



eLINK Guidance Document

Creating a Work Plan

January 2016

Purpose: This document provides basic guidance on how to complete a grant workplan in eLINK. Be sure to review any communications from BWSR about your grant prior to completing a workplan, as each grant program may have unique requirements. If you have any questions on the specific requirements for how to complete a workplan, please contact your Board Conservationist.

Creating a Grant Workplan

A workplan can *only* be created after receiving notification of grant award and workplan requirements. To create a workplan, find the approved grant on the [Home](#) page by either typing the **Grant Title** in the search field, or scanning for the grant (Stage/Status = **Workplan – In Process**) in the **Grants** window. Select the workplan activities action icon  for the grant found in the **Action** column. This will bring you to the [Workplan Activities](#) page with the Activities & Expenditures grid filtered by the grant selected.

Creating the Workplan Budget

1. Most workplans are created from activities identified during the application process. **If your grant did not have an application, skip to step 4.** In order to transfer activities that were included in an application to the workplan, click the “Add New Activity Budget” button. This will open the Add Activity Budget window for your new activity budget line.
2. Within the Add Activity Budget window:
 - a. **Grant:** select the grant for which you are developing the workplan from the dropdown.
 - b. **Activity:** Select an activity from the dropdown. For workplans that are derived from a grant application, the activity list initially consists of the activities from an application. These activities appear in the dropdown list followed by the phrase “from application”. When an activity from the application is selected, eLINK will populate additional fields with data from the application. Note that some edits or additional details may be needed at the workplan stage. Sections 3 and 4 below will identify how to add additional activity budgets and funding sources to these activities, and how to add activities that were not part of the original grant application.
 - c. **Budgeted Amount.** For activities added from the application, the budgeted amount entered during the application will appear. This should not be changed unless you have been instructed to do so by your BWSR Board Conservationist.
 - d. **Source Type:** For activities added from the application, the Source Type will default to “Current State Grant”; this should not be changed.
 - e. **Source Description:** For activities added from the application, the Source Description will auto-fill with the grant title.

- f. **Match:** For activities added from the application, this field will default to “no” and should not be changed.
 - g. **Save:** If there are no errors, the system will indicate that this activity has been saved successfully. If there are errors in one of the fields identified above, the system will display an error message above the line item with the error. You will need to correct the errors before you can save the activity.
 - h. **Close:** Close out of the activity window.
 - i. Repeat as many times as necessary to move the all desired activities from the application to the workplan.
3. To create additional budget(s) and fund source information to include matching or other leveraged funds, you will need to select the “Add New Activity Budget” button and add each matching or leveraged fund item as a separate Activity Budget item. Note: activities with multiple budget sources will appear in the grid on the [Workplan Activities](#) page multiple times with each activity budget entry representing an individual Source Type, Source Description, and Budget Amount.
- a. **Grant:** select the grant for which you are developing the workplan from the dropdown.
 - b. **Activity:** Select an activity from the dropdown. The activity list initially consisted of the activities from the application (“from application”); these same activities will now show up without “from application”.
 - c. **Budgeted Amount.** Enter budgeted amount for the match amount or other source allocated for this activity.
 - d. **Source Type.** Select the applicable Source Type.
 - i. **Current State Grant:** do not select; grant is represented in step 1.
 - ii. **Federal Funds:** reflects Federal sources of funds. The use of federal funds as match for a state grant program depends on the specific grant program. If the federal funds are eligible for match and are to be used as match, the match drop down box in step f should be set to yes. If federal funds are ineligible as match or if federal funds are to be used as leverage but not match, the drop down box in step f should be set to no.
 - iii. **Landowner Funds:** reflects sources of funds (or in-kind equivalent) applied towards the activity.
 - iv. **Local Funds:** reflects all other sources.
 - v. **State fund not in eLINK:** reflects funds from other state sources that are not represented in eLINK. Match must always = no for these funds.
 - e. **Source Description:** provide enough specificity so that you can differentiate between source types. If you have questions relating to the level of specificity required, please contact your Board Conservationist for additional guidance.
 - f. **Match:** Select “yes” if the source is to be considered match fund for the grant fund or “no” if the source is to represent other leveraged funds not to be considered match.
 - g. **Save:** If there are no errors, the system will indicate that this activity has been saved successfully. If there are errors in one of the fields identified above, the system will display an error message above the line item with the error. You will need to correct the errors before saving the activity.
 - h. **Close:** Close out of the activity window.
 - i. Repeat as many times as necessary for all activities to represent all necessary match or other leveraged funds.
4. **Adding activities that are not associated with an application:** Some grants may require an eLINK workplan, but did not originate from an eLINK application. Alternately, there may be additional activities that were not part of

the original grant application. (Note: If you plan to add additional activities that were not in the grant application and will use state grant dollars as part of the funding source, please work with your BWSR Board Conservationist to confirm this is acceptable.) In order to add new activities that were not part of an application, select the button “Add New Activity Budget” and take the following steps:

