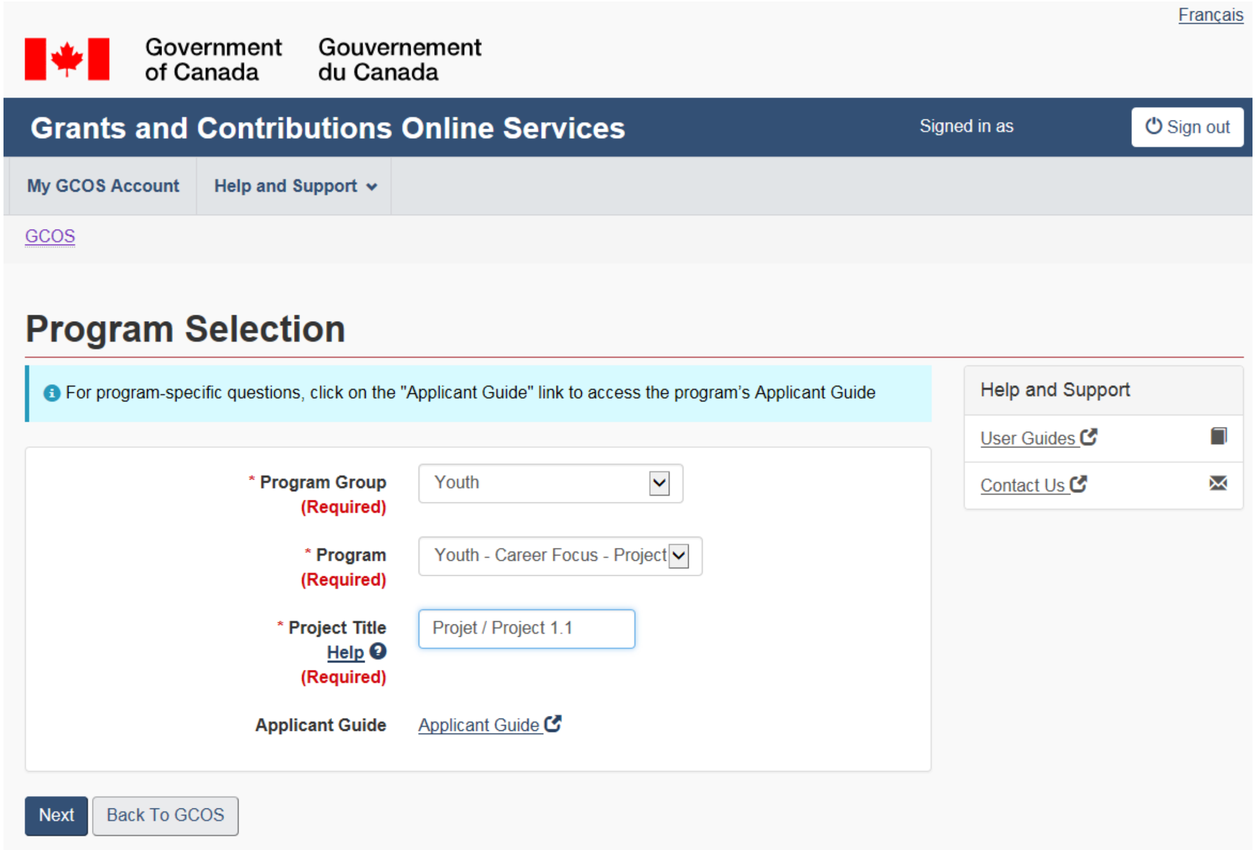
If the "Create" and/or "Submit" checkboxes for application for funding are not selected, please contact the Primary Officer of your organization or an authorized representative as they will be able to delegate you the appropriate rights.

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

Figure 9 – Program selection screen



Text description of Figure 9
The Program Selection screen displays the basic information regarding your application.

2.2.1 Summary of application

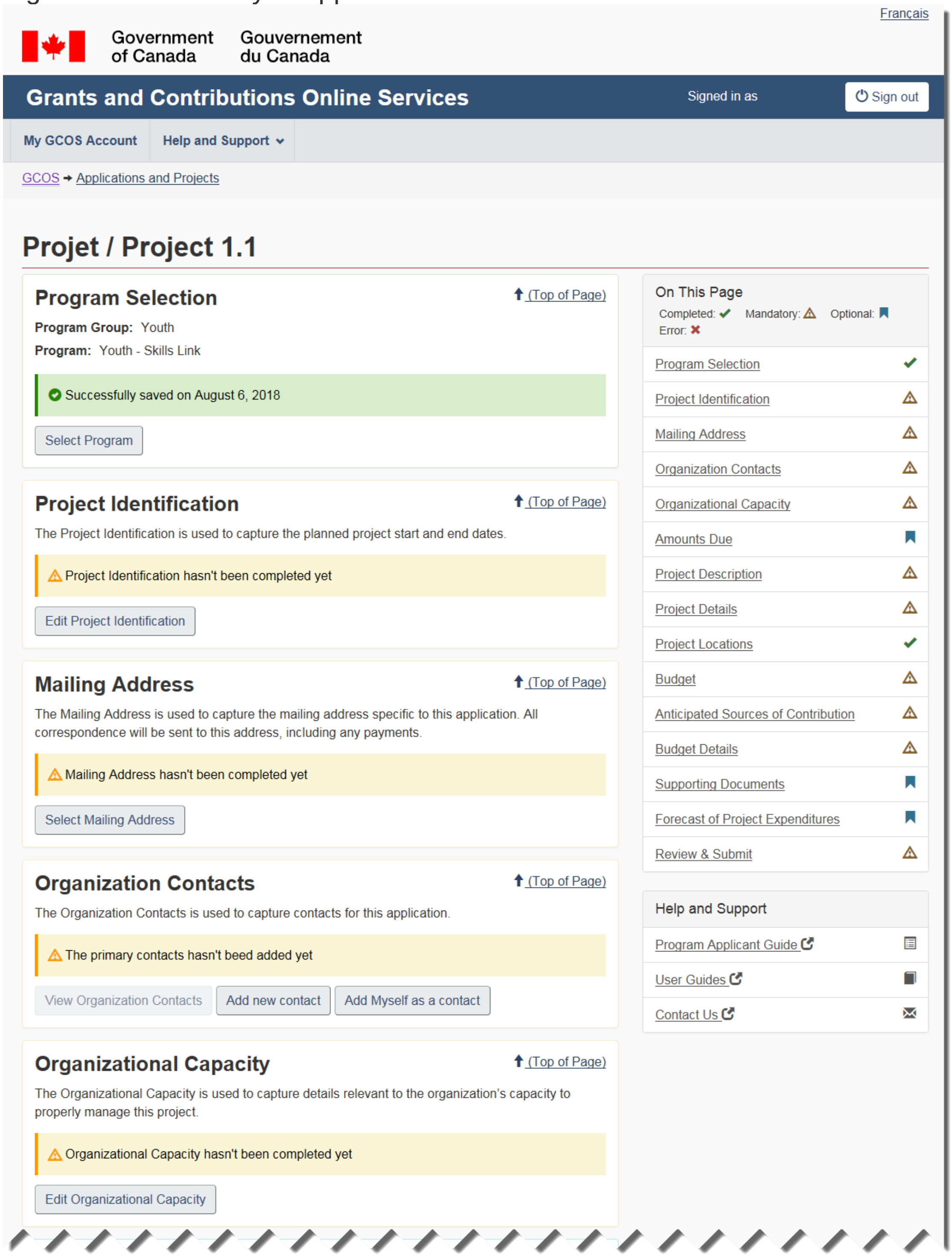
The Summary of Application screen (Figure 10) is where you access and complete all the screens of your application.

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



Text description of Figure 10

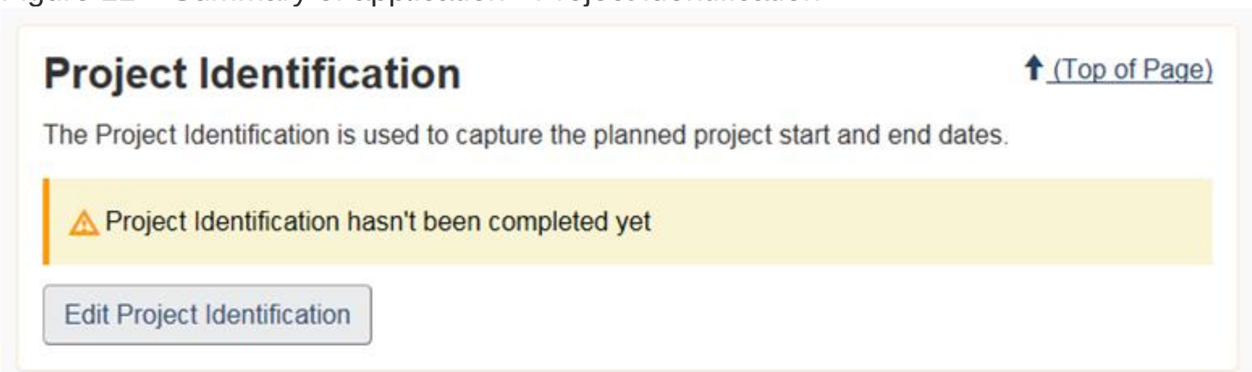
The Summary of Application screen displays all the screens of your application that need to be completed.

2.3 Project identification

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

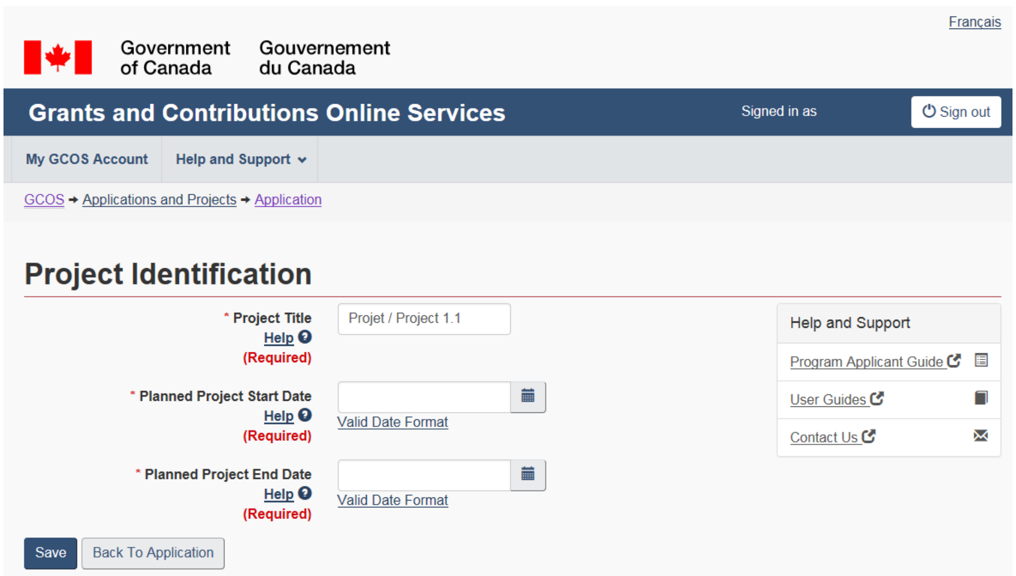
- Click Edit Project Identification (Figure 11)
- Enter Planned Project Start and End Dates
- Click Save
- Back to Application will bring you back to the summary of application screen

Figure 11 – Summary of application - Project identification



Text description of Figure 11
The Project Identification screen is used to enter the project start and end dates.

Figure 12 – Project identification screen



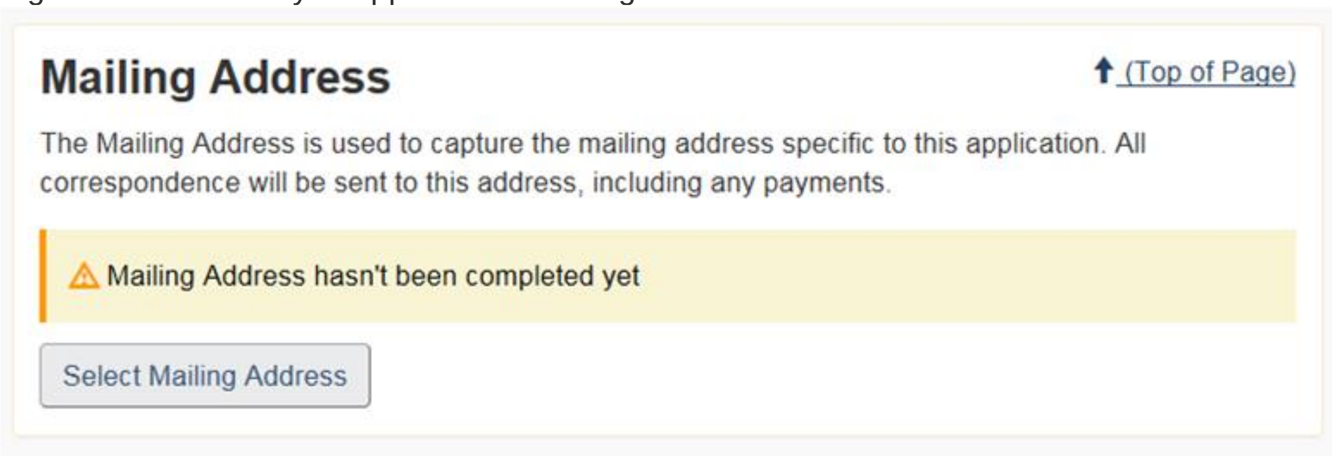
Text description of Figure 12
The Project Identification screen is used to enter the project start and end dates.

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.

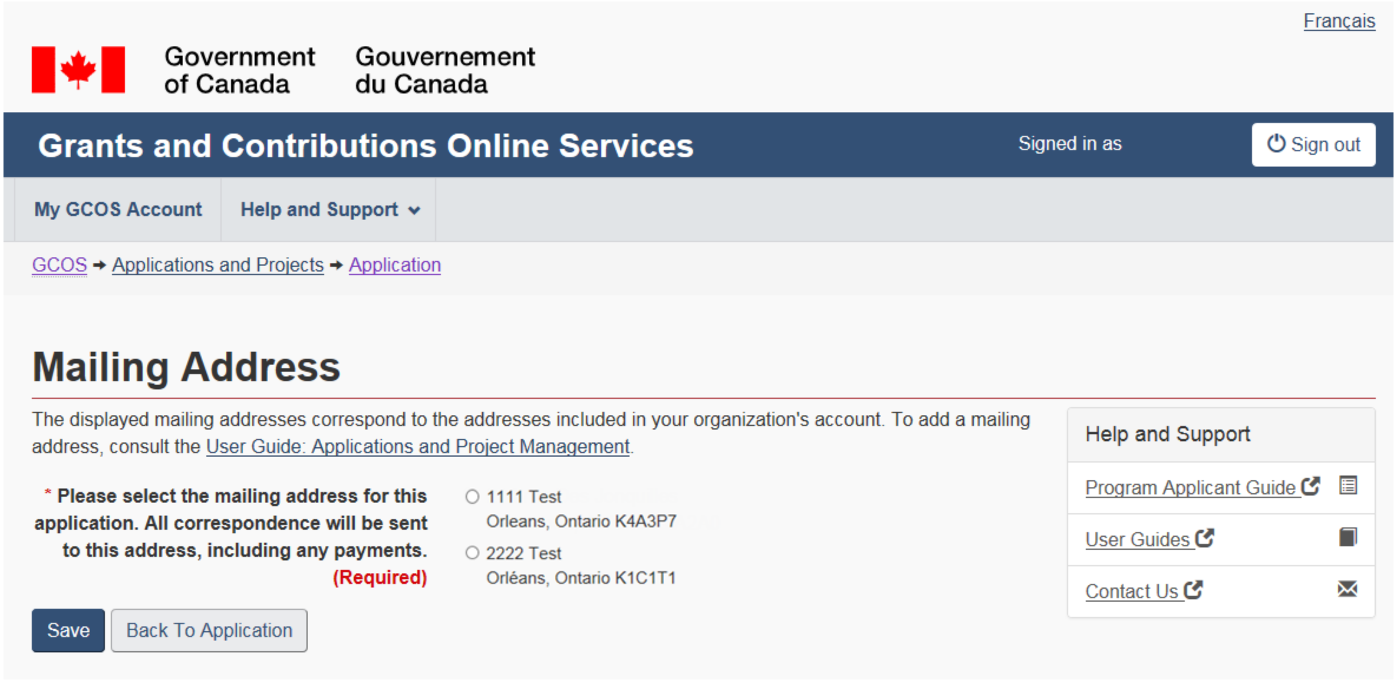
- Click select Mailing Address (Figure 13)
- Select the mailing address for this application
- Click Save
- Back to Application will bring you to the Summary of the application screen

Figure 13 – Summary of application - Mailing address



Text description of Figure 13
The Mailing Address screen is used to select the mailing address specific to your application.

Figure 14 – Mailing address screen



Text description of Figure 14
The Mailing Address screen is used to select the mailing address specific to your application.

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

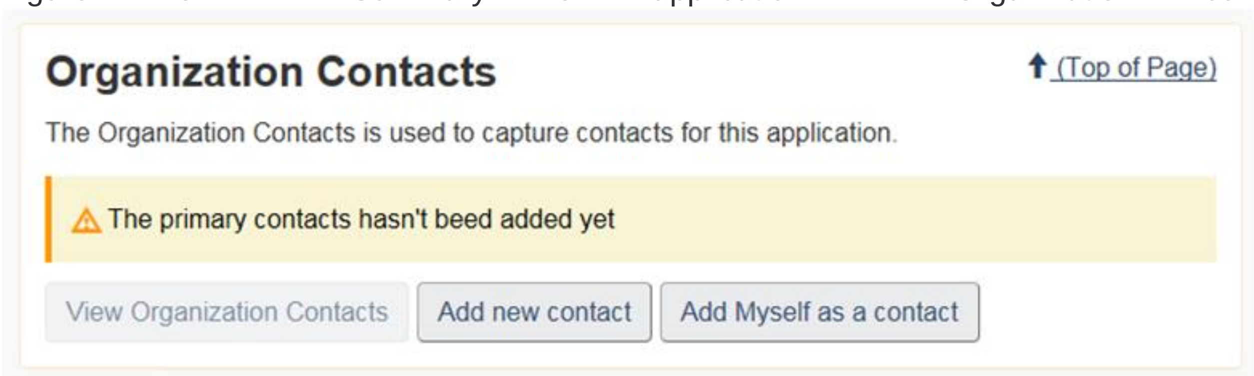
- Click My GCOS Account in the top menu
- Click My Organizations
- Click the organization name for which you want to add a mailing address
- Click Manage Addresses
- Click Add Address
- Once saved, the address will display on the Mailing Address screen
- To return to your application, click My Organizations 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



Text description of Figure 15
The Organization Contacts screen is used to add contacts to your application.

Add new Contact: (Figure 15)

- Click Add new contact
- Complete all required fields
- Click Save

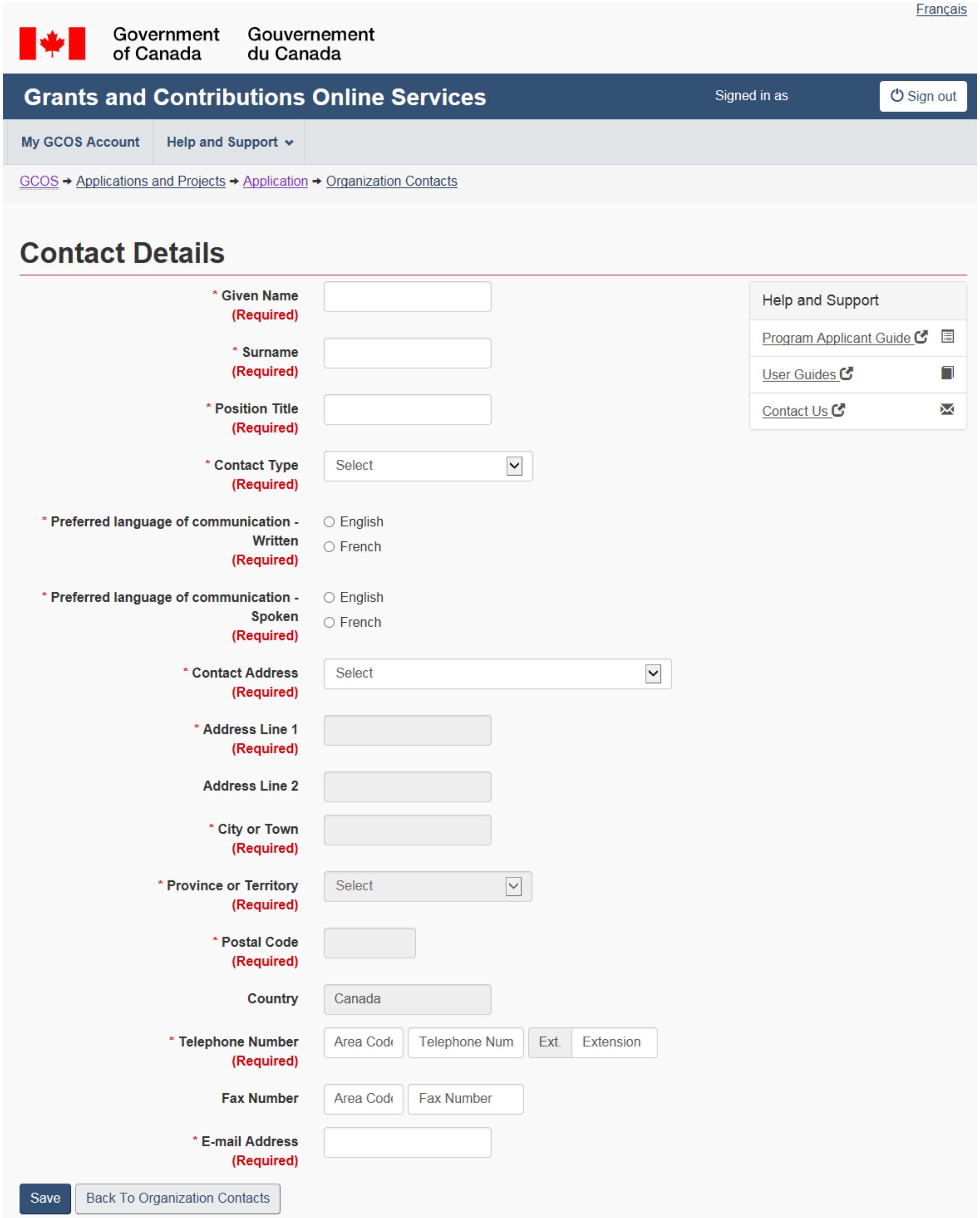
Back to Organization contact will bring you to the Organization Contacts screen (Figure 17)

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

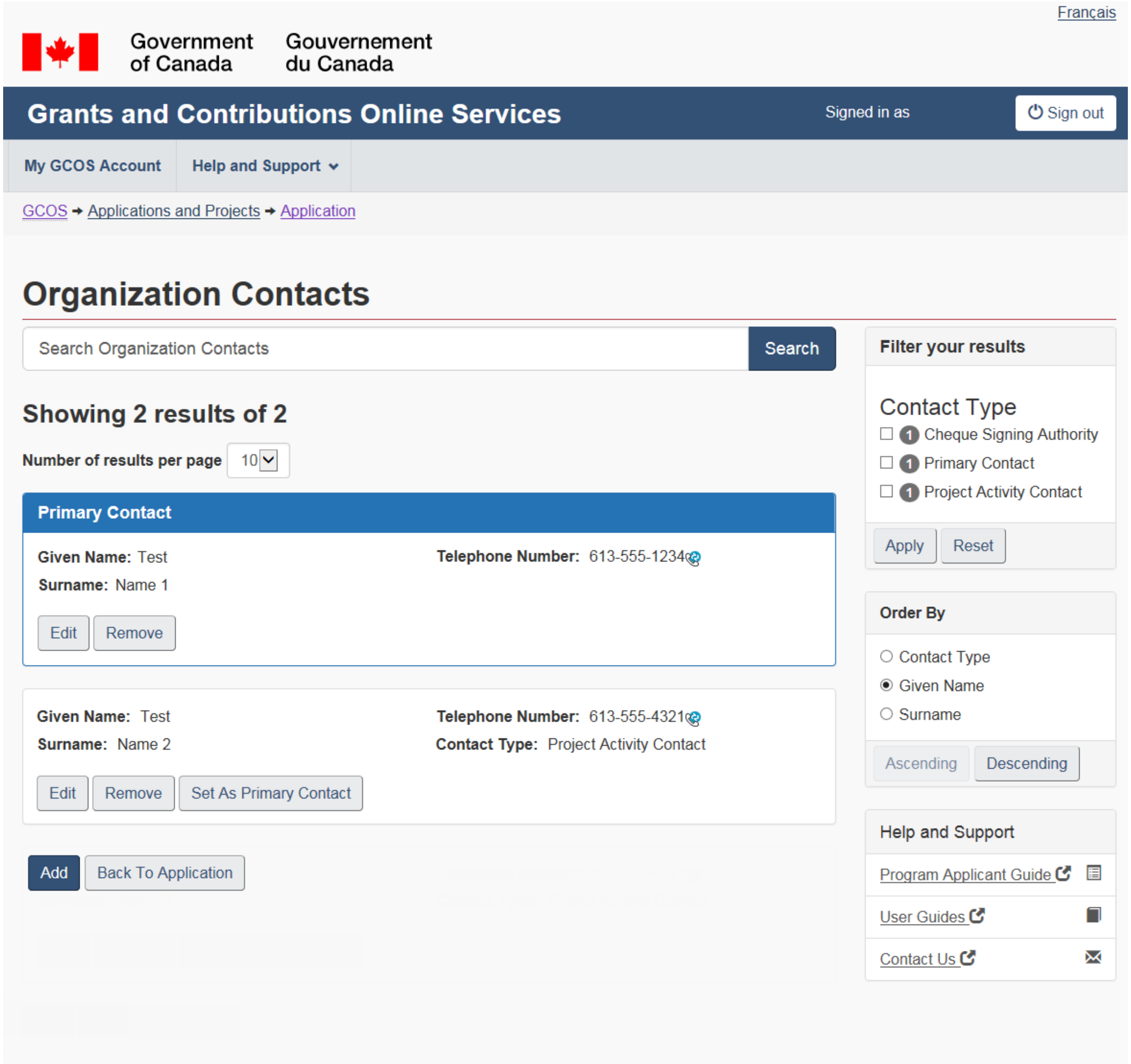
Figure 16 – Contacts details screen



Text description of Figure 16

The Contact Details screen is used to enter the details of the contact person whom the department communicates with regarding the application or any consequent agreement.

Figure 17 –Organization contact summary screen



Text description of Figure 17

The Organization Contacts screen provides you with a summary of all contacts for this application.

Back to Application will bring you to the Summary of application screen

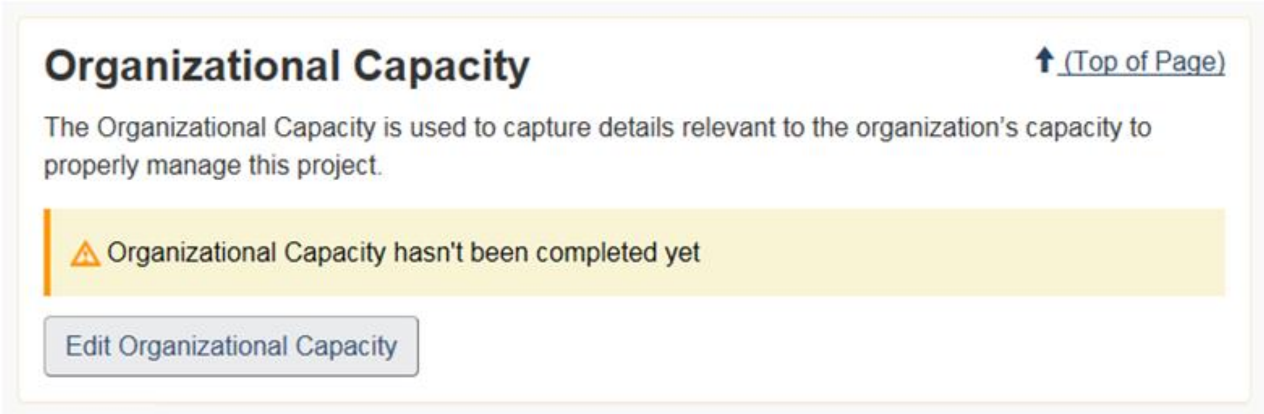
2.6 Organizational capacity

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

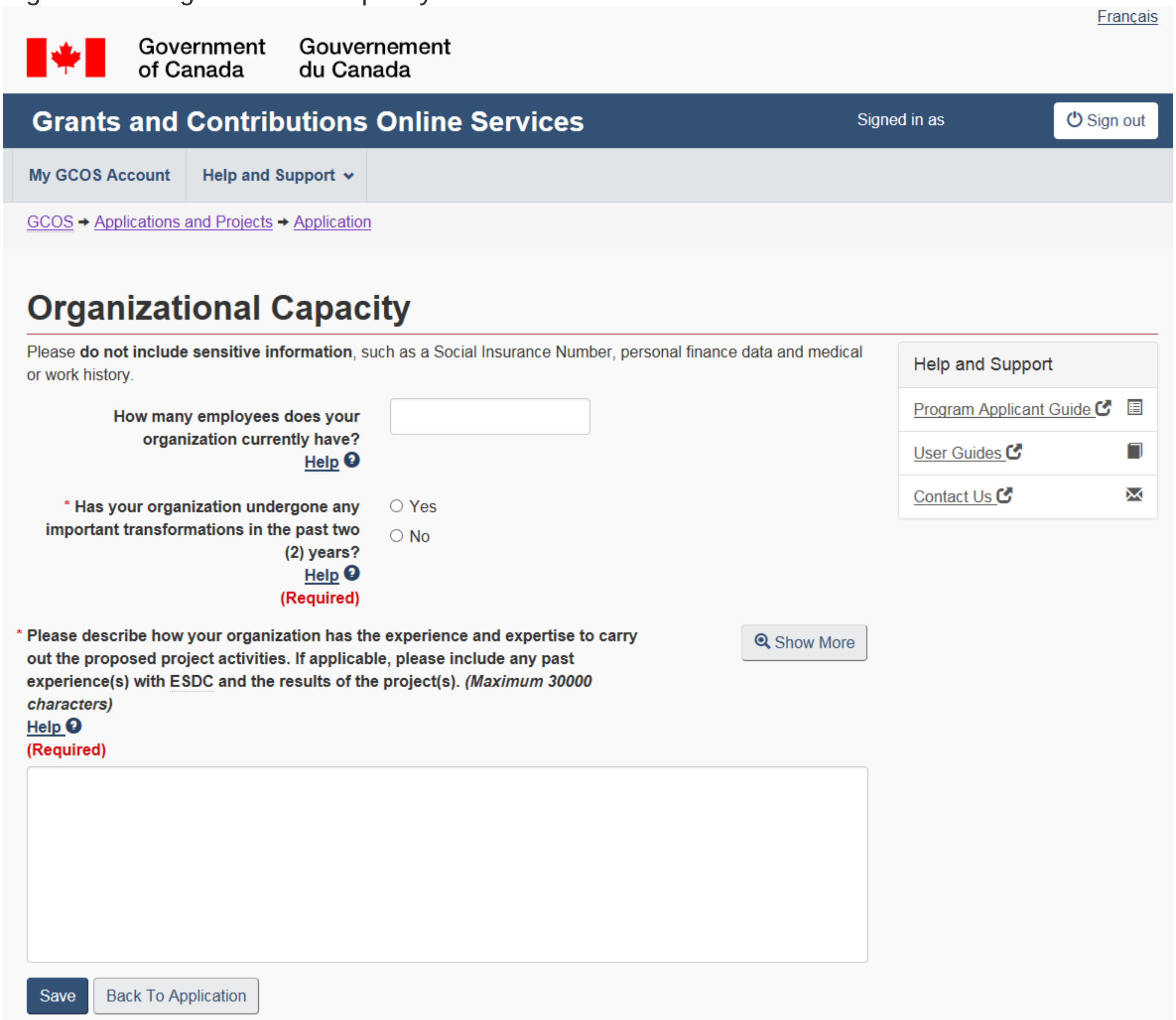
Figure 18 – Summary of application - Organizational capacity



Text description of Figure 18

The Organizational Capacity screen is used to enter details regarding your organization's capacity to manage this project.

Figure 19 – Organizational capacity screen

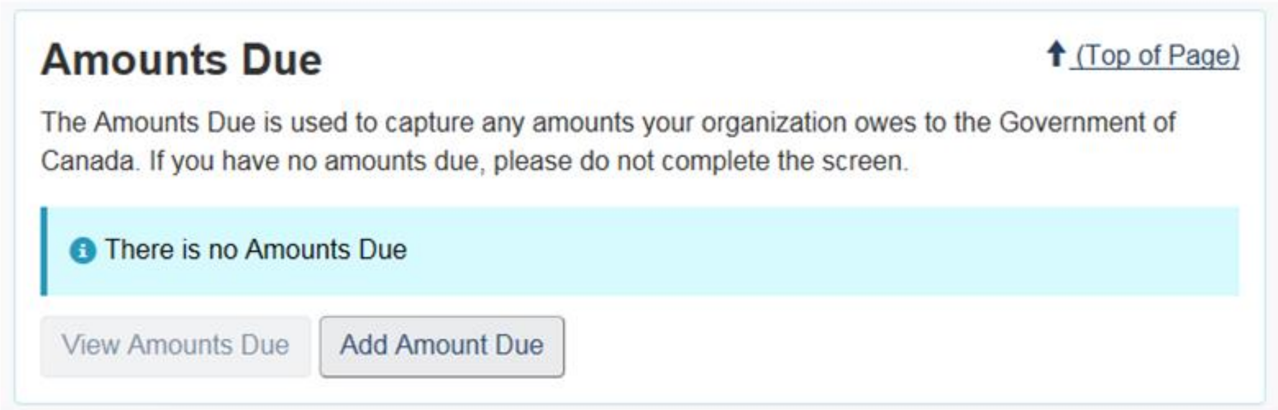


Text description of Figure 19
The Organizational Capacity screen is used to enter details regarding your organization's capacity to manage this project.

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

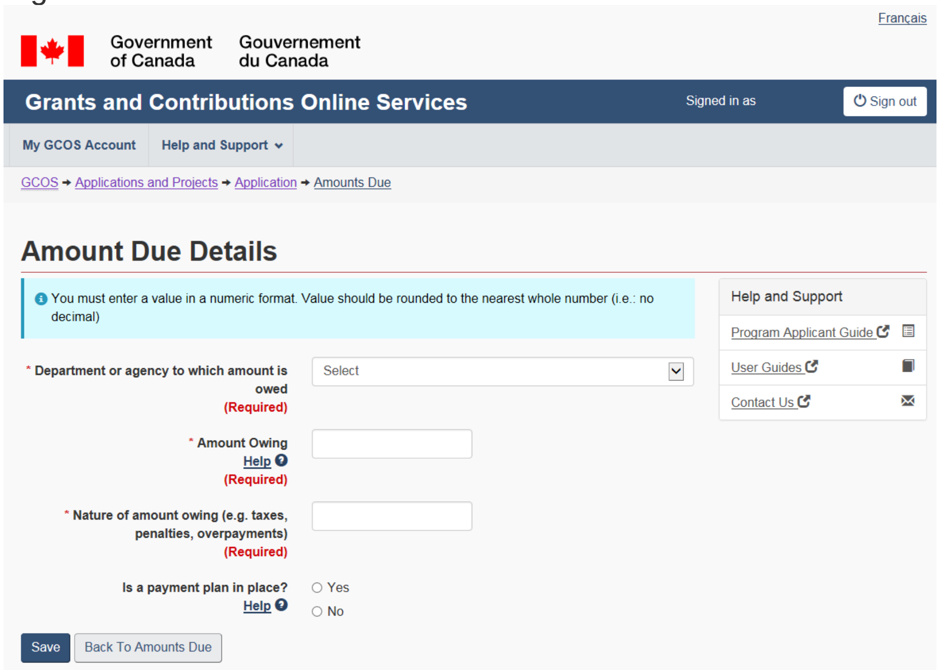


Text description of Figure 20
The Amounts Due screen is used to declare any amounts your organization owes to the Government of Canada.

- Click Add amount due (Figure 20)
- Complete all required fields (Figure 21)
- Click Save

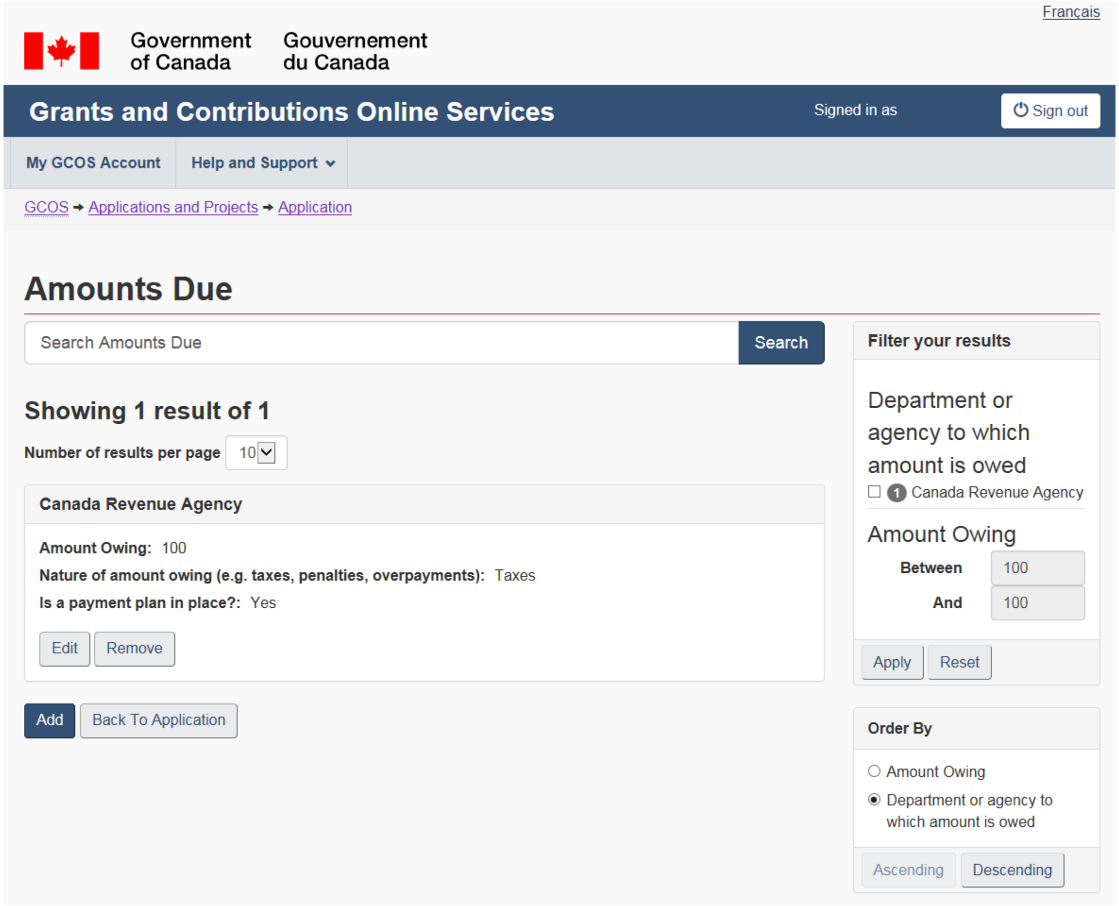
Back to Amounts Due brings you to the summary of your amounts due (Figure 22)

Figure 21 – Amounts due details



Text description of Figure 21
The Amounts Due screen is used to declare any amounts your organization owes to the Government of Canada.

Figure 22 – Amounts due summary



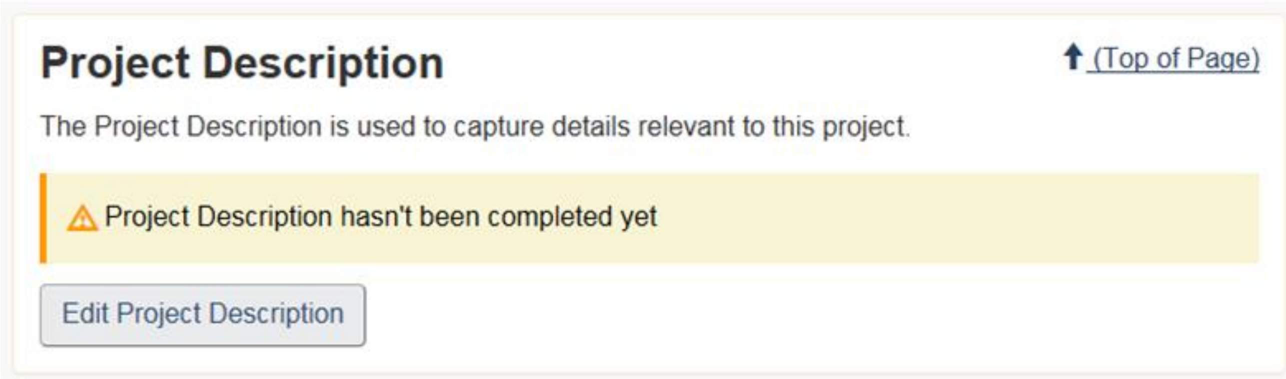
Text description of Figure 22
The Amounts Due Summary screen provides a summary of any amounts your organization owes to the Government of Canada.

- 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.

Figure 23 – Summary of application - Project description

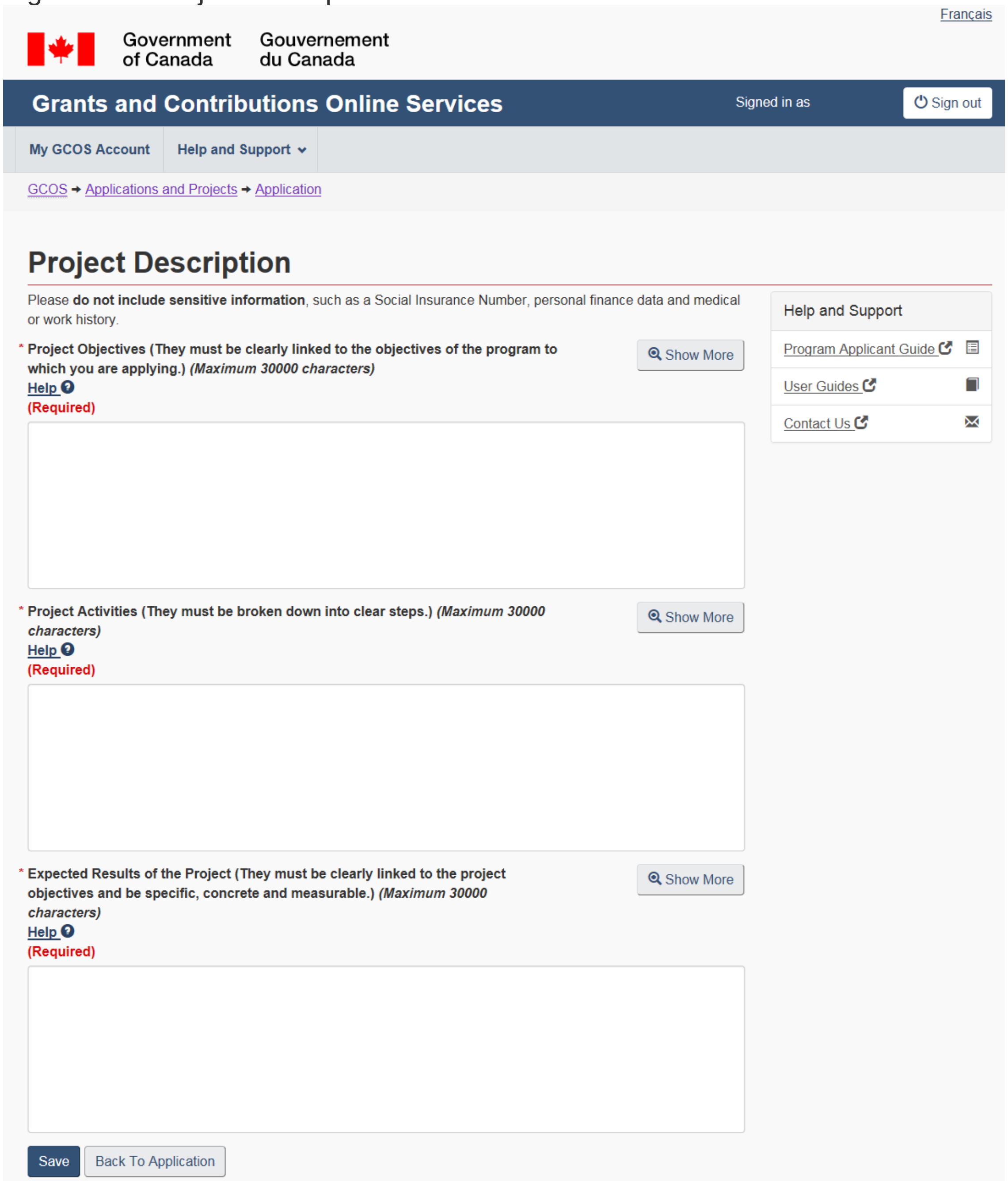


Text description of Figure 23
The Project Description screen is used to enter details relevant to your project.

- 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

Figure 24 – Project description screen



Text description of Figure 24

The Project Description screen is used to enter details relevant to your project.

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

Text

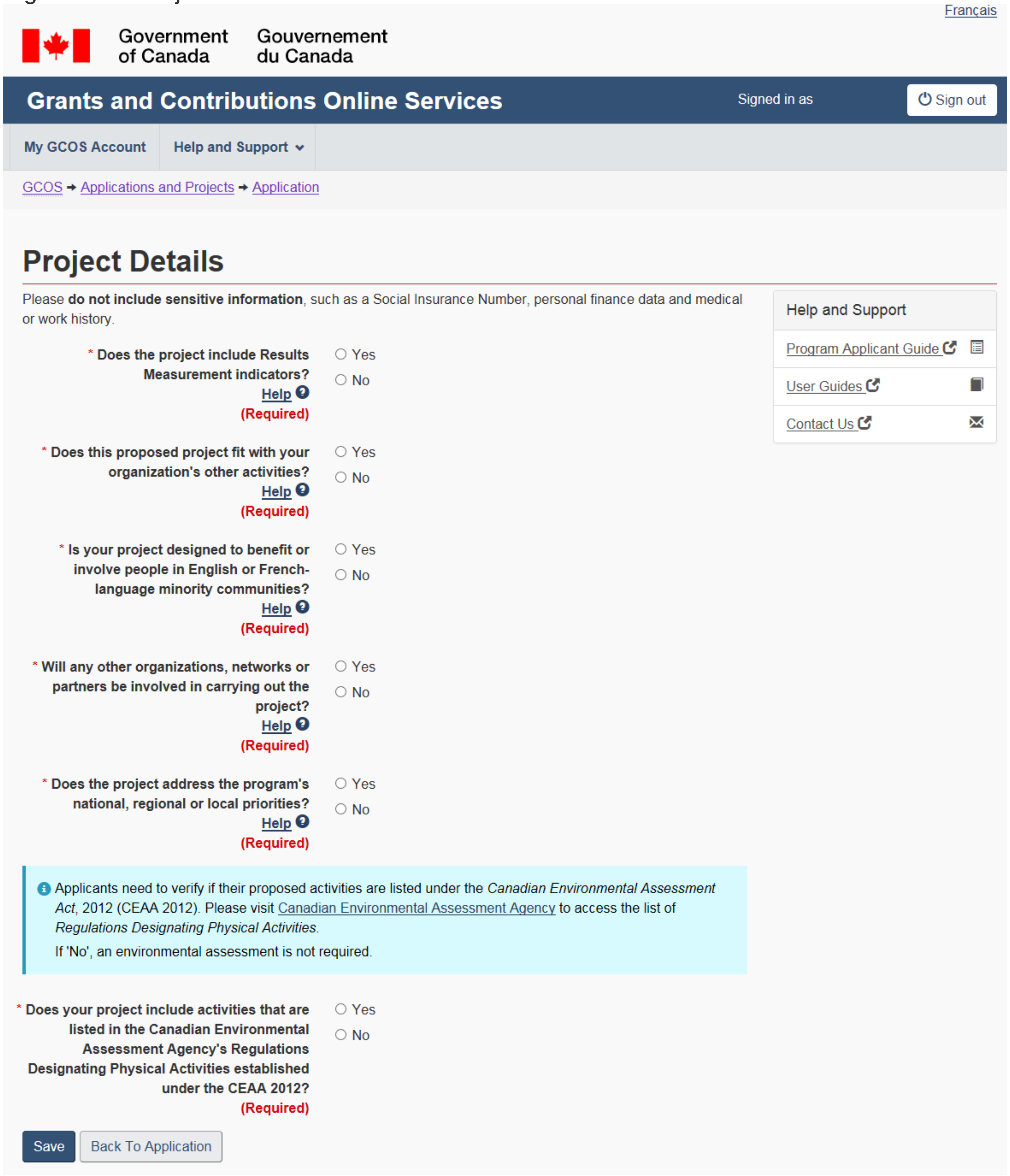
Text description of Figure 25

The Project Details screen is used to provide details on the project's activities and priorities they address.

