DEPARTMENT OF
ECOLOGY
State of Washington

EAGL

Ecology's Administration of Grants and Loans

External Users' Manual

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1 How to use this Manual

If you are new to EAGL, we suggest you first skim sections 2-8 to get an idea of how EAGL works. These sections give details on things like the language of EAGL, finding your way around the system, how your role affects what you can do, uploading supporting documents, and finding Parent or Subdocuments.

If you have used EAGL before, or just want to dive in, you can skip to the process you want to work on. If you get stumped, you can refer back to the first few sections for help.

- **IMPORTANT NOTE** These indicate that work or documents may be lost if you do not pay attention to the warnings.
- **NOTE** These notes provide you with information that clarifies a process or provides more in-depth information.
- Document or Subdocument statuses are in bold text; for example, **Agreement Active**, **Payment Request/Progress Report In Process.**
- When the text refers to one of the four menu headings, the text will look like this: **Change the Status**.
- Appendix 1 has Quick Steps for the EAGL processes for users that just need reminders of steps for an activity.

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2 Ecology's Administration of Grant & Loans (EAGL)

Ecology's Administration of Grants and Loans (EAGL) is a comprehensive, web-based grant and loan management system. This is a form and workflow based system; the system provides different forms to users depending on where they are in the workflow. Because of this structure, users always need to know their own role and the status of the document they need to access. Throughout this user manual, we will remind you of the roles and statuses needed to complete a process.

Ecology's grant and loan clients use EAGL to:

- Complete grant and loan applications.
- Download grant and loan agreements and amendments.
- Submit payment requests with progress reports.
- Submit equipment purchase reports.
- Request amendments.
- Upload agreement deliverables.
- Submit close out reports.

The system provides a streamlined application and reporting process for both external clients and Ecology staff.

NOTE

In addition to this manual and help from Ecology staff, you can find YouTube videos about EAGL on Ecology's YouTube site here: https://www.youtube.com/user/EcologyWA/playlists. Select Grant and Loan System Tutorials.

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3 System Requirements

To use EAGL, you must have access to the internet and one of the following web browsers:

- Google Chrome
- Edge Chromium
- Mozilla Firefox
- Safari

NOTE

EAGL does not spell check. Web browsers have built-in spell check tools that should work with EAGL.

We do not recommend using Internet Explorer with EAGL.

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4 The Language of EAGL

For the most part, the terms used as part of the EAGL system mirror those for processes outside of EAGL. For example, a Project Manager is someone who manages a project; a Financial Manager is someone who is responsible for the accounting side of a project.

There are a few words or phrases that have special meaning within EAGL. Knowing these will help you understand how EAGL works and make this manual more useful to you. They include:

Equipment Purchase Report (EPR). An EPR is a Subdocument with just one form that allows Ecology to track recipient equipment purchases of $5,000 or more.

Form. Every Parent Document or Subdocument in EAGL consists of one or more forms. For example, an Application (Parent Document) may have 15-20 forms. Some Subdocuments (for example, Recipient Close Out Report) may have only one form.

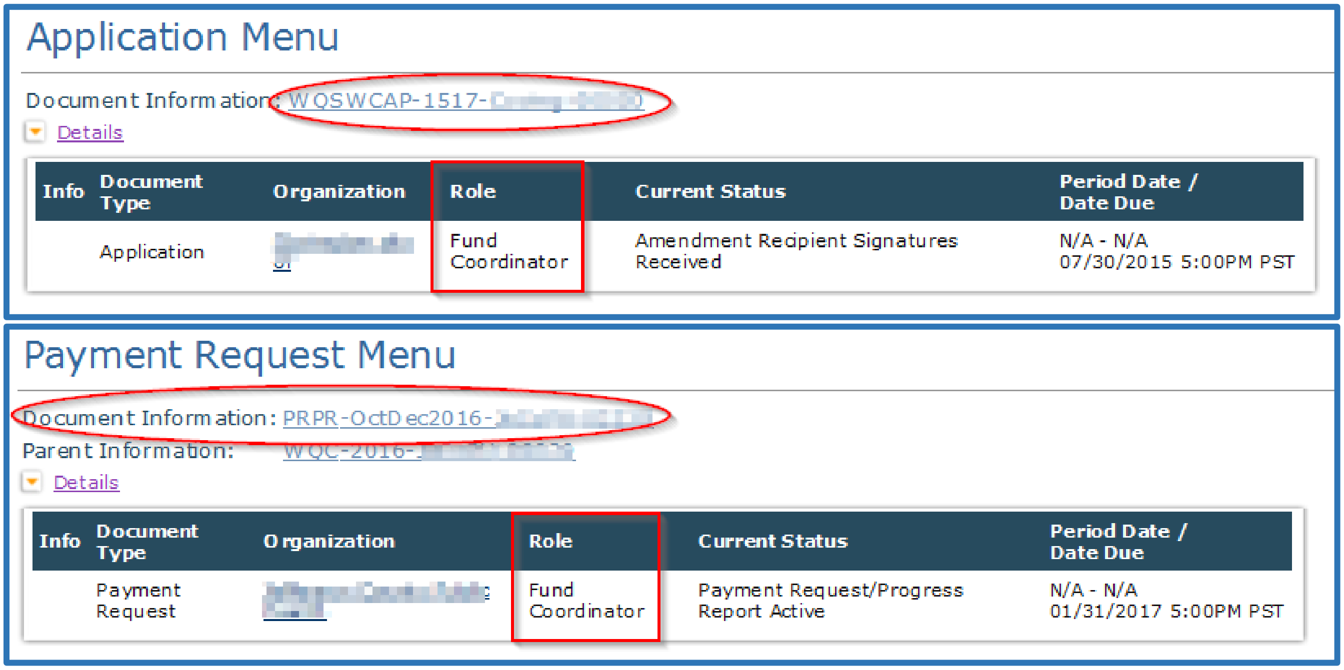
Parent Document. During the application process, the Application is the Parent Document. If the project is funded, and the Agreement approved/signed, the subsequent Agreement becomes the Parent Document. All other EAGL documents associated with the Application/Agreement are Subdocuments.