- a. **Grant:** select the grant for which you are developing the workplan from the dropdown.
- b. **Activity:** Select “Create New Activity” from the dropdown.
- c. **Activity Name:** Enter a unique activity name, descriptive of the activity. BWSR recommends including the year of the activity in the name.
- d. **Budgeted Amount.** Enter budgeted amount for this activity.
- e. **Source Type.** Select the applicable Source Type.
 - i. **Current State Grant:** select if the current state grant funds will apply to the activity.
 - ii. **Federal Funds:** reflects Federal sources of funds. The use of federal funds as match for a state grant program depends on the specific grant program. If the federal funds are eligible for match and are to be used as match, the match drop down box in step f should be set to yes. If federal funds are ineligible as match or if federal funds are to be used as leverage but not match, the drop down box in step f should be set to no.
 - iii. **State fund not in eLINK:** reflects funds from other state sources that are not represented in eLINK. Match must always = no for these funds.
 - iv. **Landowner Funds:** reflects sources of funds (or in-kind equivalent) applied towards the activity.
 - v. **Local Funds:** reflects all other sources
- f. **Source Description:** provide enough specificity so that you can differentiate between source types. If you have questions relating to the level of specificity required, please contact your Board Conservationist for additional guidance.
- g. **Match:** Select yes if the source is to be considered match fund for the grant fund or no if the source is to represent other leveraged funds not to be considered match.
- h. **Save:** If there are no errors, the system will indicate that this activity has been saved successfully. If there are errors in one of the fields identified above, the system will display an error message above the line item with the error. You will need to correct the errors before they can save the activity.
- i. **Close:** Close out of the activity window.
- j. Repeat as many times as necessary to add all additional activities that were not included in the additional grant application and to include all the necessary match or other funds for each additional activity.

Entering Activity Action and Planning Information

5. **Activity Actions:** Activity Actions are divided into different components that are related to the specific activities identified above by selecting each of four different action icons. Changing the Activity Actions for any row of a given activity will change this information for all rows of this activity.
 - a. Click the  **Edit Activity** icon to edit information about the activity such as the description, lifespan, and start date. If the start date is unknown, this can be left blank. Completion date and actual results will be filled in when the activity has been installed or implemented through progress reporting. If you have questions on the specific activity categories to use, refer to the *eLINK Guidance Document Activity Categories* for more information or contact your Board Conservationist.