- 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



Français

Government of Canada Gouvernement du Canada

Grants and Contributions Online Services

Signed in as

Sign out

My GCOS 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?** Help **(Required)**
- Yes
- No

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

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

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

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

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 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?** **(Required)**
- Yes
- No

Save | Back To Application

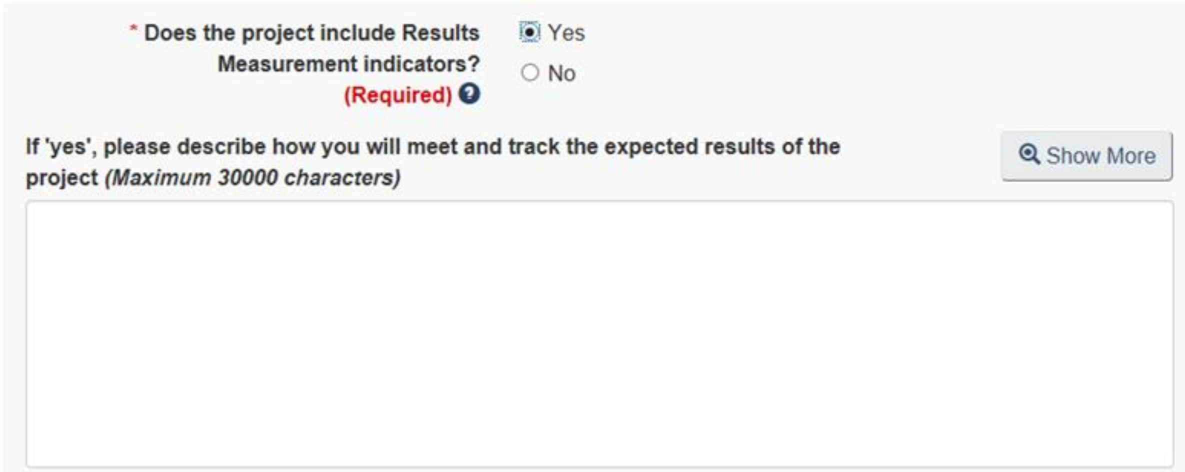
Help and Support

- Program Applicant Guide
- User Guides
- Contact Us

Text description of Figure 26

The Project Details screen is used to provide details on the project's activities and priorities they address.

Figure 27 – Project details screen – Text box



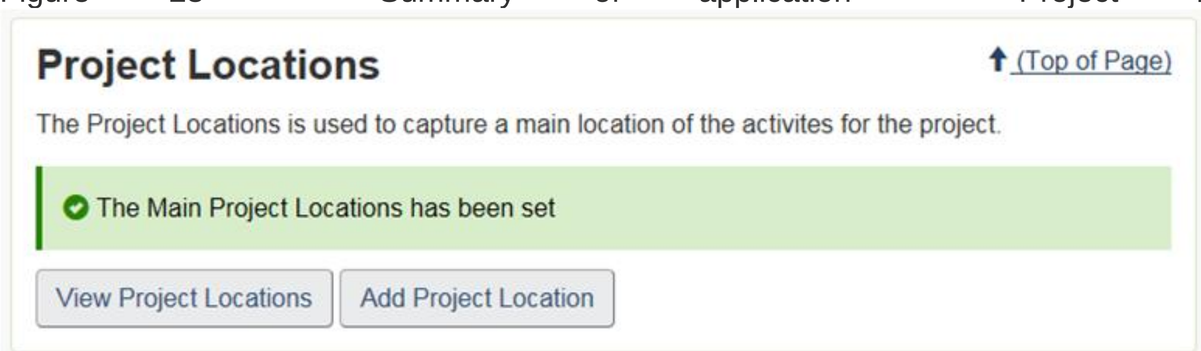
Text description of Figure 27

The Project Details Text boxes are used to provide details on how the project's activities and priorities they address meet all the different criteria.

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 (Figure29).

Figure 28 – Summary of application - Project locations



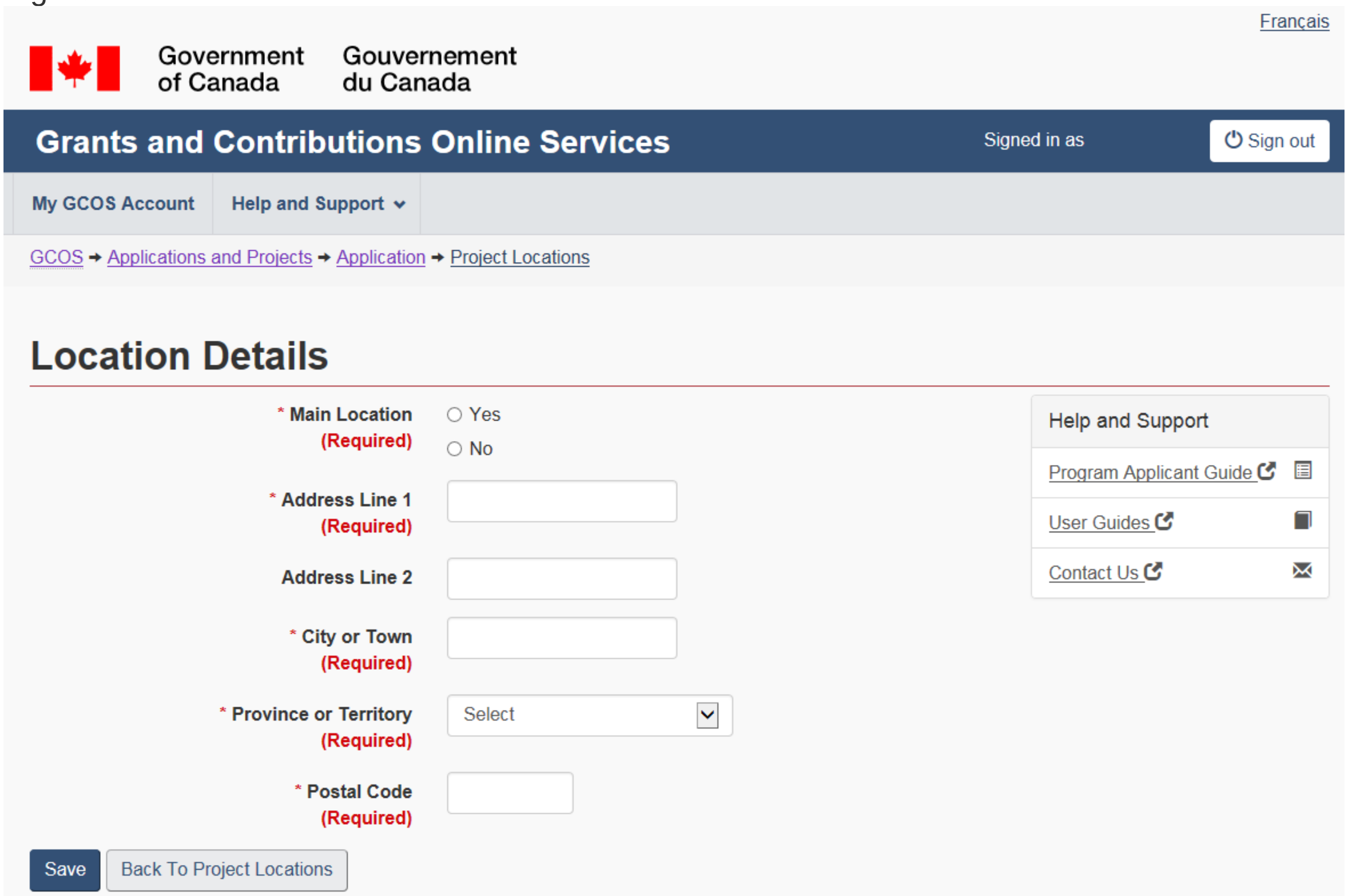
Text

Text description of Figure 28

The Project Locations screen is used to add a location of activities.

- Click Add Project location (Figure 28) which will direct you to the Location Details Screen (Figure 29)
- Complete all required fields
- Click Save

Figure 29 – Location details screen

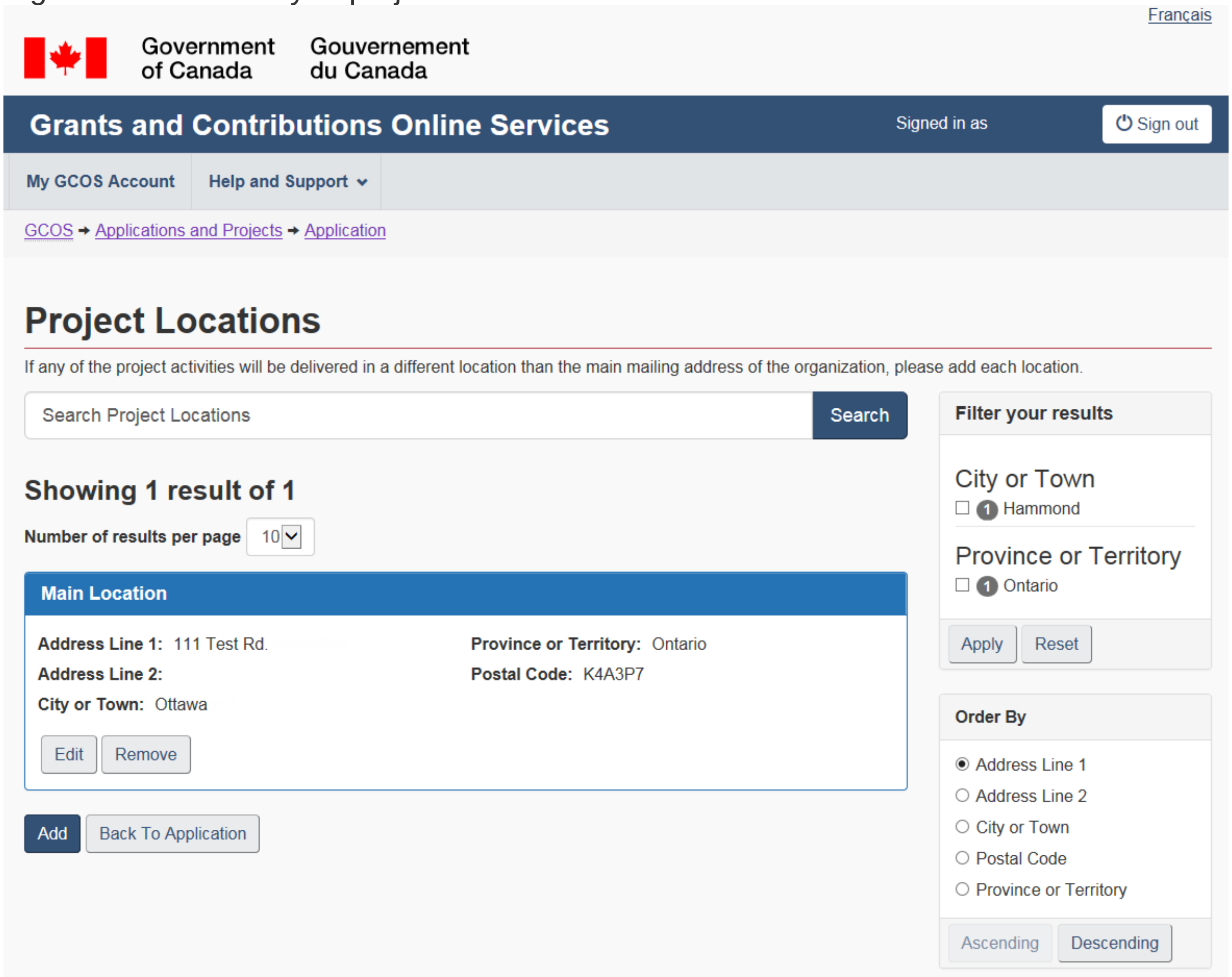


Text description of Figure 29

The Location Details screen is used to add a location of activities.

Back to Project Locations brings you to the summary of your projects locations (Figure 30)

Figure 30 – Summary of project locations



Text description of Figure 30

The Project Locations screen is used to add a location of activities. The displayed address is your organization's main mailing address.

- 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

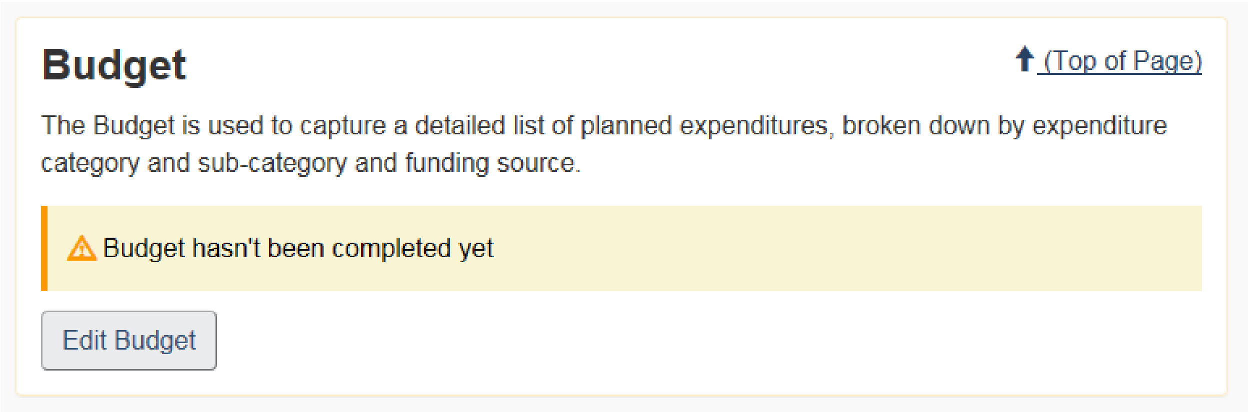
Provide a detailed list of planned expenditures, broken down by expenditure category, sub-category and funding source under the Budget screen (Figure 32). The Department will use this information:

- 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.

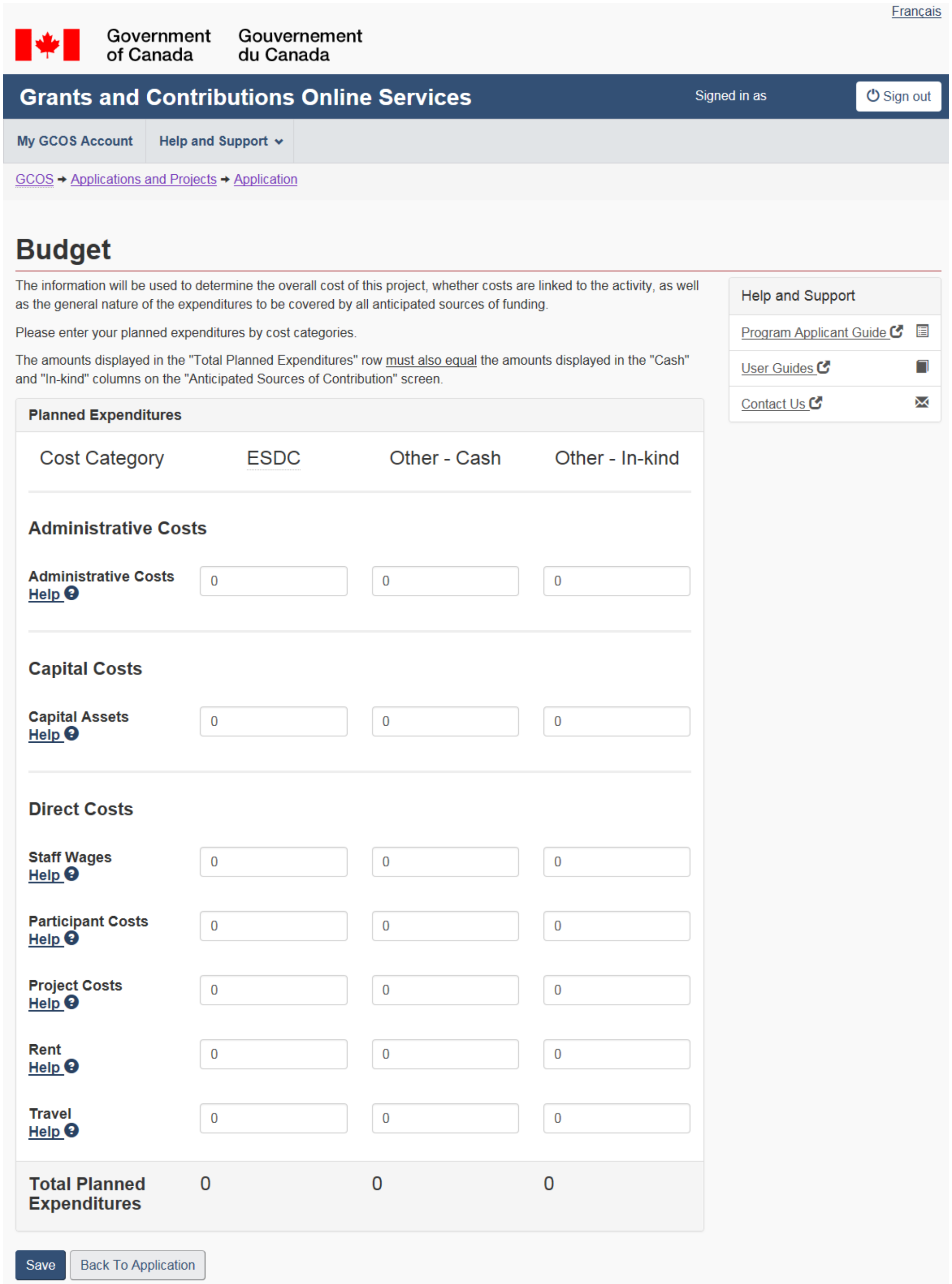
Figure 31 – Summary of Application - Budget



Text description of Figure 31:
The Budget screen is used to provide a detailed list of planned expenditures.

- 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



Text description of Figure 32:

The Budget screen is used to provide a detailed list of planned expenditures, broken down by

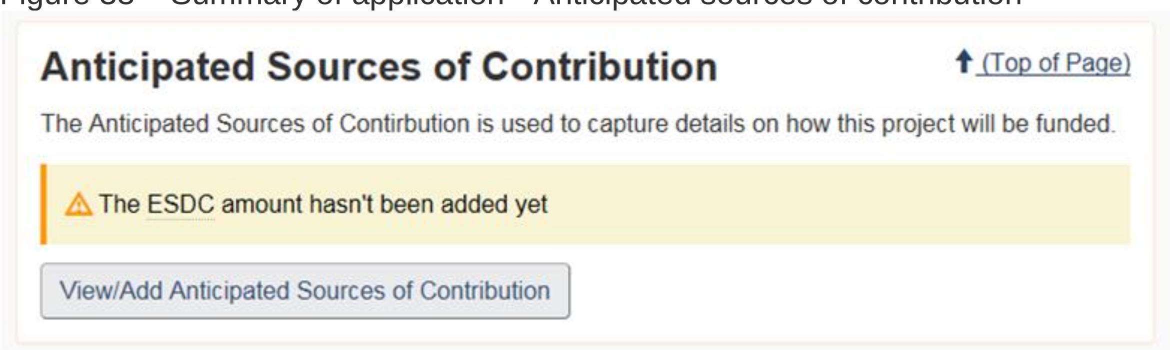
2.12 Anticipated sources of contribution

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

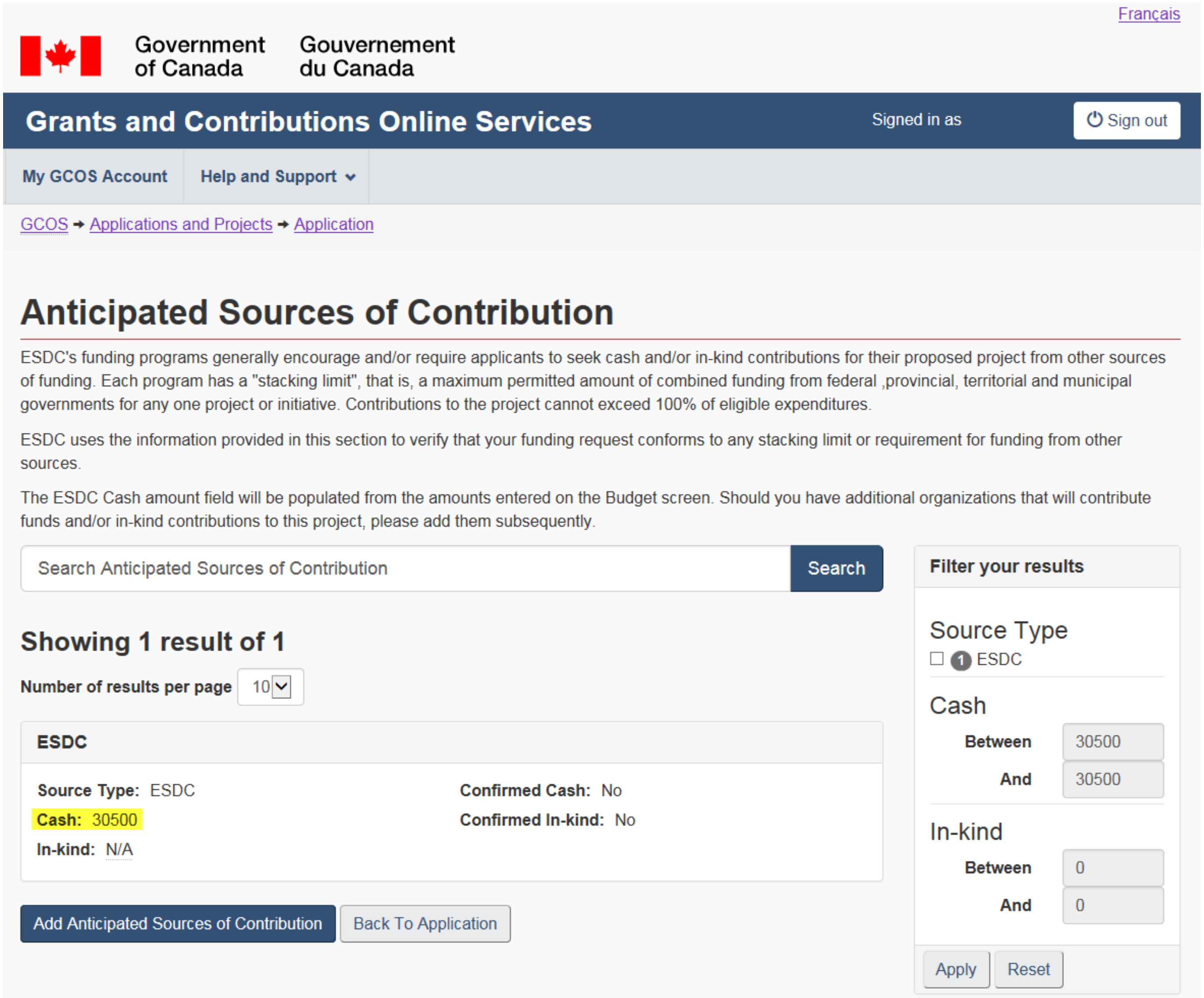


Text description of Figure 33
The Anticipated Sources of Contribution screen is used to provide details on how this project will be funded.

- 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

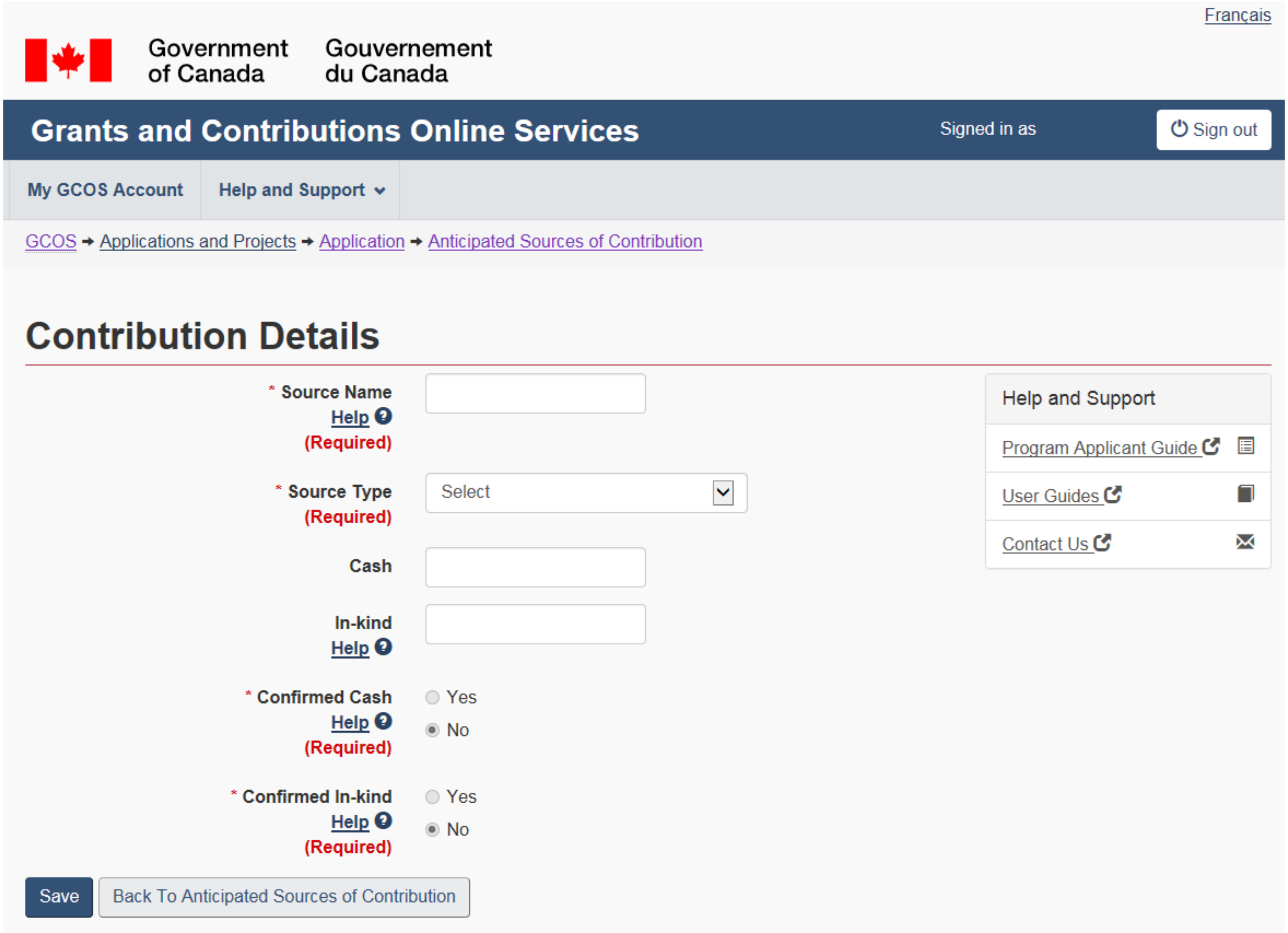
Figure 34 – Anticipated sources of contribution screen



Text description of Figure 34

The Anticipated Sources of Contribution screen is used to provide details on how this project will be funded.

Figure 35 – Anticipated sources of contribution screen

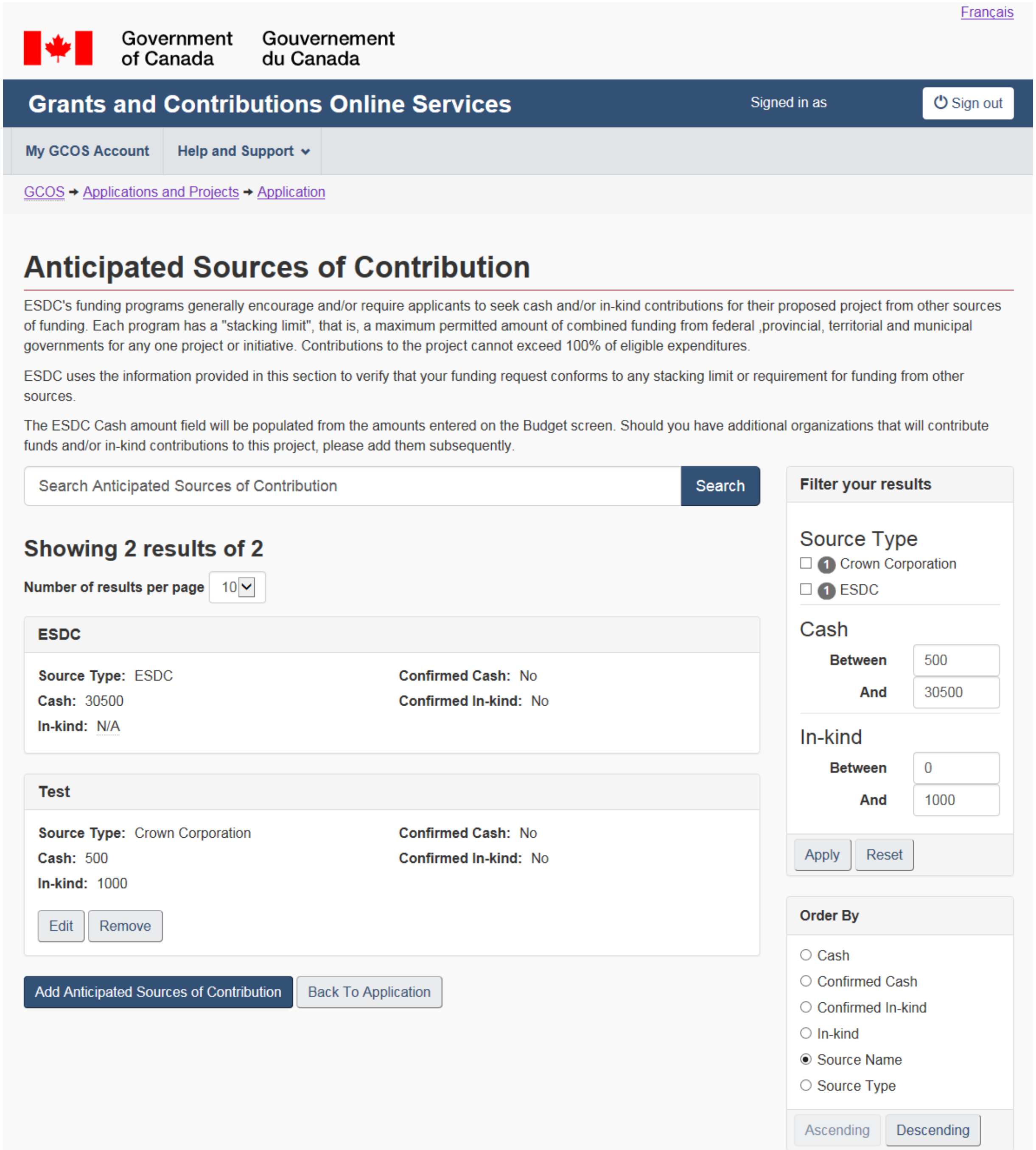


Text description of Figure 35

The Contribution Details screen is used to provide details on how this project will be funded by sources other than ESDC.

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



Text description of Figure 36

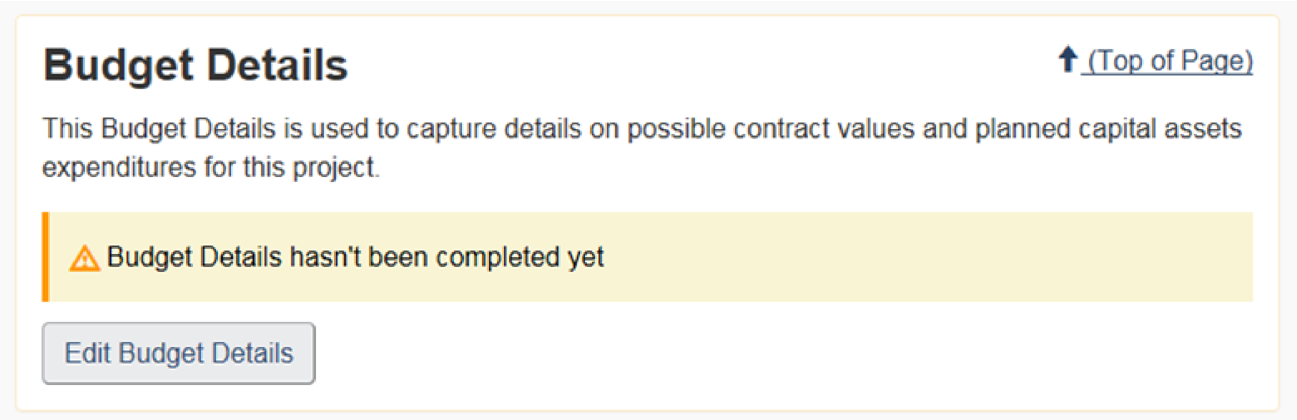
The Anticipated Sources of Contribution Summary screen is used to provide a summary of all anticipated sources of contributions for this project.

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

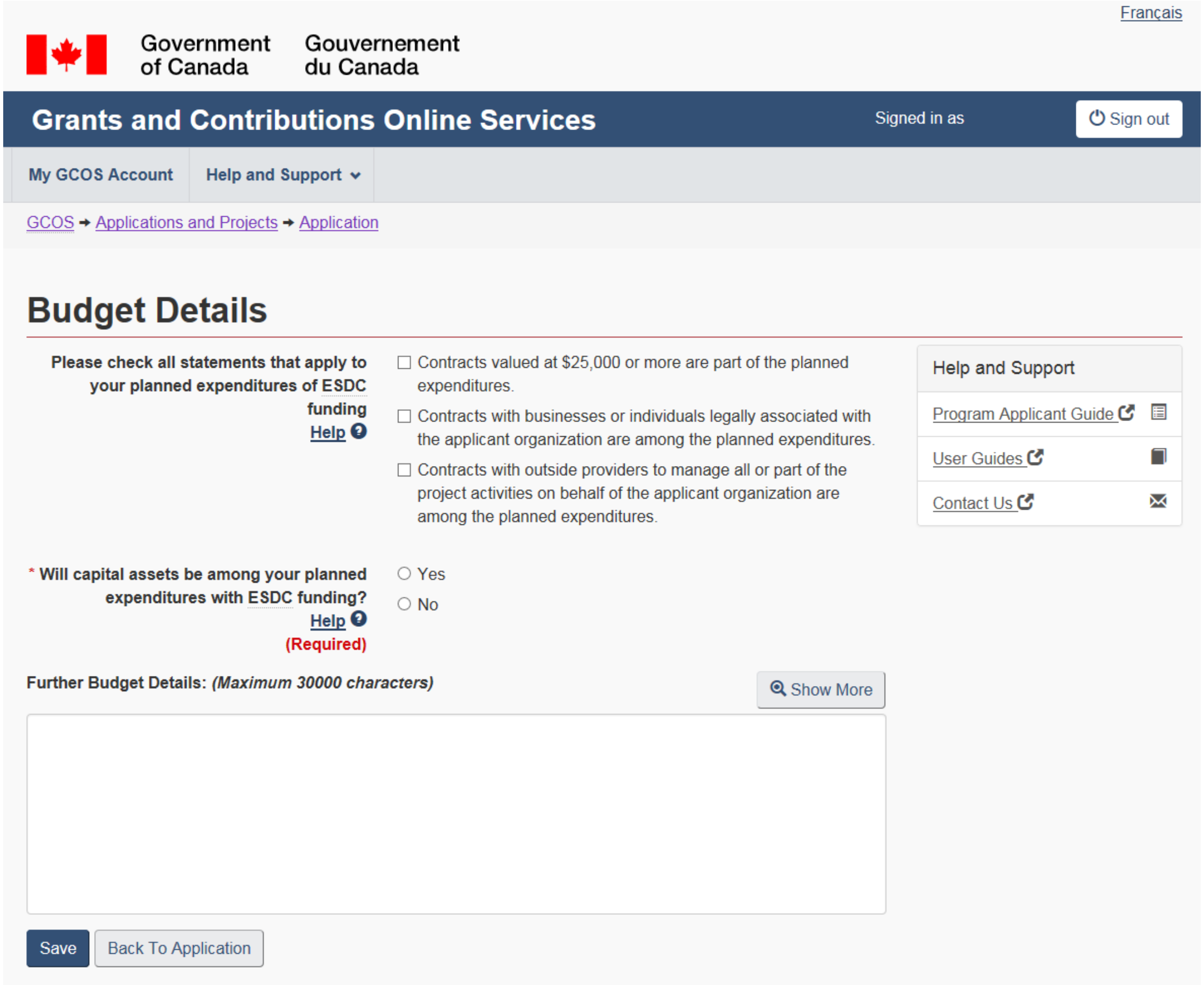


Text description of Figure 37
The Budget Details screen is used to provide details on possible contract values and planned capital assets expenditures for your project.

- 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



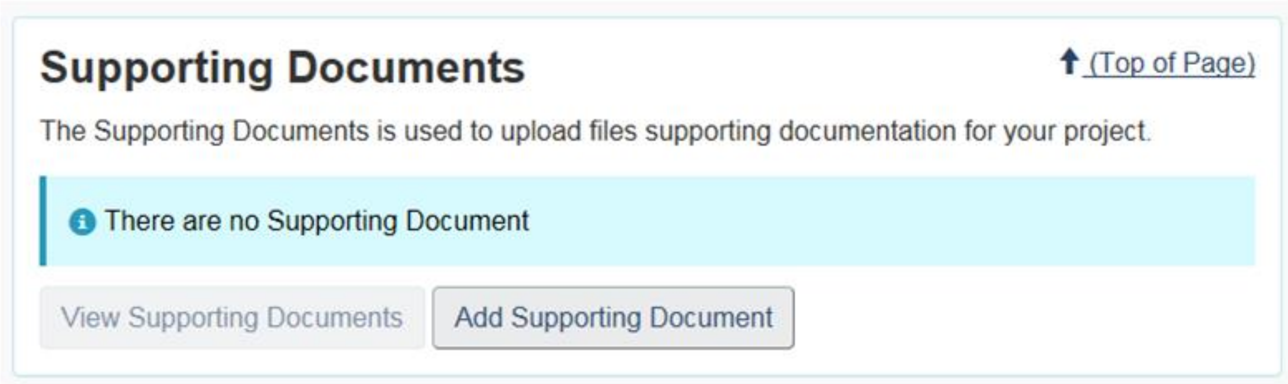
Text description of Figure 38

The Budget Details screen is used to provide details on possible contract values and planned capital assets expenditures for your project.

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.

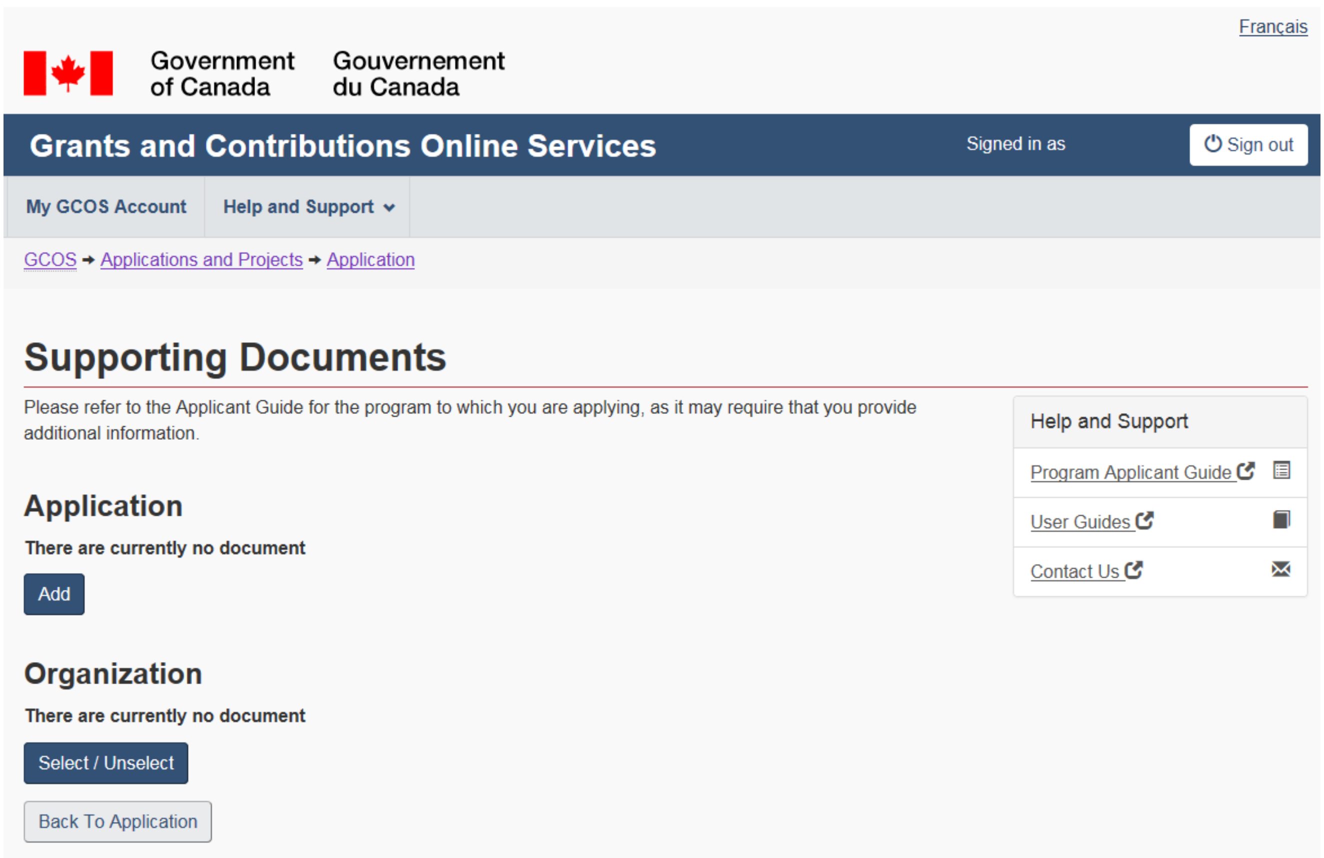
Figure 39 – Summary of application - Supporting documents



Text description of Figure 39
The Supporting Documents screen is used to view, add and manage documents uploaded as supporting documentation for your application.

Click Add Supporting Document (Figure 39)

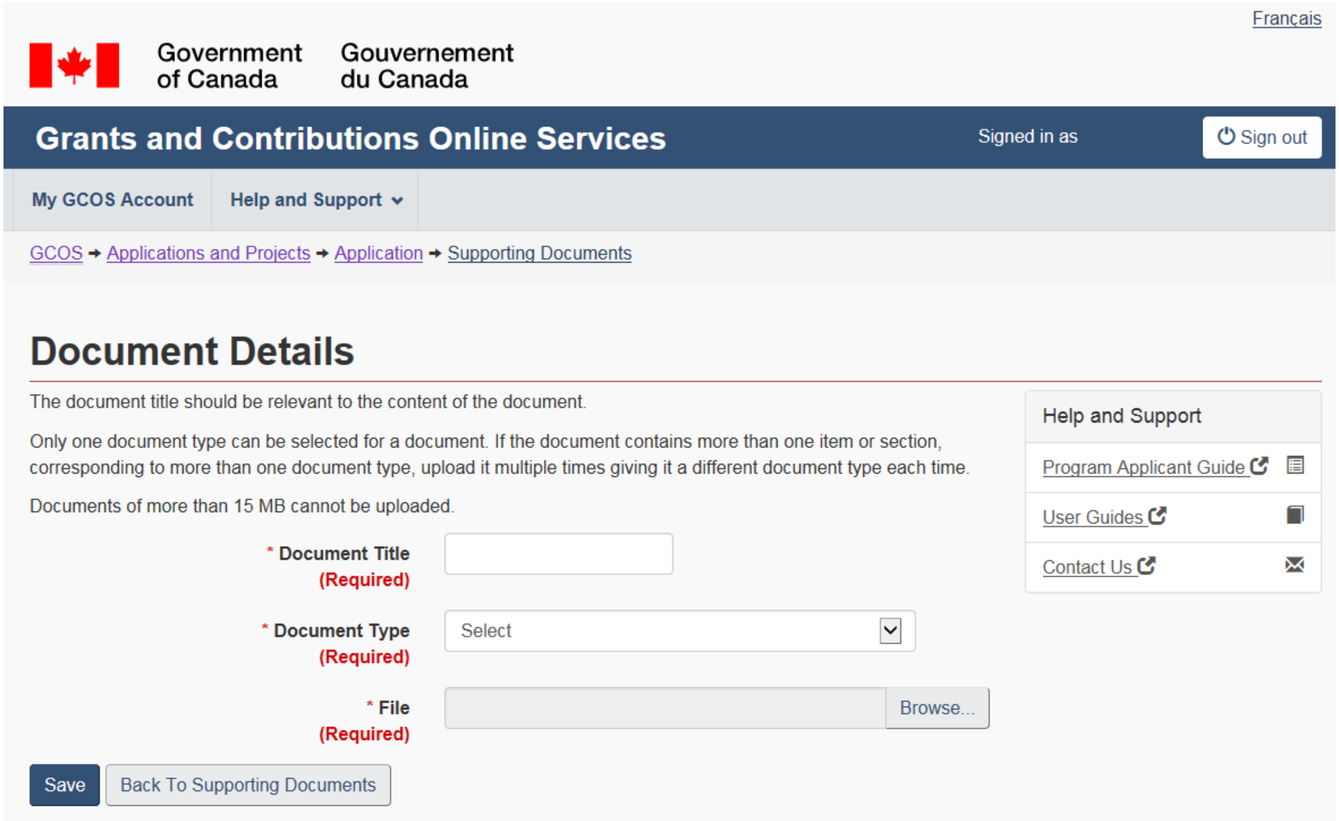
Figure 40 – Supporting documents screen



Text description of Figure 40
The Supporting Documents screen is used to view, add and manage documents uploaded as supporting documentation for your application.

- 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



Text description of Figure 41

The Document Details screen is used to provide details and upload a document as supporting documentation for your application.