Payment Request/Progress Report (PRPR). Before EAGL existed, Ecology used Payment Requests and Progress Reports as part of grant and loan project management. EAGL combined the two documents into one. A PRPR Subdocument consists of several forms – the Payment Request and Progress Report forms make up the core of a PRPR.

Related Items. One of the menu options for any Parent or Subdocument is **Examine Related Items**. For a Parent Document, Related Items are all of its Subdocuments and any system messages related to the Parent Document. Such as PRPRs, Equipment Requests and Close Out Reports. For Subdocuments, Related Items include the Parent Document and any system messages concerning the Subdocument.

Role. EAGL is a form and workflow system that uses a person's role and a document's status to determine what can be completed in a workflow.

Your role can be different for different documents. EAGL displays your role at the top of both Parent Document (Application Menu) and Subdocument (Payment Request Menu) windows.



Status. Every document within EAGL has a status assigned to it. That status changes as a document makes its way through the workflow. The Menu window also displays the document's status.

Subdocument. All EAGL documents that are not an Application/Agreement are Subdocuments.

> **NOTE**
>
> Documents that you or Ecology staff upload to EAGL are NOT Subdocuments.

Workflow. A workflow is a process. It consists of a series of steps that must be completed in a certain order. As a document's status changes, the document is making its way through the workflow.

5 Tips on Using EAGL

IMPORTANT NOTE

EAGL undergoes routine system maintenance on Mondays from 2:00 p.m. to 3:00 p.m. If you work during this time, you may lose data.

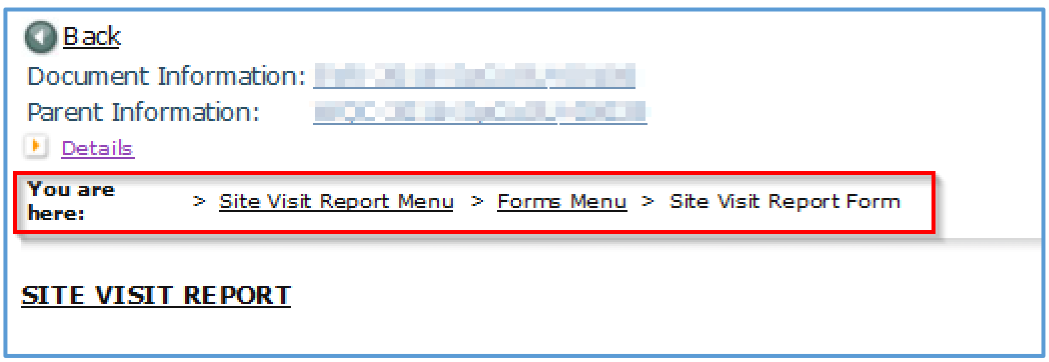
5.1 Basic Navigation

5.1.1 Breadcrumbs

When you are working on a form, EAGL will display a “You are here:” line below the Document information near the top of your screen. These are the breadcrumbs that you can use to navigate back without having to return to the menu for the document.

5.1.2 System Back button

Generally, the system back button will take you to the previous screen. In some situations, the back button may take you several screens back, rather than to your most recent page. To avoid this, we recommend that you use the “You are here:” links (breadcrumbs) or the document number links.



5.1.3 Document or Parent Information Links

You can click on the Document Information and Parent Information links to return to the main menu page for either the Subdocument (Document) or Parent Document (Parent) at any time.

5.1.4 Opening a second window

It is not recommended that multiple windows or sessions be used.

5.1.5 Opening the User Manual in a separate window.

Right click the link to the User Manual and select open in a new window to view the User Manual while you work on your document.

5.1.6 Logging out of EAGL.

You will automatically be logged off when you close the browser.

5.2 Completing Forms

5.2.1 Save Regularly

EAGL does not have a LOGOUT button. When you close your browser, you are logged out.

IMPORTANT NOTE

After 20 minutes or more of inactivity, the system will time out and you will be prompted to log in again. Unsaved work may be lost. Save data regularly.

5.2.2 Use unformatted text

EAGL supports only plain text. It does not support rich text formatting (bold, italics, underlining, etc.) or special characters or symbols.

If you copy and paste text into EAGL from a Word document, first remove all formatting by saving the document as plain text, pasting the text into a plain text editor such as Notepad or TextEdit, or any other strategy that removes or clears formatting.

IMPORTANT NOTE

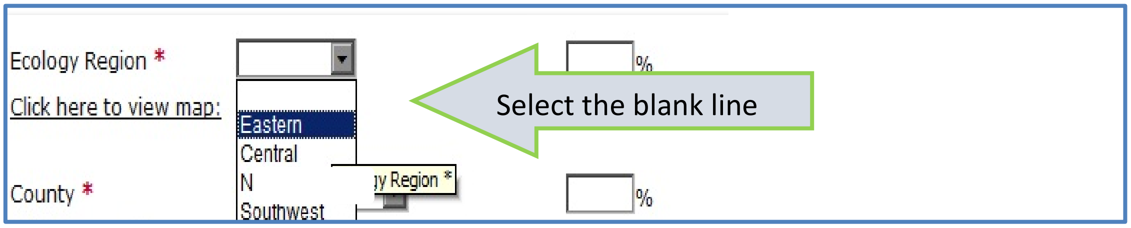
If you insert formatted text into an EAGL text box, the system may not accept it, the formatting may change, or you may lose text.

To find Notepad: The Notepad program should be within the Start button list for Windows users. If you don't see it, type the word "Notepad" into the Search Programs and Files box in the Start button screen.

5.2.3 Data Fields with multiple entries

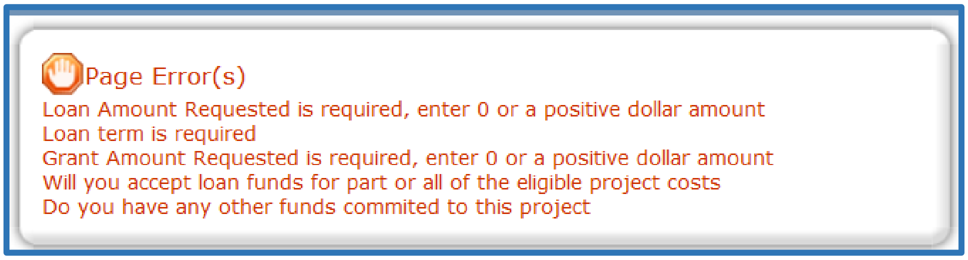
For data fields with multiple entries, such as Legislative Districts, you must click **SAVE** at the top of the screen to get an additional box (or row) for more entries.