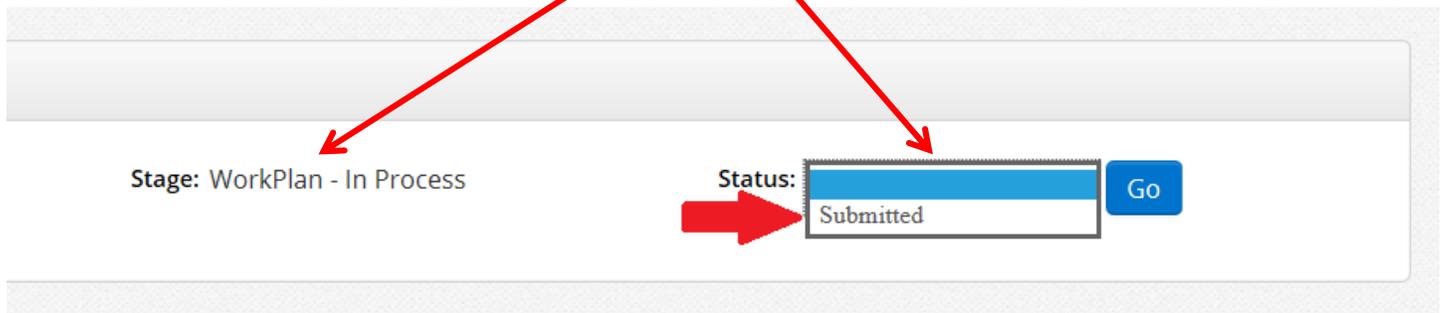
- a. When the Activity Name, Activity Description, Activity Category, Activity Lifespan, and Start Date are filled in, click **Save**.
 - b. **Close** to close the window and return to the **Activities and Expenditures** screen.
- b. Click the  **Edit Activity Details** icon to enter details about the activity such as the specific practices to be installed. This will open a new window. Note that this is not required at the workplan stage, but may be entered at this time if specific practice details are known. Click the Add New Activity Details button and entered required information.
- i. **Activity Detail Name:** enter a name that will distinguish the activity action.
 - ii. **Practice:** select the appropriate practice from the dropdown; this list is filtered based on the **Activity Category** selected in 3a.
 - iii. **Count of Activities:** enter the proposed number of the activities to be accomplished.
 - iv. **Activity Lifespan:** enter the appropriate lifespan
 - v. **Proposed Size:** enter the estimated size
 - vi. **Actual Size:** to be entered after project completed
 - vii. **Units:** units of the size
 - viii. **Description:** enter any other information that describes the project.
 - ix. **Installed Date:** to be entered after project completed
 - x. **Save**
 - xi. **Close**
 - xii. Repeat for additional activity details associated with the project.
- c. Click the icon  **Edit Activity Rates and Hours** icon to enter information about the rates and estimated hours. This field is used to estimate the number of full time employees (FTEs) that will be employed by this grant, and is a legislative requirement of the Clean Water Fund if funds will be used to pay for staff time. If you will not be using this grant to pay for staff time, you can leave this section blank. If you are unsure about what to enter into this section, please contact your Board Conservationist.
- d. Click the  **Edit Cooperators** icon to enter information about the people associated with the project, such as the landowner or land occupier. This is an optional field provided for your convenience.
6. **Planning and Expense Actions:** Planning and Expense Actions are used to edit budgets established in the steps above, or later on to report expenditures. Selecting Planning and Expense Actions for any row will change the information for only that row.
- a. Click the **Edit** icon  in this column to change a budgeted amount. **Note: this amount can't be changed after the workplan has been approved without contacting your Board Conservationist, and may require a grant and/or workplan amendment.**
 - b. The edit expenditures icon  is not needed until after the workplan has been approved and progress has been made on the activities.
 - c. The delete  icon can be used to remove an activity budget before work plan submittal.
7. If files such as project assurances need to be attached to the grant, or additional **Team Members** were identified for the grant, click on the **Grant** name in the grid. This will take you to the grant record. Select the **Team Selection** tab to add or edit Team Members, or the **Attachments** tab to attach files. To return to the **Workplan Activities** page, click the **Go to Workplan** link in the header.

Linking an existing activity to a grant.

There are times when grants share funding for a single activity. In these situations, an existing activity from one grant is linked to another using the “Link Existing Activity to Grant” button. This linking feature prevents you from needing to double enter the activity and will associate all the activity and its related data, such as details and indicators to this new grant. Linking rarely happens in creating a workplan, but can happen in progress reporting and through workplan amendments. See the *eLINK Guidance Document Managing Activities* for more information on how to link activities between grants and below for more information on amending a workplan.

Submitting the Workplan

8. To review the workplan before submitting, go to **Home** and type the title of the grant into the **Quick Reports**. Select “Work Plan” from the dropdown and click **Go**.
9. To submit the workplan, go back to the **Workplan Activities** page for the grant. The current workplan stage will be displayed. Select **Submitted** from the status dropdown in the header. Click **Go**. The system will lock the activities in your work plan and will notify your Board Conservationist that the workplan has been submitted and is ready for review.



Amending the Workplan

If after approval a workplan needs to be amended, the grantee’s authorized representative can submit an amendment request through the Progress Report. If the request is approved, additional instructions will be provided with the approval. See the [BWSR Grant Manual](#) for additional information regarding workplan revision and grant amendment criteria and policies.

Stage/Status Definitions for Workplans

- **Workplan - In Process:** active workplan that can be edited by grant applicants. Must be submitted to be reviewed.
- **Workplan – Submitted:** active workplan that has been submitted and is in review at BWSR.
- **Workplan – Need More Information:** workplan that has been reviewed and is in need of additional information.
- **Workplan – Approved:** workplan has been reviewed and approved. The grant agreement can now be signed.
- **Workplan - In Process –** workplan has been opened up for amendment by BWSR staff, following a user request through the Progress Report to amend the workplan.