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

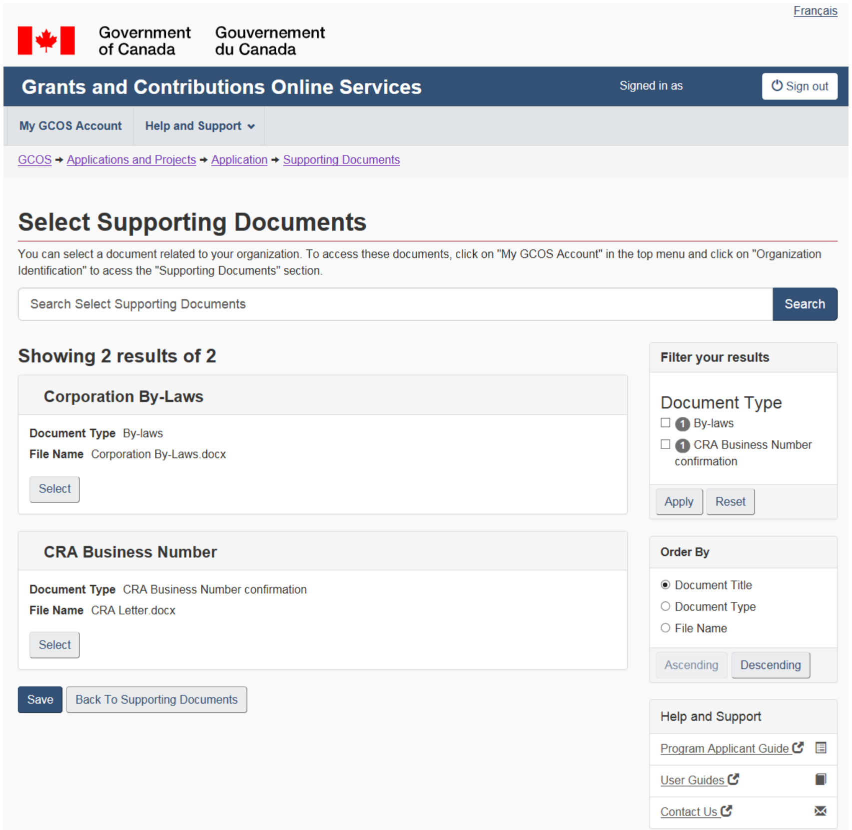
- Once saved, the document will appear on the Select Supporting Documents screen (Figure 42).

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



Text description of Figure 42
The Select Supporting Documents screen is used to select or unselect documents previously added to your organization’s profile as supporting documentation for your application.

- 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

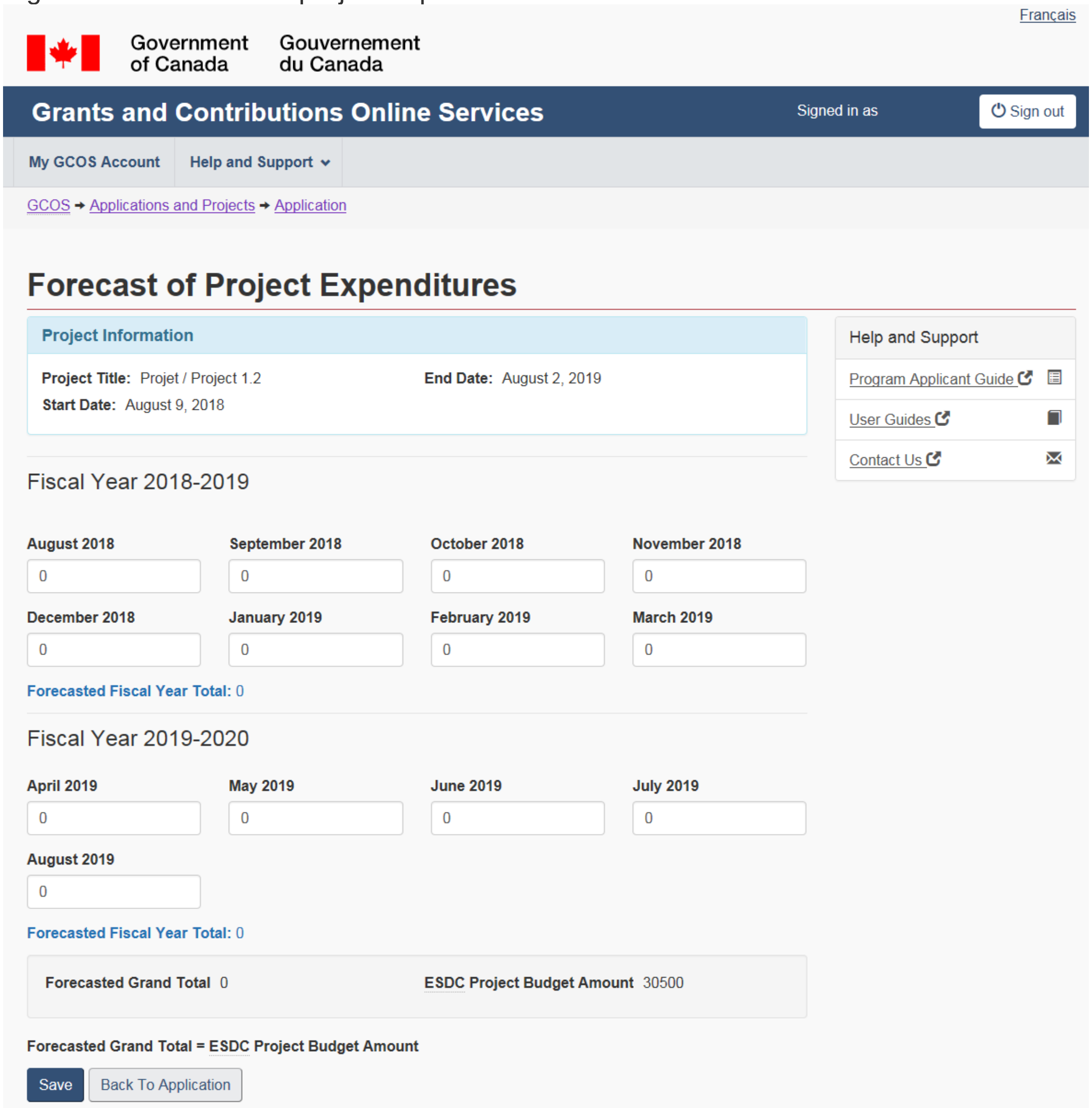
Text description of Figure 43

The Forecast of Project Expenditures screen is used to capture the monthly financial requirements for your project.

- 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



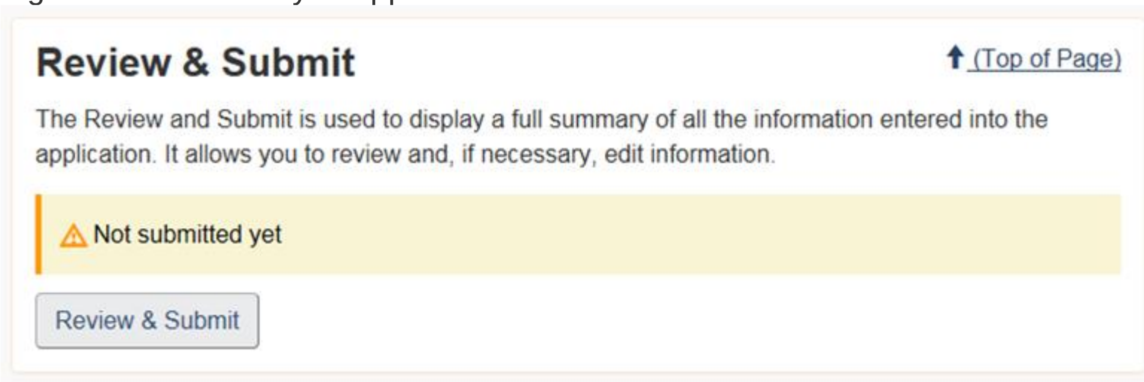
Text description of Figure 44

The Forecast of Project Expenditures screen is used to capture the monthly financial requirements for your project per month and per fiscal year.

2.16 Review and 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 and submit



Text description of Figure 45

The Review and Submit screen provides a full summary of all the information entered into your application.

- Click Review & Submit (Figure 45)

Figure 46 – Review & submit screen (One signatory required)

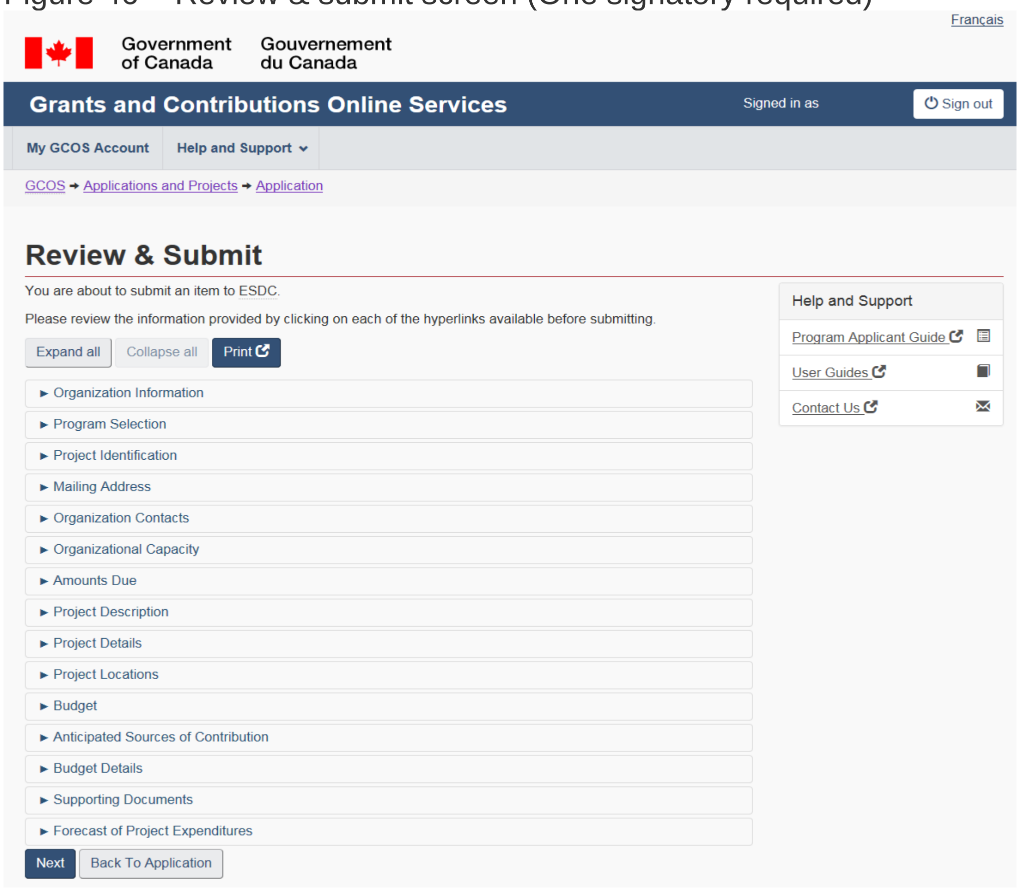
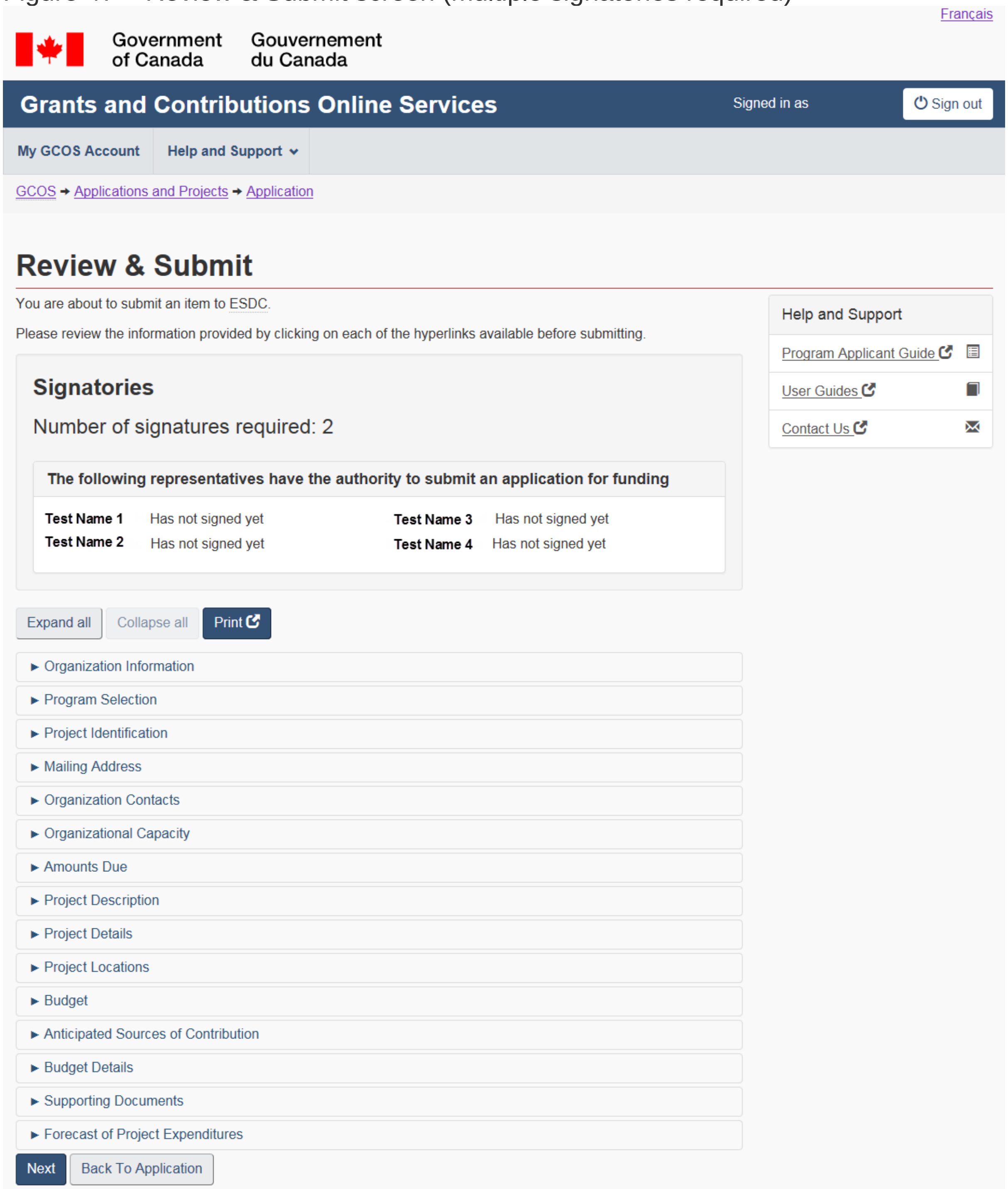


Figure 47 – Review & Submit screen (multiple signatories required)



Text description of Figures 46 & 47

The Review and Submit screen provides a full summary of all the information entered into your application.

Review & Submit screen (Figure 46 & 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 & 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:

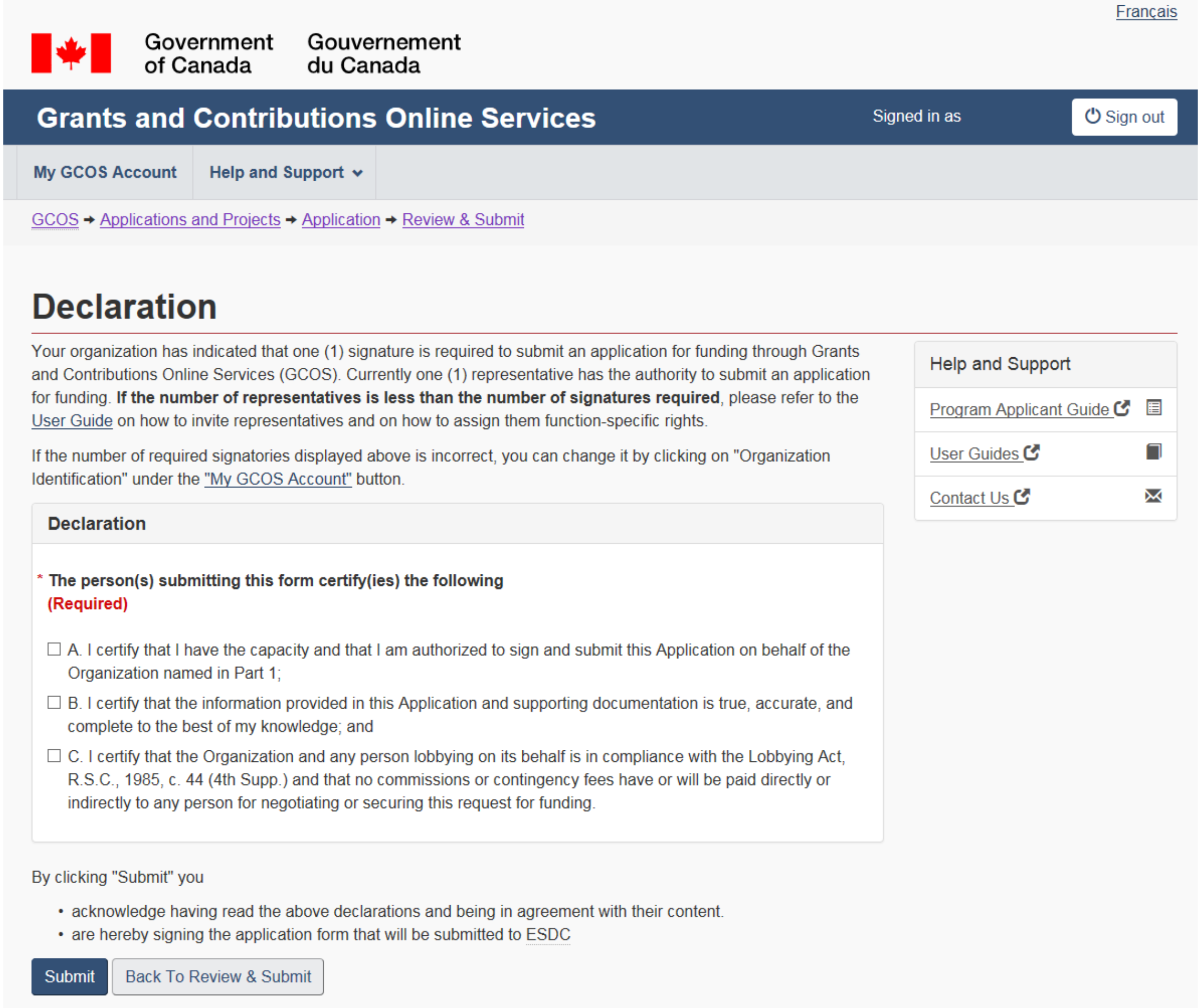
- Click My GCOS Account in the top menu
- Click Organization Identification
- Click Edit Organization Identification
- Scroll down to the Signatories Section, change the number of signatories required to submit an application
- Click save

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.

Figure 48 – Declaration screen (one signatory required)

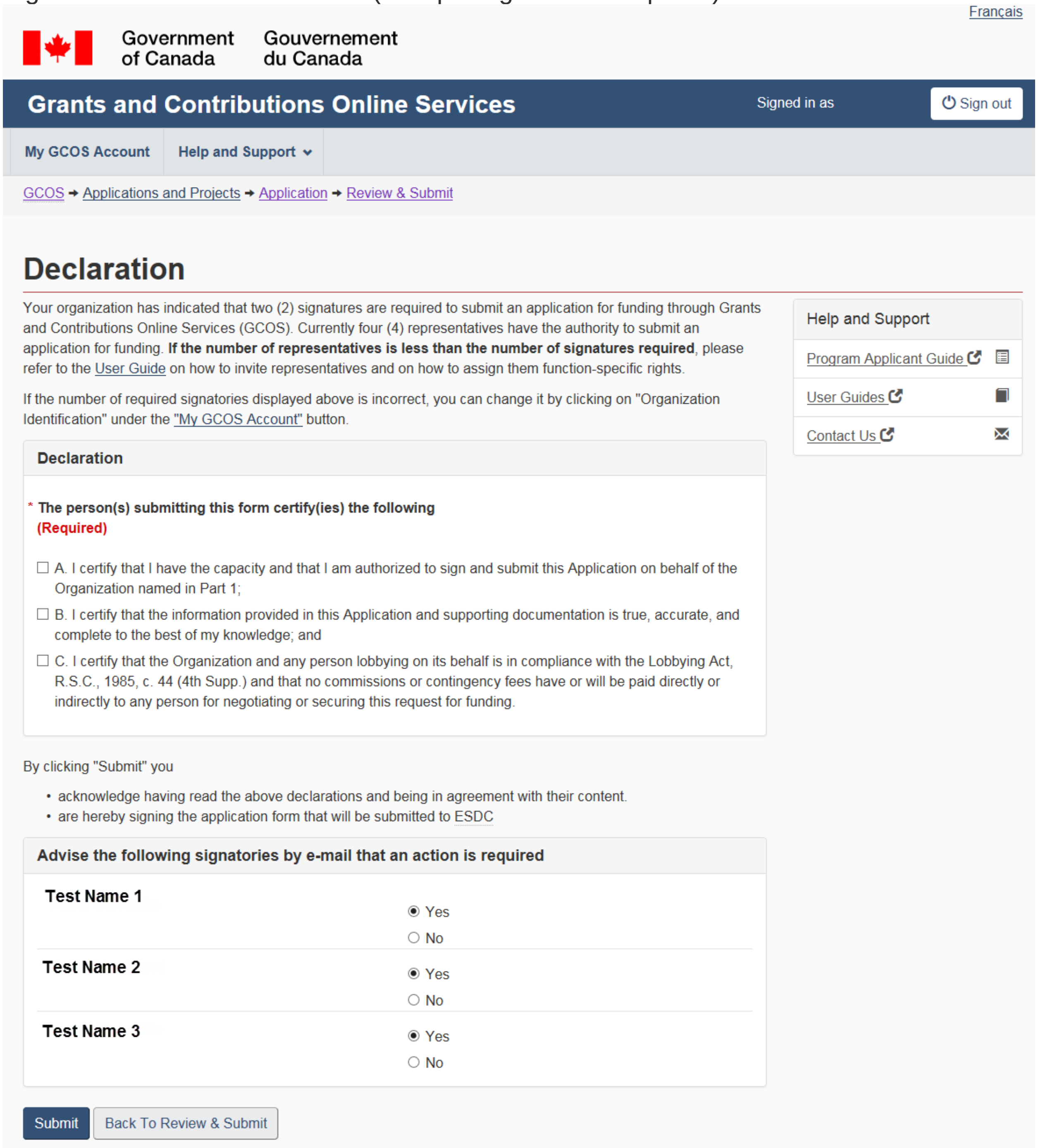


Text description of Figure 48
The Declaration screen is used to certify the user's authority.

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)



Français

Government of Canada Gouvernement du Canada

Grants and Contributions Online Services

Signed in as

Sign out

My GCOS Account Help and Support

GCOS → Applications and Projects → Application → Review & Submit

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

Test Name 1 ◉ Yes ○ No

Test Name 2 ◉ Yes ○ No

Test Name 3 ◉ Yes ○ No

Submit | Back To Review & Submit

Help and Support

Program Applicant Guide

User Guides

Contact Us

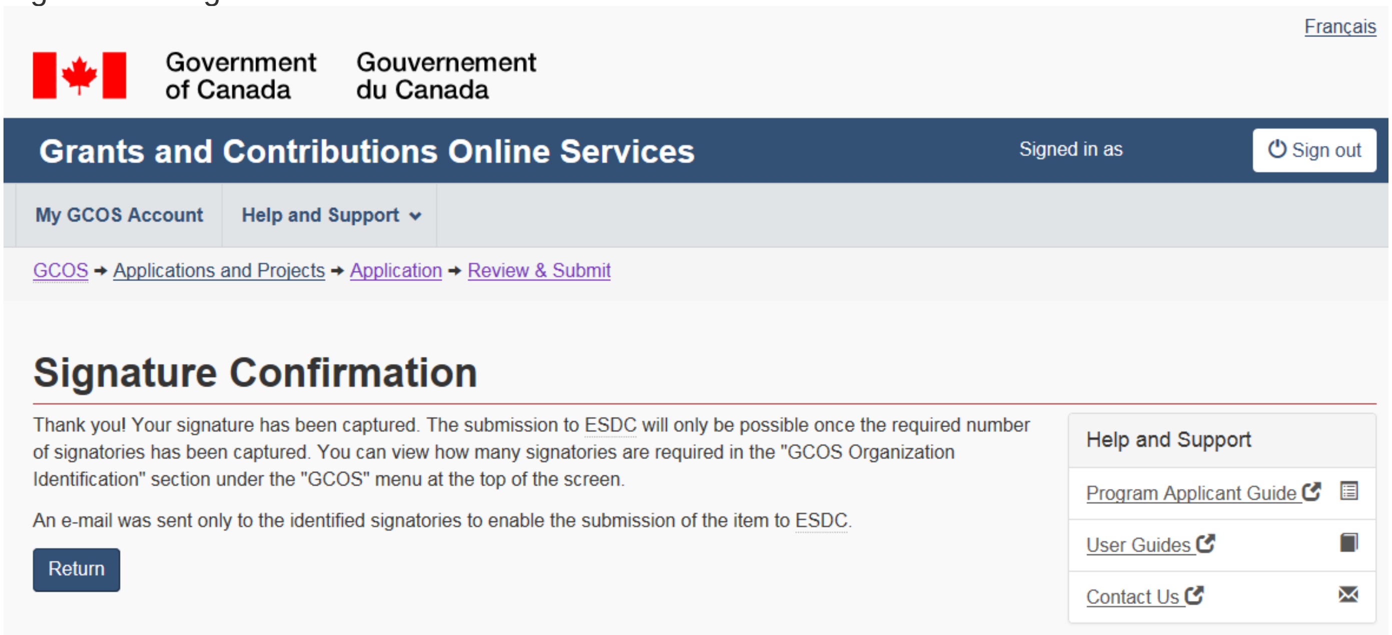
Text description of Figure 49

The Declaration screen is used to certify the user’s authority.

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).

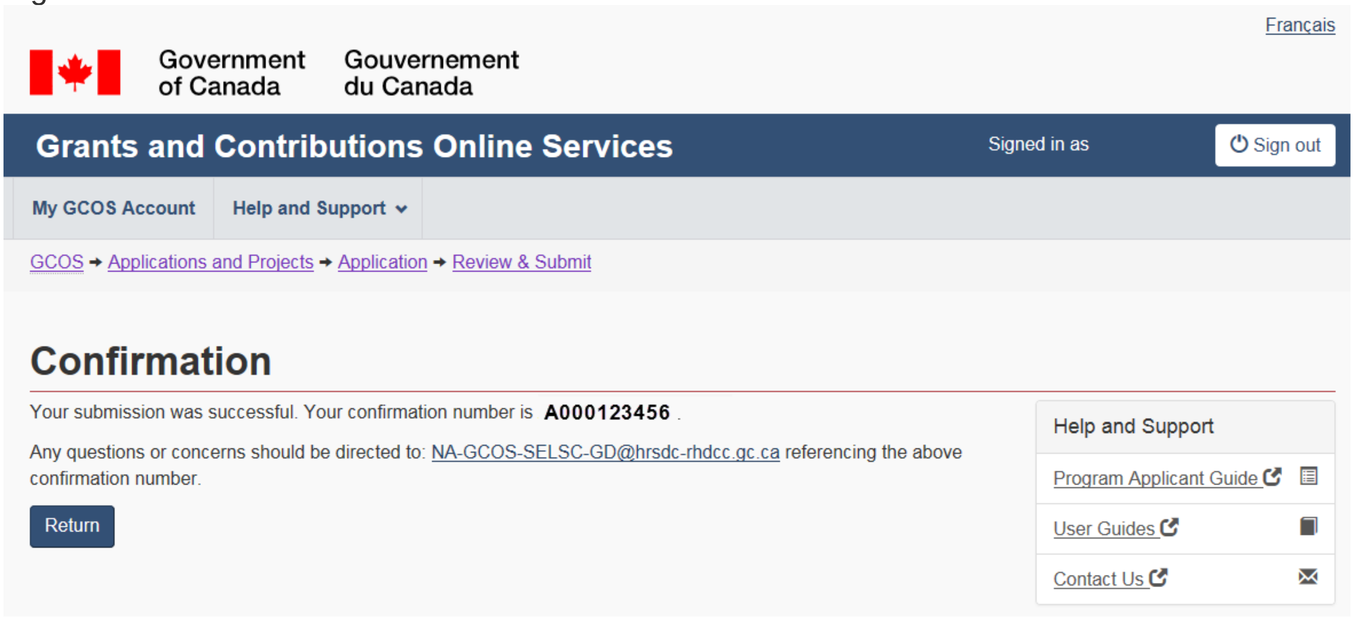
Figure 50 – Signature confirmation screen



Text description of Figure 50

The Signature Confirmation Screen confirms that your signature has been captured by the system.

Figure 51 – Confirmation screen



Text description of Figure 51

The Confirmation screen provides you with a confirmation number that your application was successfully submitted.

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

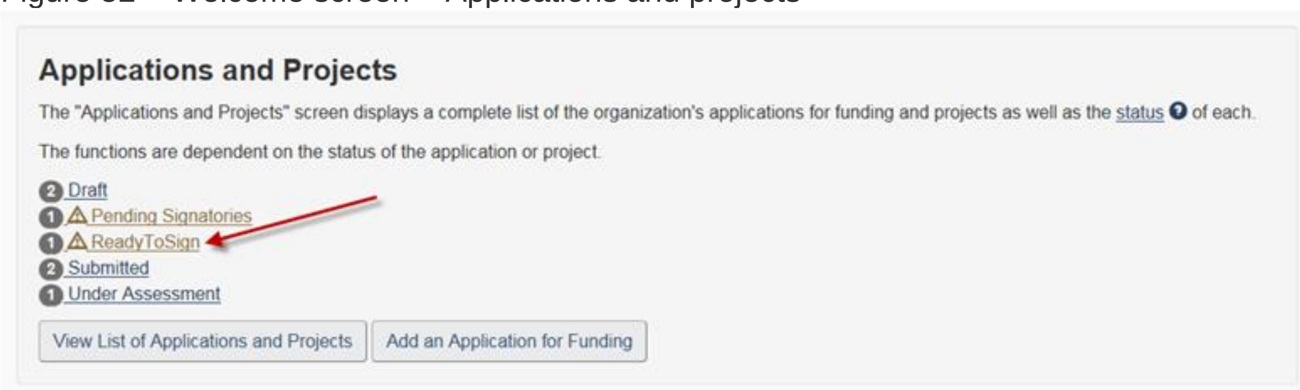
- Click Representatives
- Identify your name
- Click View
- Ensure the Submit checkbox for Agreement is selected

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

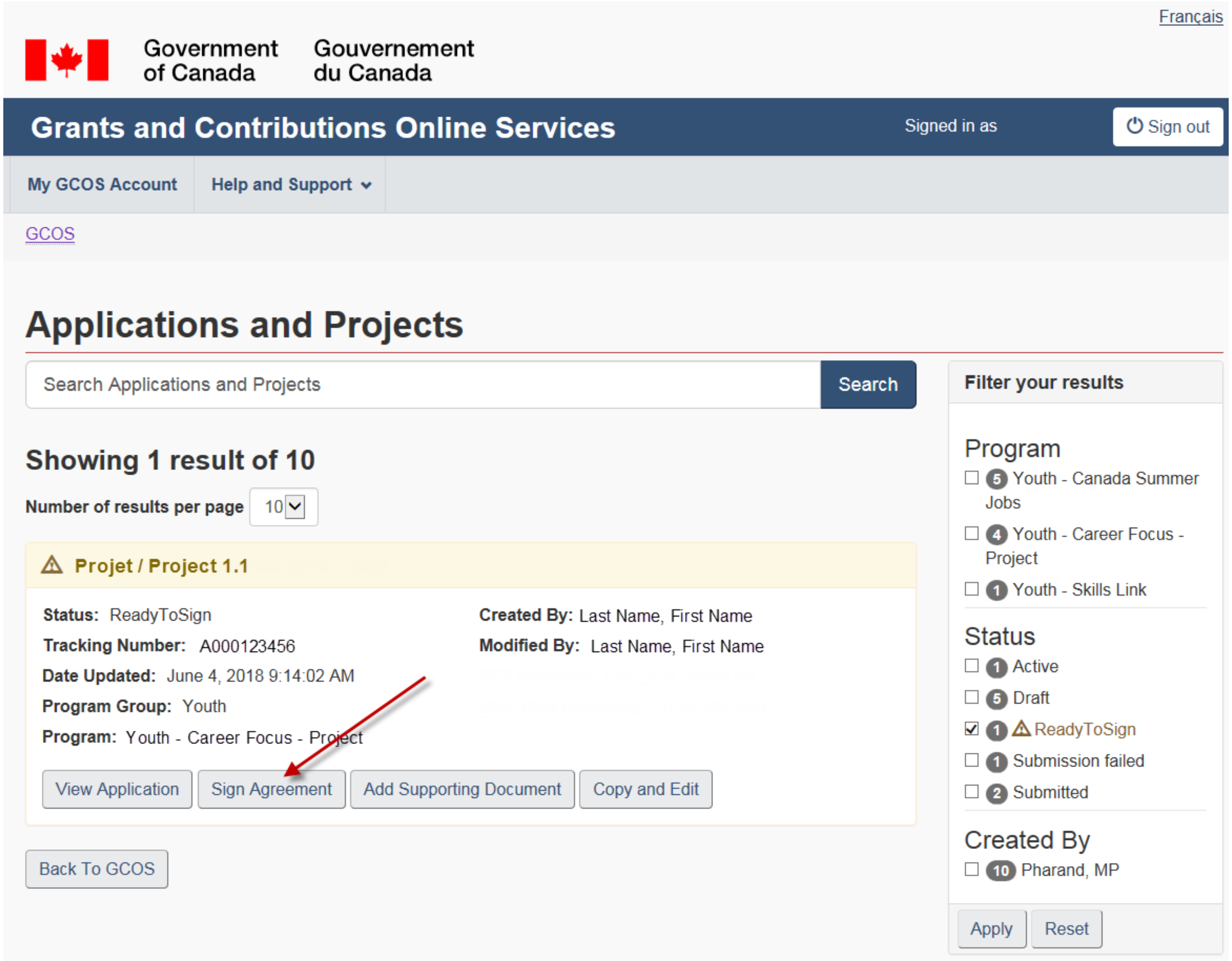
- Enter your username and password to access GCOS
- Click Continue
- Click your organization's name
- Click Gs&Cs Online Services
- Click ReadyToSign (Figure 52)
- Click Sign agreement (Figure 53)

Figure 52 – Welcome screen – Applications and projects



Text description of Figure 52
The Applications and Projects section of the Welcome screen provides you with the status of your applications and projects.

Figure 53 – View list of applications and projects screen



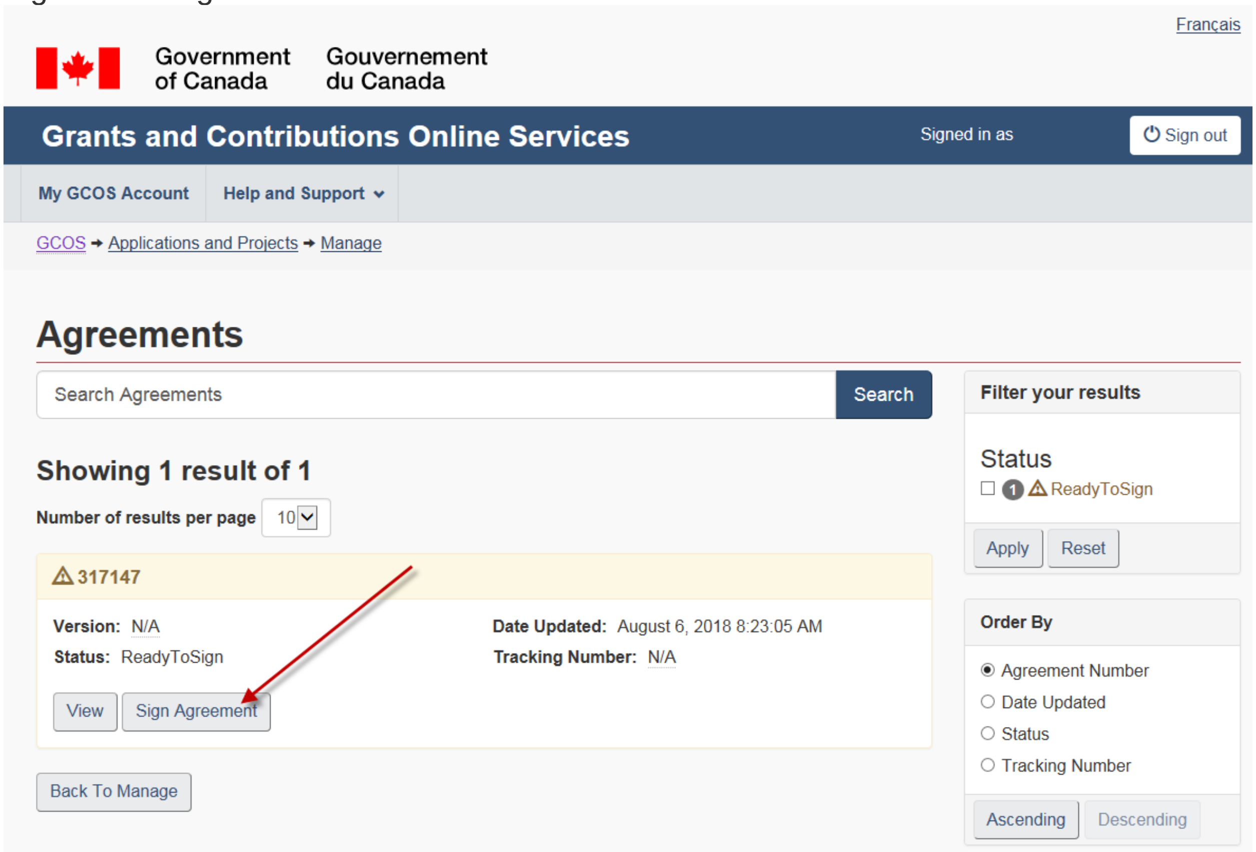
Text description of Figure 53
The Applications and Projects screen allows you to view the status of your application or project and choose an action to complete.

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



Text description of Figure 54
The Agreements screen provides you with a summary of the agreement(s) for your project.

3.4 Review and 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:

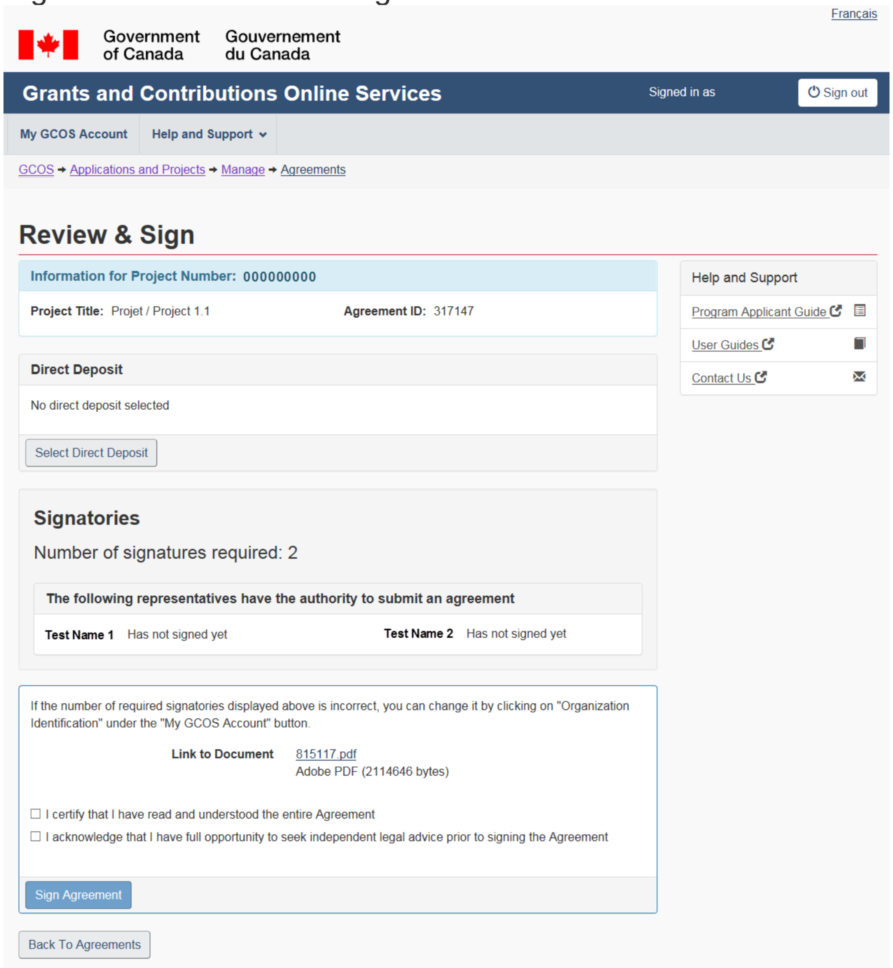
- Click My GCOS Account in the top menu

- 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

Figure 55 – Review and sign screen



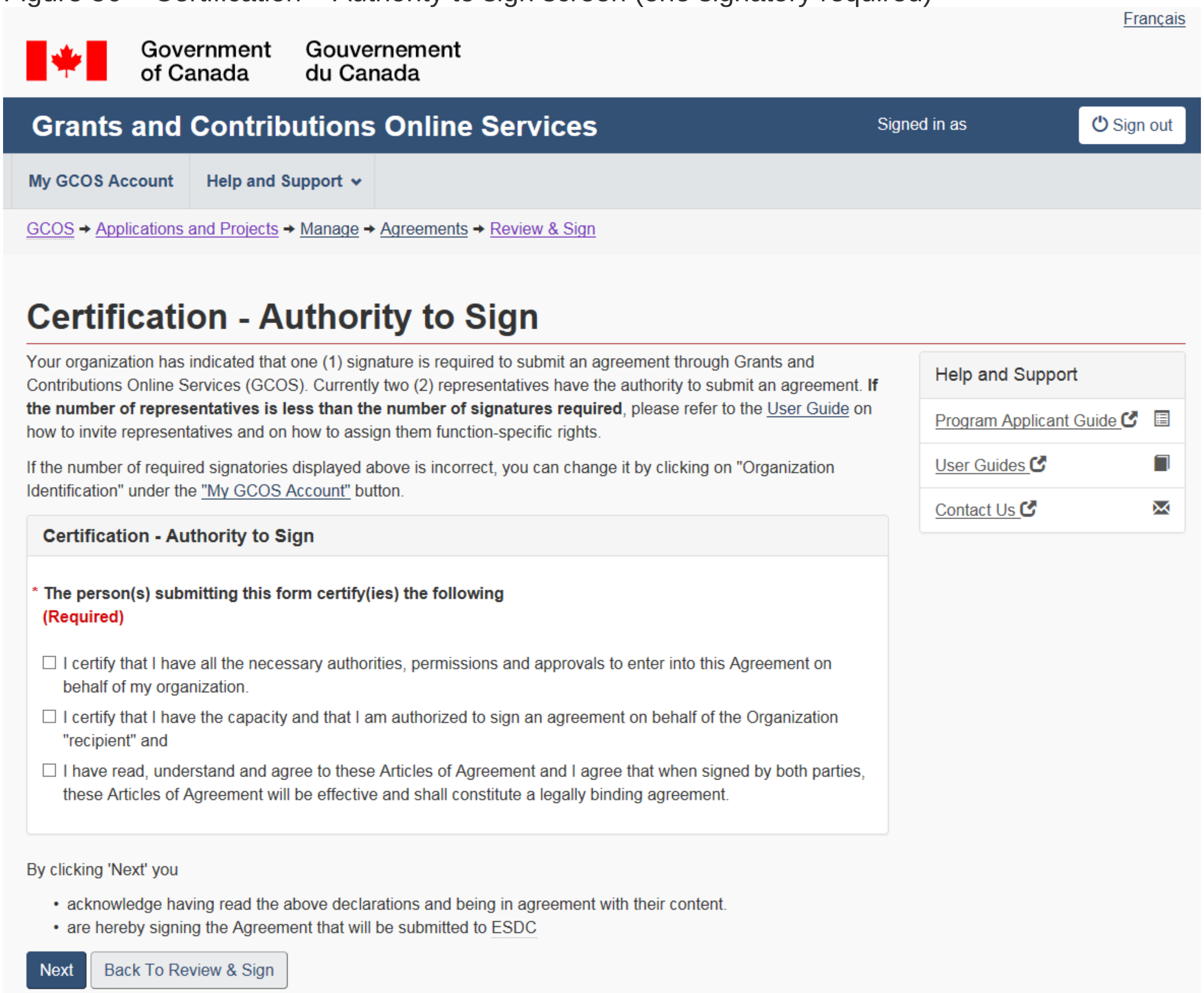
Text description of Figure 55

The Review and Submit screen provides a link to view your agreement and permits you to add Direct Deposit information. It is also used to certify that you have read and understood the entire agreement.

3.4.1 Signing 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.

Figure 56 – Certification – Authority to sign screen (one signatory required)

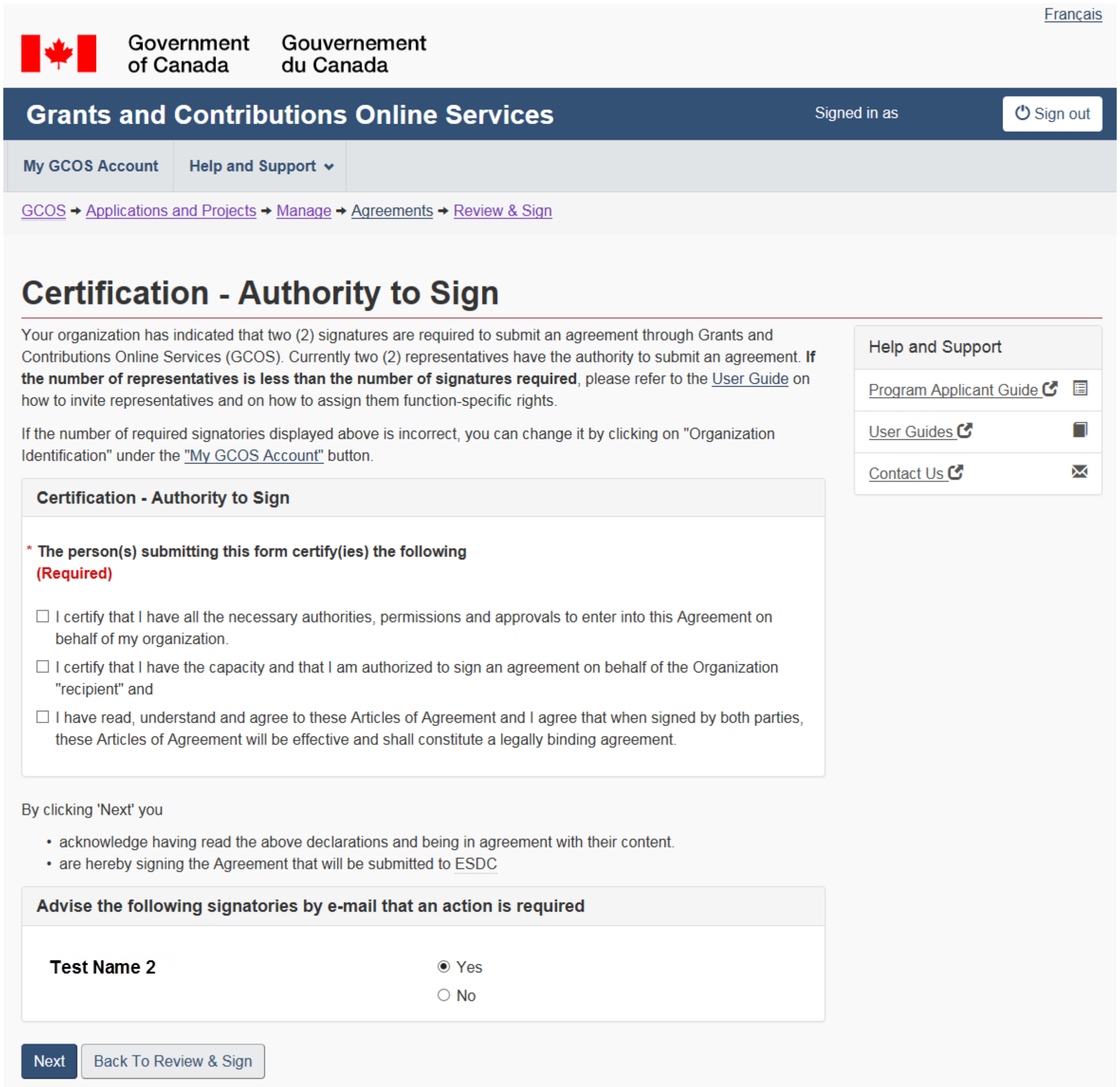


Text description of Figure 56
The Certification – Authority to Sign screen is used to certify the user’s authority.