If you add a row by mistake, you can delete that row by selecting the blank option from the drop down menu. You would also need to delete any percentages associated with the row – you can simply delete the amount you entered.



5.2.4 Other tips

- A red asterisk identifies fields that you are required to complete.
- All fields have character limits, so make sure your response is concise enough to fall within the character limit. Fields show the character limit beneath the entry box.
- Double check for typos – the EAGL system does not have a spell checker. You may edit your application responses on all forms until you submit them to Ecology.
- If you try to save a screen that is missing information from the required fields, or if a field was filled out incorrectly, you will get an error message like the one below.



- A symbol indicates more information is available. Hovering over the symbol with your mouse will reveal those instructions. For additional guidance or questions, refer to the funding program guidelines. You can find the guidelines on the Application Menu Page for the Parent Document (application).

5.3 Uploading Documents

Several forms in EAGL allow you to upload documents and other files.

5.3.1 Supported File Formats

The following file types may be uploaded to EAGL:

- Microsoft Office File Types
  - .doc and .docx (Word)
  - .xls and .xlsx (Excel)
  - .ppt and .pptx (PowerPoint)
  - .vsd and .vsdx (Visio)
- Images Files
  - .jpg, .gif, .tif, .png
- Media Files
  - .mov, .mp4, .avi, .wmv
- Adobe PDF files (.pdf)
- Other Supported File Types
  - .zip, .xml, .txt, .wpd

5.3.2 File Size Restrictions

EAGL limits individual files to 35 MB. If you try to upload a file that is larger than this, EAGL will give you an error message. There is no limit on the total number of files or collective file size that can be associated with a document.

If your file is larger than 35 MB, you will need to reduce the file size in some way. Some suggestions for reducing file size include:

- Breaking a large document into a few smaller documents.
- Reducing the quality of graphics or images.
- Using the optimization setting for minimum size when creating a PDF from Microsoft Word.
- Saving the larger file in a .zip file and uploading the .zip file to EAGL.

5.3.3 File Naming Conventions for Uploads

Give all files a descriptive title. EAGL does not allow you to rename files after they have been uploaded to the system. Do not use symbols or special characters in file names. If certain special characters are used, EAGL will require you to re-upload the file with the special characters removed.

NOTE

Some funding programs may have naming conventions and require that documents be uploaded in specific locations. Refer to the application instructions or funding program guidelines for more information.

5.3.4 Finding uploaded files

The Parent Document and accompanying Subdocuments each have an attachment repository where EAGL users can view all uploads belonging to the individual document. You can get to the Attachment Repository through the **Access Management Tools** menu.

To Access the Attachment Repository:

1. Browse to the Parent Document or Subdocument (such as a PRPR) you'd like to view attachments for. See Finding Your Applications/Agreements for details.
2. On the document's menu, click View Management Tools under the **Access Management Tools** heading. See General Documents Overview for details about EAGL menus.
3. On the **Access Management Tools** menu, click Attachment Repository.

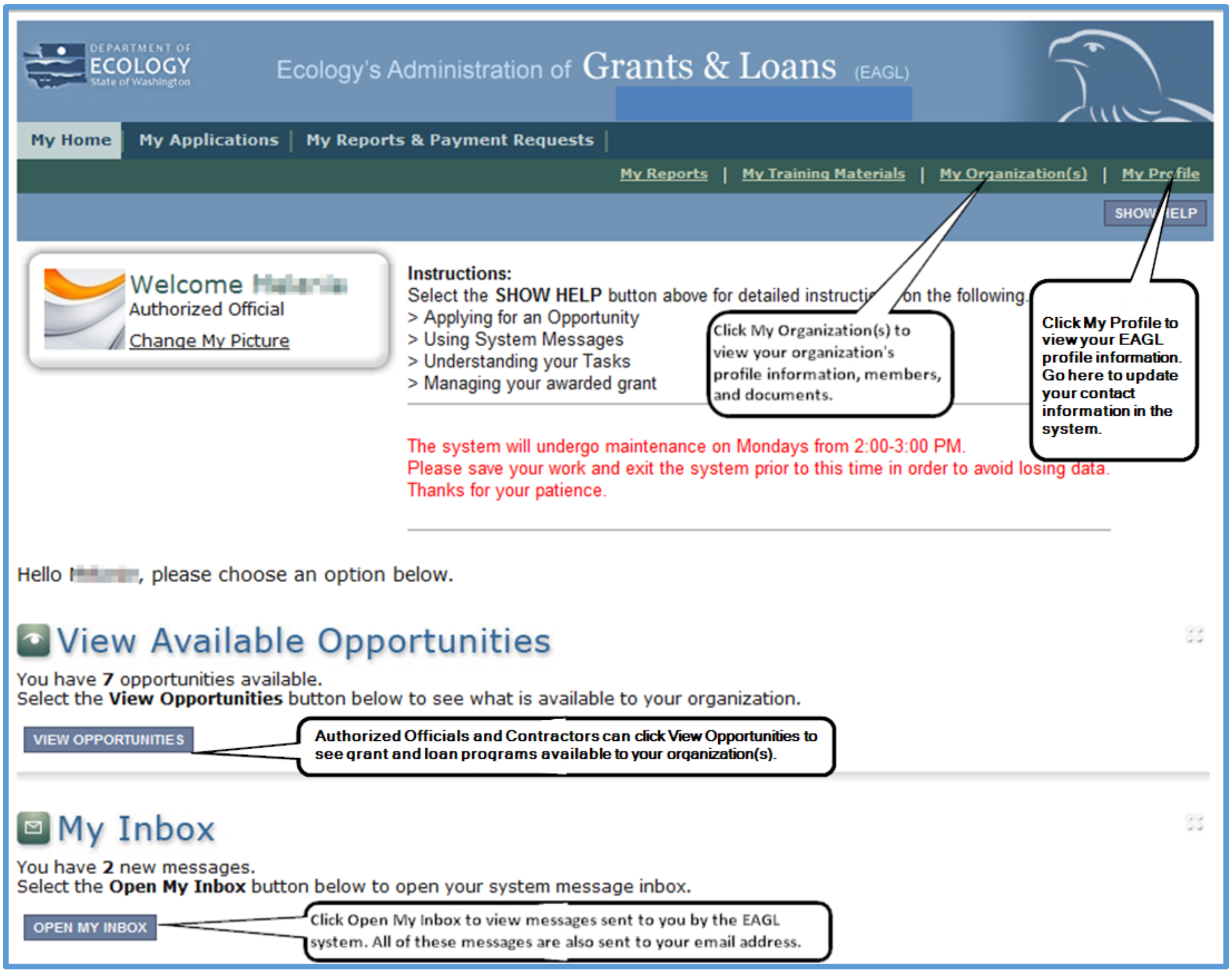
On the attachment repository page you will see a list of all uploads and the form to which the file was uploaded. You can hover your mouse over each attachment link to see the file name on the bottom left corner of the window.