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)

Figure 57 – Certification – Authority to sign screen (Multiple signatories required)



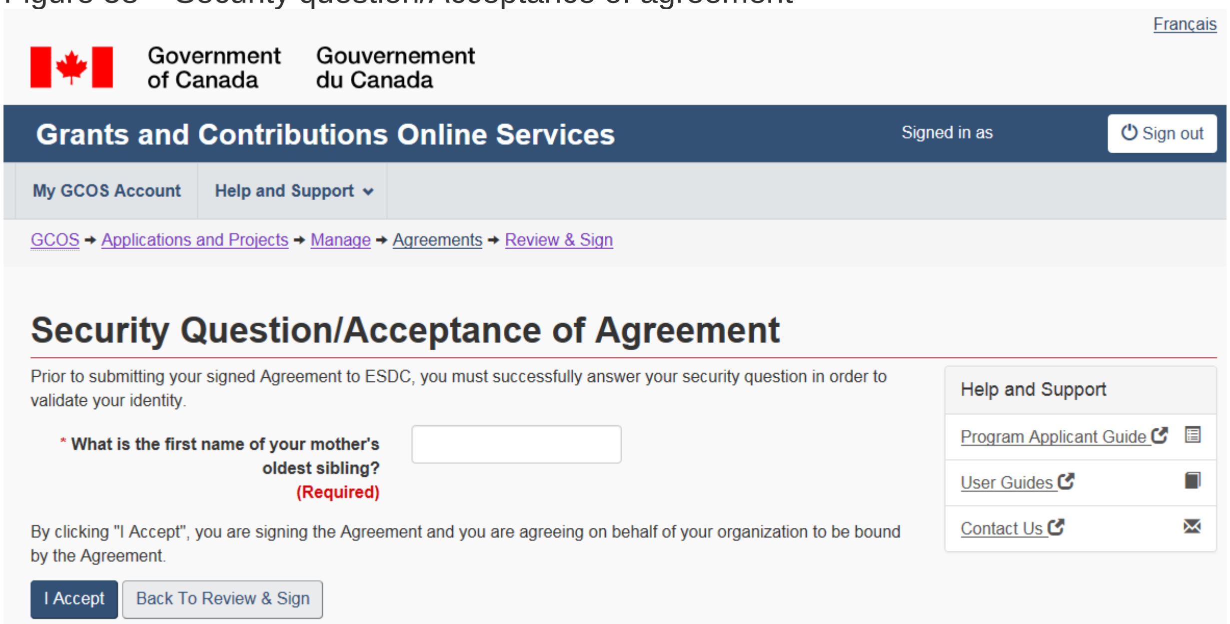
Text description of Figure 57

The Certification – Authority to Sign screen is used to certify the user’s authority.

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.

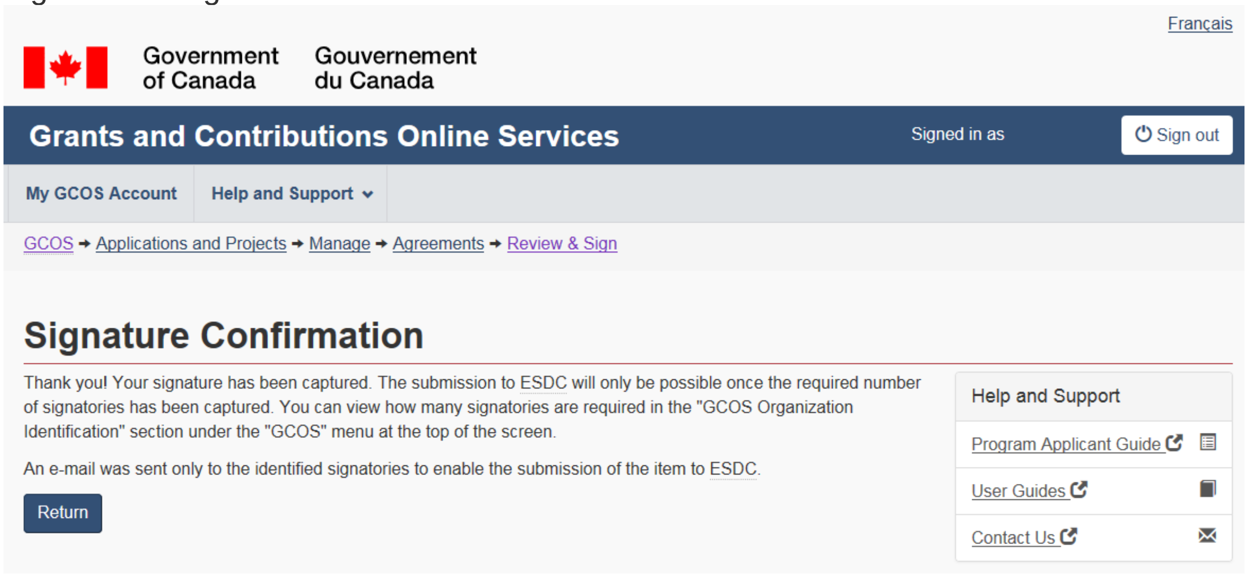
Figure 58 – Security question/Acceptance of agreement



Text description of Figure 58

The Security Question / Acceptance of Agreement screen is used to validate your identity and sign your agreement.

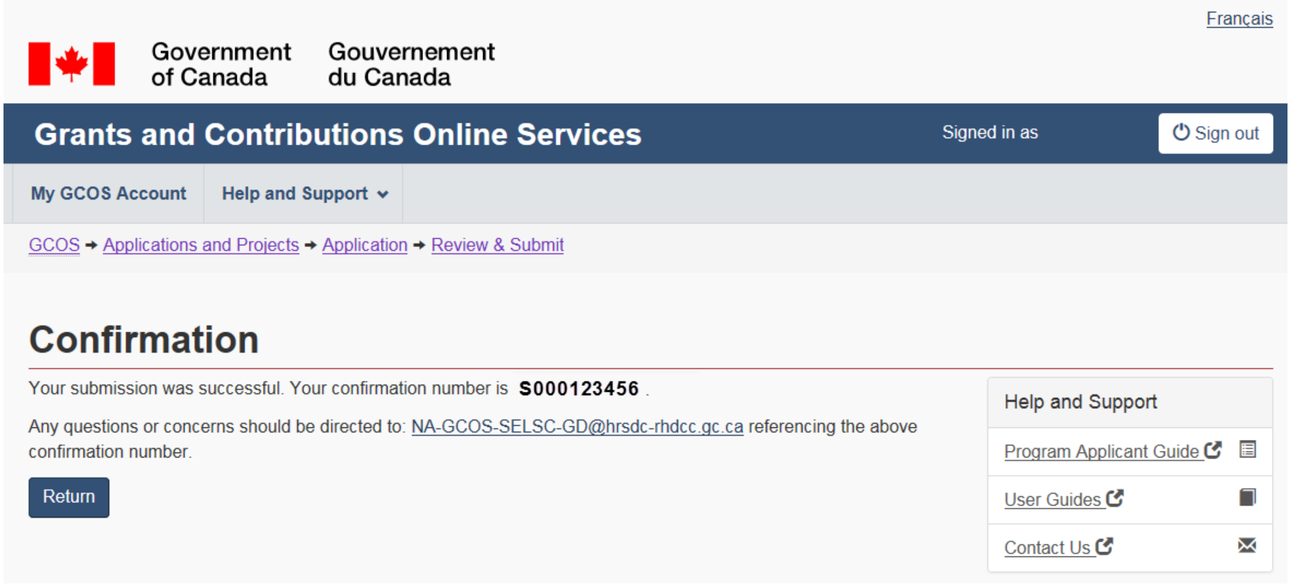
Figure 59 – Signature confirmation screen



Text description of Figure 59

The Signature Confirmation Screen confirms that your signature has been captured by the system.

Figure 60 – Confirmation screen



Text description of Figure 60

The Confirmation screen provides you with a confirmation number that your agreement was successfully submitted.

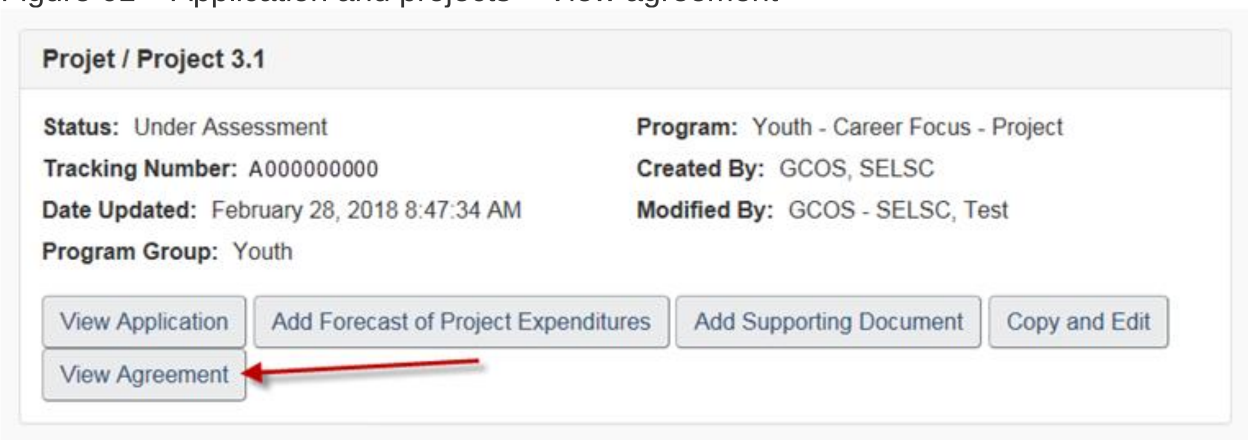
3.5 How to view the signed agreement

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)

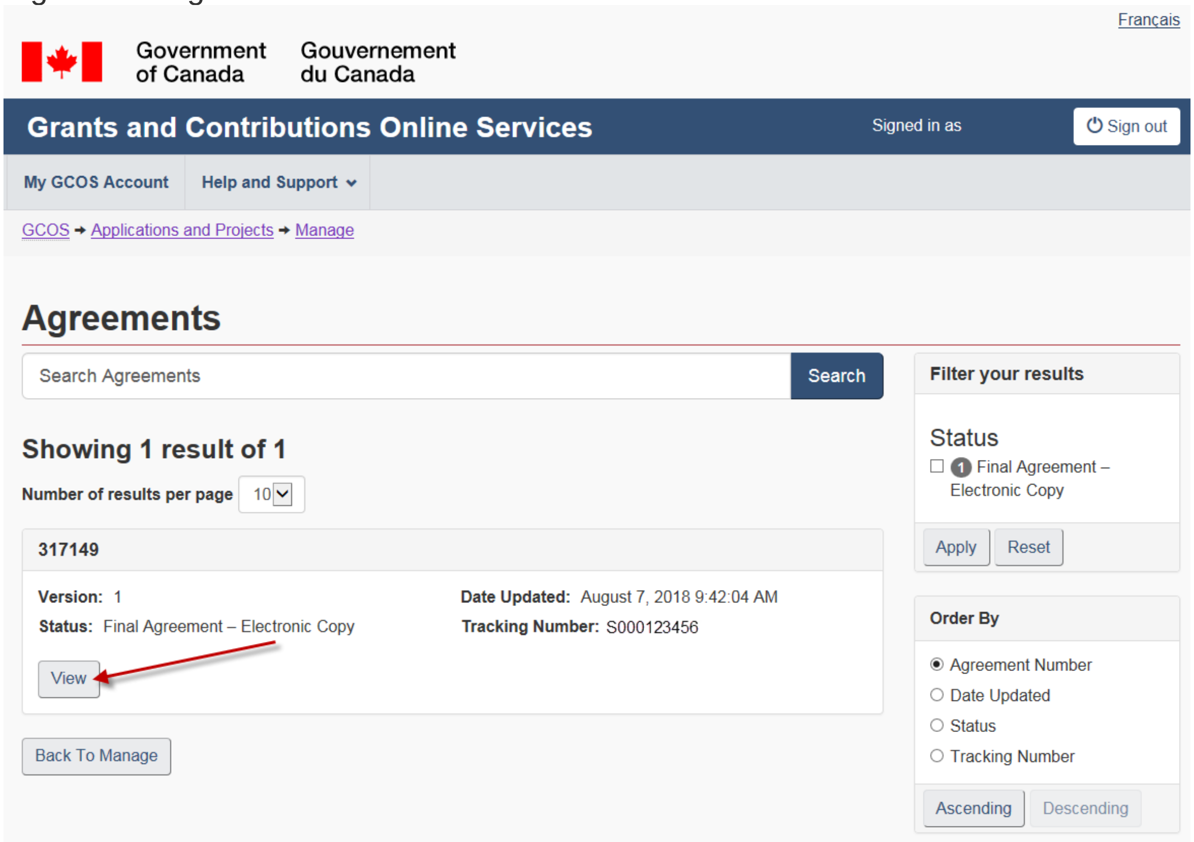
Figure 61 – Application and projects – View agreement



Text

Text description of Figure 61
The Application and projects screen provides you access to view your agreement.

Figure 62– Agreements screen



Text description of Figure 62

The agreements screen provides you with access to view your agreements.

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:

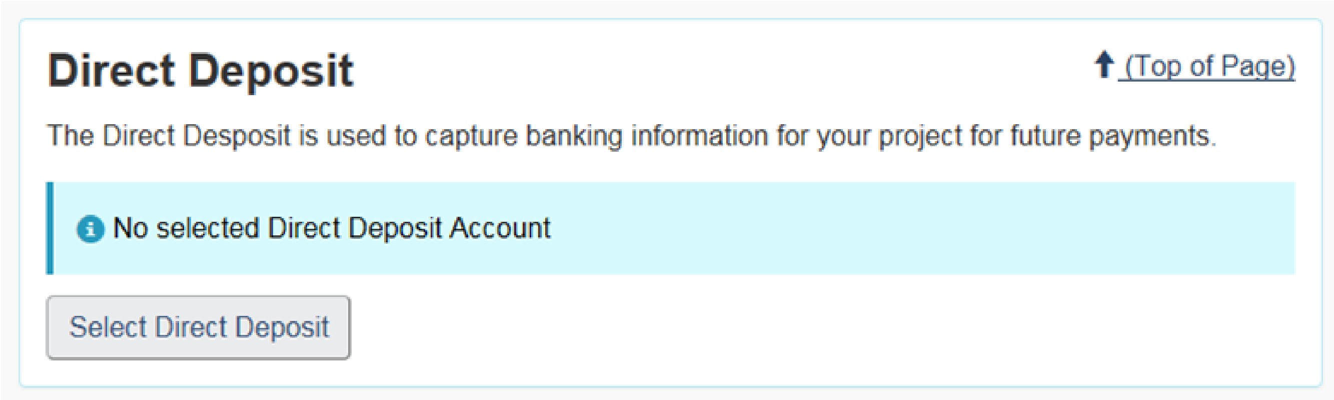
- Enter your username and password to access GCOS
- Click Continue
- Click your organization's name
- Click Gs&Cs Online Services
- Click My GCOS Account in the top menu
- Click Representatives
- Identify your name
- Click View
- Ensure the "Create" and "Submit" checkboxes for direct deposit are selected

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

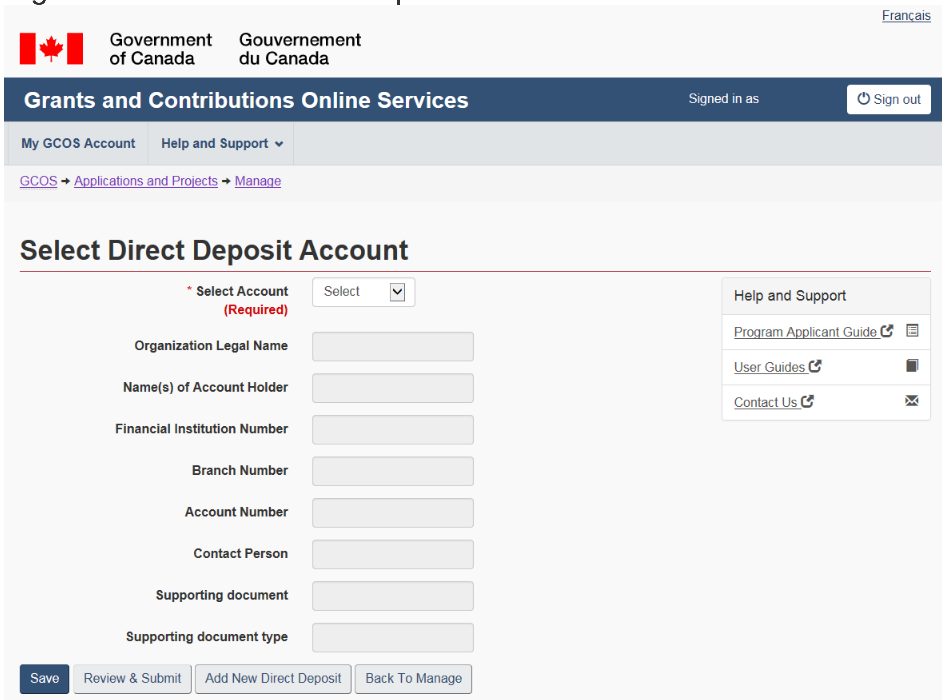


Text description of Figure 63
The Summary of Projects= screen will allow you to click on Select Direct Deposit to capture your Direct Deposit Request.

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



Text description of Figure 64
The Select Direct Deposit Account screen is used to select the direct deposit account you wish to associate to this project.

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

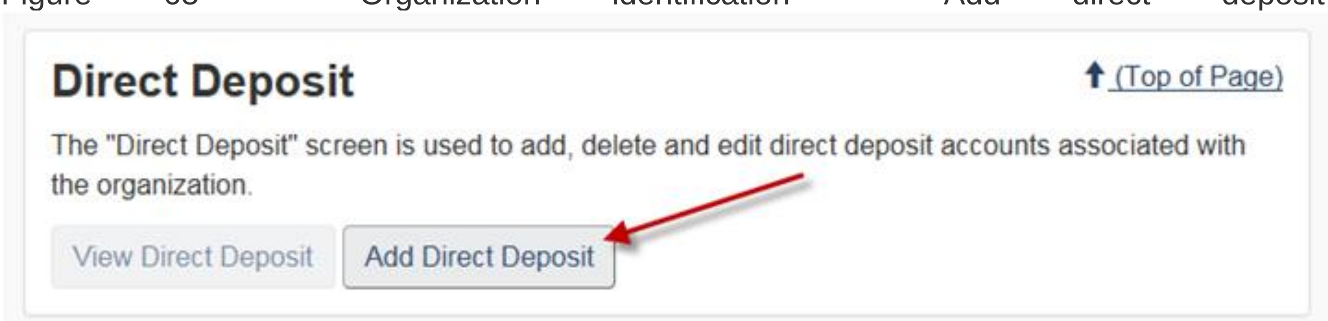
- Click My GCOS Account in the top menu
- Click Organization Identification
- Click Add Direct Deposit (Figure 65)
- Click Yes, I Agree.
- Please note that if you disagree with the Privacy Notice Statement, you will not be able to add a direct deposit account.
- Complete all mandatory fields. (Figure 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

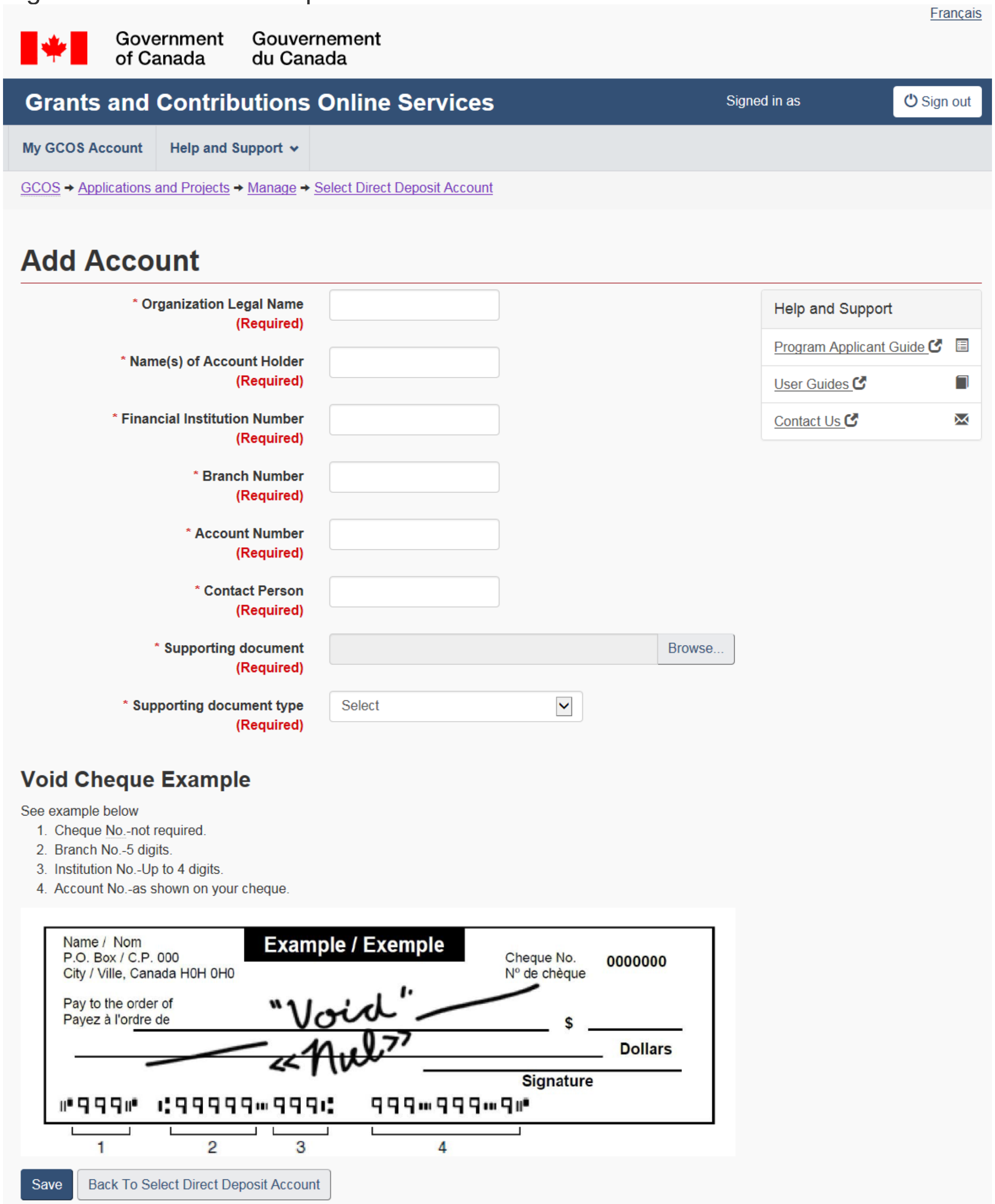
Once saved, the account will be available in the Select Account drop-down menu on the Select Direct Deposit Account screen (Figure 64).

Figure 65 – Organization identification - Add direct deposit



Text description of Figure 65
The Direct Deposit screen is used to add, delete and edit direct deposit accounts associated with the organization.

Figure 66 –Add direct deposit account



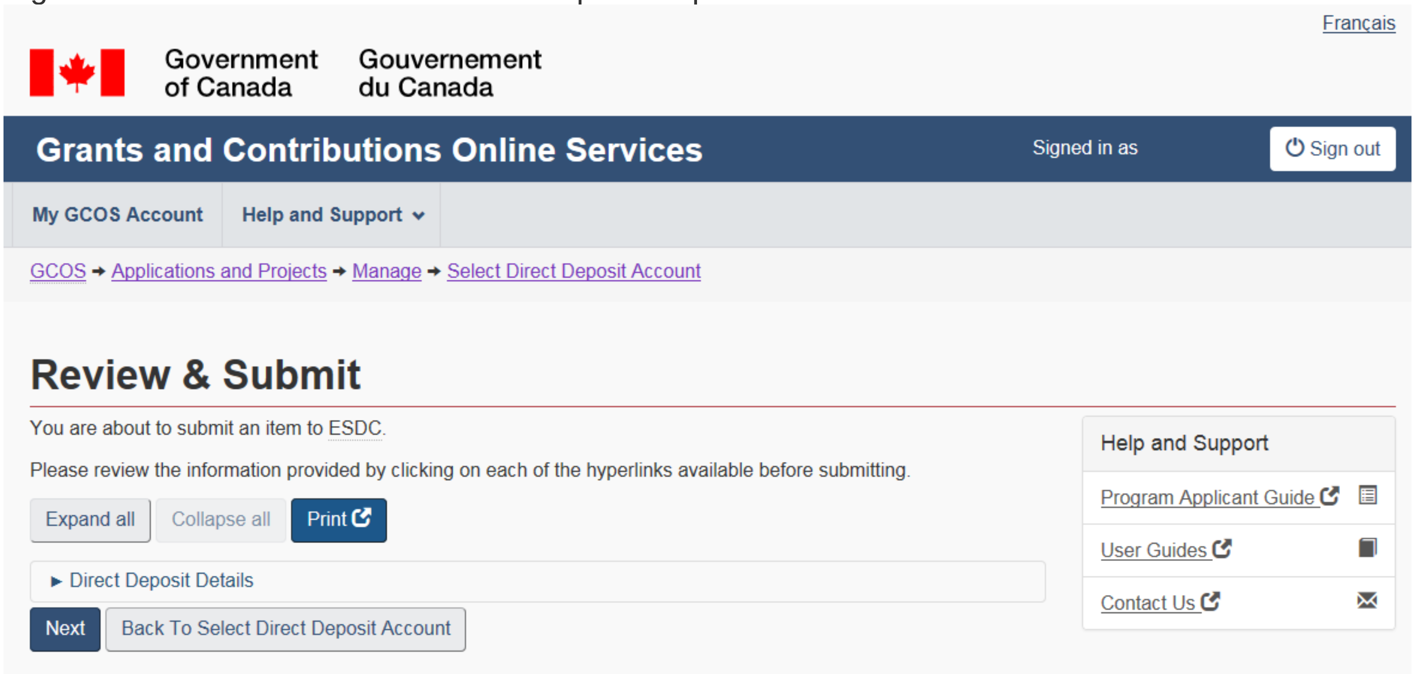
Text description of Figure 66

The Add Account screen is used to add direct deposit account information

- 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).

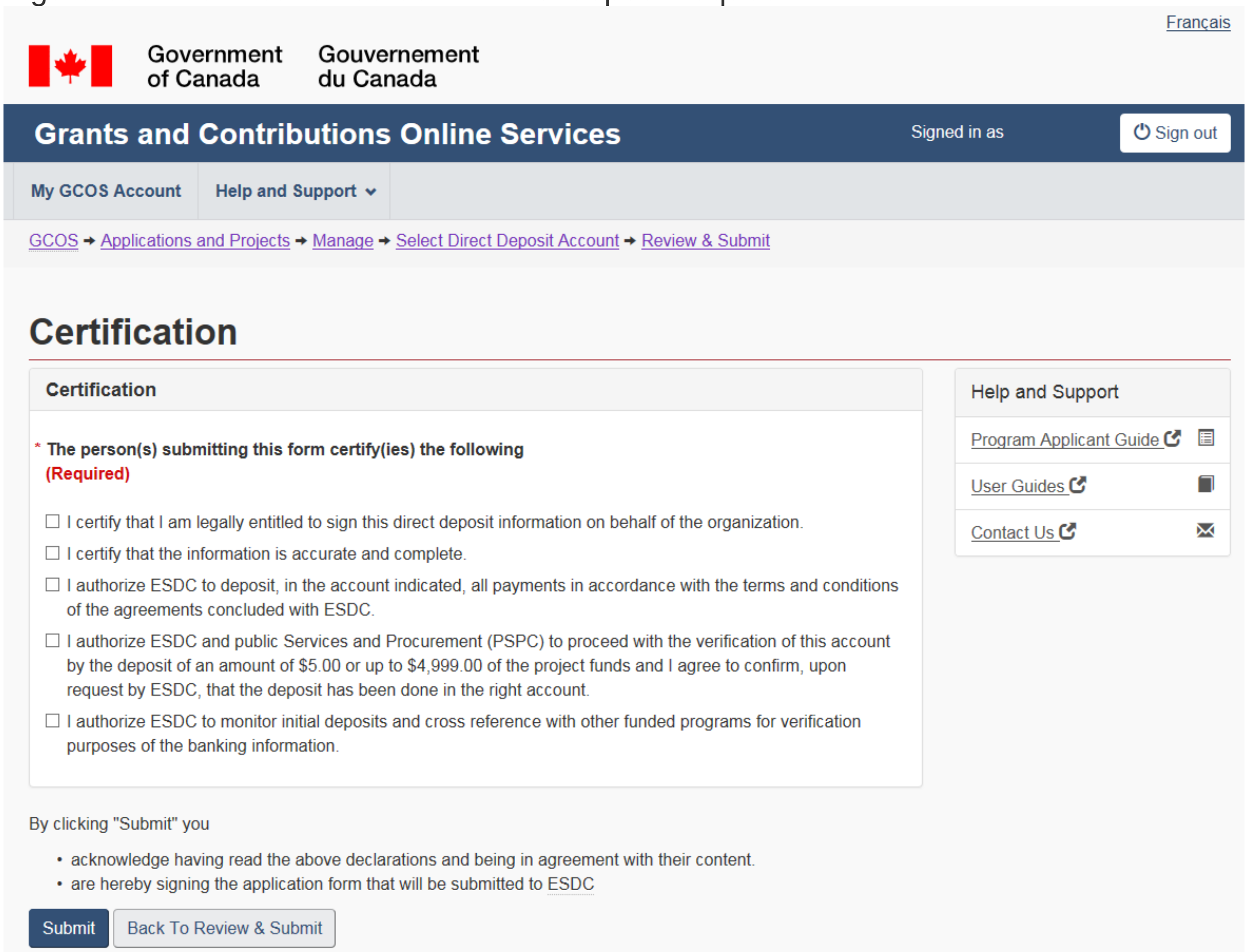
Figure 67 – Review and submit direct deposit request



Text description of Figure 67

The Review & Submit screen is a full summary of all the information entered into the direct deposit request.

Figure 68 – Certification screen - Direct deposit request



Français

Government of Canada Gouvernement du Canada

Grants and Contributions Online Services

Signed in as

Sign out

My GCOS Account

Help and Support

GCOS → Applications and Projects → Manage → Select Direct Deposit Account → Review & Submit

Certification

Certification

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

- ☐ I certify that I am legally entitled to sign this direct deposit information on behalf of the organization.
- ☐ I certify that the information is accurate and complete.
- ☐ I authorize ESDC to deposit, in the account indicated, all payments in accordance with the terms and conditions of the agreements concluded with ESDC.
- ☐ I authorize ESDC and public Services and Procurement (PSPC) to proceed with the verification of this account by the deposit of an amount of $5.00 or up to $4,999.00 of the project funds and I agree to confirm, upon request by ESDC, that the deposit has been done in the right account.
- ☐ I authorize ESDC to monitor initial deposits and cross reference with other funded programs for verification purposes of the banking information.

Help and Support

- Program Applicant Guide
- User Guides
- Contact Us

By clicking "Submit" you

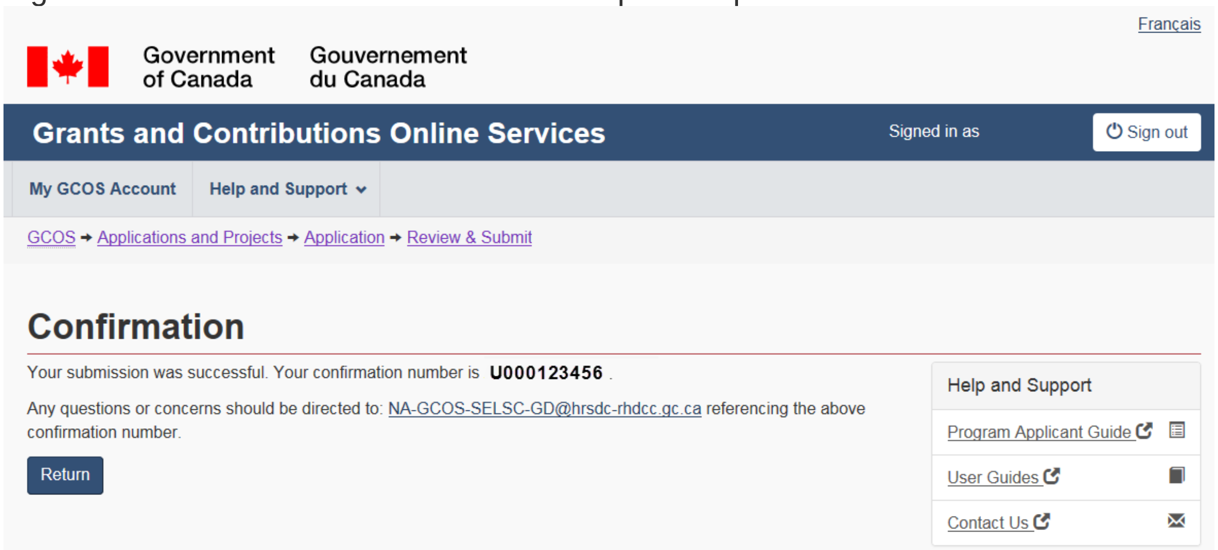
- acknowledge having read the above declarations and being in agreement with their content.
- are hereby signing the application form that will be submitted to ESDC

Submit | Back To Review & Submit

Text description of Figure 68

The Certification screen is used to certify the user’s authority.

Figure 69 – Confirmation screen - Direct deposit request



Text description of Figure 69

The Confirmation screen provides you with a confirmation number that your Direct Deposit request was successfully submitted.

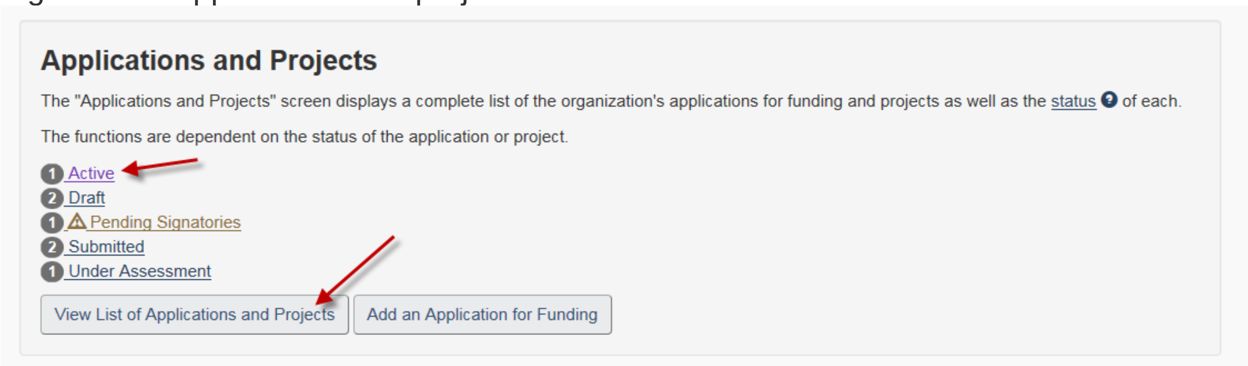
5. Project management

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

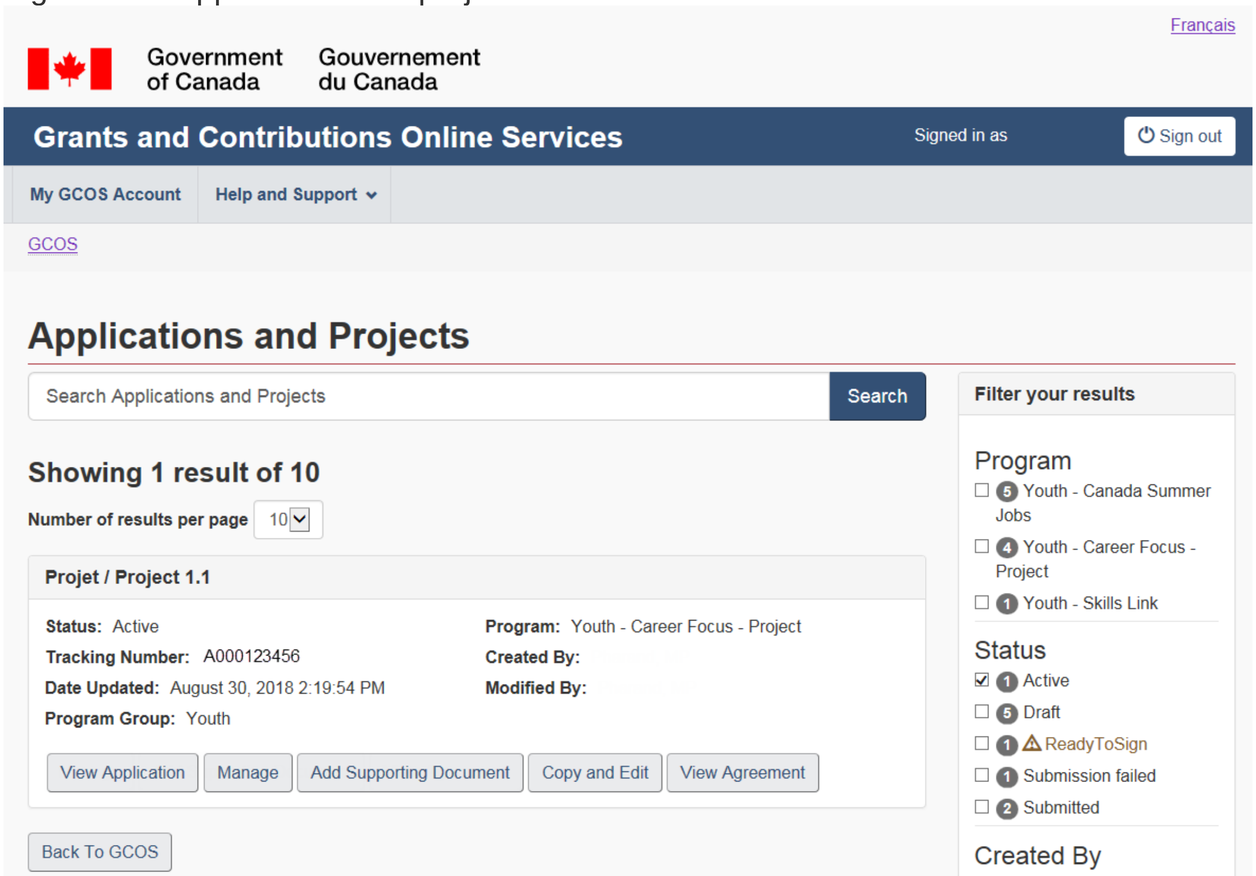
- Enter your username and password to access GCOS
- Click Continue
- Click your organization's name
- Click on Gs&Cs Online Services
- Under the section Applications and Projects you can either click Active or you can click View List of Applications and Projects (Figure 70)
- Identify your project and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

Figure 70 – Applications and projects



Text description of Figure 70
The Applications and Projects section on the welcome screen permits you to access your list of Applications and Projects.

Figure 71 – Applications and projects screen



Text description of Figure 71
The Applications and Projects screen permits you to access the management module of your active project.

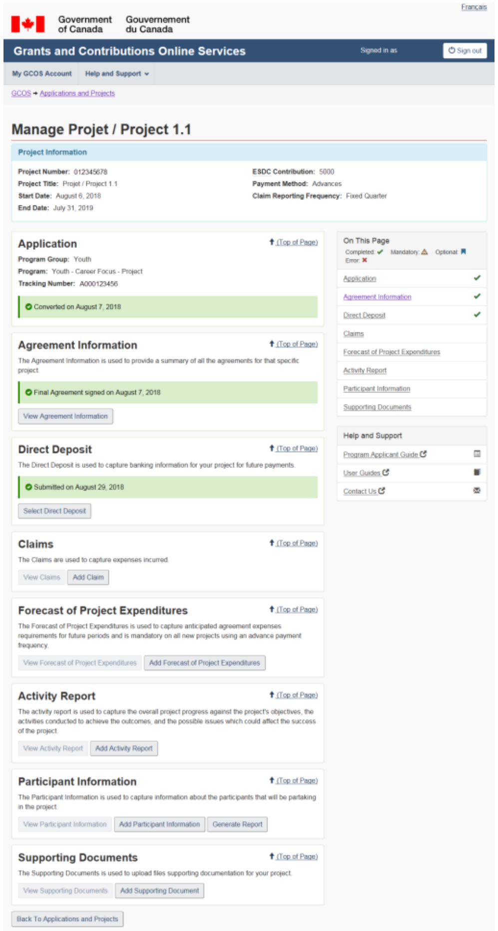
5.2 Manage Project Summary

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

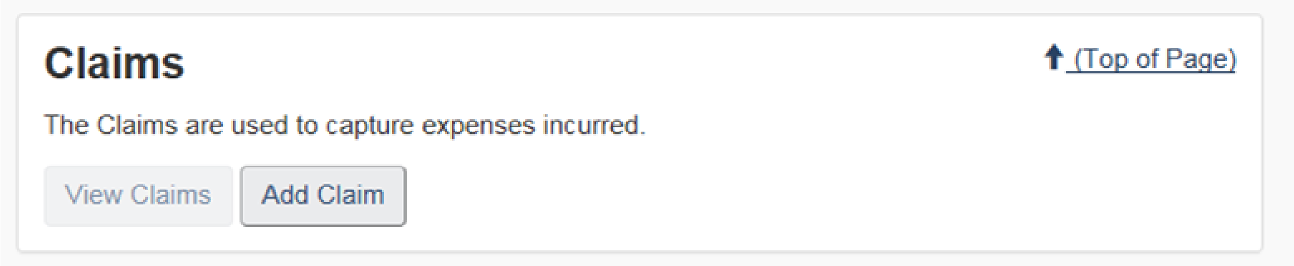


Text description of Figure 72
The Manage Project Summary Screen permits you to access and complete all the project management items.

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

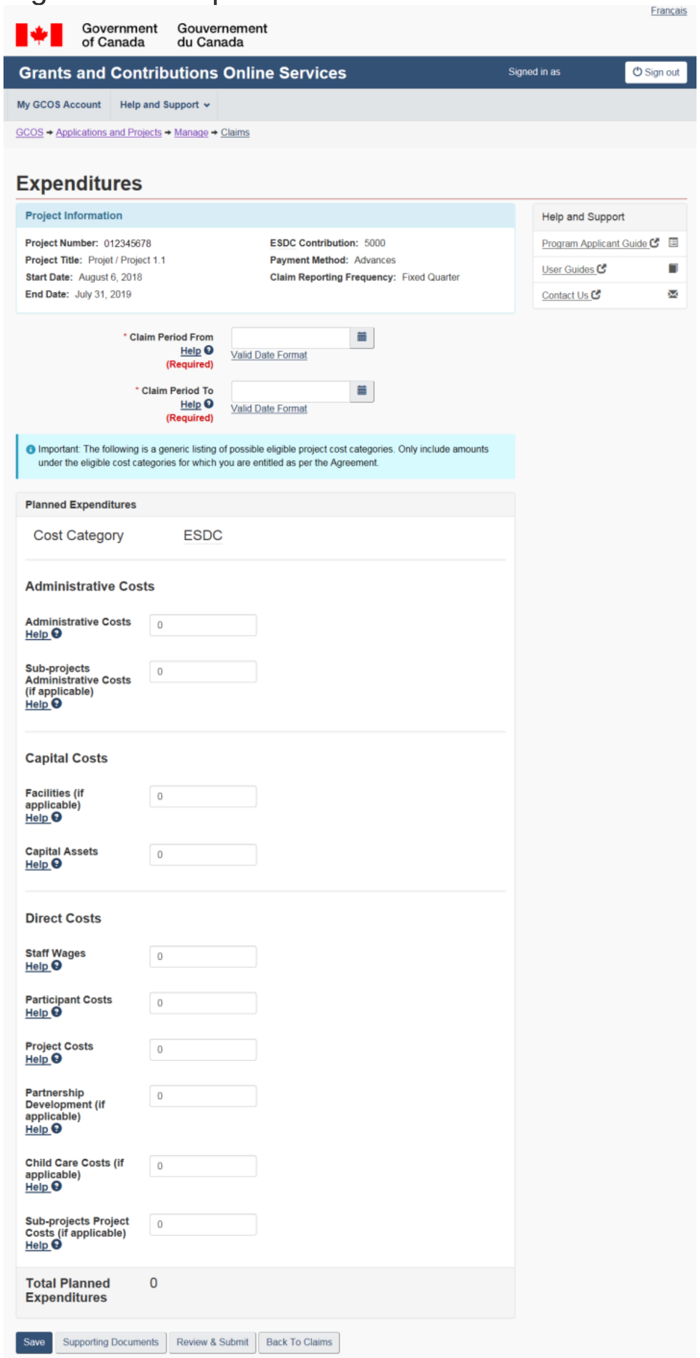


Text description of Figure 73
The Claims screen is used to capture expenses incurred for your project.

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)

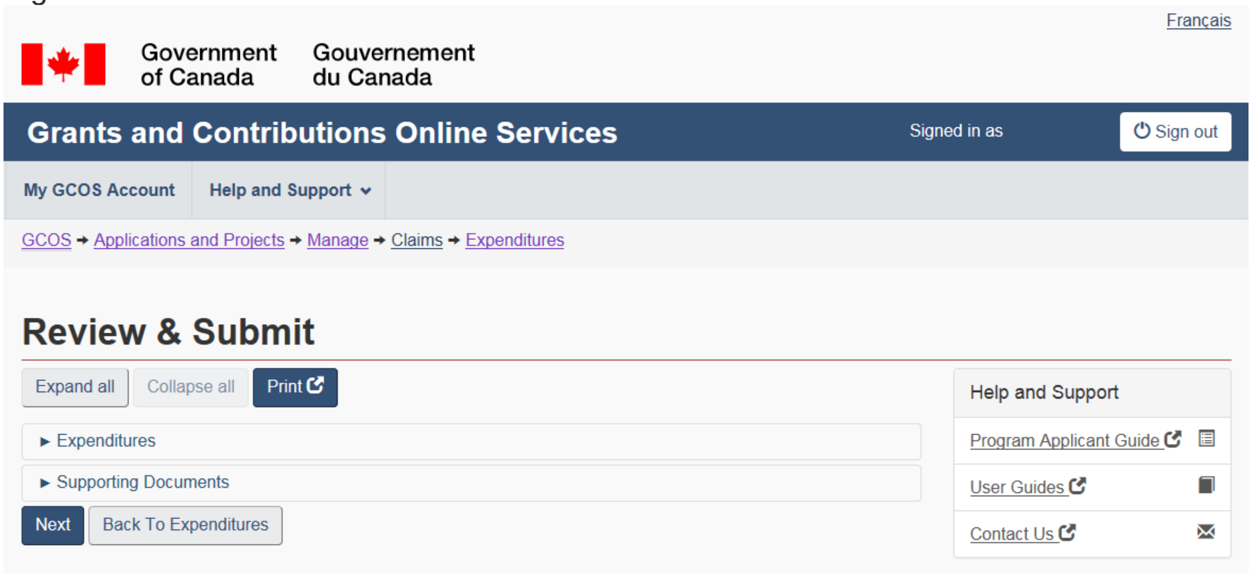
Figure 74 – Expenditures screen



Text description of Figure 74

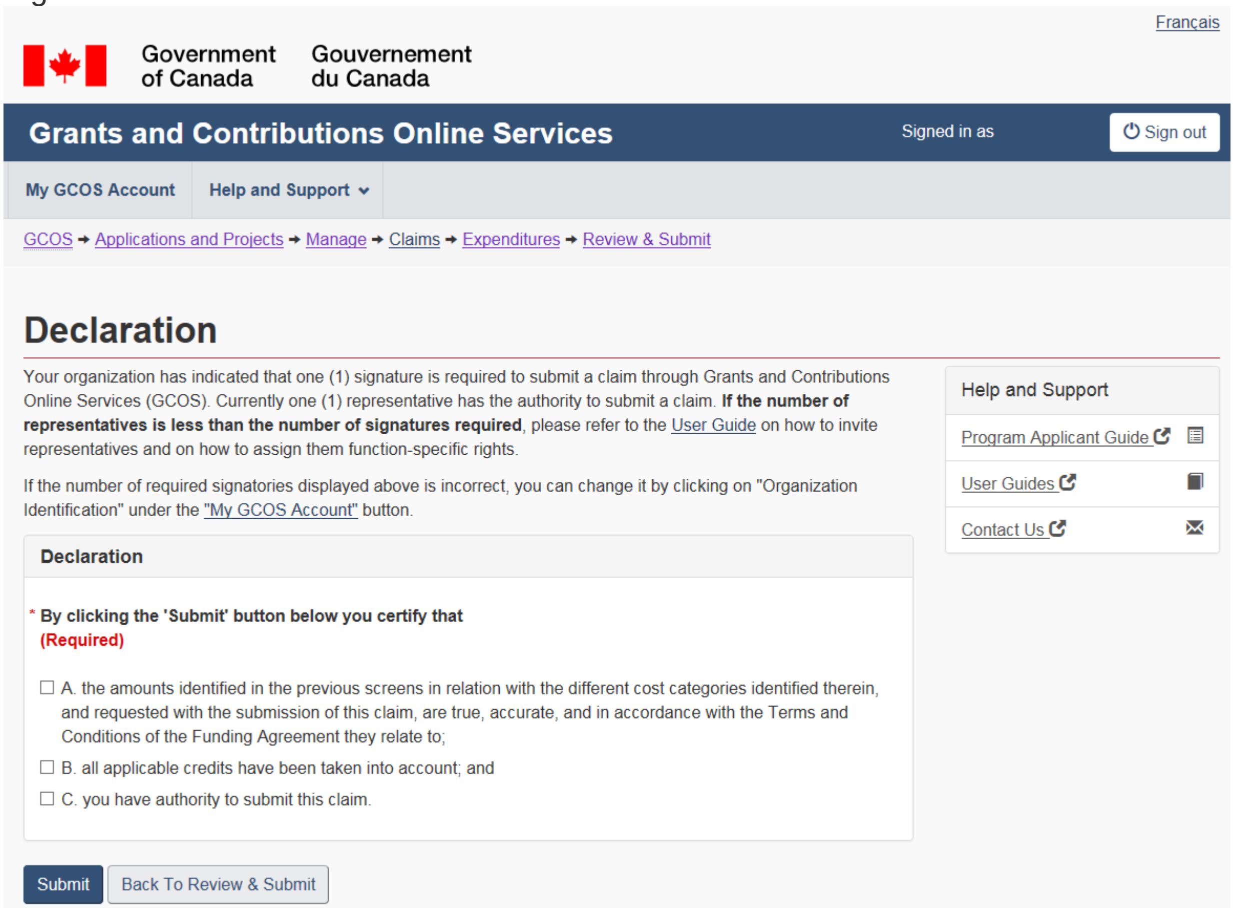
The Expenditures screen is used to capture expenses incurred for your project during a specified period.

Figure 75 – Claim – Review and submit screen



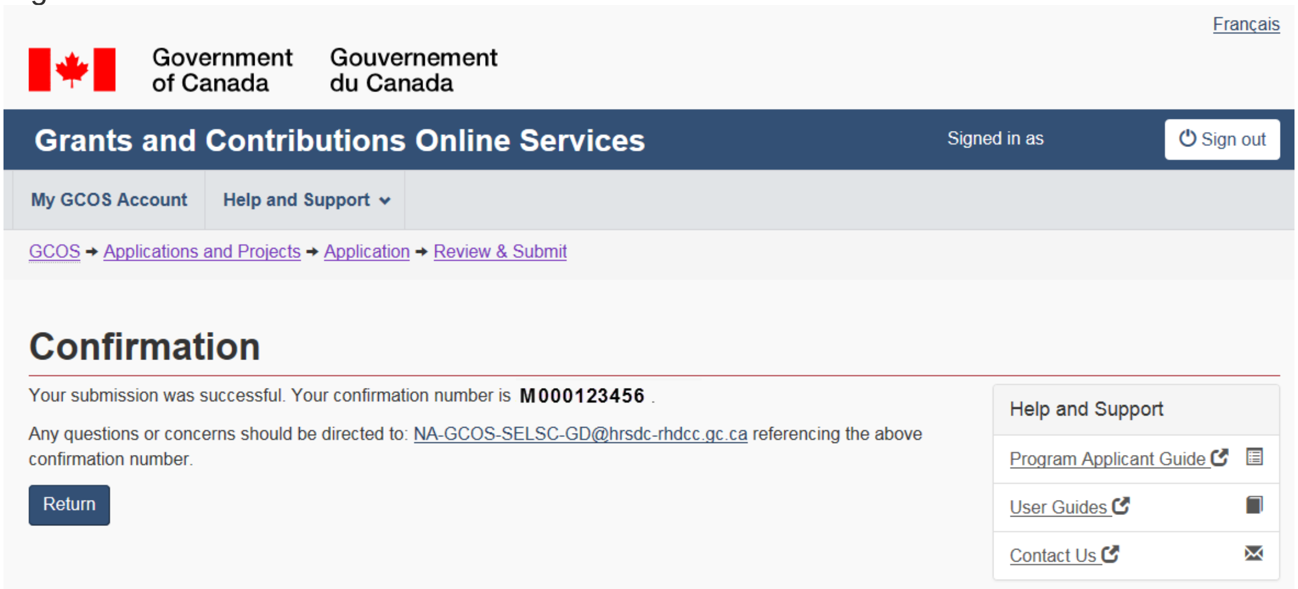
Text description of Figure 75
The Review & Submit screen is a full summary of all the information entered into the claim.

Figure 76 – Claim – Declaration screen



Text description of Figure 76
The Declaration screen is used to certify the user’s authority.

Figure 77 – Claim – Confirmation screen

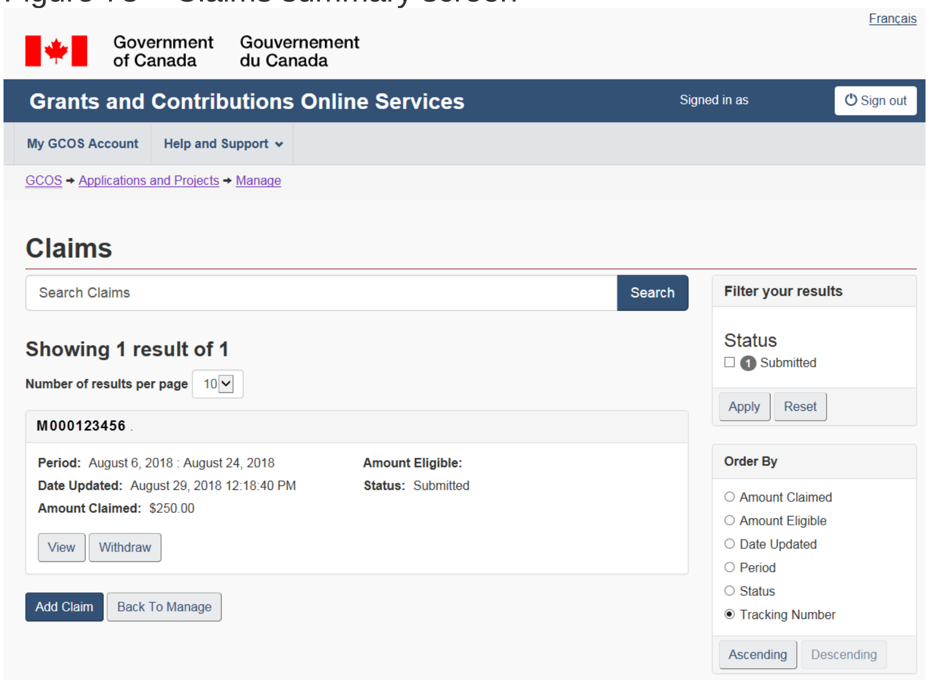


Text description of Figure 77

The Confirmation screen provides you with a confirmation number that your Claim was successfully submitted.

The Return Button will bring you to the Claims Summary Screen (Figure 78)

Figure 78 – Claims summary screen



Text description of Figure 78

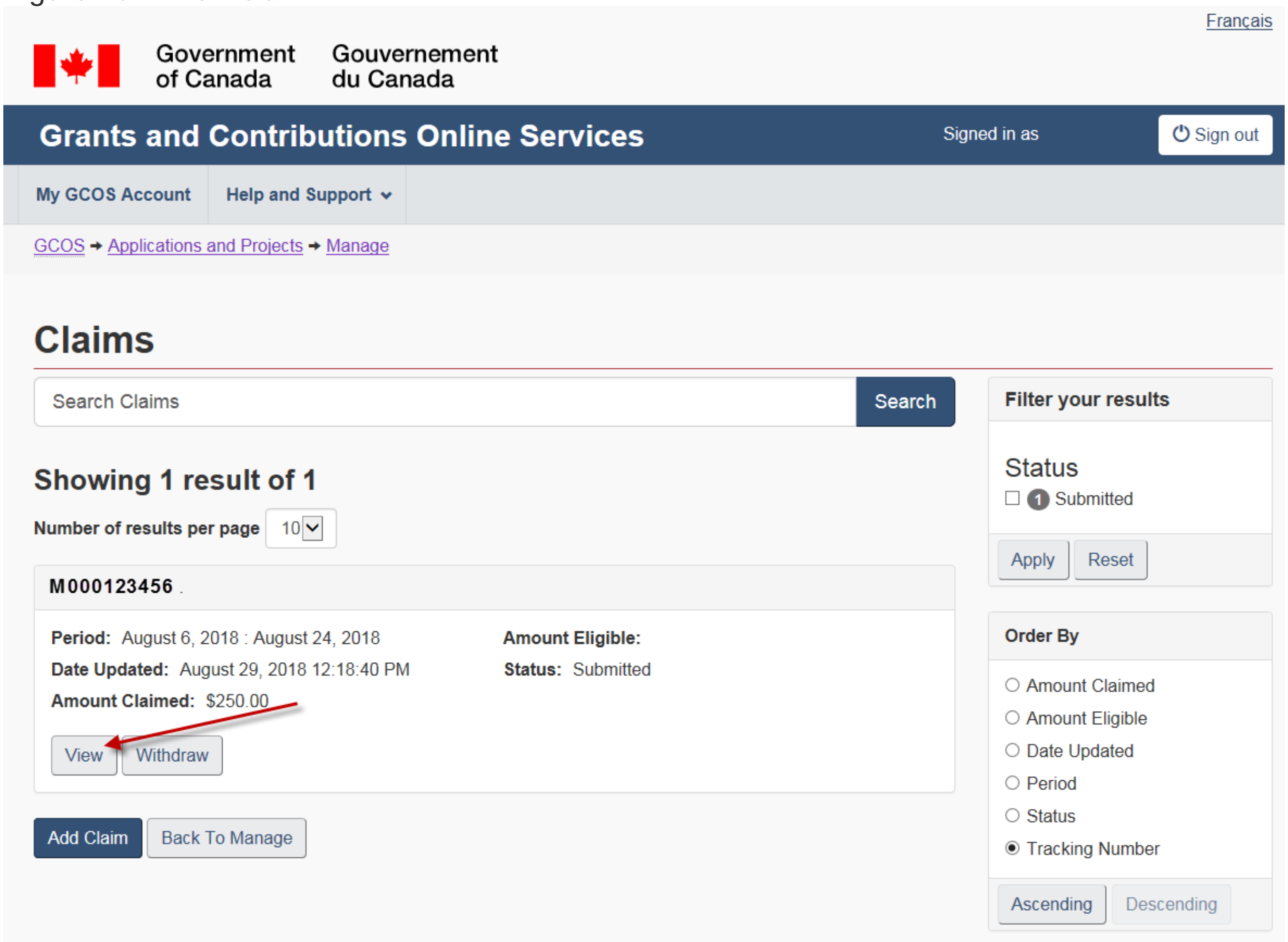
The Claims Summary screen provides you with a summary of all claims for your project.

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 79) will direct you to the Expenditures screen. You will be able to view the submitted claim in read-only format.

Figure 79 – View claim



Text description of Figure 79

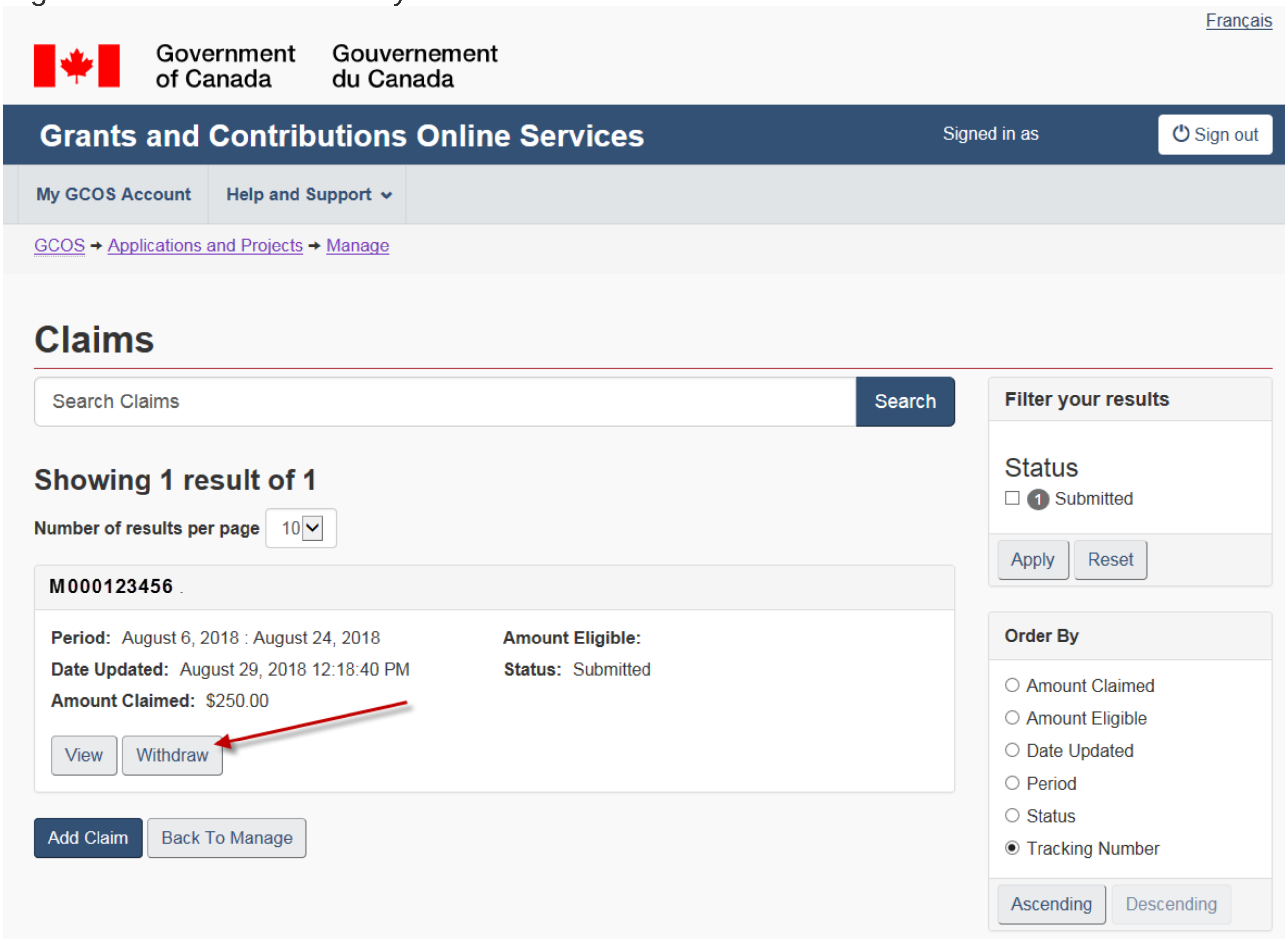
The view button on the Claims Summary screen allows you to view your submitted claim.

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

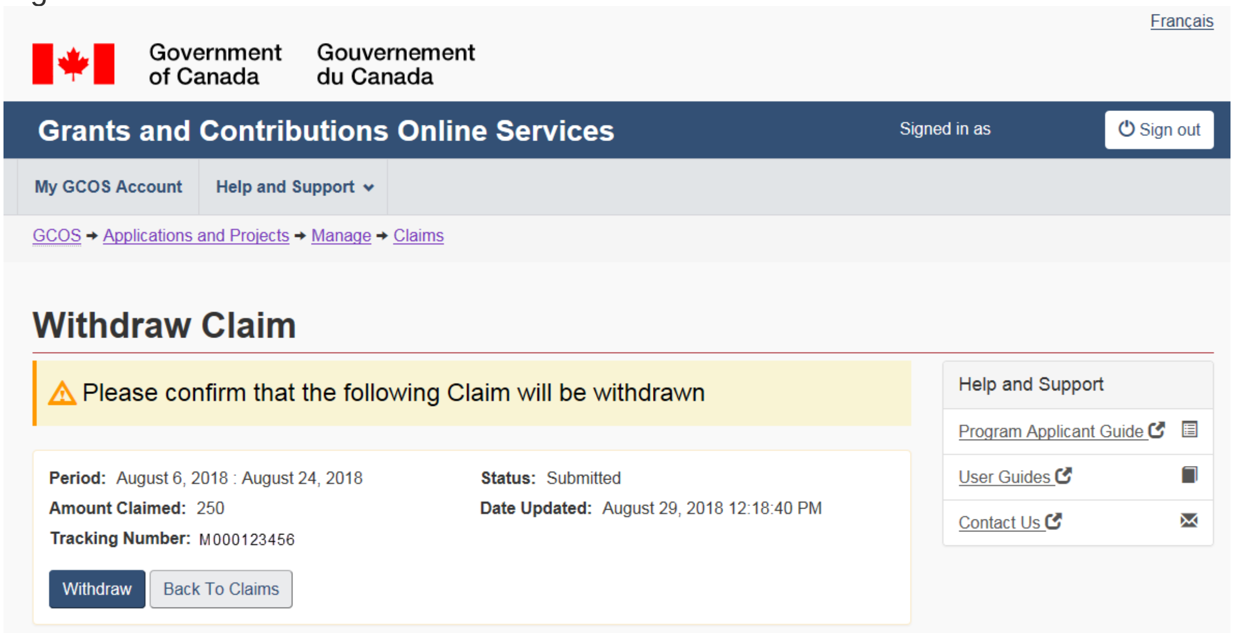
Figure 80 – Claims summary screen - Withdraw a claim



Text description of Figure 80

The Withdraw button on the Claims Summary screen allows you to withdraw your submitted claim.

Figure 81 – Withdraw claim confirmation screen



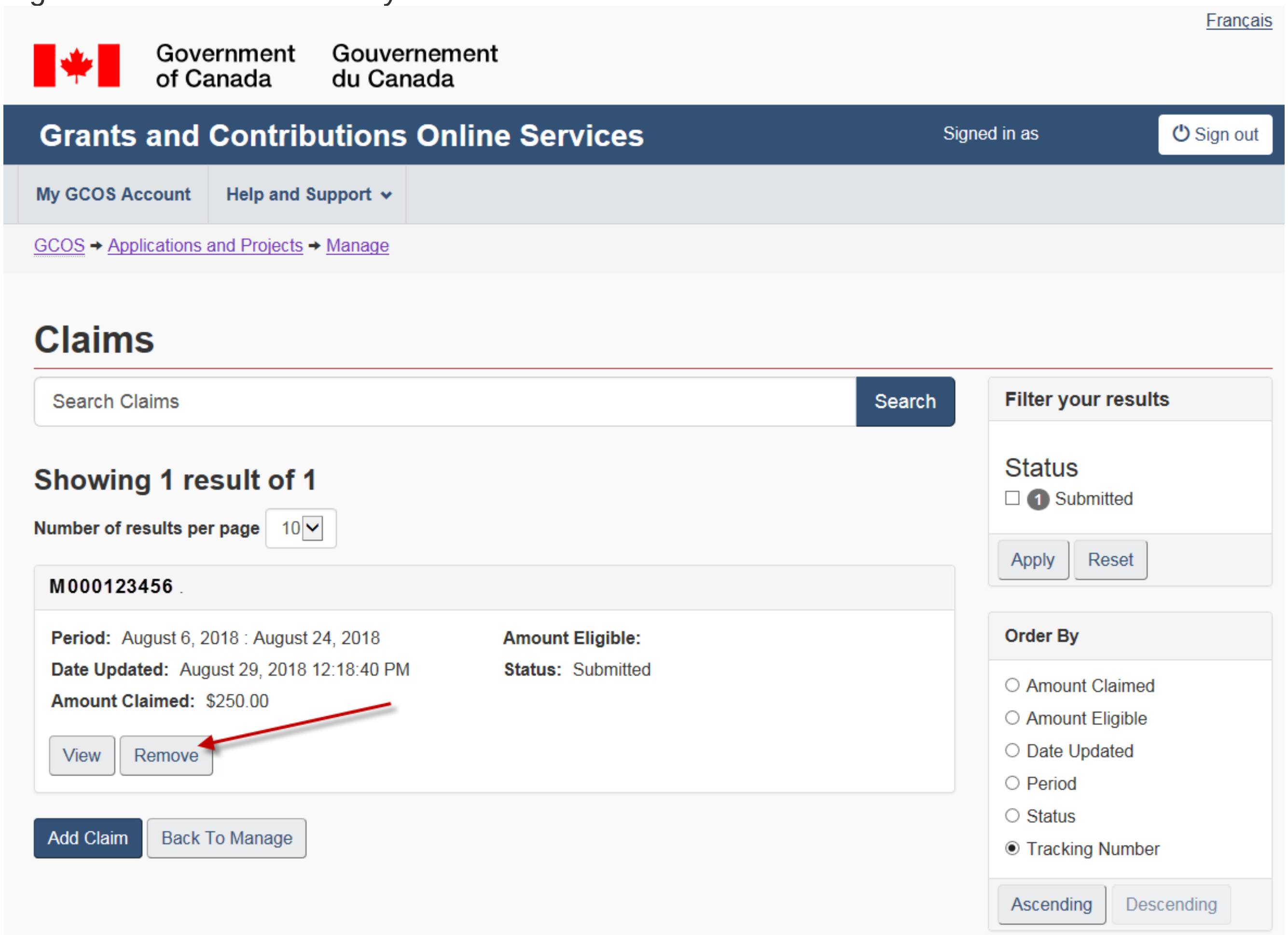
Text description of Figure 81
The Withdrawn Claim screen confirms that you would like to withdraw your claim.

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

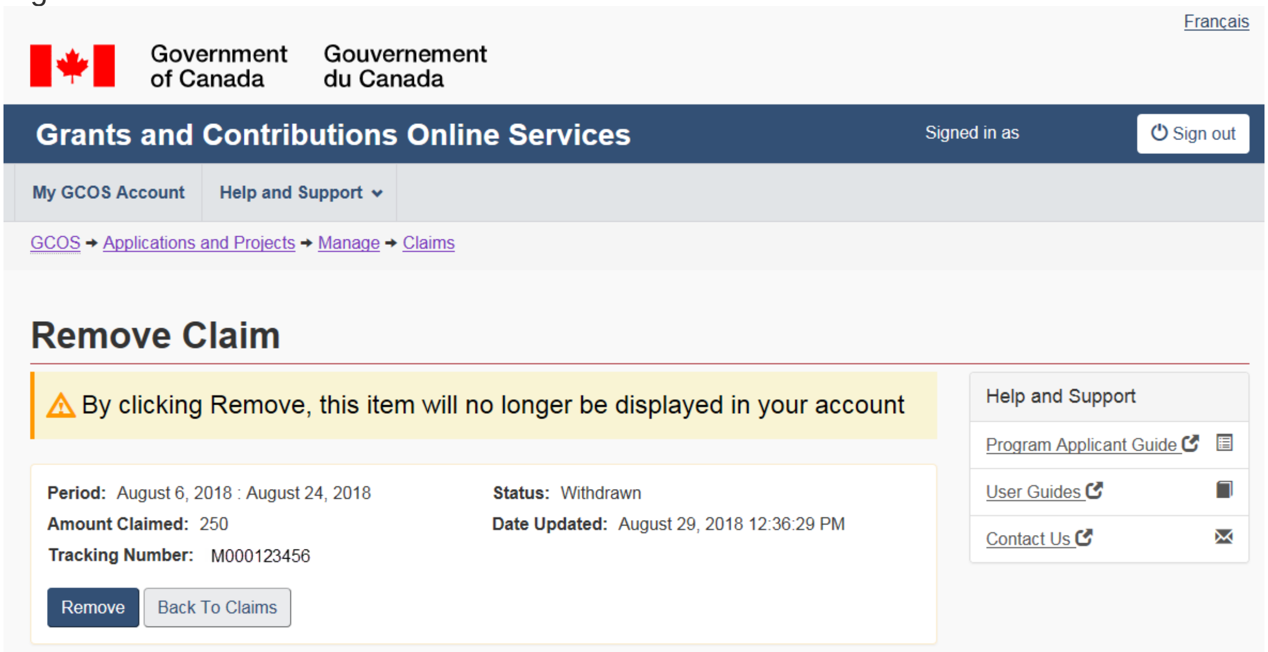
Figure 82 – Claims summary screen – Remove a claim



Text description of Figure 82

The Remove button on the Claims Summary screen allows you to Remove your withdrawn or draft claim.

Figure 83 –Remove claim



Text description of Figure 83
The Remove Claim screen confirms that you would like to remove your claim.

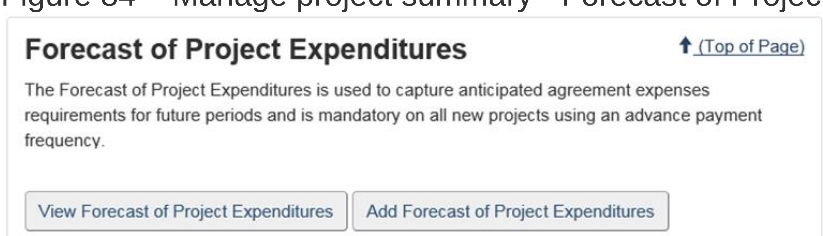
5.4 Forecast of Project Expenditures (FPE)

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

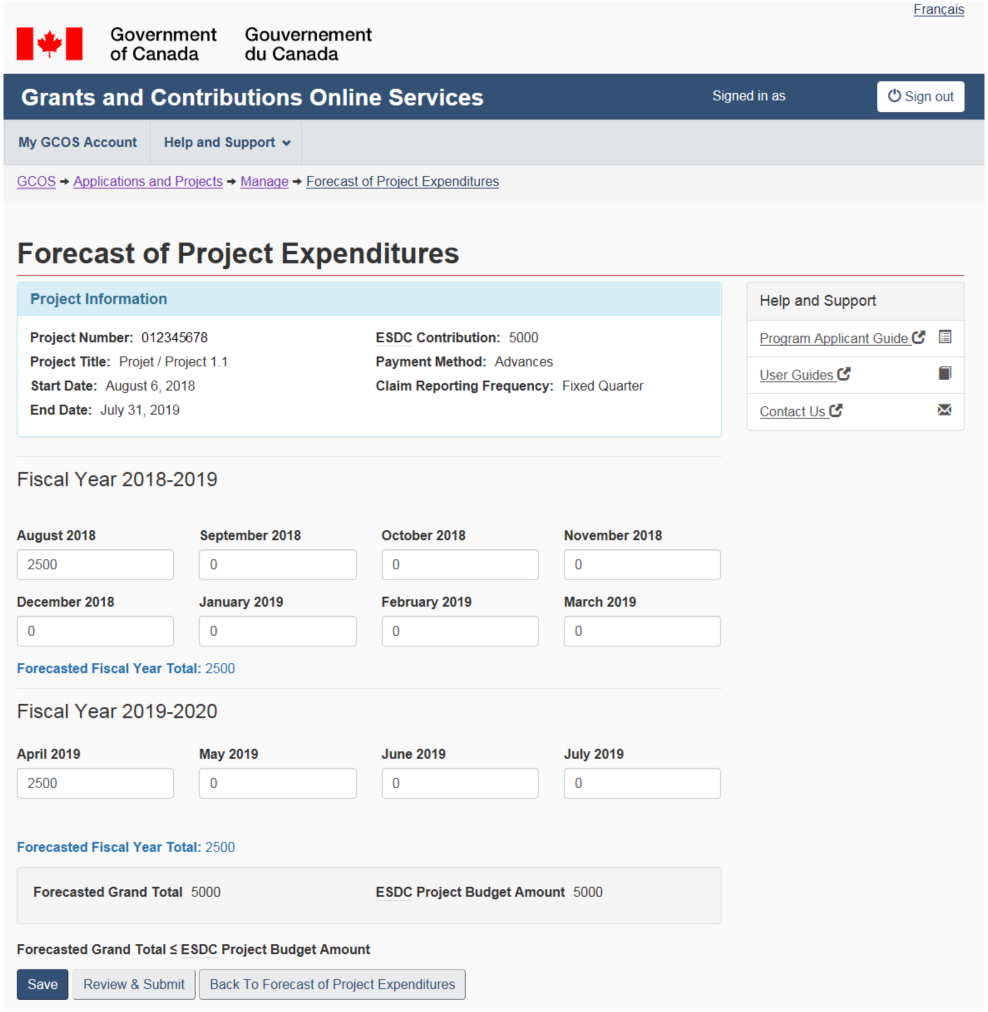


Text description of Figure 84
The Forecast of Project Expenditures screen is used to capture the monthly financial requirements for your project.

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)

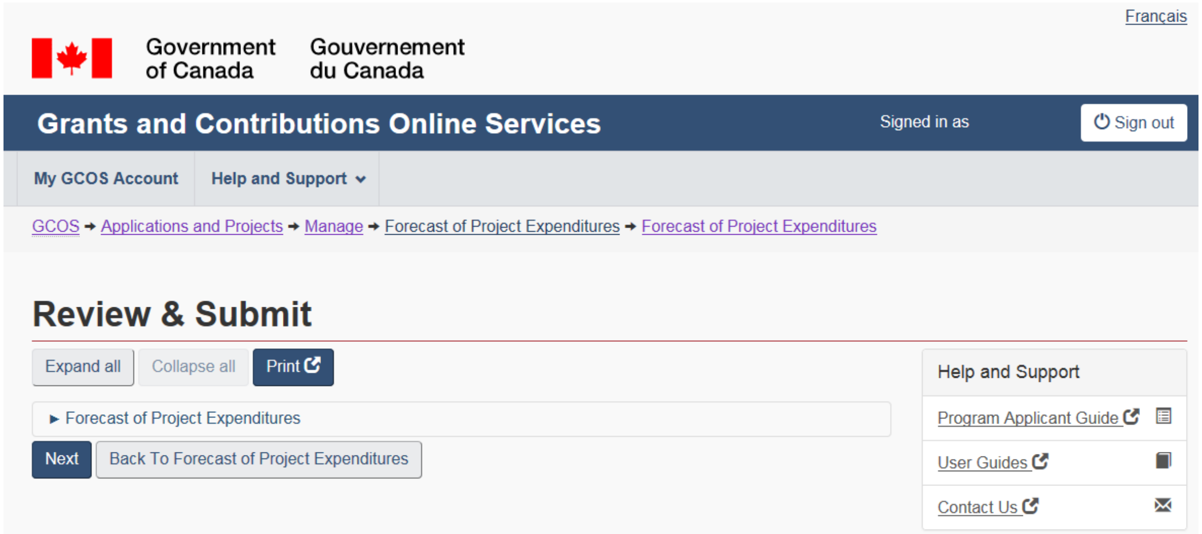
Figure 85 – Forecast of project expenditures screen



Text description of Figure 85

The Forecast of Project Expenditures screen is used to capture the monthly financial requirements for your project per month and per fiscal year.

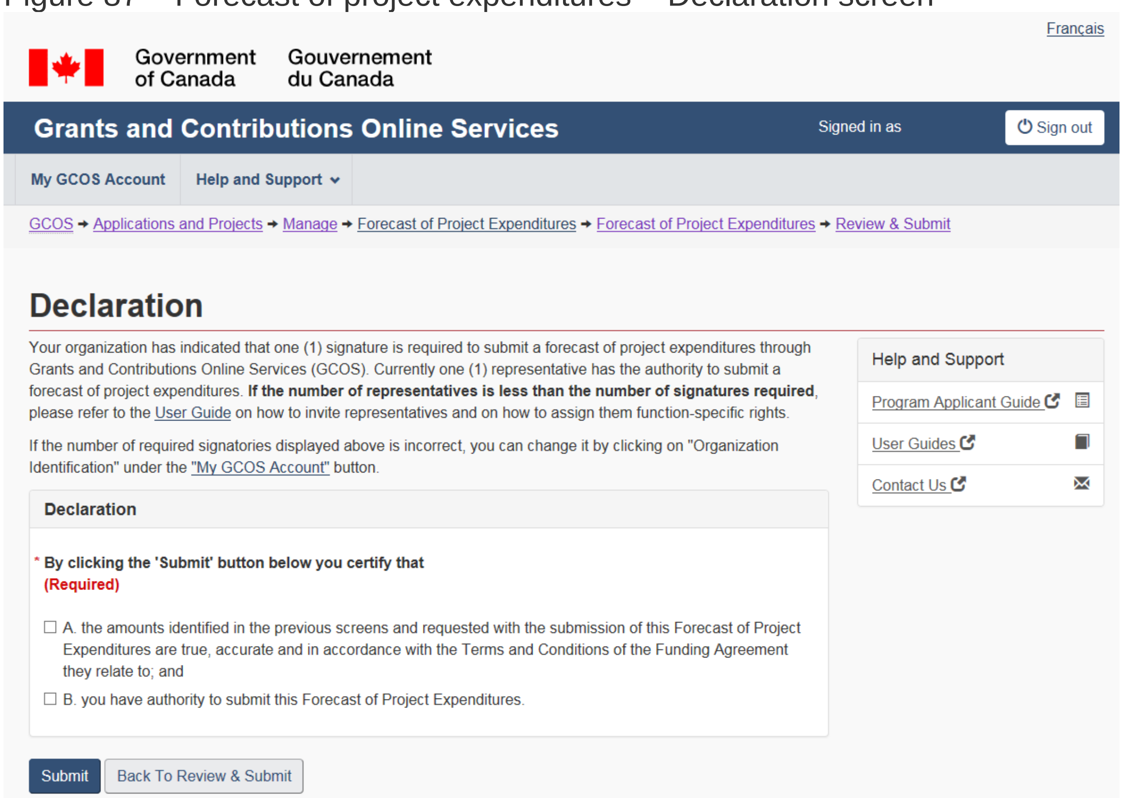
Figure 86 – Forecast of project expenditures – Review and submit screen



Text description of Figure 86

The Review & Submit screen is a full summary of all the information entered into the Forecast of Project Expenditures.

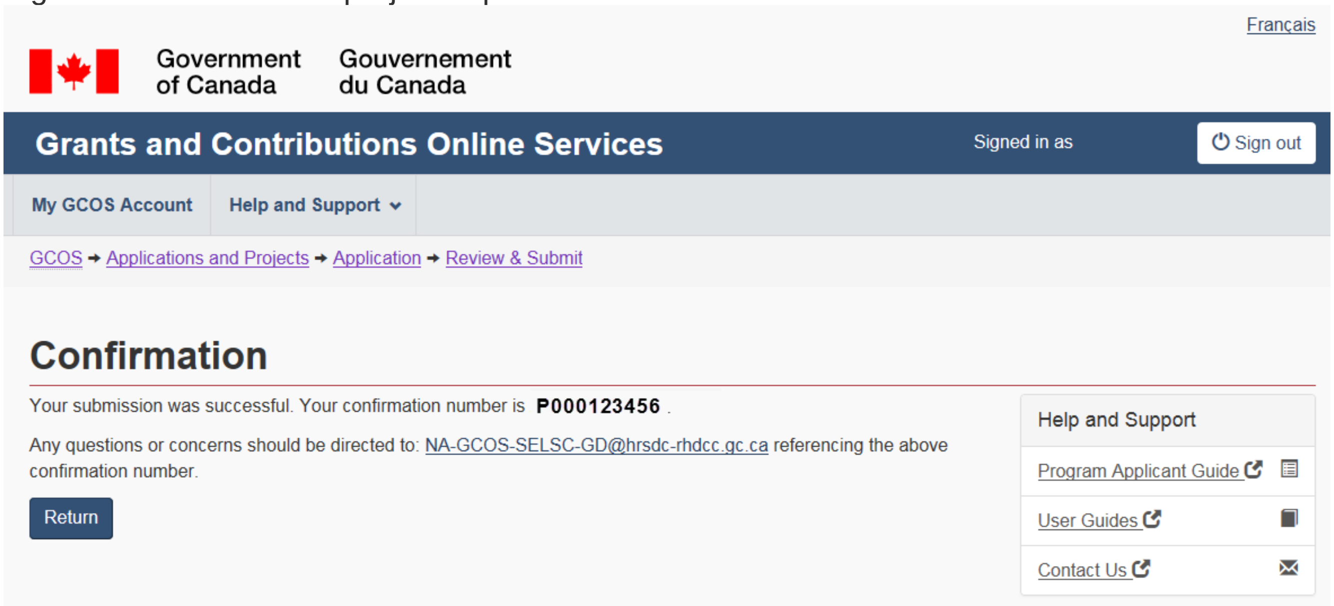
Figure 87 – Forecast of project expenditures – Declaration screen



Text description of Figure 87

The Declaration screen is used to certify the user's authority.

Figure 88 – Forecast of project expenditures – Confirmation screen

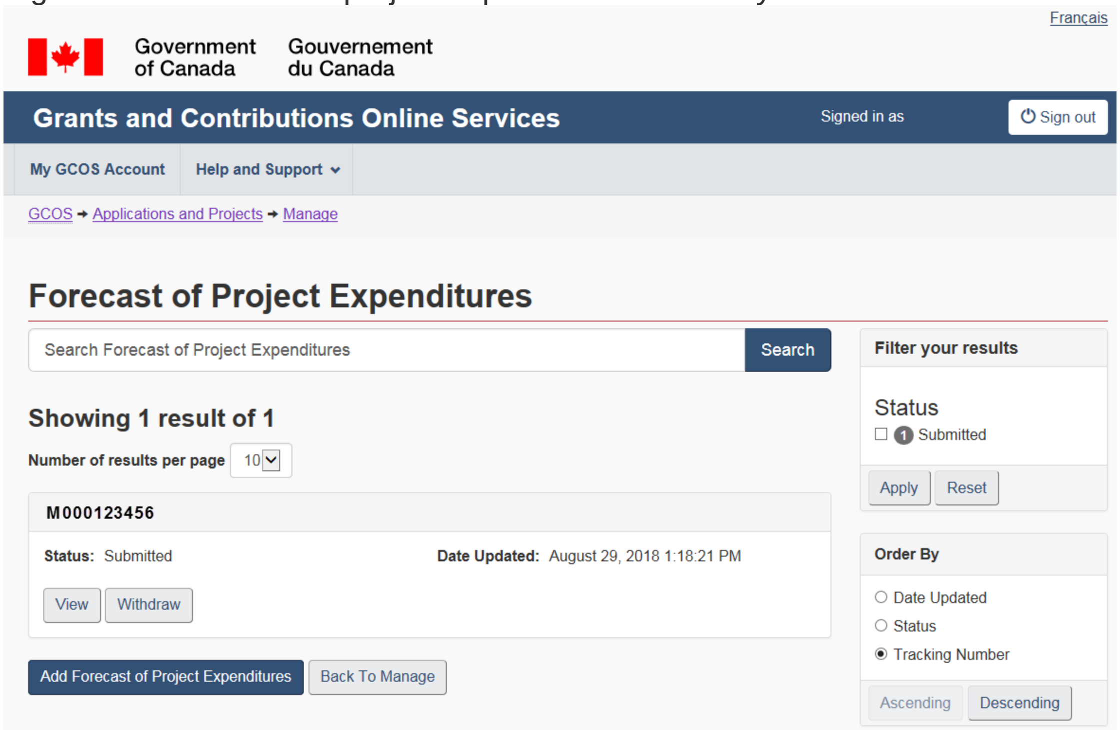


Text description of Figure 88

The Confirmation screen provides you with a confirmation number that your Forecast of Project Expenditures was successfully submitted.

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

Figure 89 – Forecast of project expenditures summary screen



Text description of Figure 89

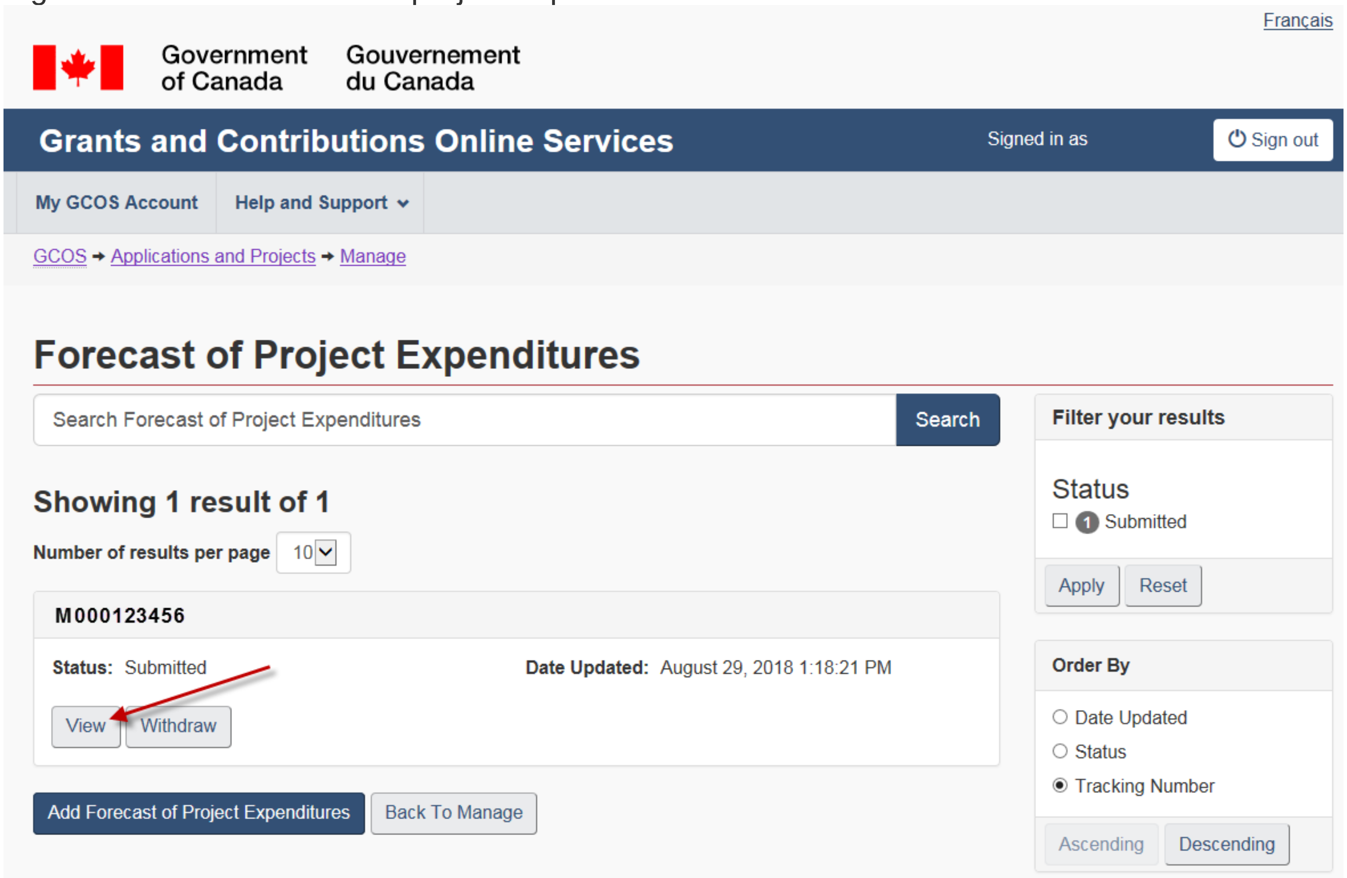
The Forecast of Project Expenditures screen provides a summary of all Forecast of Project Expenditures for this project.

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



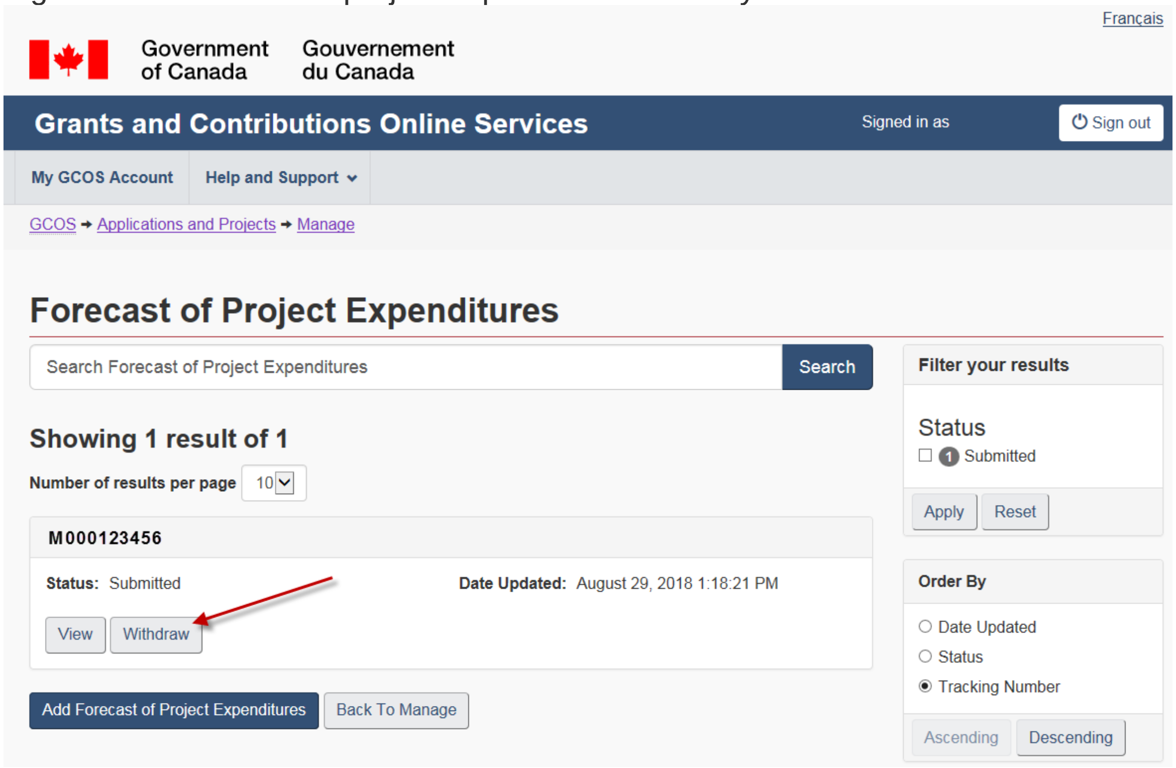
Text description of Figure 90
The view button on the Forecast of Project Expenditures Summary screen allows you to view your Forecast of Project Expenditures.

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



Text description of Figure 91
The Withdraw button on the Forecast of Project Expenditures Summary screen allows you to withdraw your Forecast of Project Expenditures.