6 The EAGL Home Page

6.1 Navigating My Home

Your EAGL home screen (My Home) is the front door to EAGL. From here, you can:

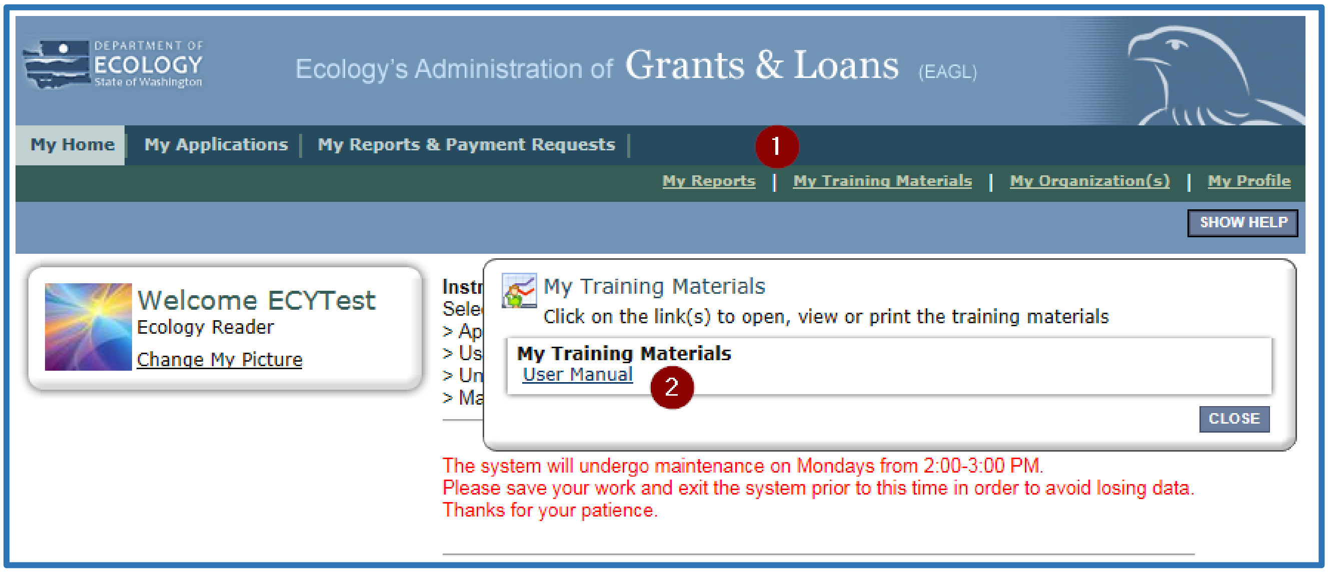
- Access the most current version of this manual (My Training Materials).
- View Available Opportunities.
- Review your messages from EAGL (My Inbox).
- Find your application(s) or other documents.
- Access forms to maintain information for your personal profile or (if authorized) your organization.



6.2 Accessing My Training Materials

To open the EAGL user manual:

1. Click My Training Materials on the green navigation bar.
2. In the window that pops up, click User Manual.

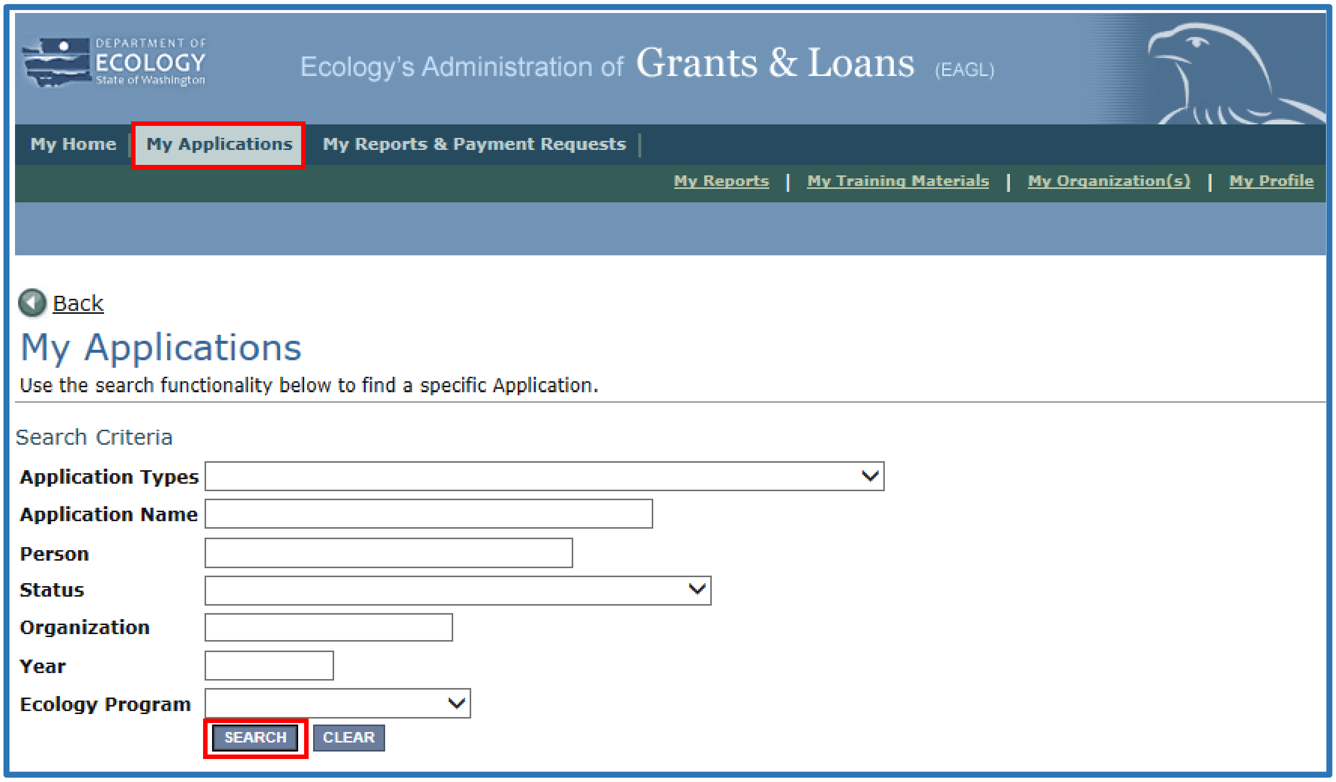


6.3 Finding Your Applications/Agreements (Parent Documents)

To find Parent Documents in the system:

Option 1 – via My Applications

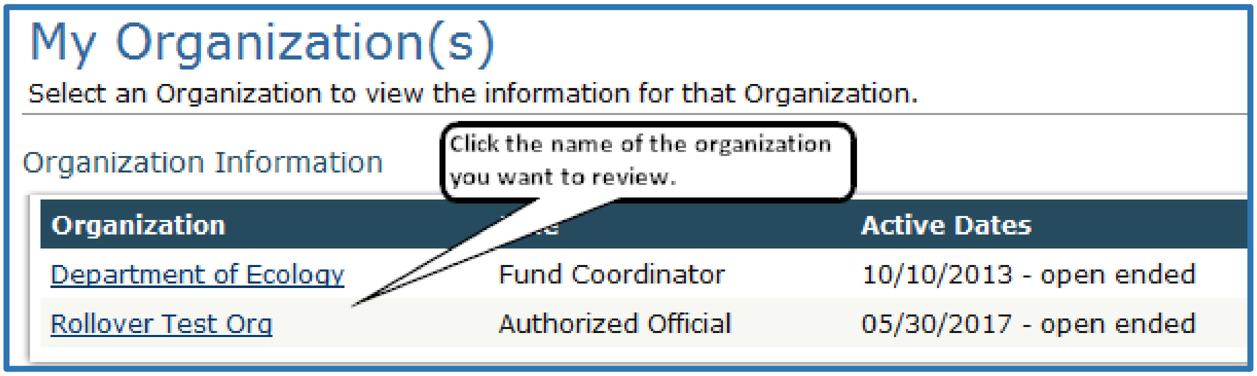
1. Click on the My Applications link on the top blue navigation bar.
2. On the SEARCH screen, enter no search criteria or only enter the last five digits of your document number.
3. Click SEARCH. Your search results will display under the SEARCH boxes. Click on any document name to open the document.



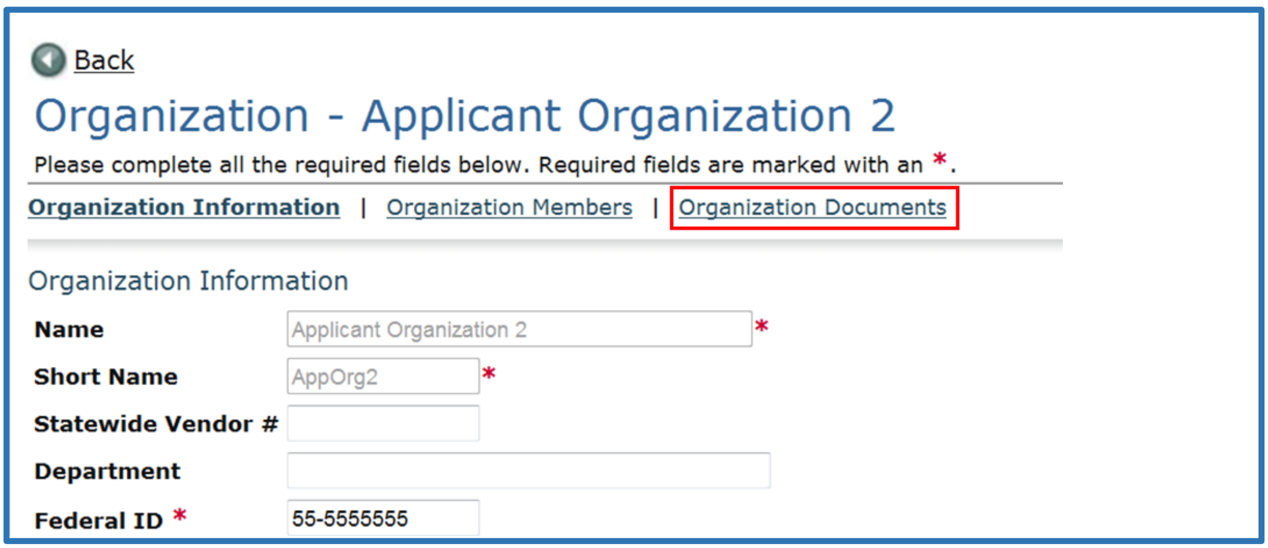
Option 2 – via My Organization(s)