Figure 92 – Withdraw Forecast of Project Expenditure confirmation screen

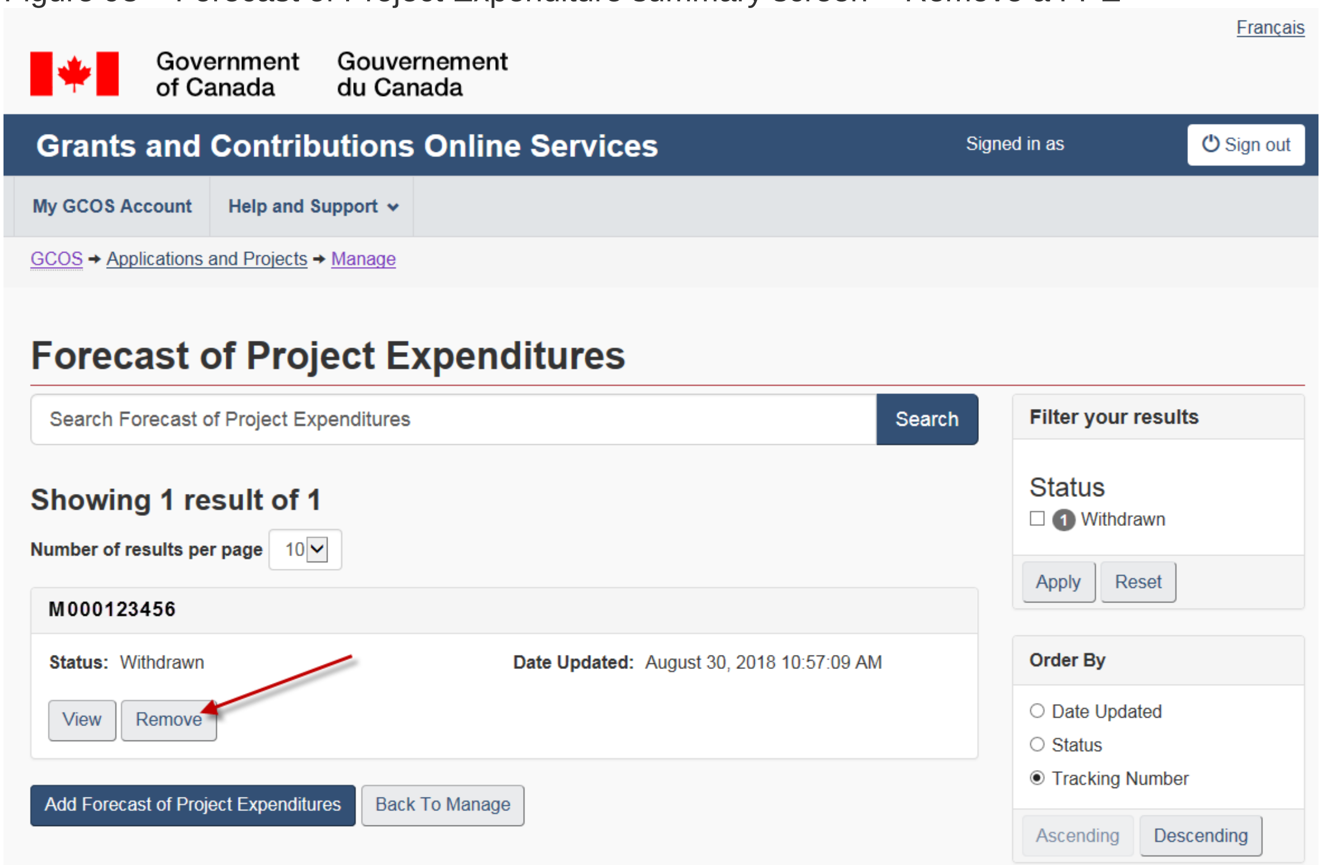
Text description of Figure 92
The withdraw Forecast of Project Expenditures screen confirms that you would like to withdraw your Forecast of Project Expenditures.

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



Text description of Figure 93

The Remove button on the Forecast of Project Expenditures Summary screen allows you to Remove your withdrawn or draft Forecast of Project Expenditures.

Figure 94 –Remove Forecast of Project Expenditures

Text description of Figure 94
The Remove Forecast of Project Expenditures screen confirms that you would like to remove your 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

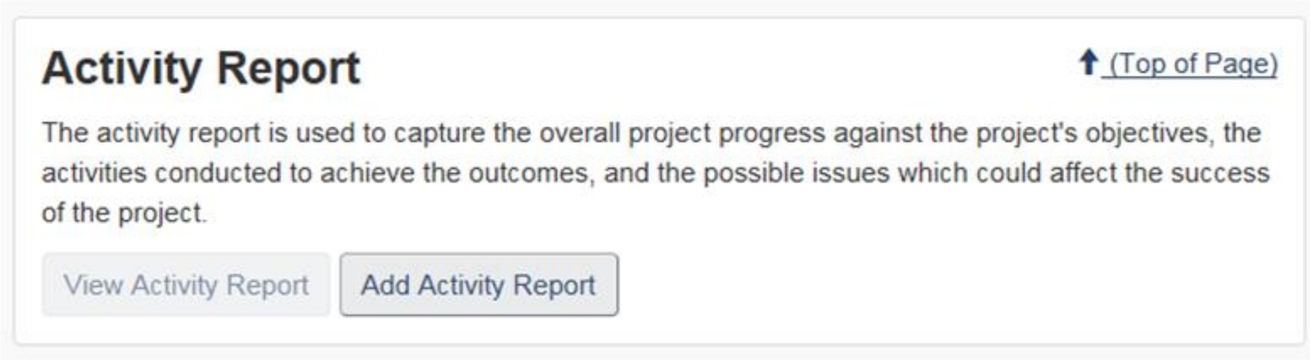
Overall, the activity report:

- 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

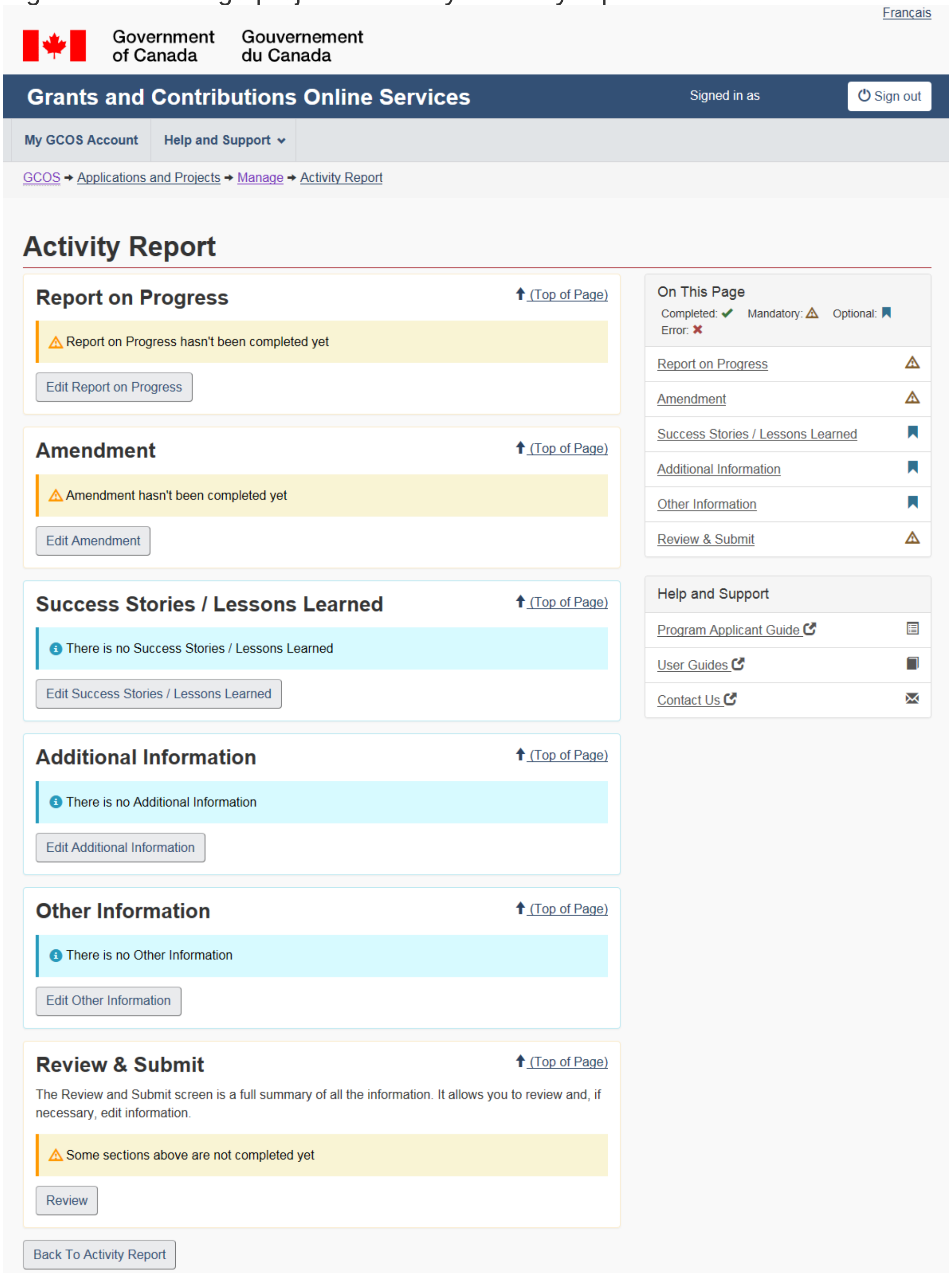
Figure 95 – Manage project summary - Activity report



Text description of Figure 95
The Activity Report screen is used to capture the details of your activity report for this project.

- 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)

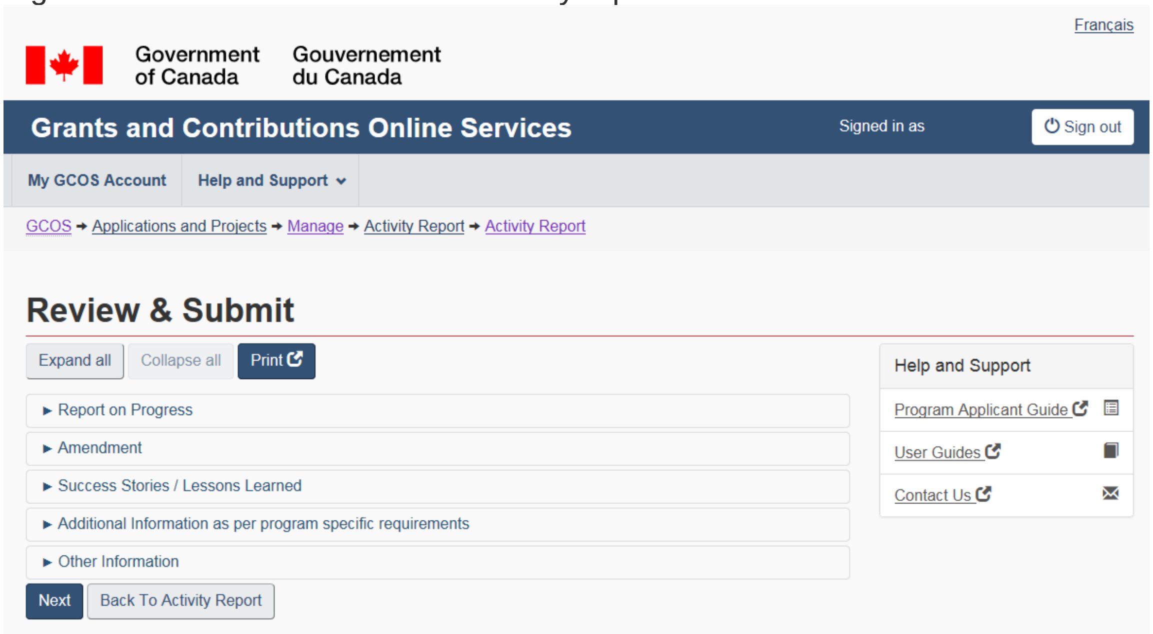
Figure 96 – Manage project summary - Activity report screenText



Text description of Figure 96

The Activity Report screen provides you with the screens to complete the details of your activity report for this project.

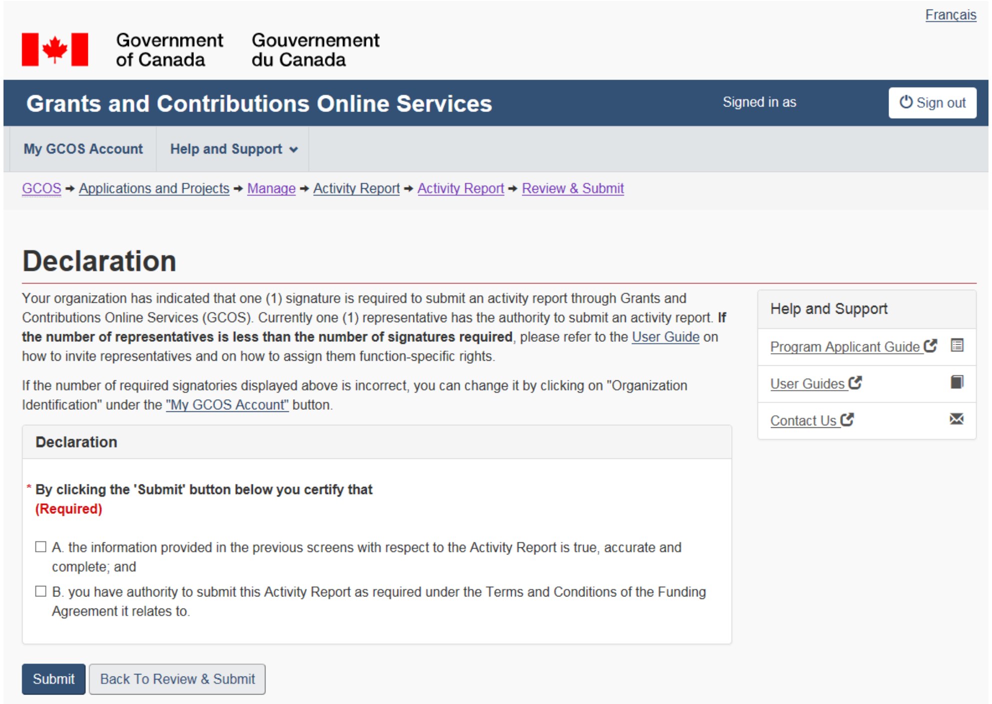
Figure 97 – Review and submit - Activity report



Text description of Figure 97

The Review & Submit screen is a full summary of all the information entered into the Activity Report.

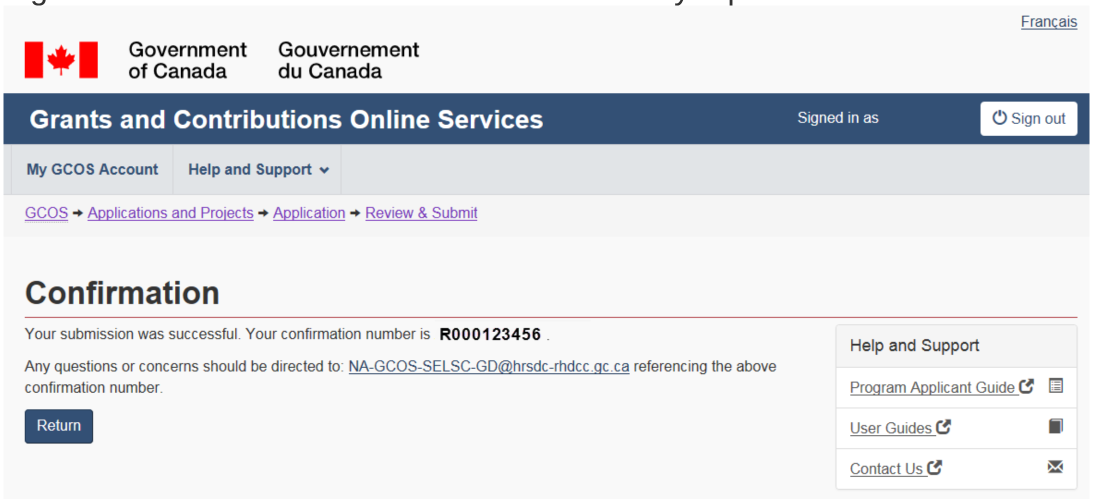
Figure 98 – Declaration screen - Activity report



Text description of Figure 98

The Declaration screen is used to certify the user’s authority.

Figure 99 – Confirmation of submission - Activity report

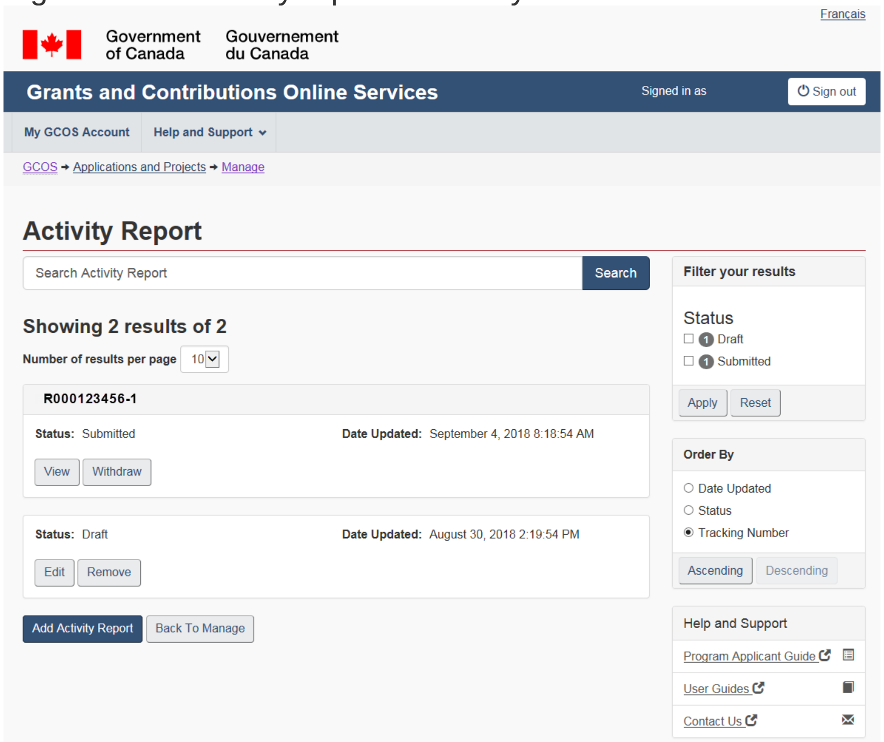


Text description of Figure 99

The Confirmation screen provides you with a confirmation number that your Activity Report was successfully submitted.

The Return Button will bring you to the Activity Report Summary Screen (Figure 100)

Figure 100 – Activity report summary screen



Text description of Figure 100

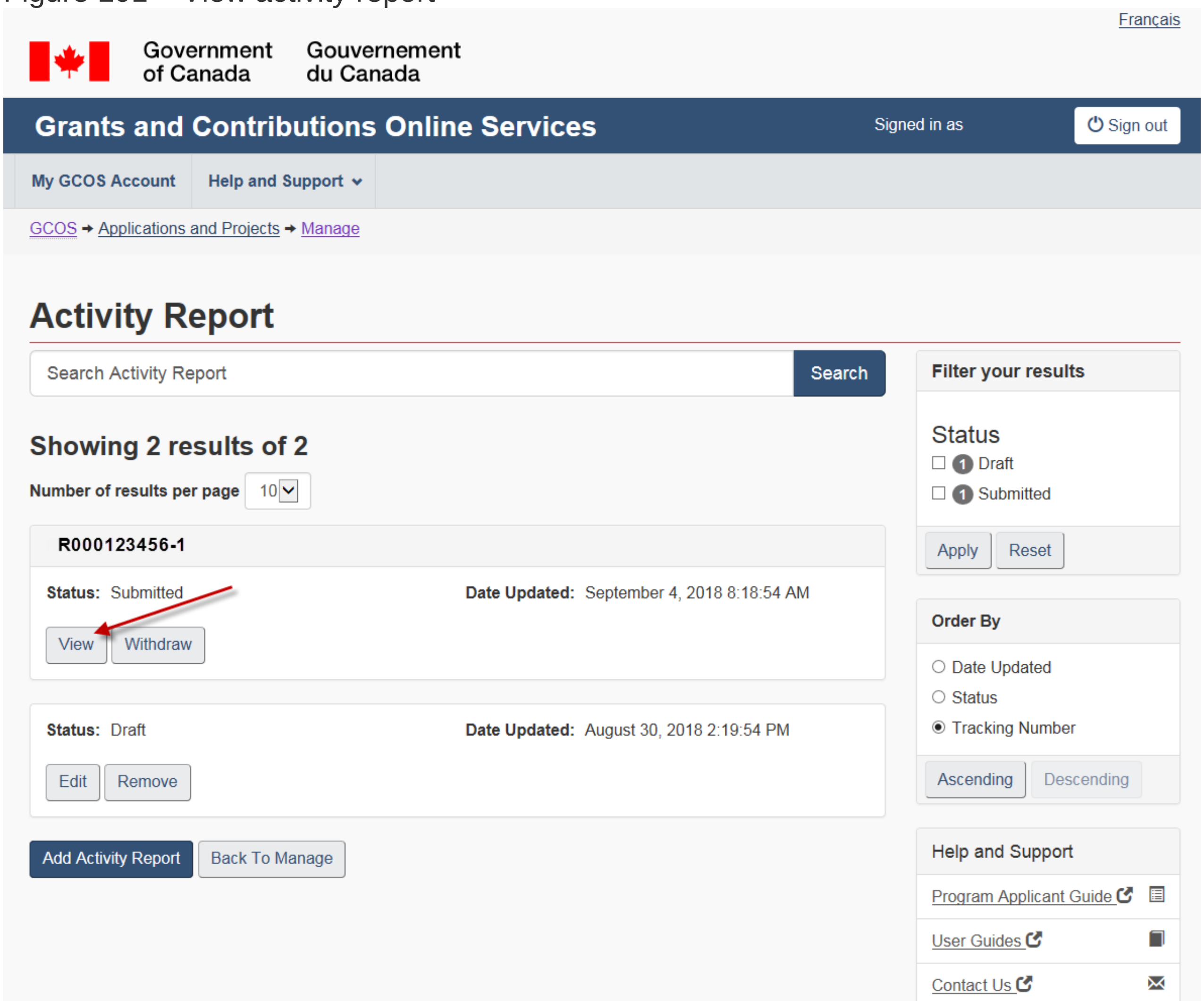
The Activity Report screen provides you with a summary of all activity reports for this project.

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



Text description of Figure 101

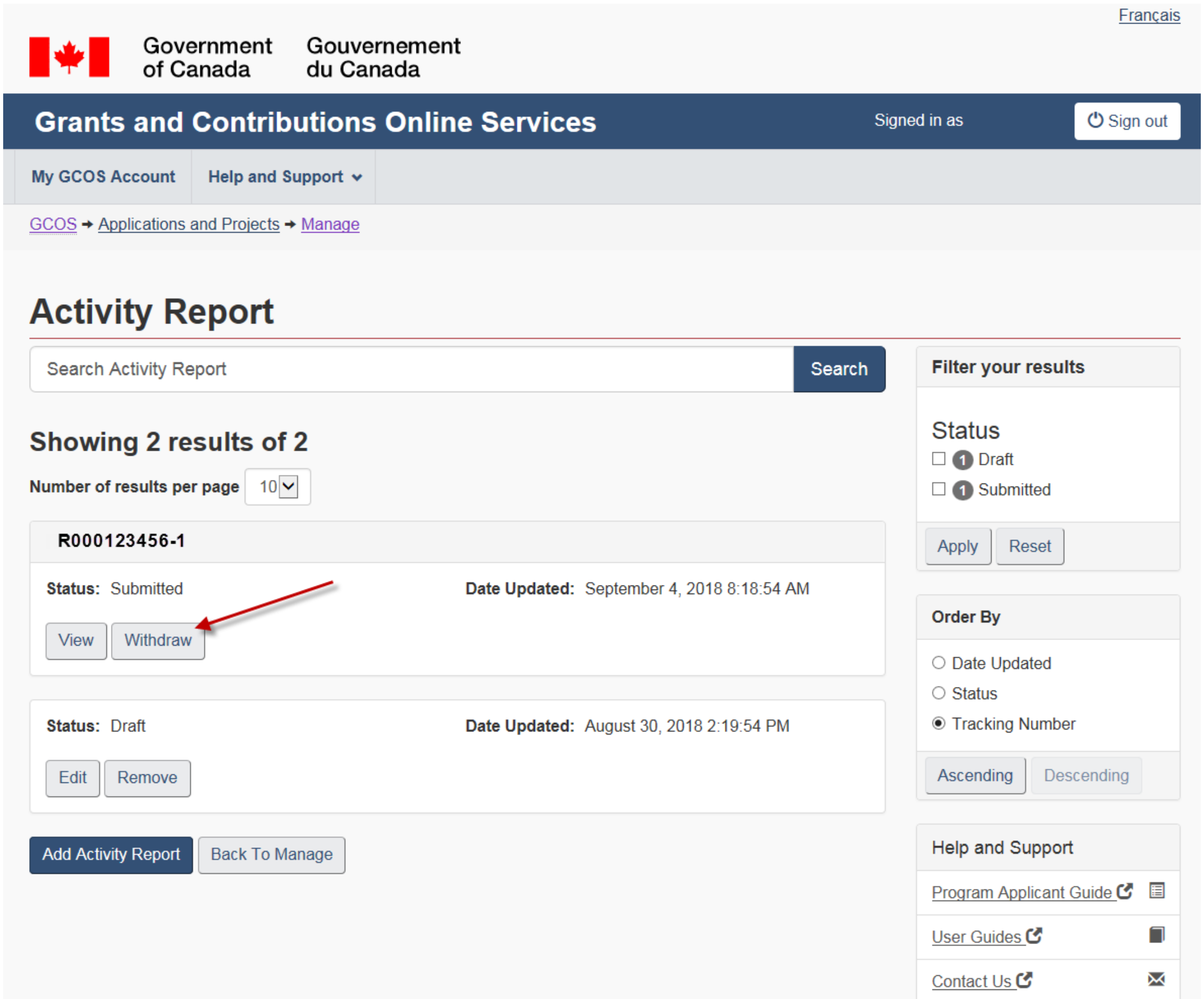
The View button on the Activity Report screen allows you to view your Participant.

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.

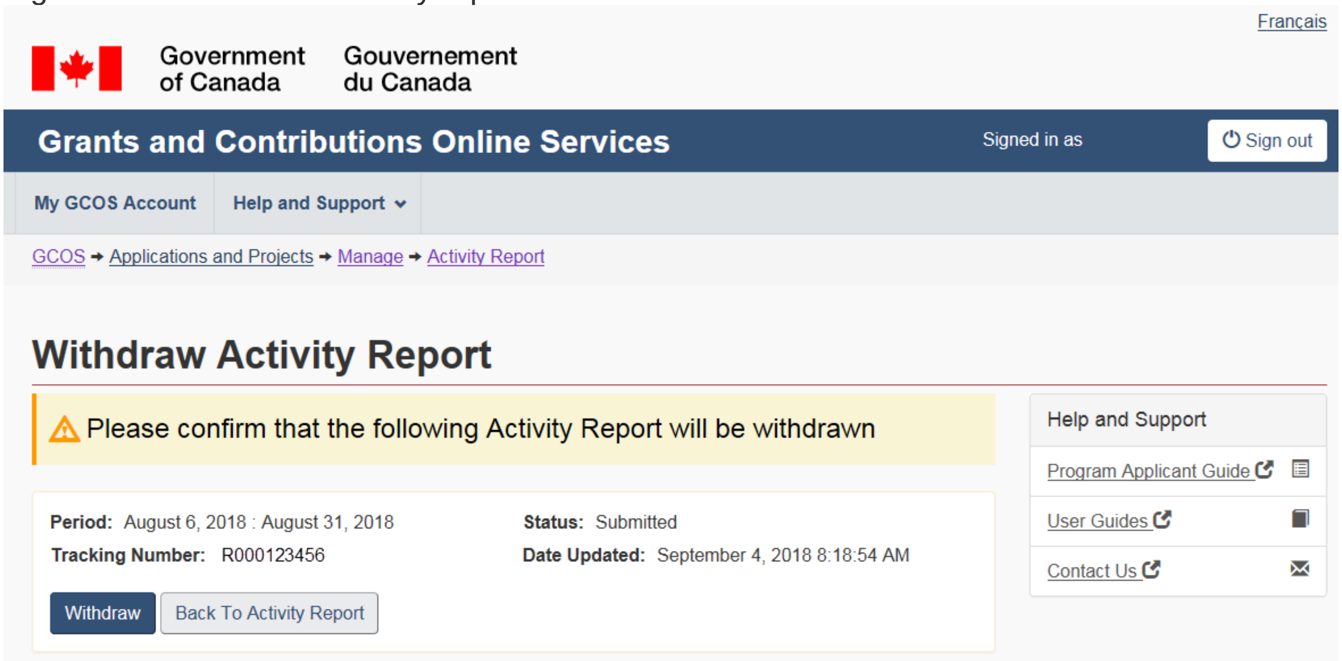
- Click Withdraw (Figure 102) which will direct you to the Withdraw Activity Report screen (Figure 103)
- Click Withdraw to confirm that the Activity Report will be withdrawn

Figure 102 – Activity report summary screen - Withdraw an activity report



Text description of Figure 102
The Withdraw button on the Activity Report screen allows you to withdraw your Participant.

Figure 103 – Withdraw activity report confirmation screen



Text description of Figure 103

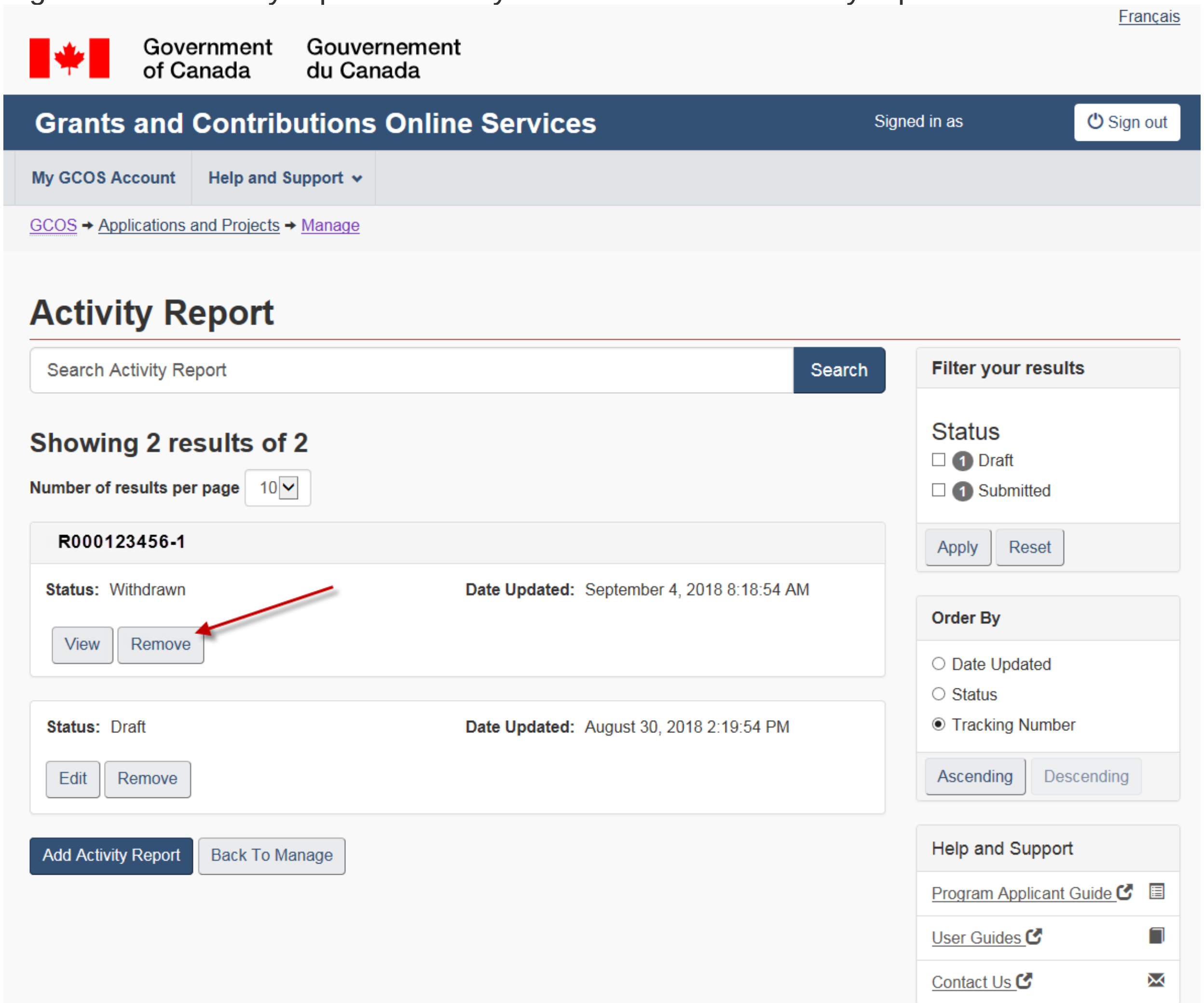
The Withdraw Activity Report screen confirms that you would like to Withdraw your Activity Report.

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

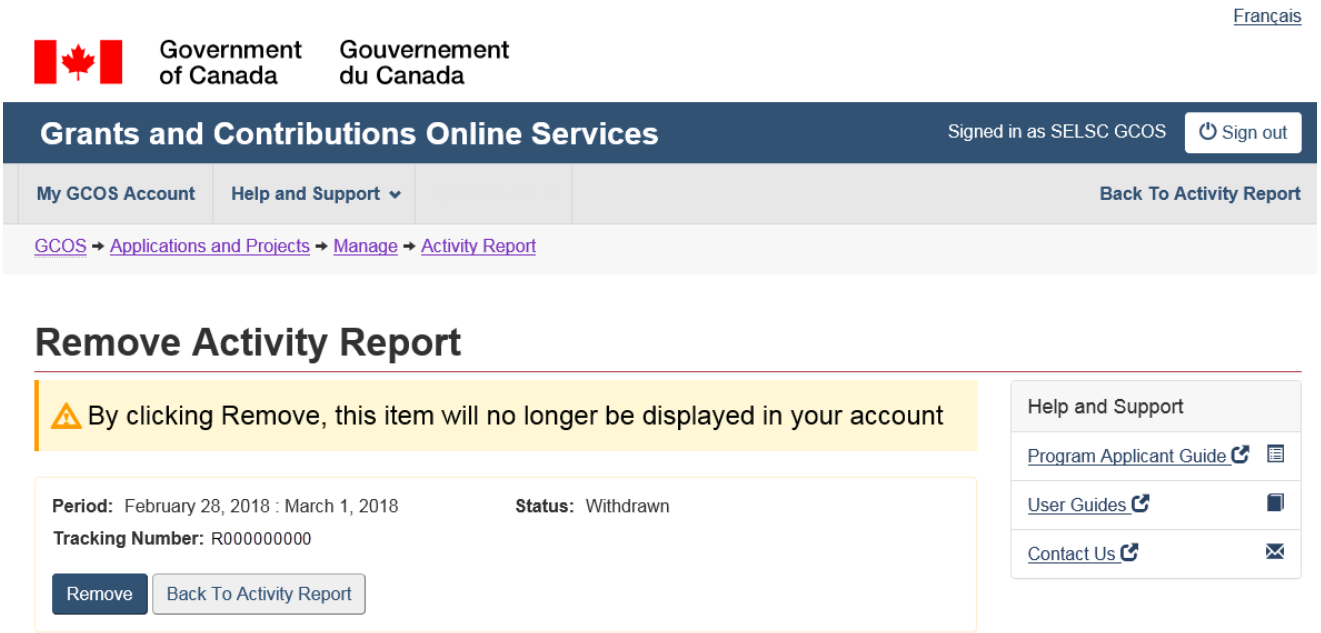
Figure 104 – Activity report summary screen – Remove activity report



Text description of Figure 104

The Remove button on the Activity Report screen allows you to remove your Activity Report.

Figure 105 – Remove activity report



Text description of Figure 105
The Remove Activity Report screen confirms that you would like to Remove your 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:

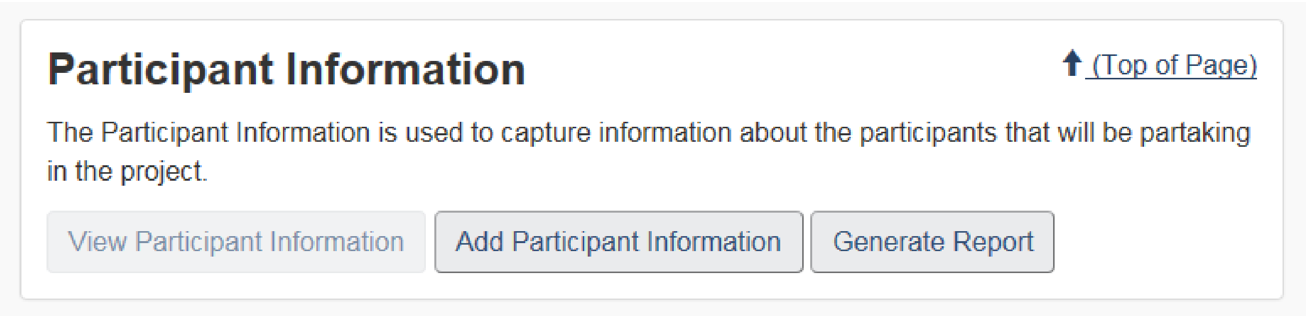
- Enter your username and password to access GCOS.
- Click Continue
- Click your organization's name
- Click Gs & Cs Online Services
- Click My GCOS Account on the top menu
- Click Representatives
- Once you retrieve your name
- Click View
- Ensure the "Create", "Submit" and/or "View" checkboxes for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

Figure 106 – Manage project summary - Participant information



Text description of Figure 106
The Participant Information screen is used to capture information about the participants that will partake in this project.

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).

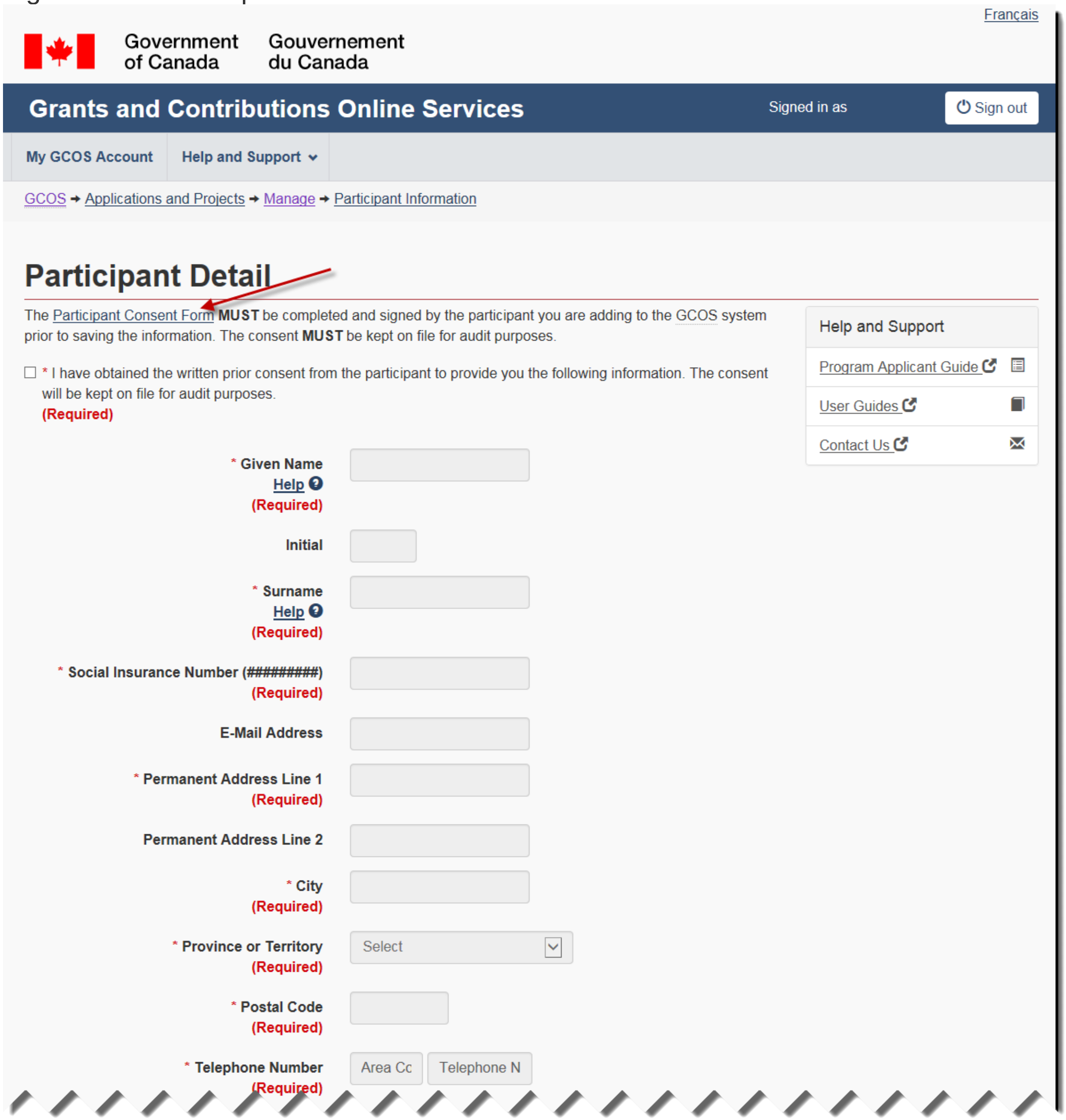
5.7.4 Adding a participant information

Important: Before completing this screen, you must print the Participant consent form 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

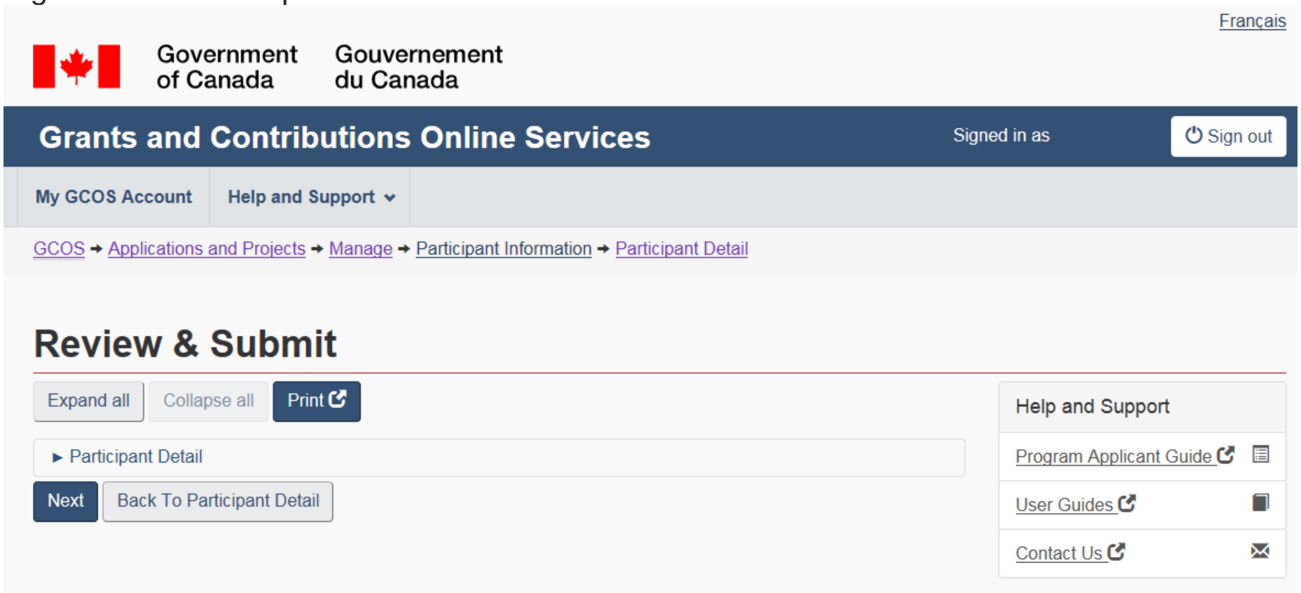


Text description of Figure 107

The Participant Details screen is used to provide details of the participant and of their eligibility to partake in this project.

Click Next (Figure 108)

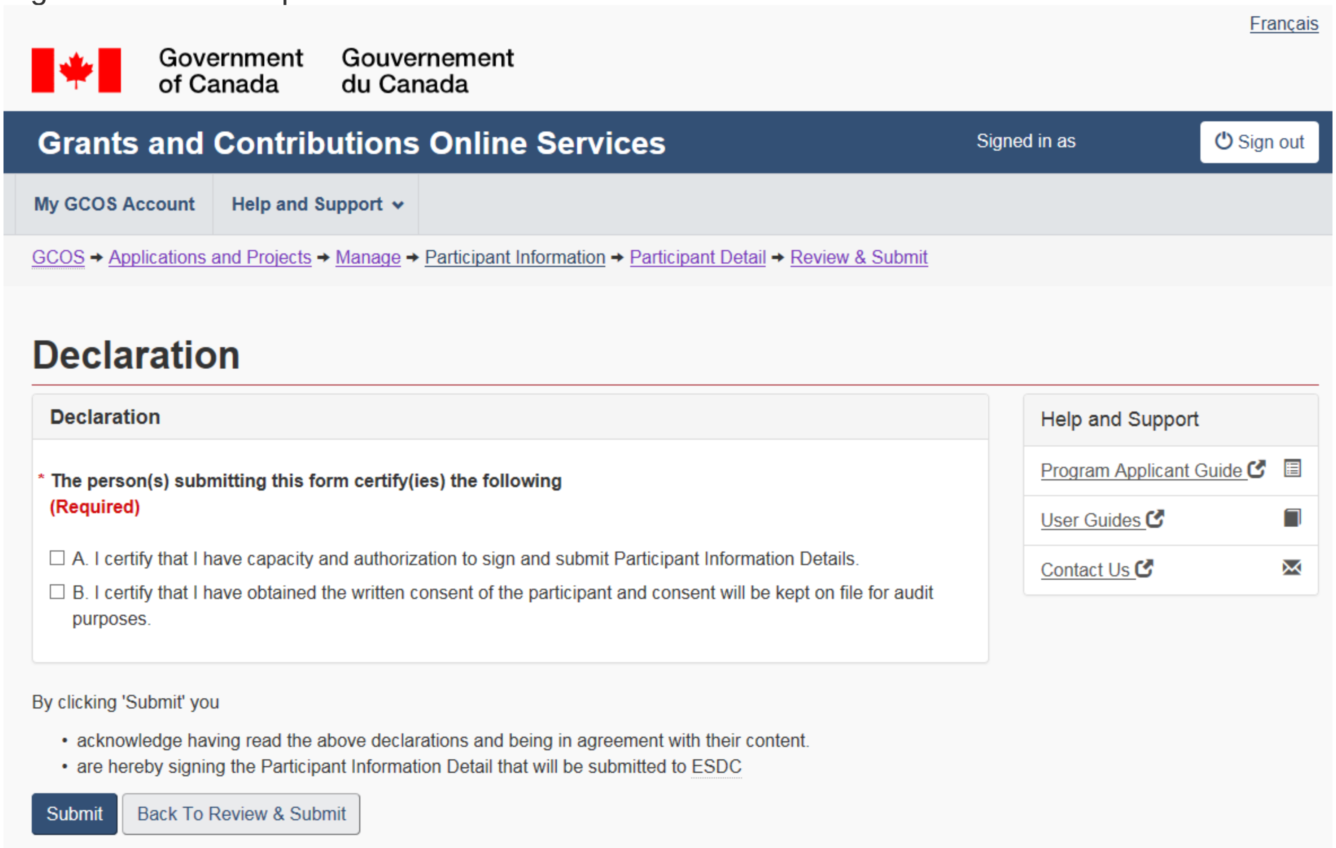
Figure 108 – Participant - Review and submit screen



Text description of Figure 108
The Review & Submit screen is a full summary of all the information entered into the Participant Information.

- 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



Text description of Figure 109

The Declaration screen is used to certify the user’s authority.

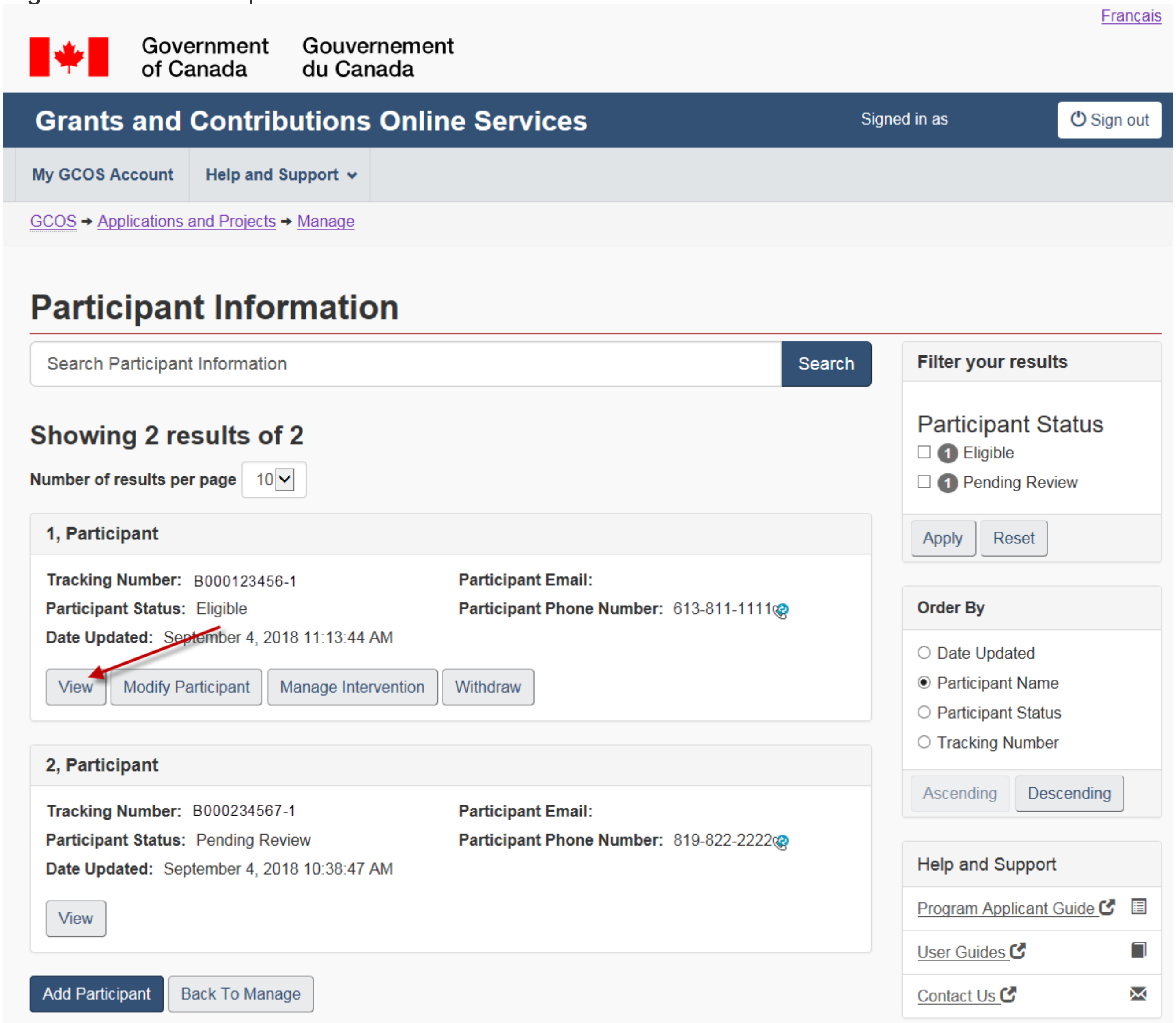
Figure 110 – Participant – Confirmation screen

Text description of Figure 110
The Confirmation screen provides you with a confirmation number that your Participant was successfully submitted.

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



Text description of Figure 111

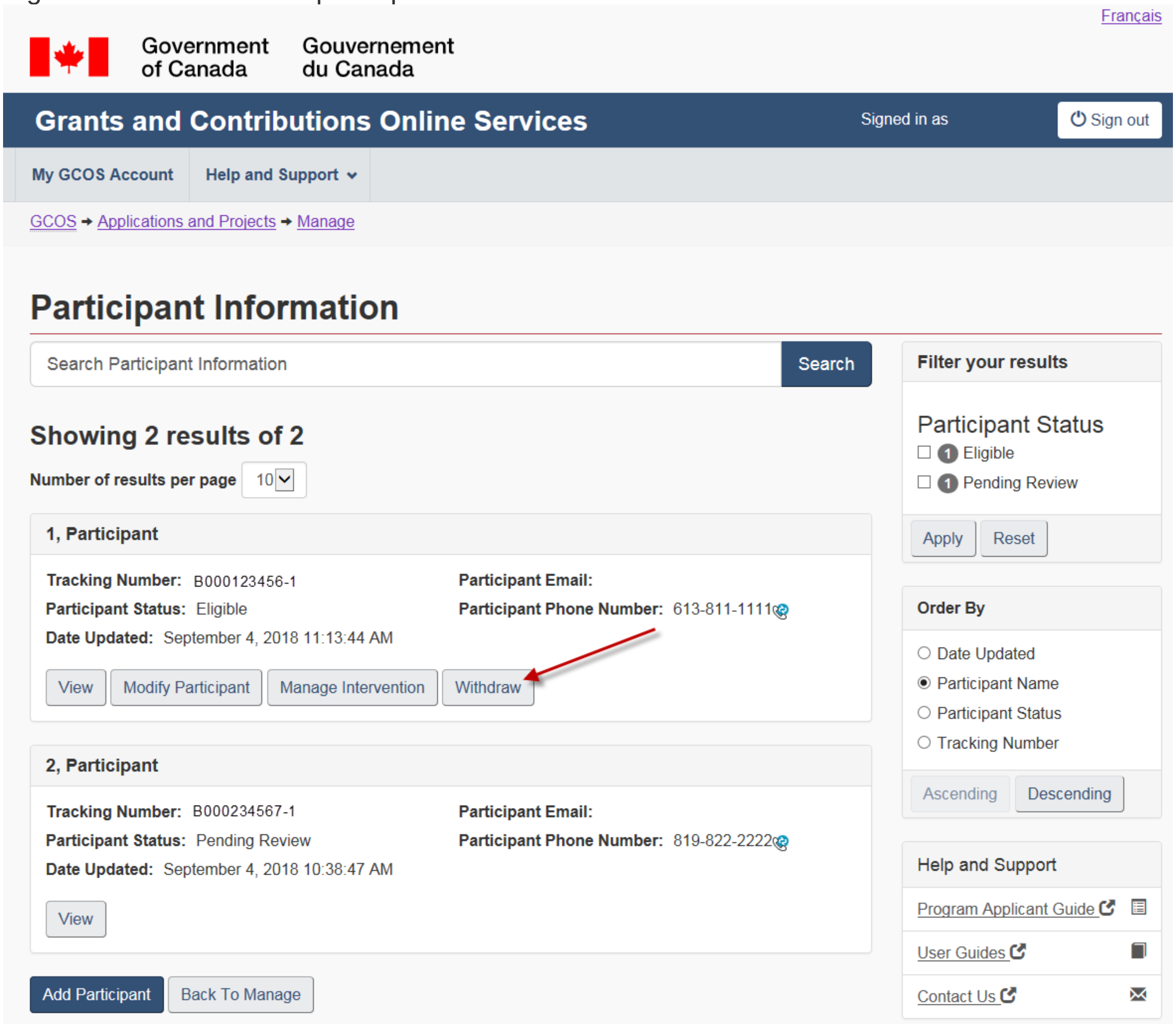
The View button on the Participant Information screen allows you to view your Participant Information.

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

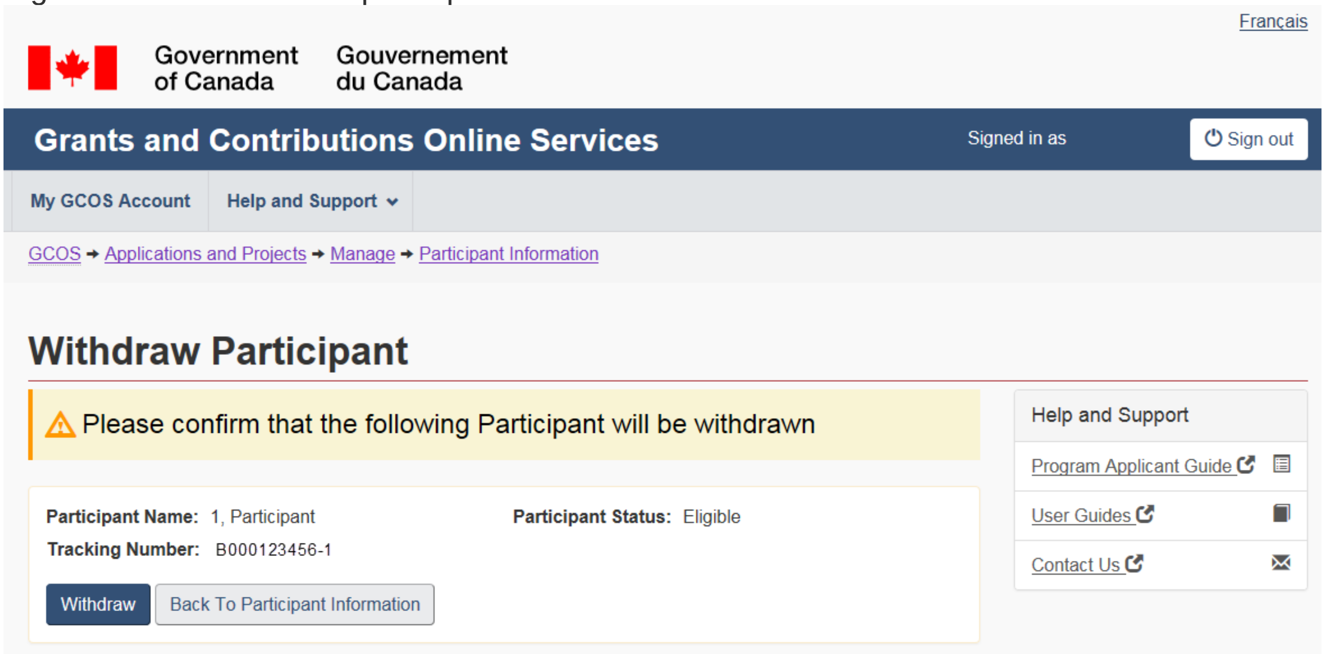
Figure 112 – Withdraw a participant



Text description of Figure 112

The Withdraw button on the Participant Information screen allows you to Withdraw your Participant from this project.

Figure 113 – Withdraw a participant – Confirmation screen

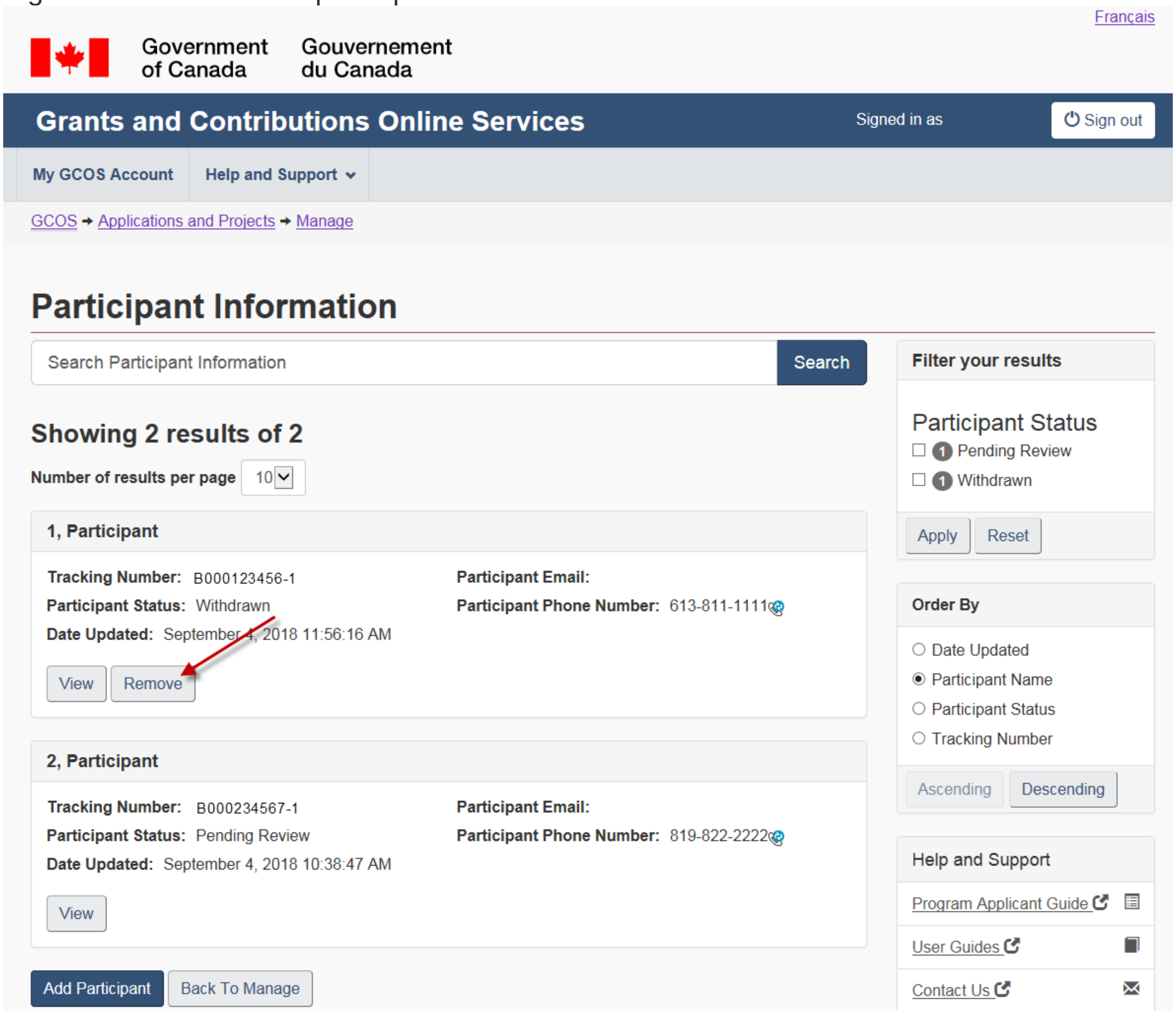


Text description of Figure 113The Withdraw Participant screen confirms that your Participant will be withdrawn.

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

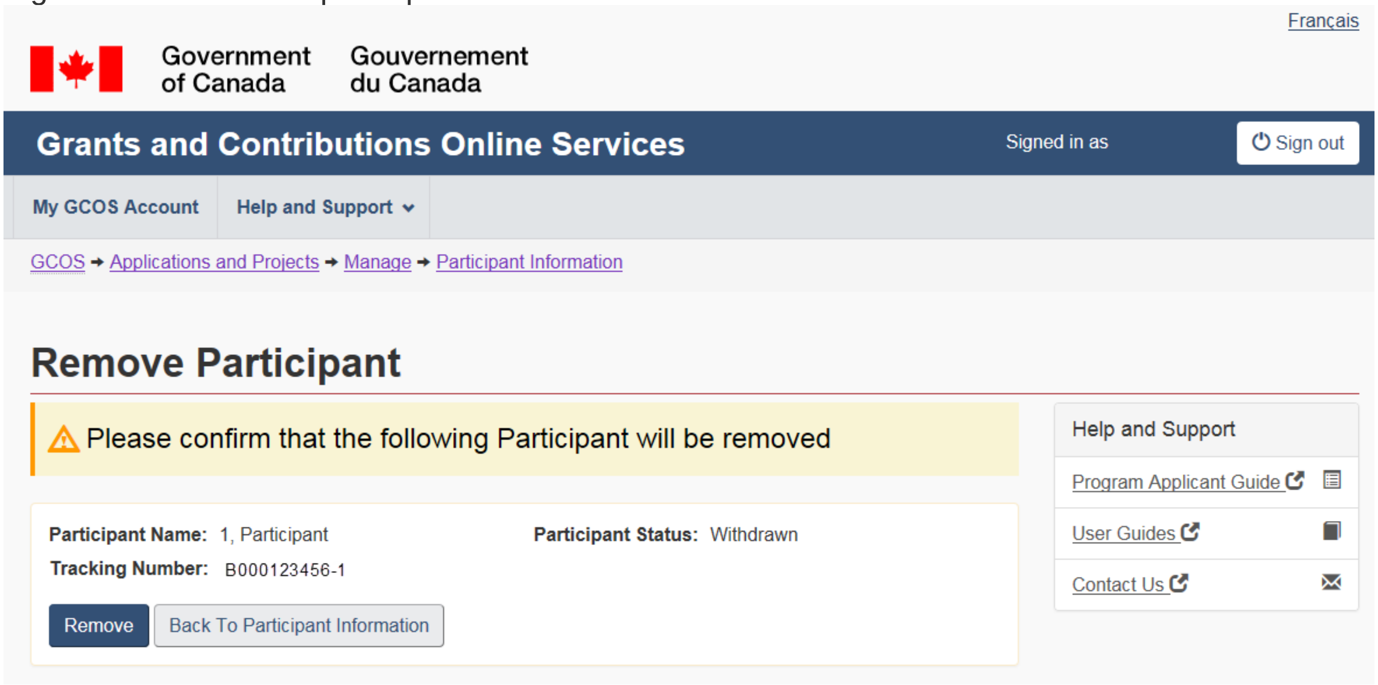
Figure 114 – Remove a participant



Text description of Figure 114

The Remove button on the Participant Information screen allows you to remove your Participant.

Figure 115 – Remove participant – Confirmation screen



Text description of Figure 115

The Remove Participant screen confirms that your participant will be removed from your account.

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:

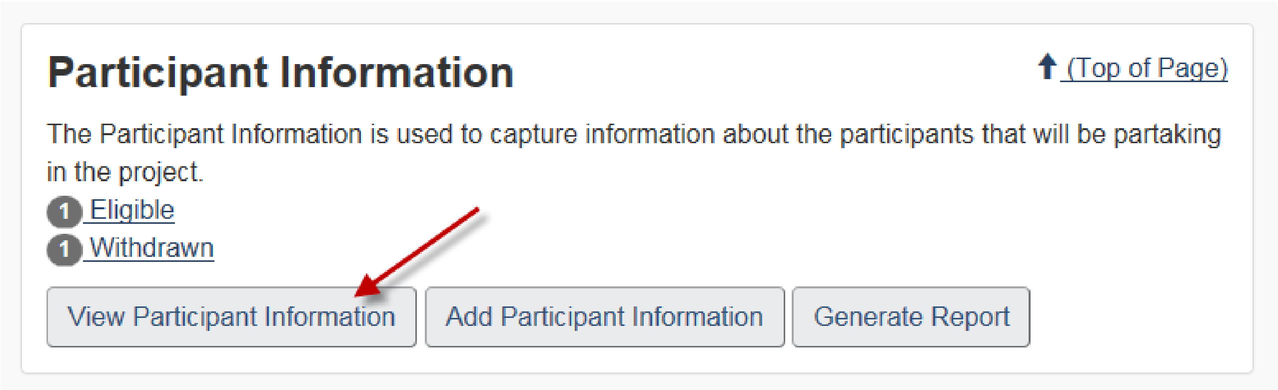
- Enter your username and password to access GCOS.
- Click Continue
- Click your organization's name
- Click Gs & Cs Online Services
- Click My GCOS Account on the top menu
- Click Representatives
- Once you retrieve your name
- Click View
- Ensure the "Create", "Submit" and/or "View" checkboxes for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

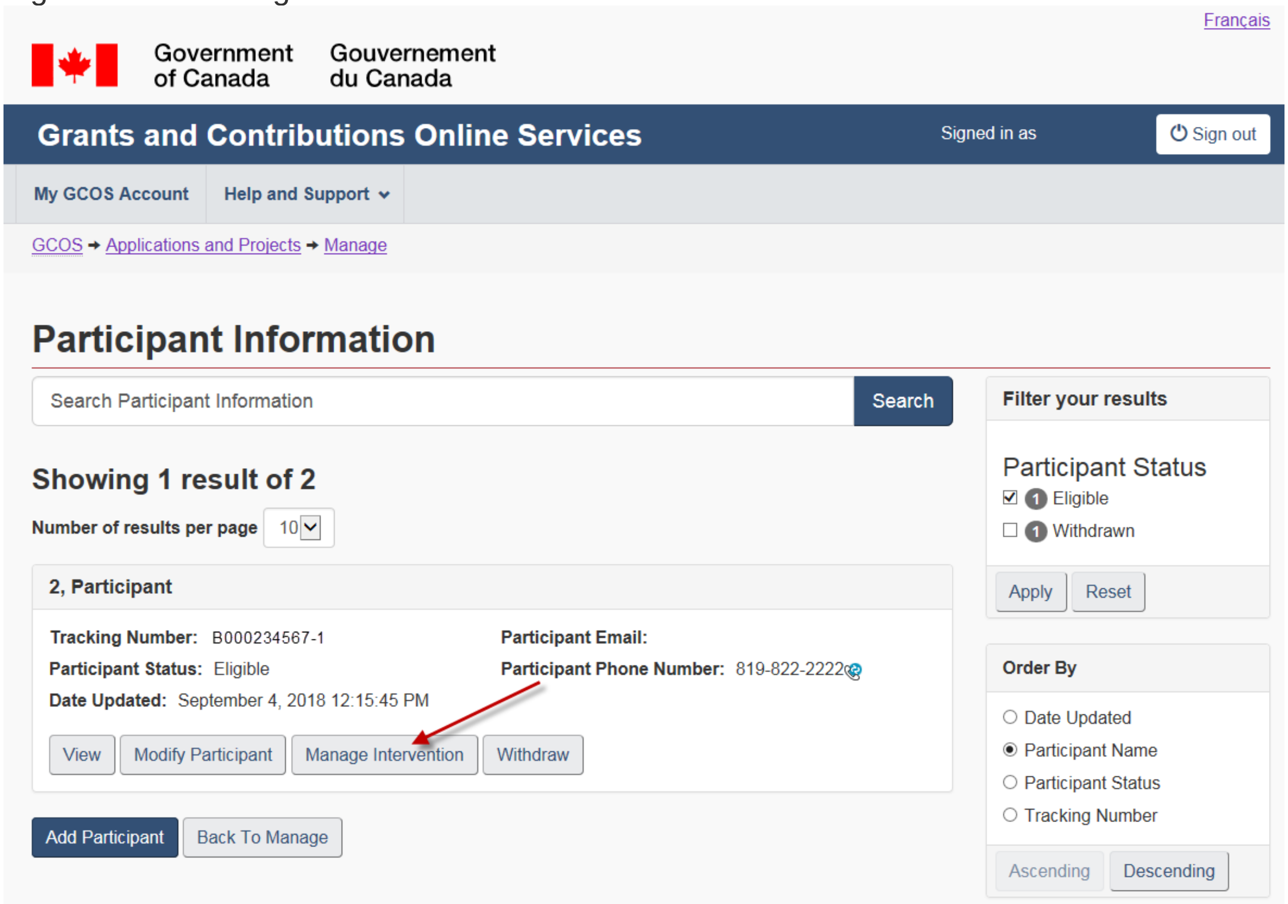
- Enter your username and password to access GCOS.
- Click Continue
- Click your organization's name
- Click Gs & Cs Online Services
- Click View List of Applications and Projects
- Retrieve your project
- Click Manage
- Click on View Participant Information to access the list of your Participants (Figure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

Figure 116 – Manage project summary - Participant information



Text description of Figure 116
The View Participant Information Button will direct you to the summary of all your participants that have been added to this project.

Figure 117 – Manage intervention

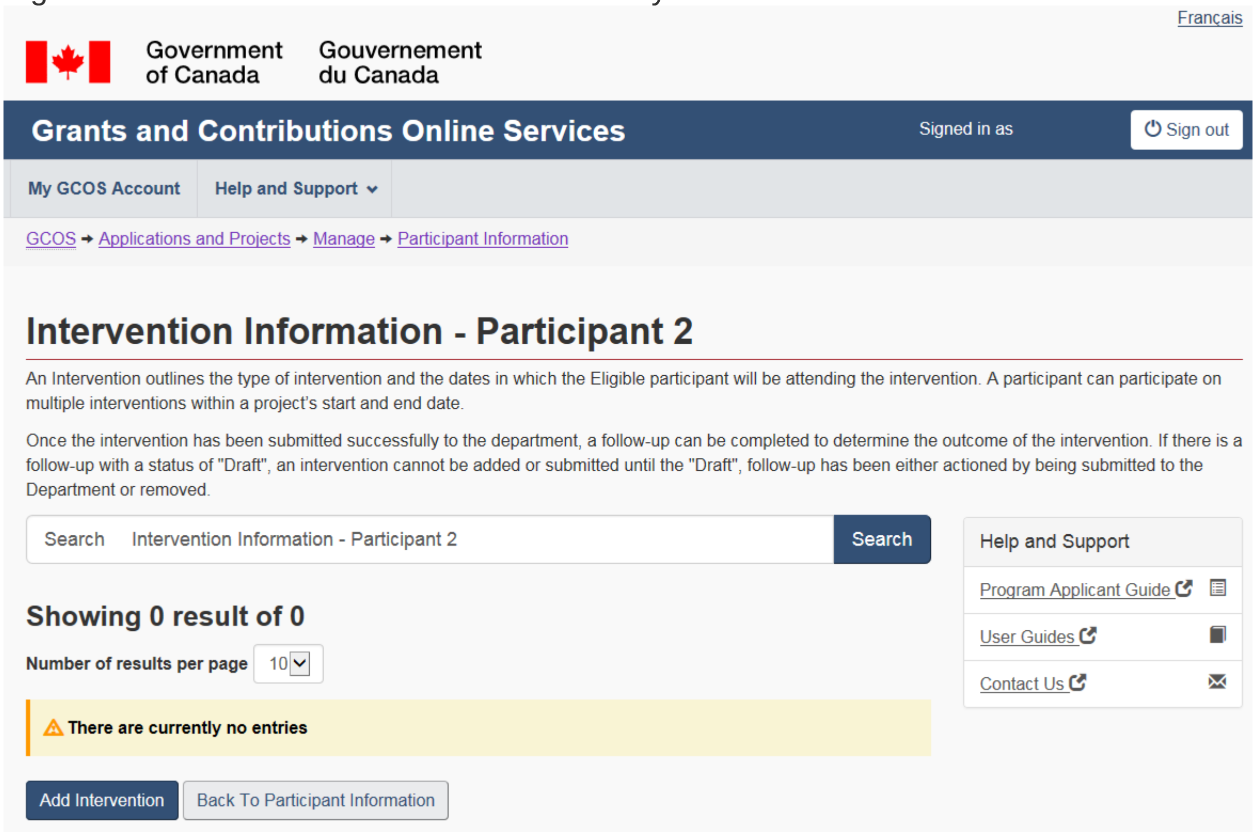


Text description of Figure 117
The Participant Information Summary screen is used to manage the Interventions for your participants.

5.8.3 How to add an intervention for a participant

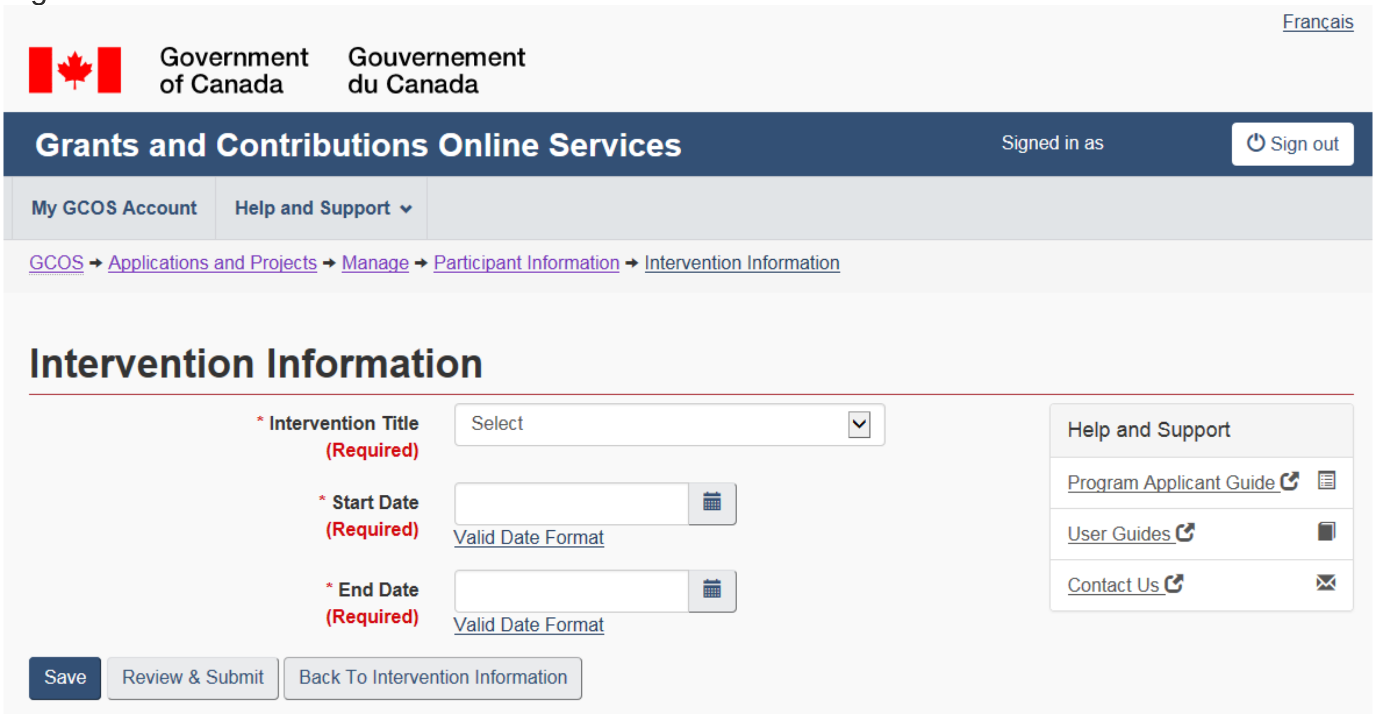
- Click on Add Intervention (Figure 118)
- Complete the Required Fields (Figure 119)
- Click Save
- Click Review & Submit

Figure 118 – Intervention information summary screen



Text description of Figure 118
The Intervention Information screen is used to add interventions for a participant.

Figure 119 – Intervention information screen

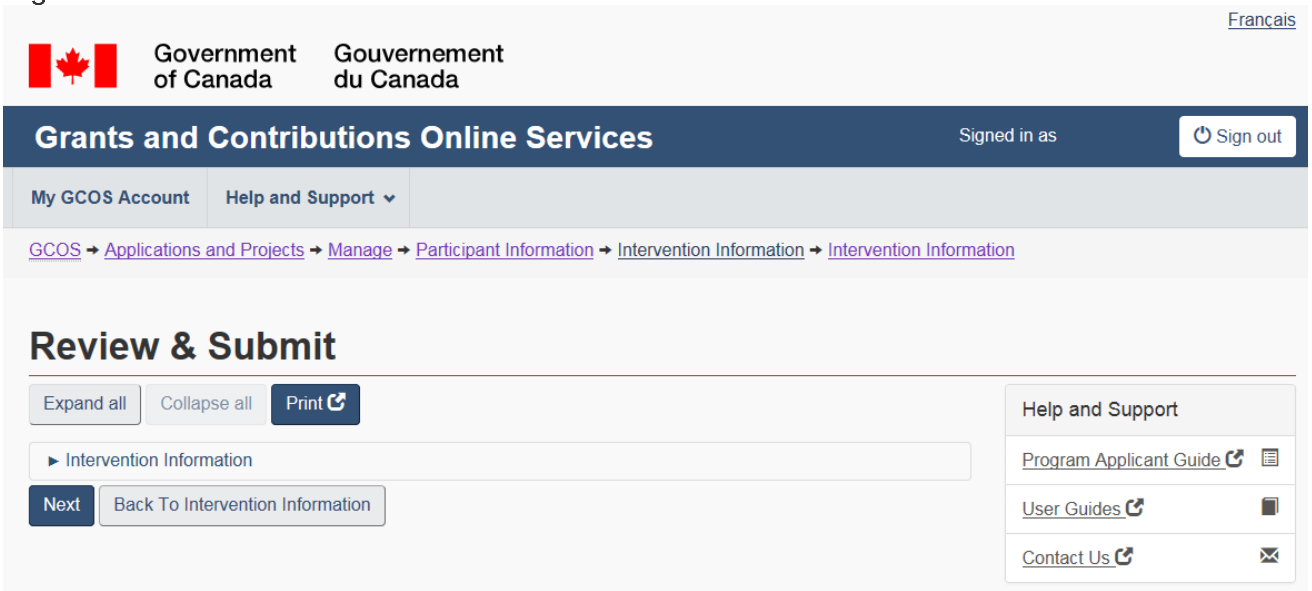


Text description of Figure 119

The Intervention Information screen is used to provide details of the intervention for a participant.

- 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

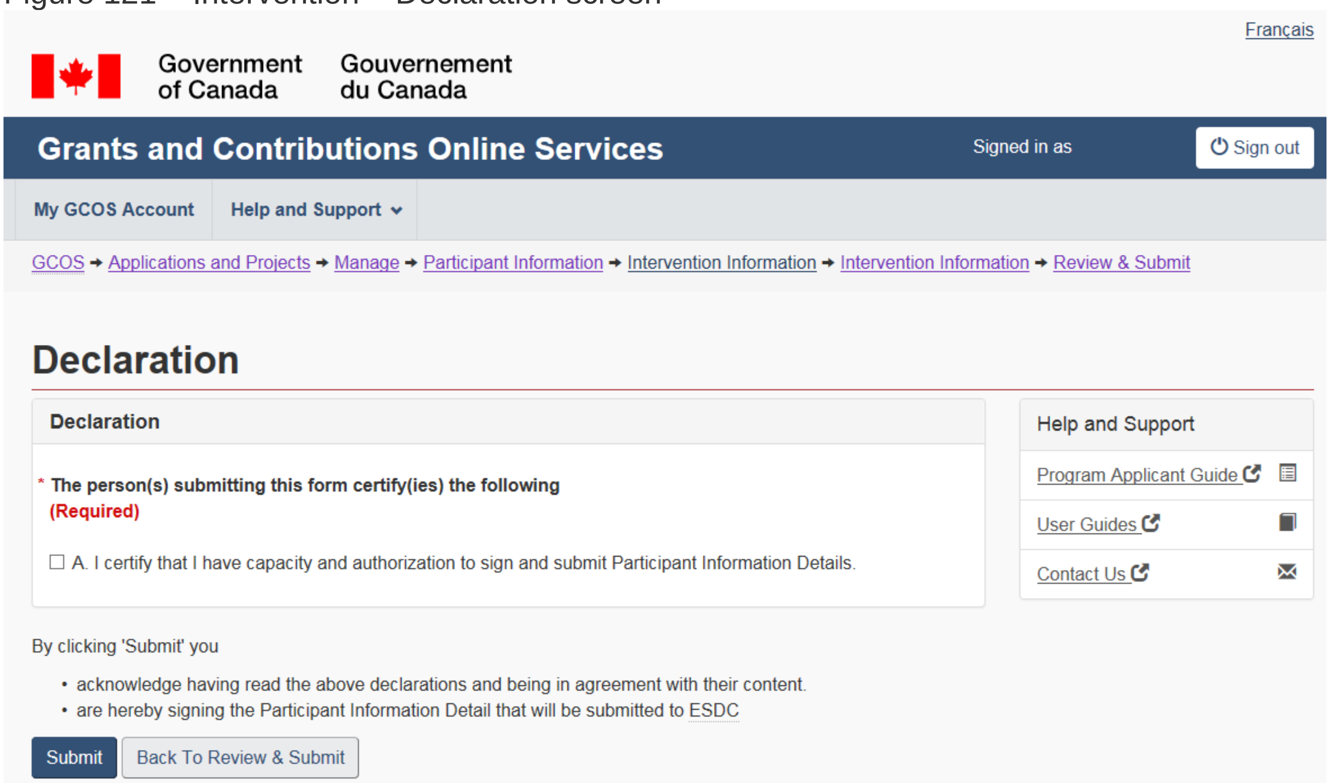
Figure 120 – Intervention – Review and submit screen



Text description of Figure 120

The Review & Submit screen is a full summary of all the information entered into the Intervention.

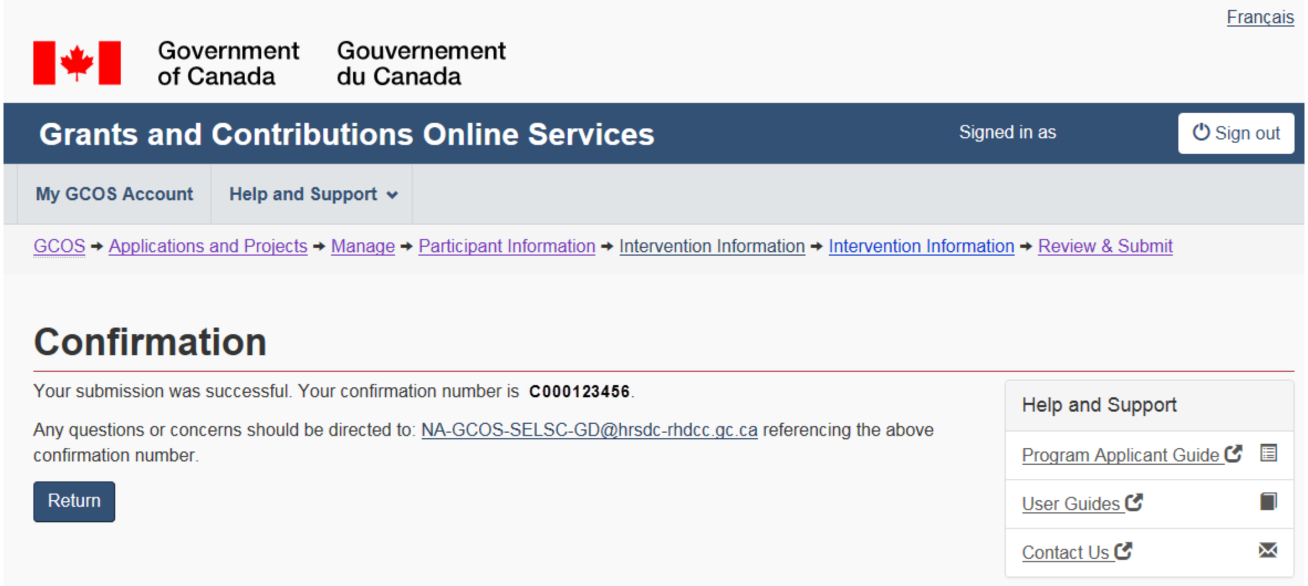
Figure 121 – Intervention – Declaration screen



Text description of Figure 121

The Declaration screen is used to certify the user’s authority.

Figure 122 – Intervention – Confirmation screen

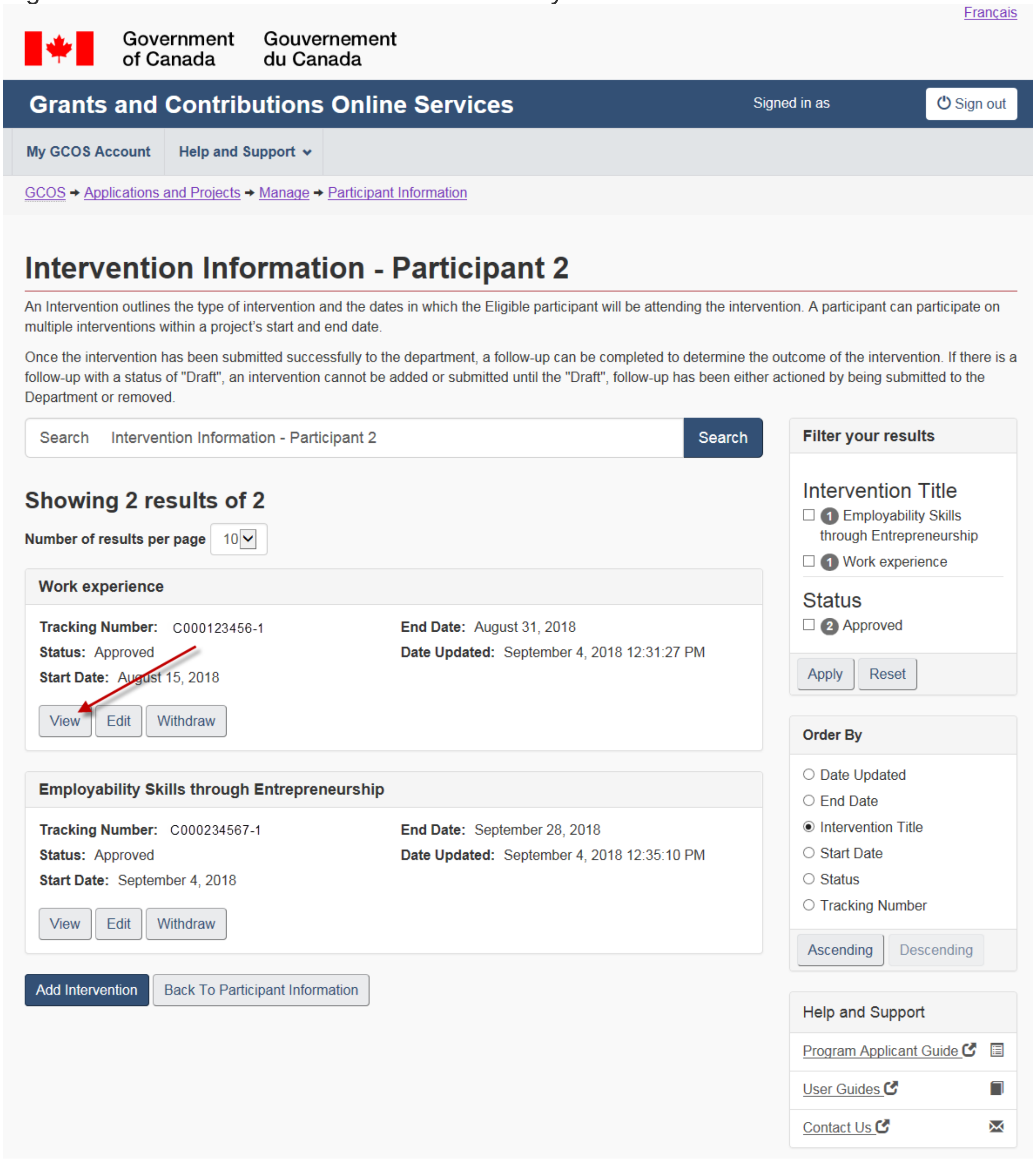


Text description of Figure 122
The Confirmation screen provides you with a confirmation number that your Intervention was successfully submitted.

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 format.

Figure 123 – Intervention information summary screen



Text description of Figure 123

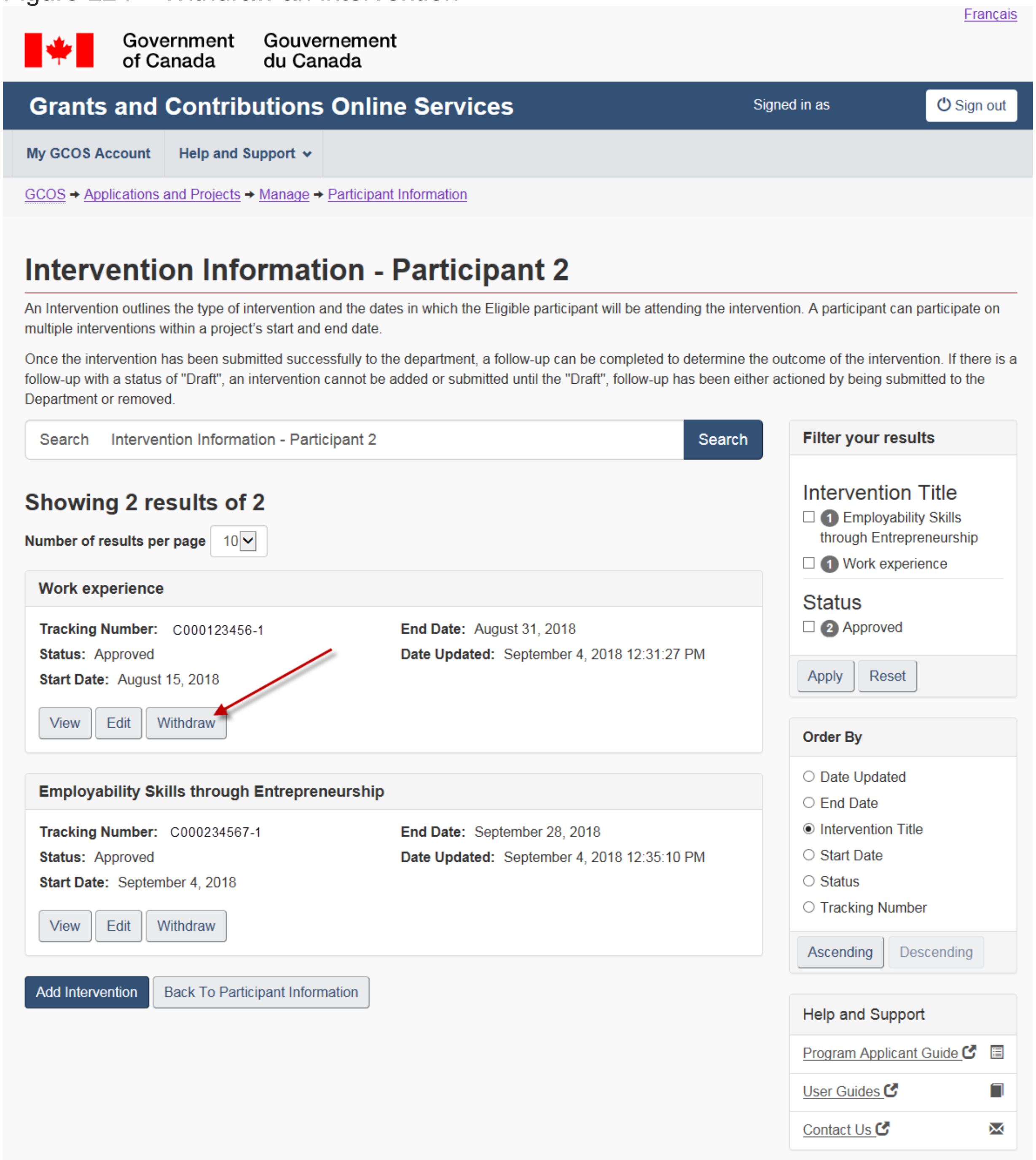
The View button on the Intervention Information screen allows you to View the Intervention.