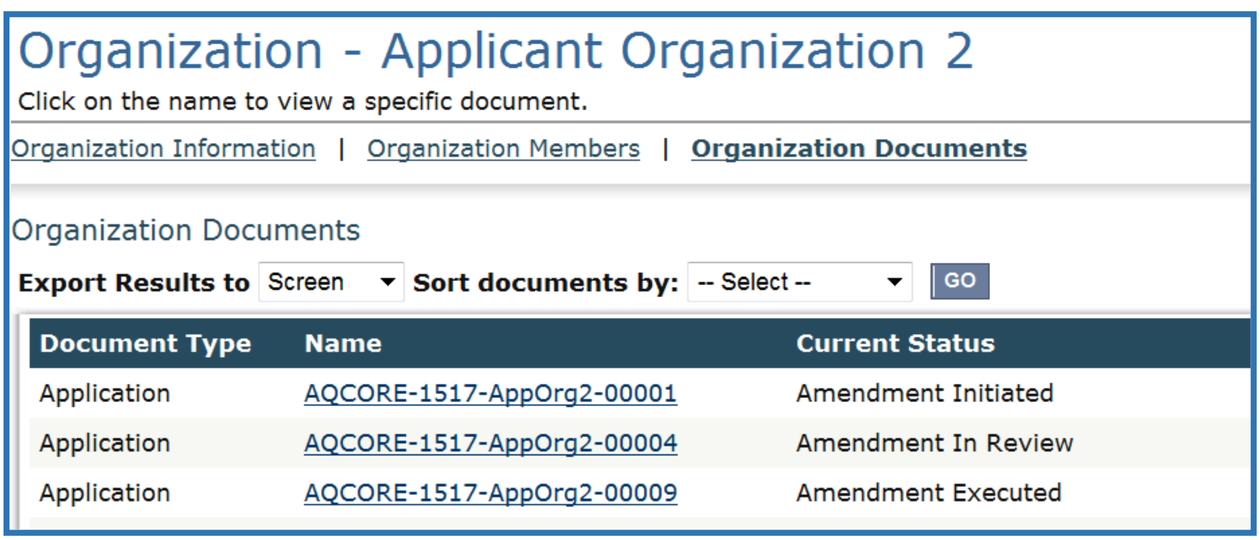
1. Click My Organization(s) from the dark green navigation bar.

2. If your account is associated with multiple organizations, the My Organization(s) screen will appear. Click on the name of the organization you wish to review. If you are not associated with multiple organizations, you will go directly to the organization details page.



3. From the organization details page, click Organization Documents to see a list of documents associated with your organization.





6.4 Finding Subdocuments

Subdocuments include Payment Request/Progress Reports, Site Visit Reports, Equipment Purchase Reports, Recipient Close Out Reports, and Ecology Close Out Reports. Subdocuments are only used on funded agreements and do not play any role in the grant/loan application process. All Subdocuments are related to a specific Parent Document.

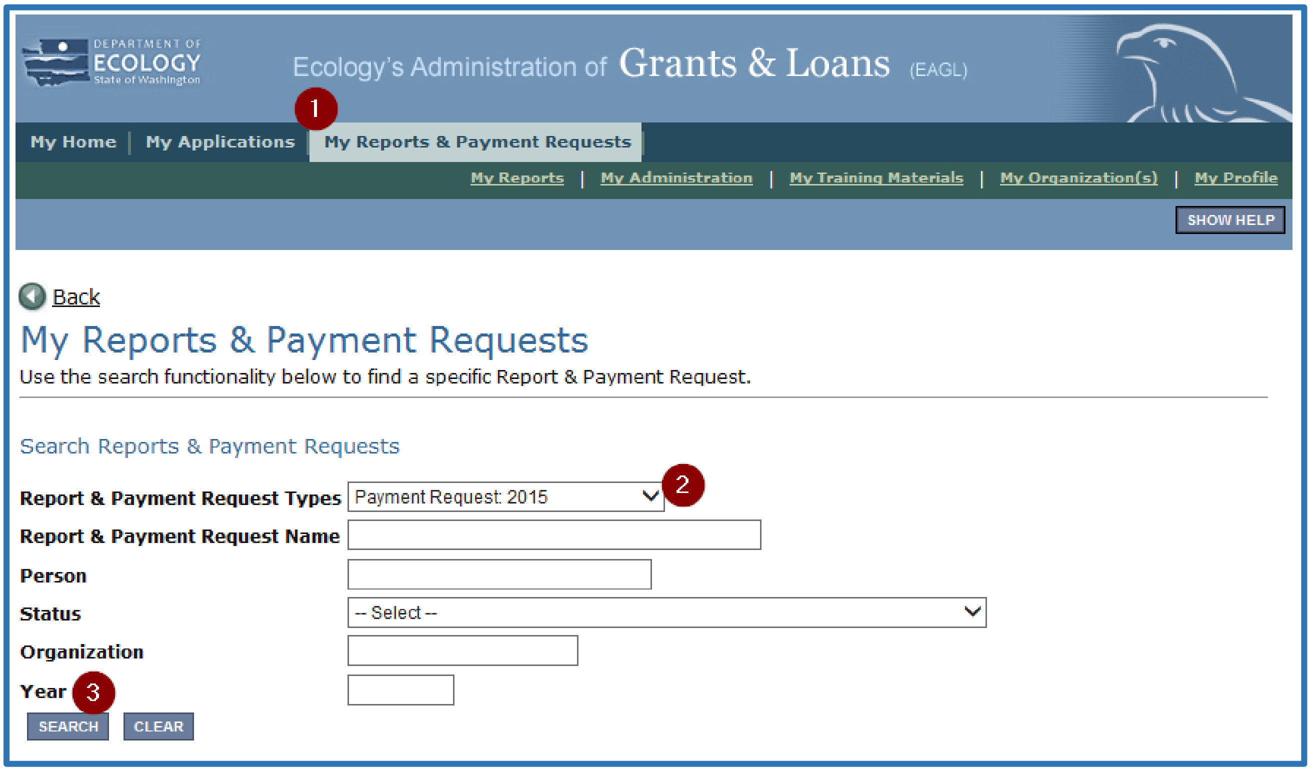
To find Subdocuments:

1. Click on the My Reports & Payment Requests link on the top blue navigation bar.
2. Select the type of Subdocument you are looking for (Report & Payment Request Type) and enter the last five digits in the Reports & Payment Requests Name field, if you know it.

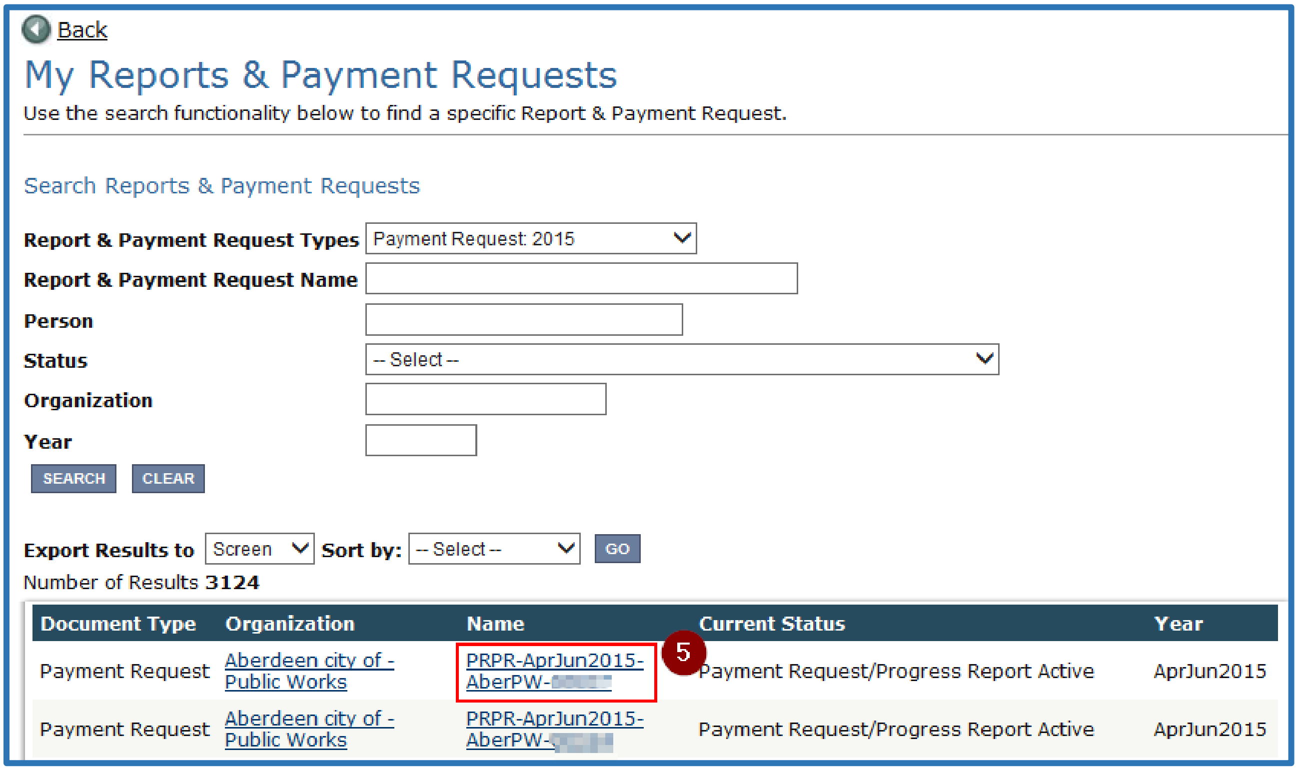
NOTE

The items in the dropdown list of Report & Payment Request Types are the EAGL templates. Most of these were developed in 2014. Only Payment Requests have more than one template.

3. Click SEARCH.
4. Another option is to leave the SEARCH criteria blank and click SEARCH to get a list of all Subdocuments from your organization.



5. Your search results will appear below the SEARCH boxes. Click on the Subdocument's name to open the Subdocument.



6.5 Updating Your Profile

EAGL must have up-to-date contact information to send you:

- Correspondence or information after a grant or loan is awarded.
- Future notices.
- Information about new grant programs.

To update My Profile:

1. From the Home page, click My Profile on the right side of the screen.
2. Update the form with current information.
3. Click **SAVE**.

NOTE

Your username and password are tied to Secure Access Washington. To change your password, visit Secure Access Washington at https://secureaccess.wa.gov. Your username cannot be changed.

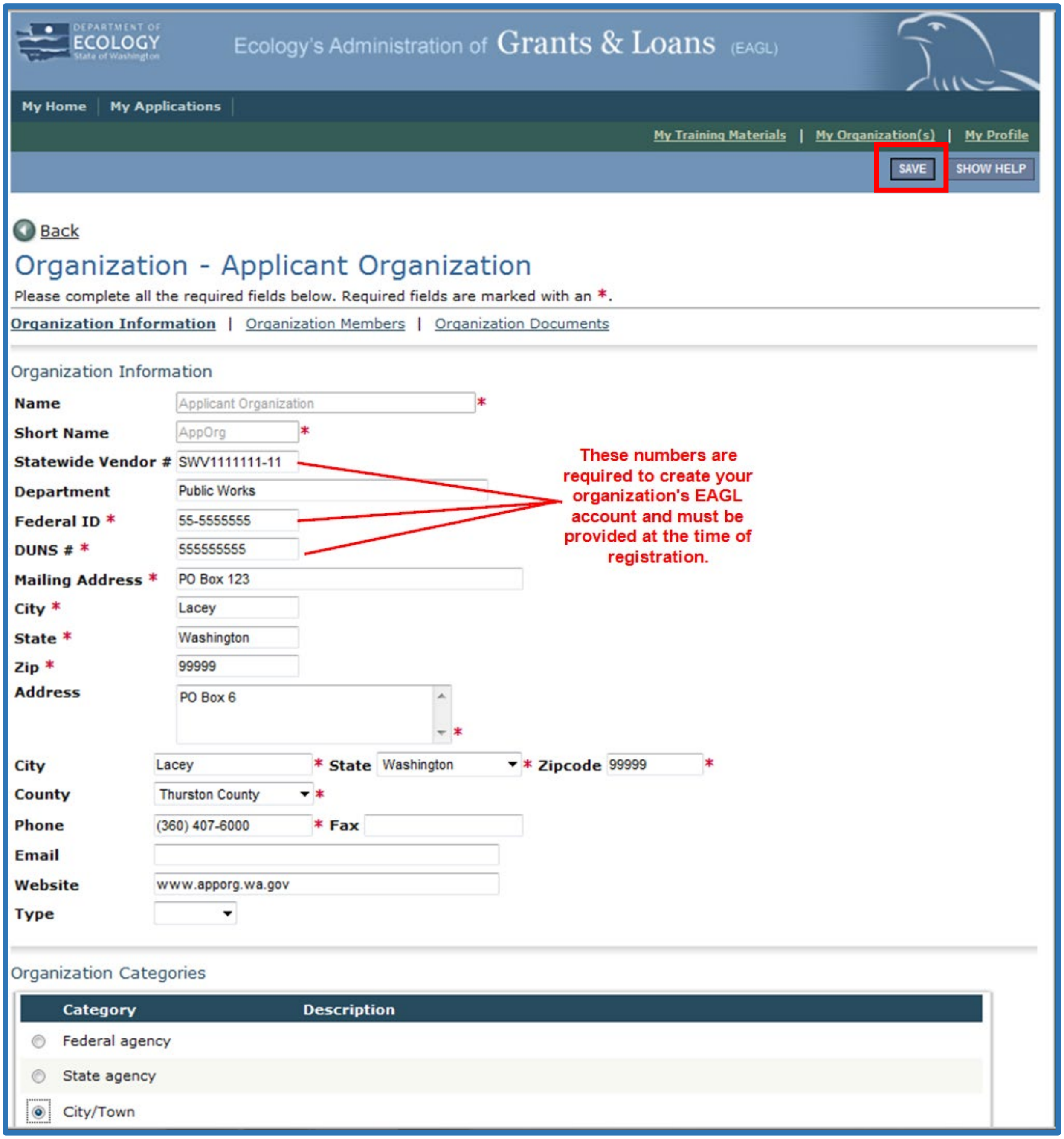
6.6 Updating Your Organization's Information