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

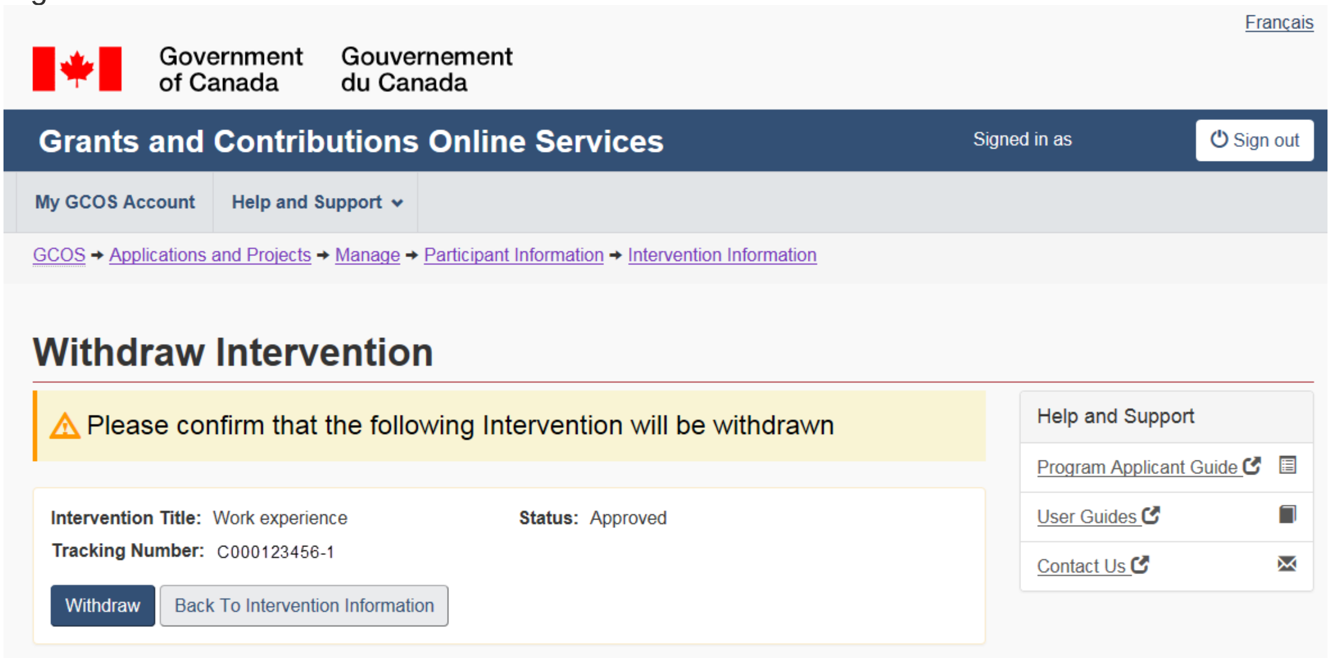
Figure 124 – Withdraw an intervention



Text description of Figure 124

The Withdraw button on the Intervention Information screen allows you to withdraw the Intervention.

Figure 125 – Withdraw an intervention – Confirmation screen

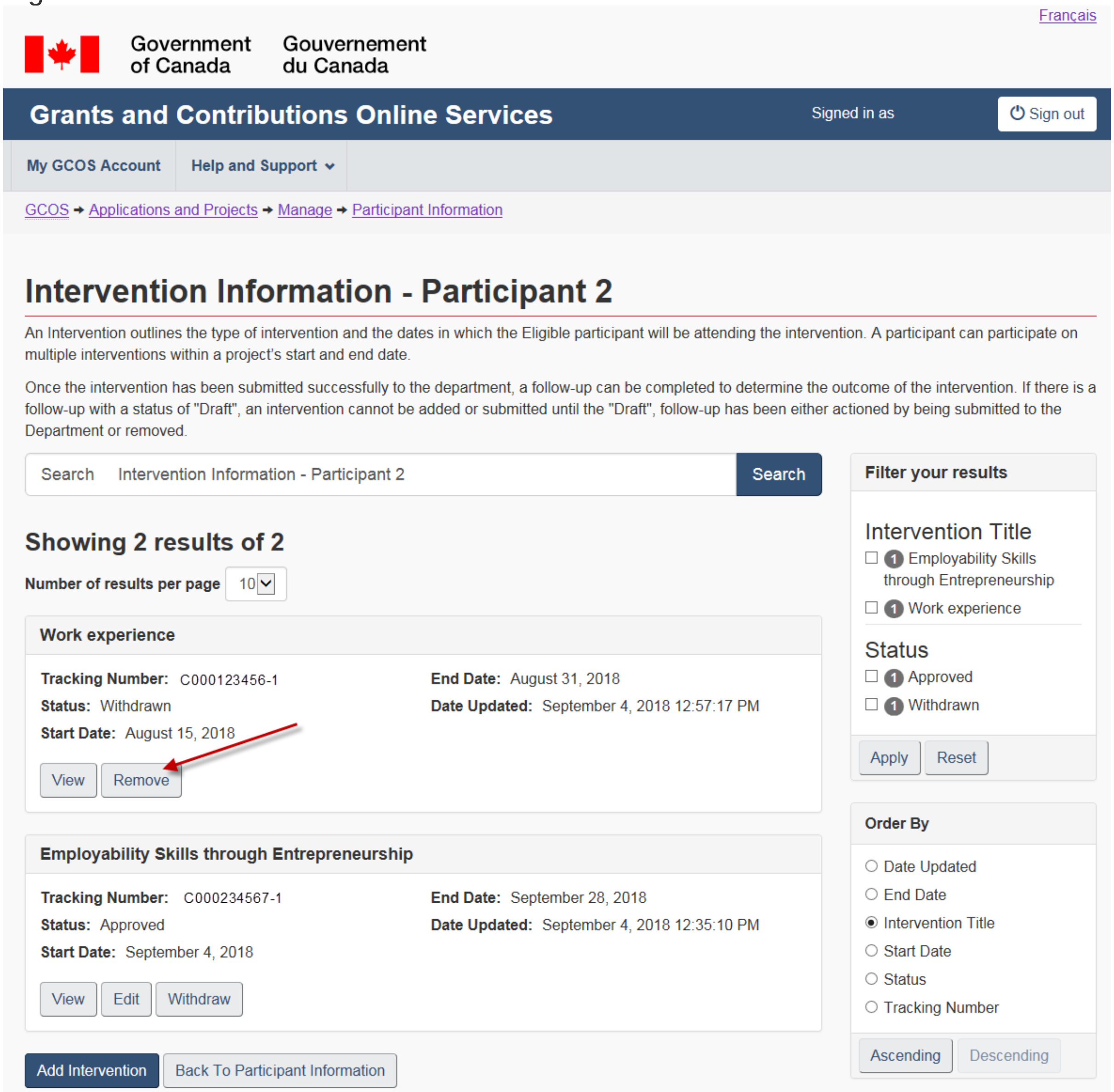


Text description of Figure 125
The Withdraw Intervention screen confirms that your Intervention will be withdrawn.

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

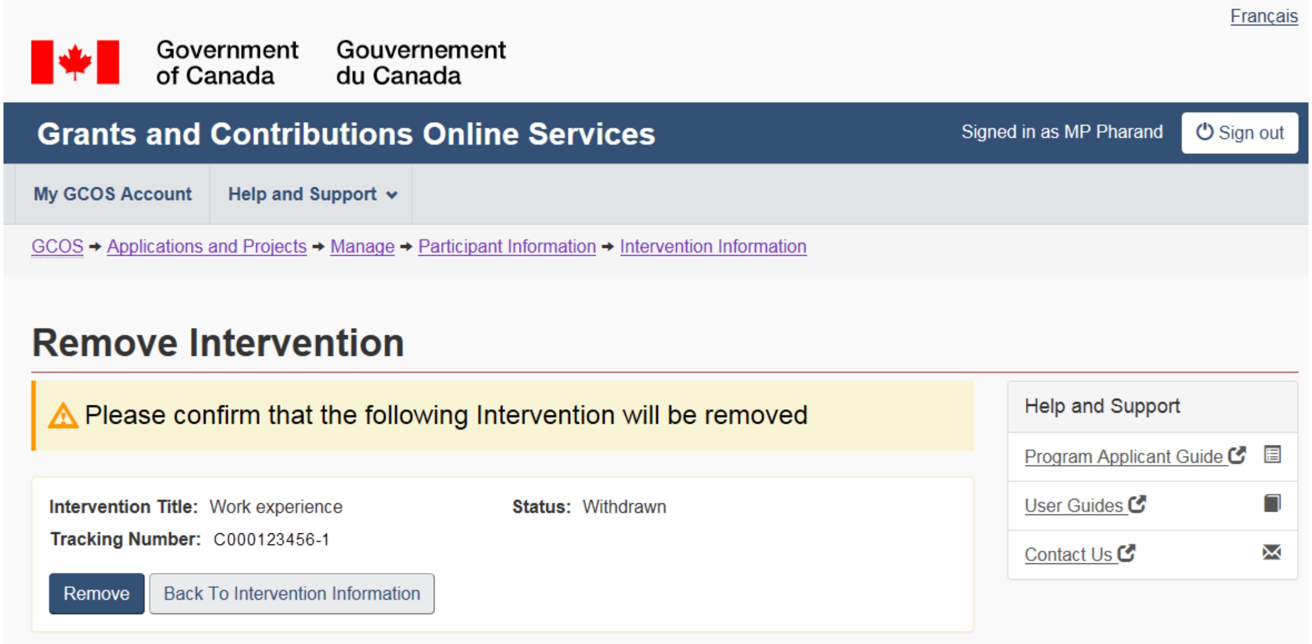
Figure 126 – Remove intervention



Text description of Figure 126

The Remove button on the Intervention Information screen allows you to remove the Intervention.

Figure 127 – Remove intervention – Confirmation screen



Text description of Figure 127

The Remove Intervention screen confirms that your Intervention will be Removed from your account.

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:

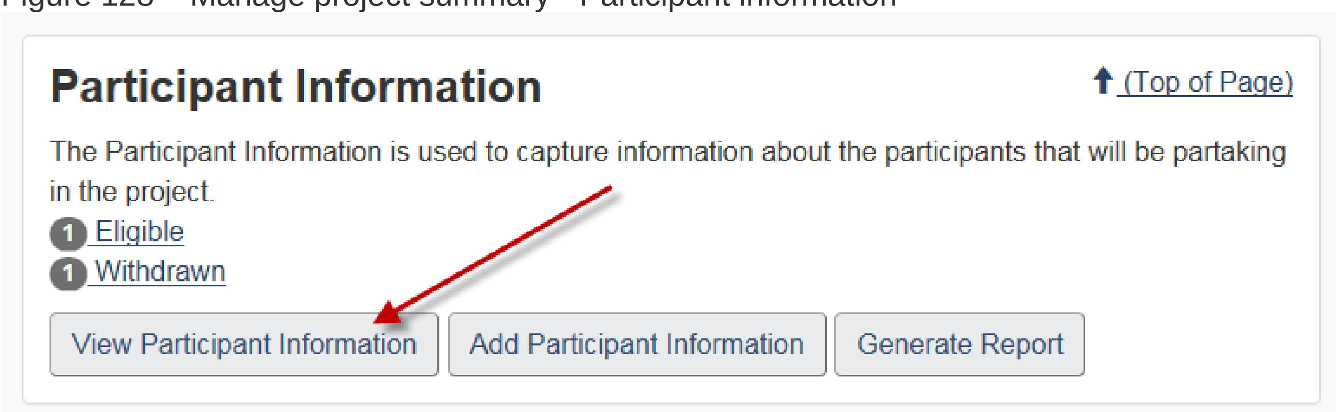
- Enter your username and password to access GCOS.
- Click Continue
- Click your organization's name
- Click Gs & Cs Online Services
- Click My GCOS Account on the top menu
- Click Representatives
- Once you retrieve your name
- Click View
- Ensure the "Create", "Submit" and/or "View" checkboxes for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

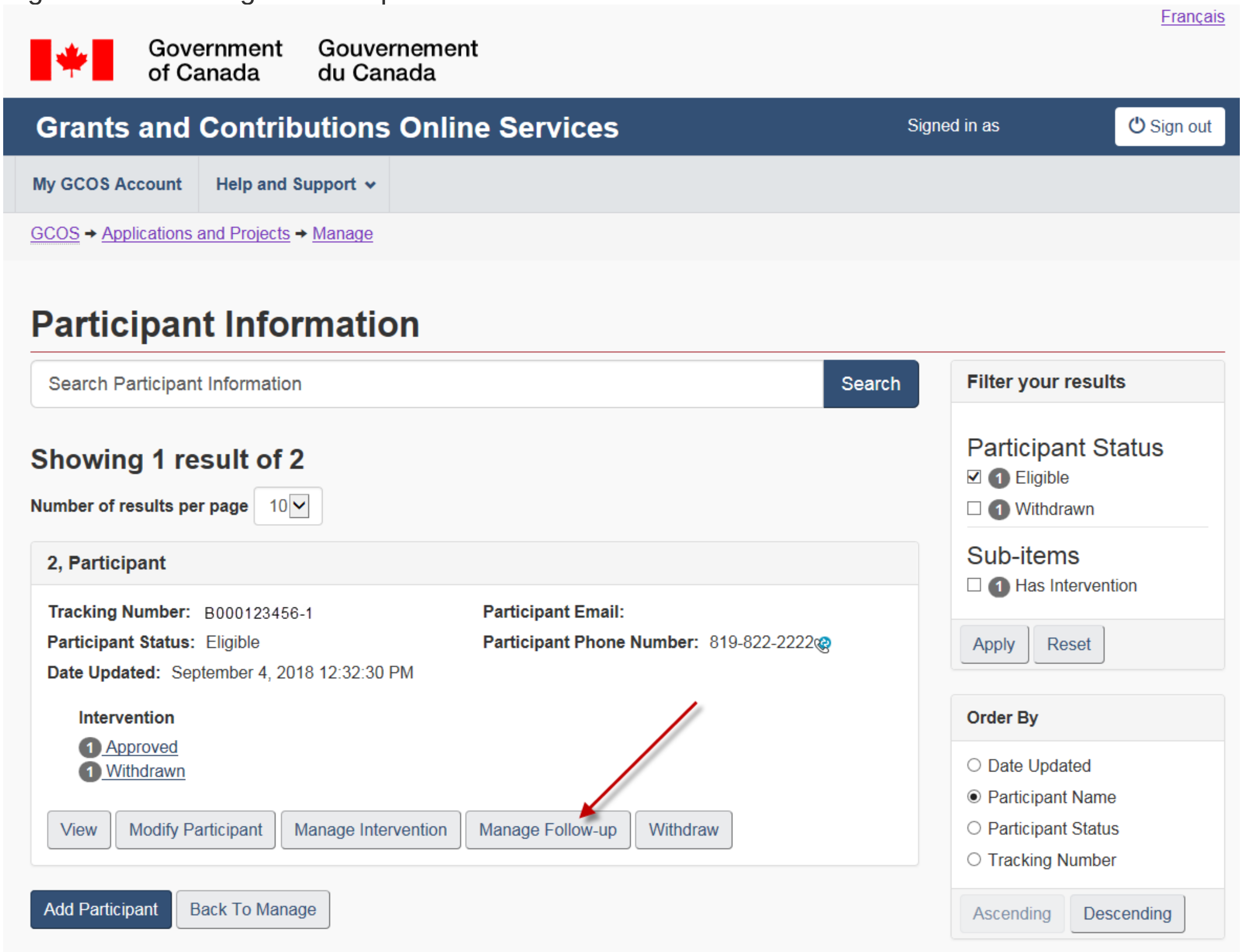
Figure 128 – Manage project summary - Participant information



Text description of Figure 128

The Manage Tracking feature highlights the type of intervention and the dates eligible participants will participate.

Figure 129– Manage follow-up



Text description of Figure 129

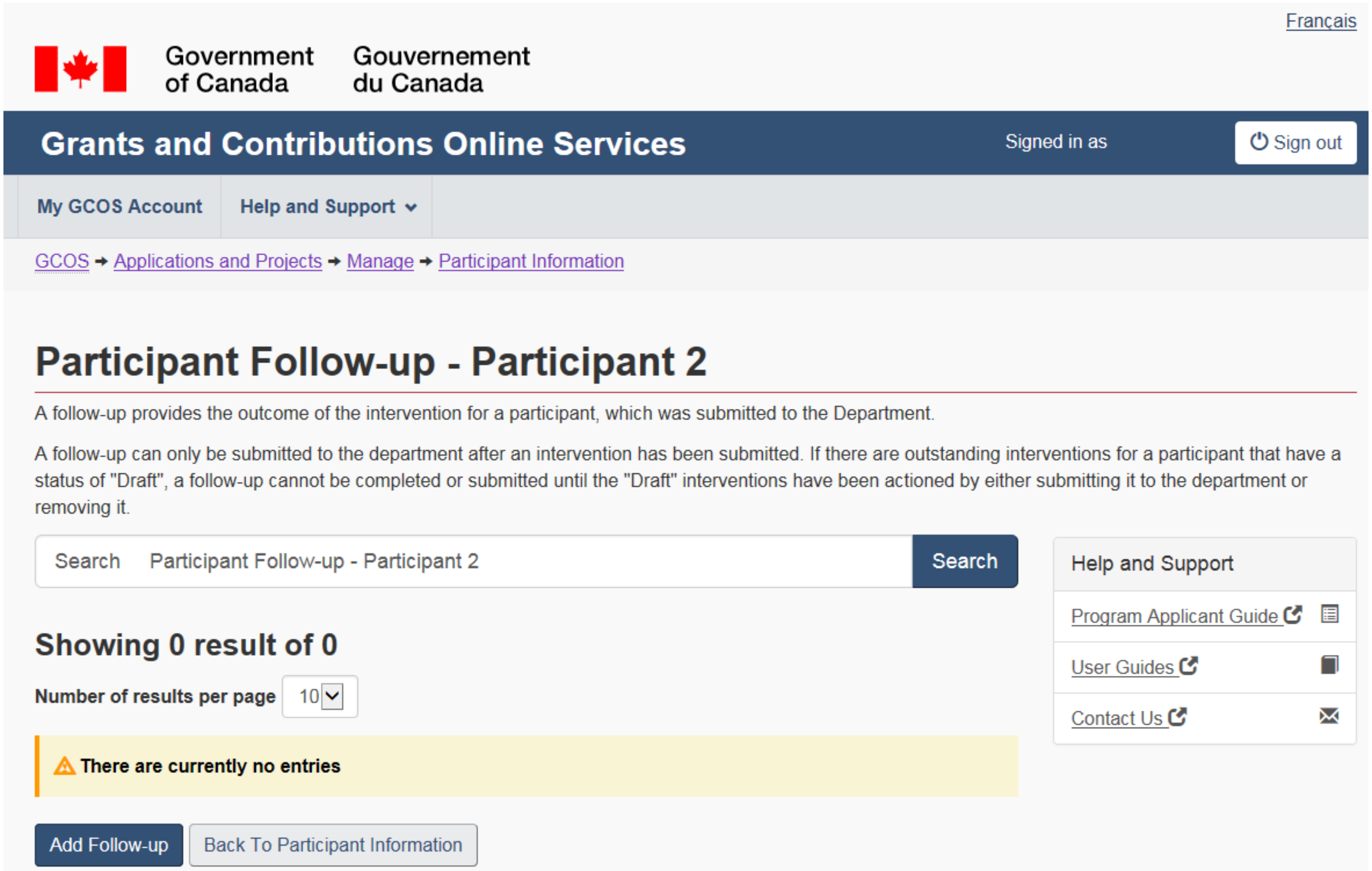
The Participant Information Summary screen is used to manage the Follow-ups for your participants.

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

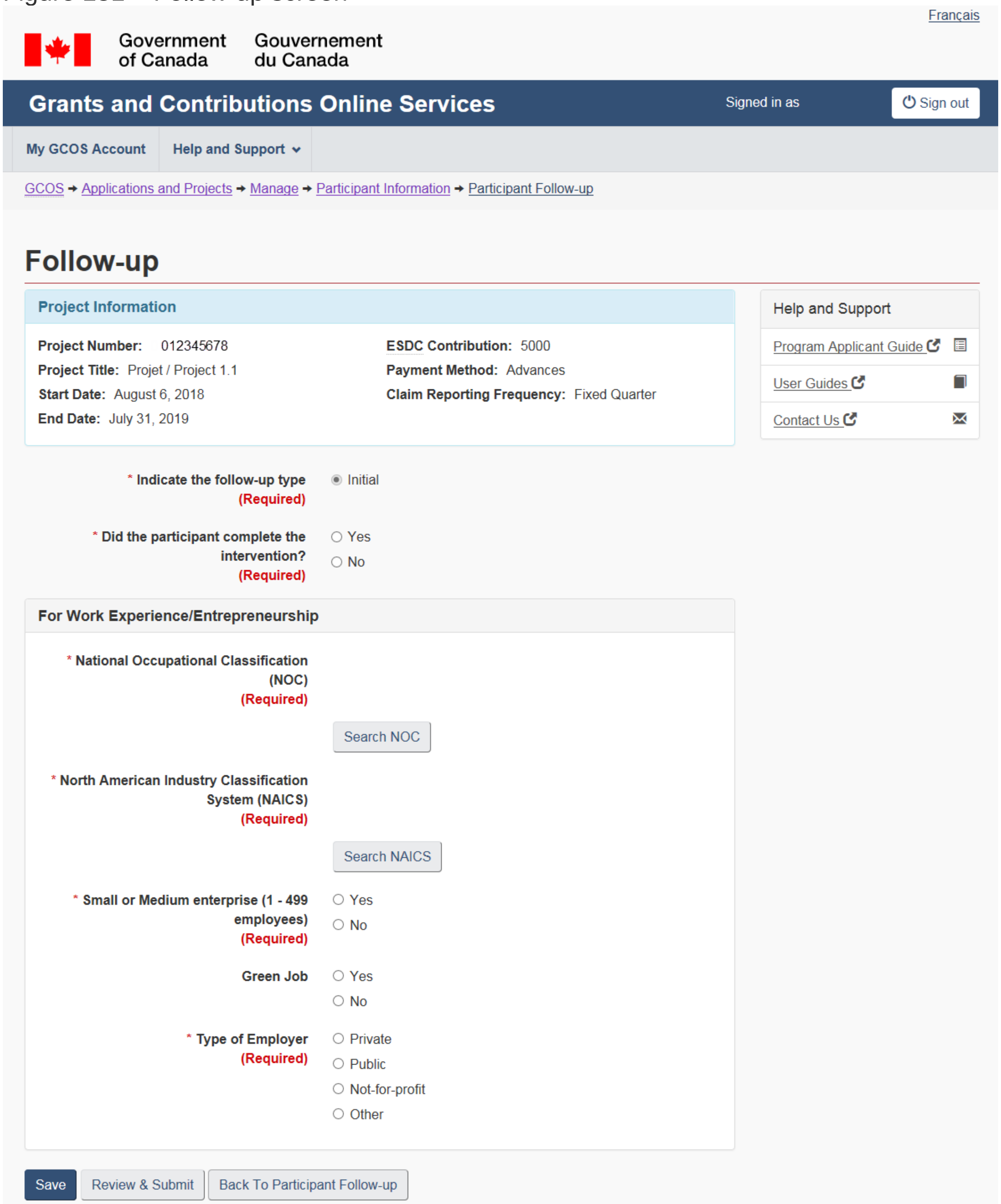
Figure 130 – Participant Follow-up summary screen



Text description of Figure 130

The Participant Follow-up screen is used to provide the outcome of the intervention for a participant.

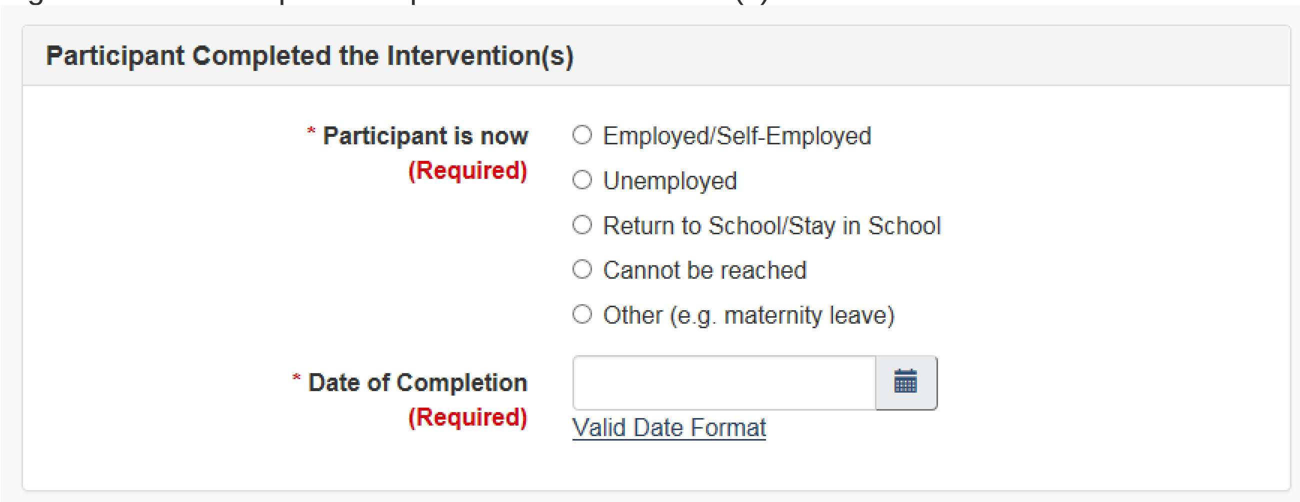
Figure 131 – Follow-up screen



Text description of Figure 131

The Follow-up screen is used to provide details of the outcome of the intervention for a participant.

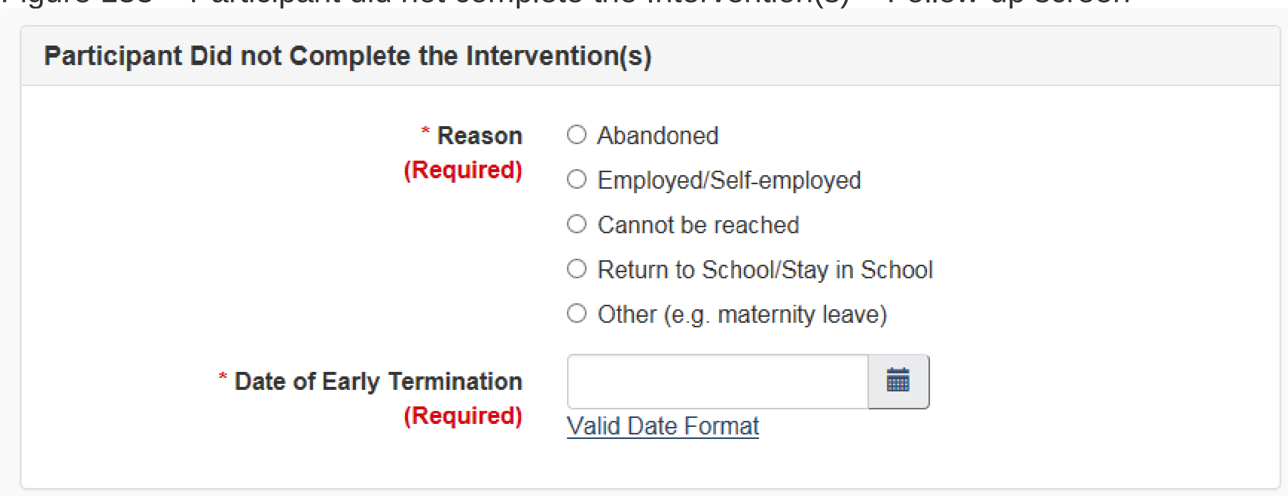
Figure 132 – Participant completed the intervention (s) – Review and submit screen



Text description of Figure 132

The section Participant completed the intervention(s) is used to capture the outcome of a participant which complete their Intervention(s).

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

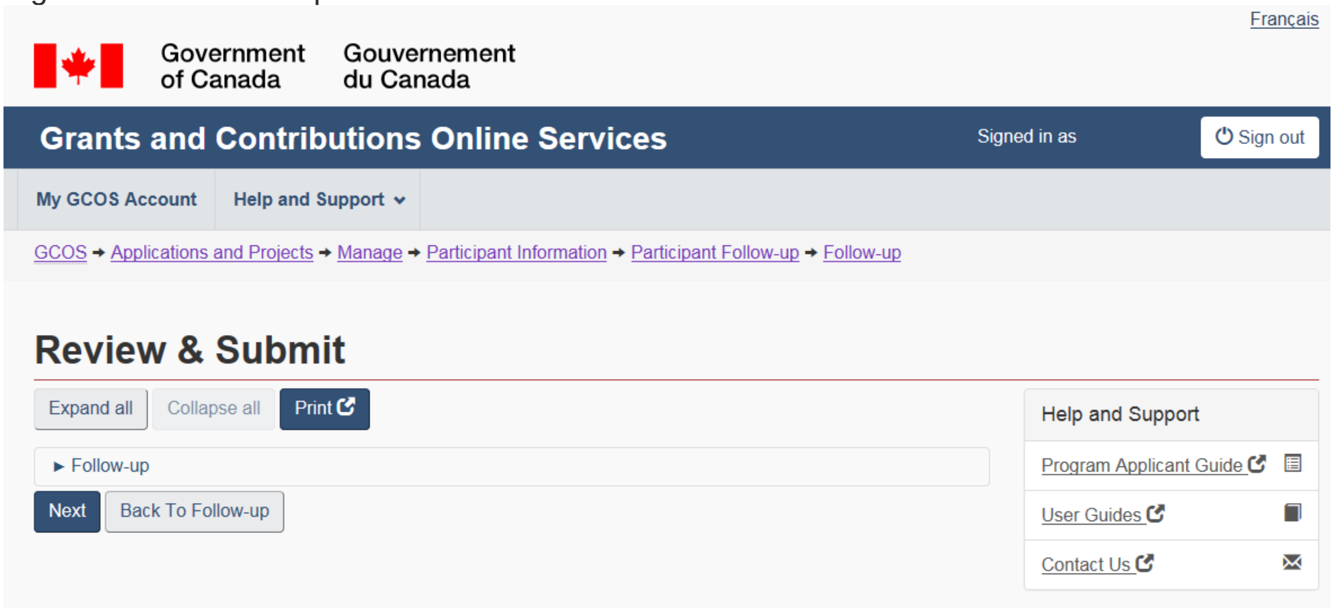


Text description of Figure 133

The section Participant did not completed the intervention(s) is used to capture the outcome of a participant which did not complete their Intervention(s).

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

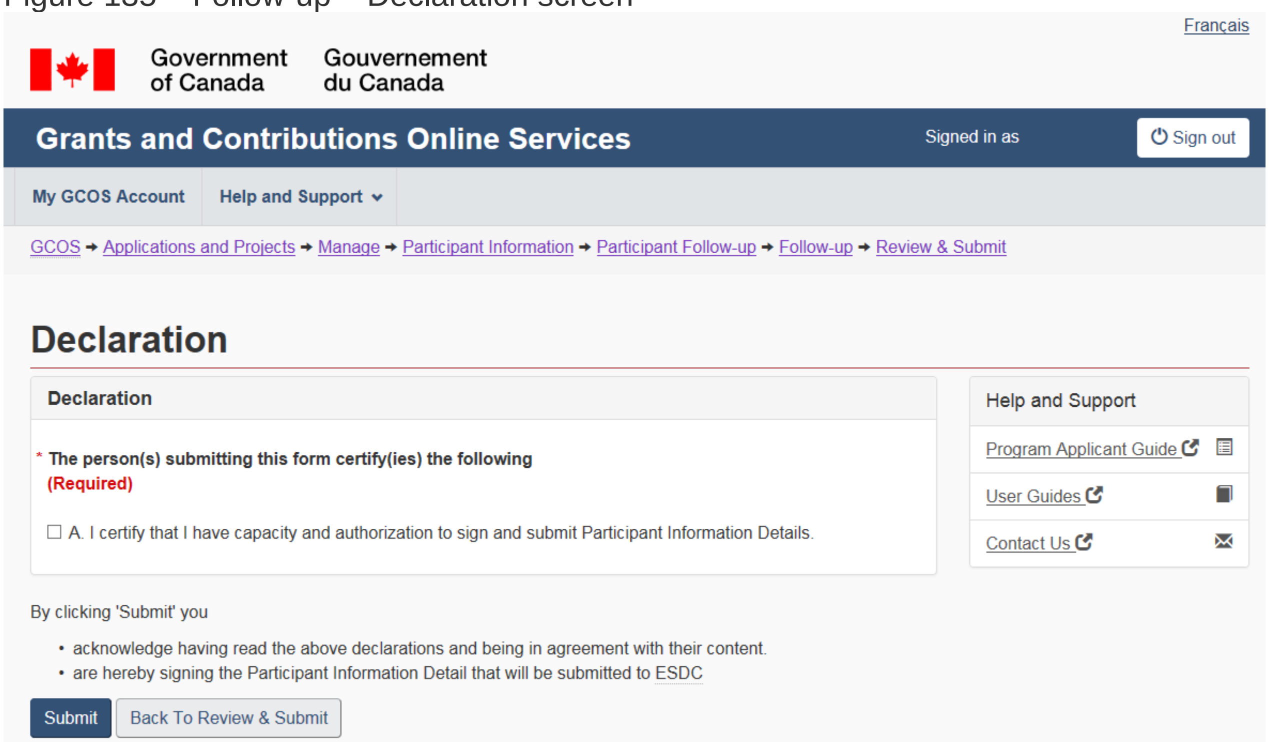
Figure 134 – Follow-up – Review and submit screen



Text description of Figure 134

The Review & Submit screen is a full summary of all the information entered into the Follow-up.

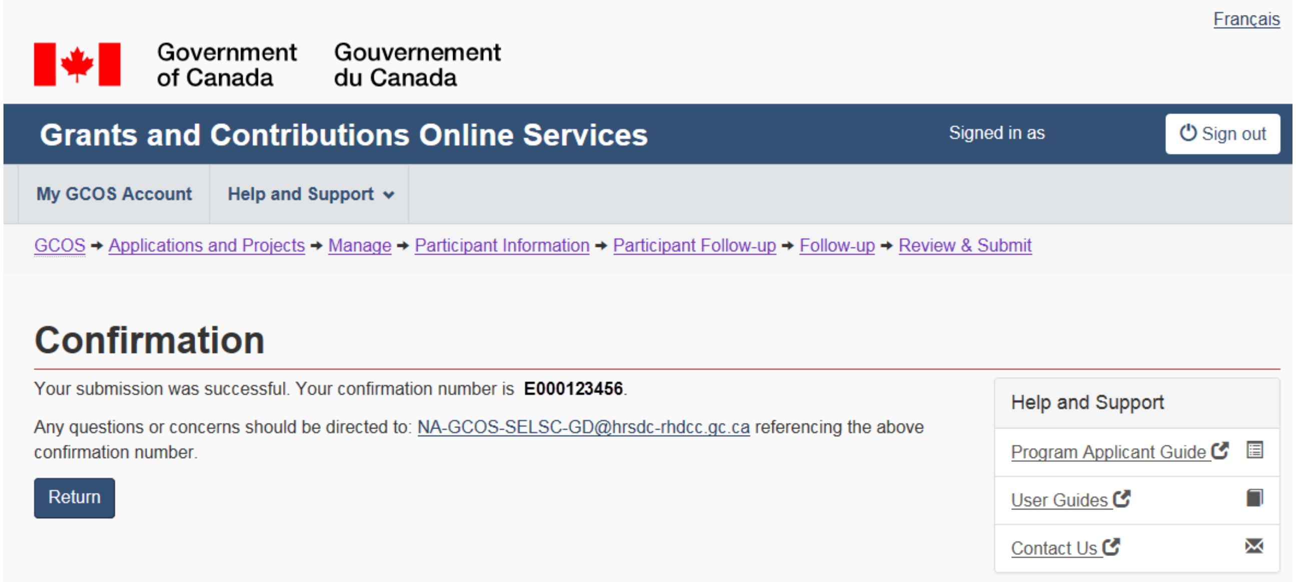
Figure 135 – Follow-up – Declaration screen



Text description of Figure 135

The Declaration screen is used to certify the user's authority.

Figure 136– Follow-up – Confirmation screen



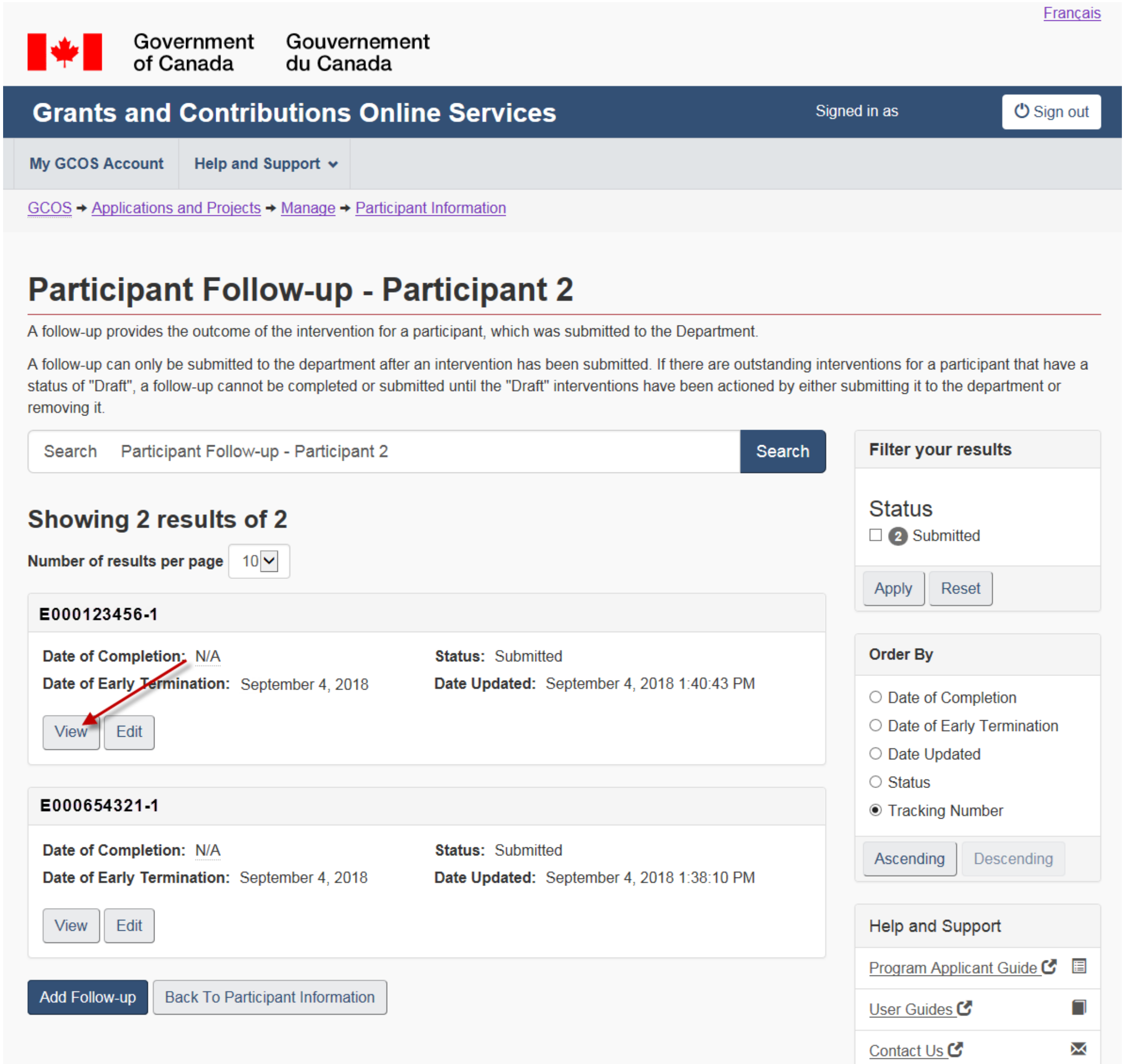
Text description of Figure 136

The Confirmation screen provides you with a confirmation number that your Follow-up was successfully submitted.

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.

Figure 137 – Participant Follow-up summary screen

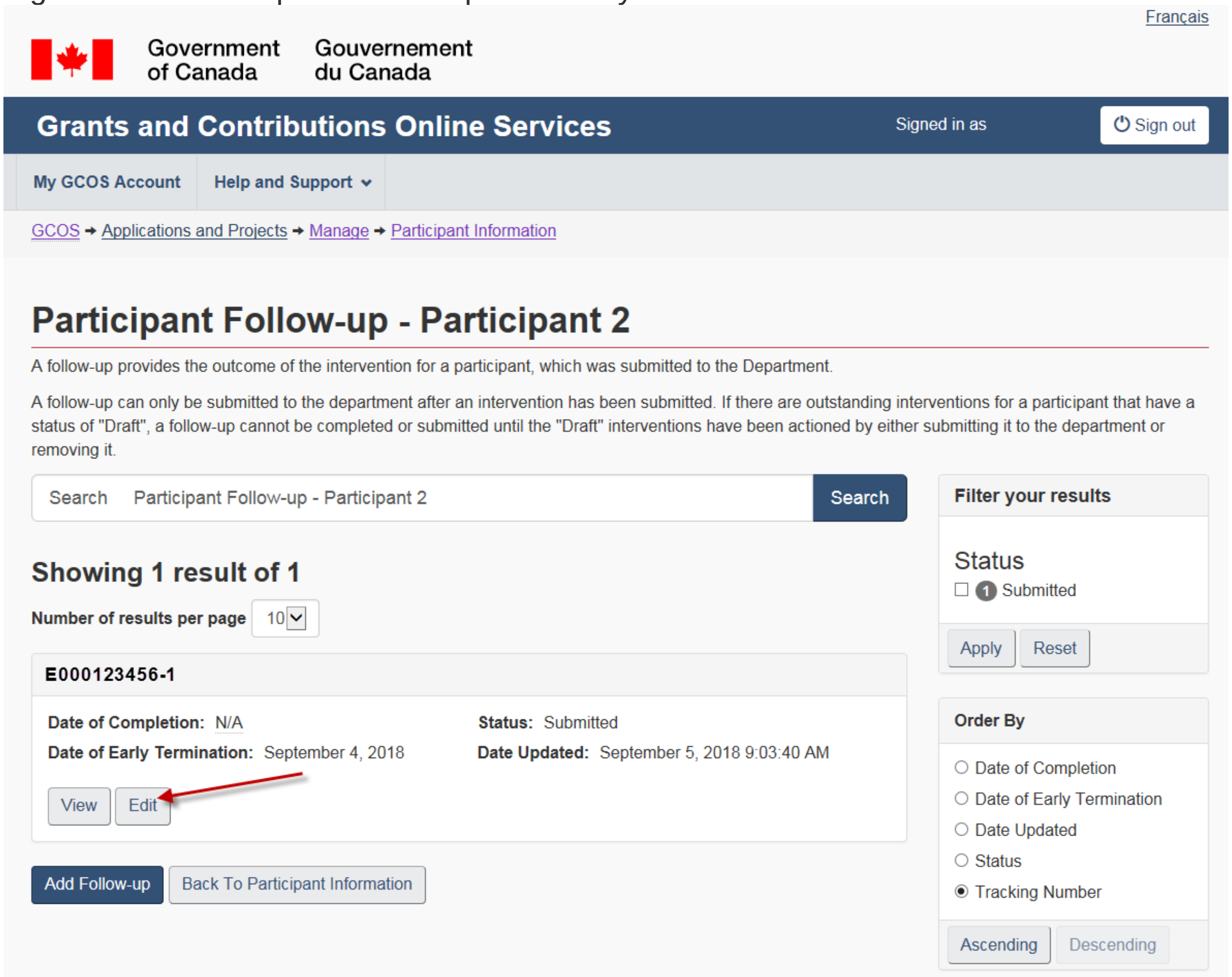


Text description of Figure 137
The View button on the Participant Follow-up screen allows you to View the Participant follow-up.

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



Text description of Figure 138
The Edit button on the Participant Follow-up screen allows you to edit the participant follow-up information.

- 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
- Enhanced Employment Assistance Services (EEAS) April 16, 2015 to April 30, 2015
- 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:

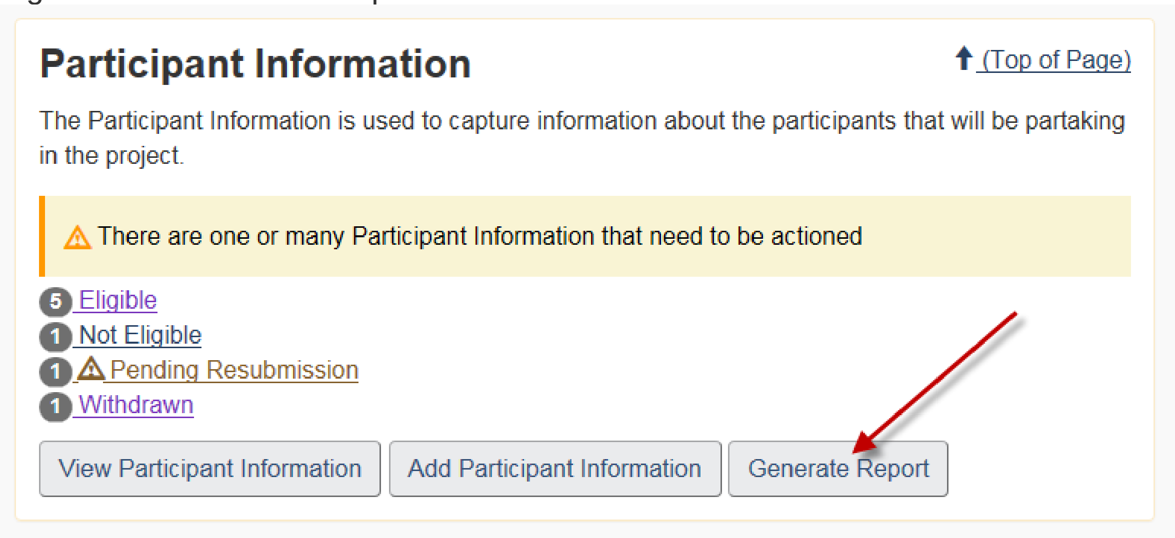
- Enter your username and password to access GCOS.
- Click Continue
- Click your organization's name
- Click Gs & Cs Online Services
- Click My GCOS Account on the top menu
- Click Representatives
- Once you retrieve your name
- Click View
- Ensure the "Create", "Submit" and/or "View" checkboxes for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

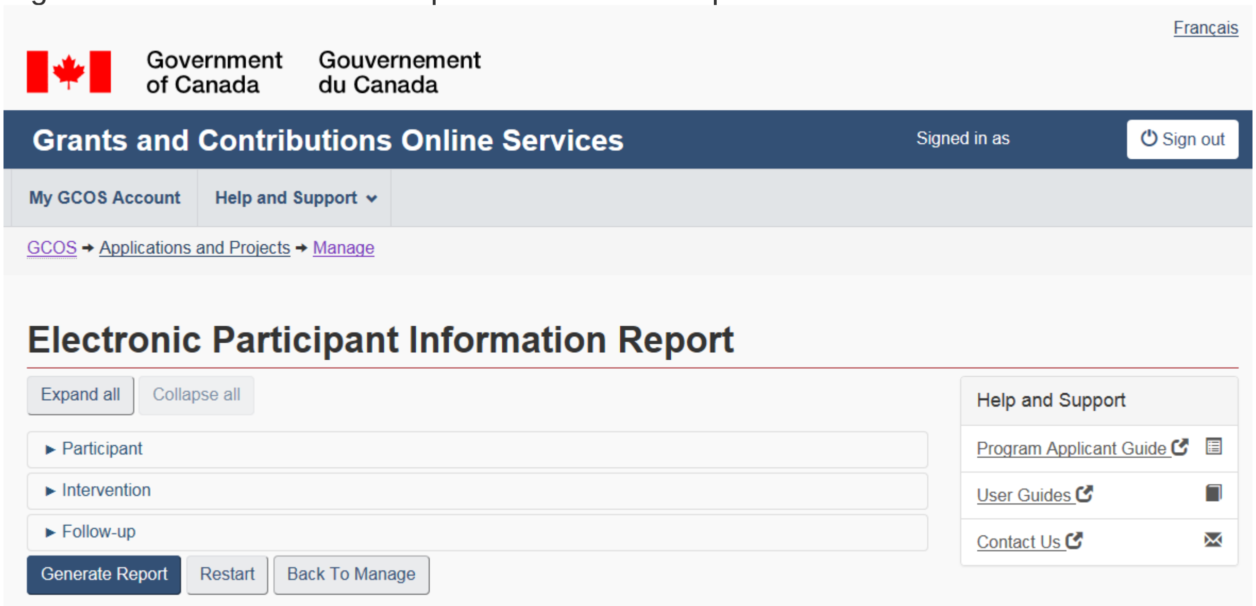


Text description of Figure 139
The Generate Report button allows you to generate a report on all participants.

- 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



Text description of Figure 140
The Generate Report button allows you to generate a report on all participants.