ROLE CHECK

To perform the actions in this section, you must be in the following role:

- Authorized Official at the *organization level*

1. From the Home page, click My Organization(s).
2. Click on the Organization you want to edit if more than one appears.
3. Update the form with current information.
4. Click **SAVE**.



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7 EAGL Role Permissions Overview

7.1 How It Works

EAGL is a workflow system. The actions you are able to perform depend on your role and the current status of your document (if applicable). The options available to you will change as a document progresses through the workflow.

Everyone in your organization who needs to do work in EAGL must:

- Have a Secure Access Washington (SAW) account.
- Be associated with the EAGL service in SAW.
- Register for EAGL and be granted access by Ecology (may take up to three business days).
- Be associated with your organization by an EAGL Administrator from Ecology (if working with multiple organizations).
- Be granted appropriate document access by the organization's Authorized Official.

7.2 System Roles

System roles control what you can do in the system. The first person from your organization who enters EAGL will be an Authorized Official. We highly encourage having at least two Authorized Officials so that a backup is in place when staff are unavailable or leave the organization.

The Authorized Official will assign all other users from your organization the role most appropriate for their job duties. There is no limit to the number of people associated with your EAGL organization, but it is a good practice to limit users to only those who need access.

Each organization should review their grant administration processes and practices and determine the appropriate roles for their staff.

IMPORTANT NOTE

Do not let your staff use or reuse another staff member's account. For example, if a member of your staff leaves your organization, do not edit the account to update it with a new person's name. New employees must get their own SAW account and EAGL access. For auditing purposes, never share SAW or EAGL accounts.

7.2.1 Authorized Official

The Authorized Official is a system role that allows a user in your organization to:

- Manage organization information.
- Assign organization user roles.
- Initiate, edit and submit applications, amendments, and Subdocuments such as Payment Request/Progress Reports.

This role is typically for users who need to do everything during the lifetime of a grant. This role receives regular email notifications from EAGL about the grant and related activity.

IMPORTANT NOTE

Contractors may not hold the Authorized Official role.

7.2.2 Contractor

A Contractor is a system role that allows a user to:

- Initiate applications.
- Edit applications.

This role is typically assigned to people outside of your organization who you have authorized to do work on your behalf. Your organization must contact the Ecology EAGL Business Administrator to get contractor approval.

7.2.3 Recipient Project Manager

A Recipient Project Manager is a system role that allows a user to:

- Edit applications.
- Initiate certain Subdocuments.
- Submit certain Subdocuments, such as Equipment Purchase Reports.
- Complete or cancel progress reports.

This role is typically for users who serve strictly in a project manager capacity for a grant or loan. This role cannot enter any information on the Payment Request form.

NOTE

A Payment Request/Progress Report consists of several forms, including a Progress Report form (completed by the Recipient Project Manager) and the Payment Request form (completed by the Recipient Financial Officer).

7.2.4 Recipient Financial Officer

A Recipient Financial Officer is a system role that allows a user to:

- Initiate Payment Request/Progress Reports.
- Submit Payment Request/Progress Reports.

This role is typically assigned to users who serve strictly in a financial management role. This role may complete Payment Request forms, but cannot enter any information on the Progress Report form.

7.2.5 Writer

A Writer is a system role that allows a user to:

- Edit applications.
- Edit Subdocuments.

This role is typically assigned to users who will help with the grant or loan’s application, payment requests, or provide support during the lifetime of the agreement. This role does not receive system notifications. This role does not allow the user to create or submit documents or

Subdocuments. Writer is a great role for people in organizations that have strict accounting protocols.

7.2.6 Reader

Reader is a system role that allows a user to:

- View documents.
- View Subdocuments, such as applications and Payment Request/Progress Reports.

This role is typically assigned to the organization's Authorized Signatory such as a mayor or director. In other cases, this role may be used for users who serve strictly in an advisory capacity, but do not actually administer the grant. This role does not receive any system notifications.

7.3 Organization and Document Level Roles Overview

EAGL has two levels of roles: organization level and document level. Roles can be customized in each document and Subdocument.

The Authorized Official should access the Parent Document and ensure the appropriate roles are assigned to other members of the organization. If you add staff to your organization after a document is created, an Authorized Official must manually assign roles for that person; EAGL will not assign new staff to existing documents. Roles you assign at the organization level will default to the document and Subdocument levels, as long as you assign the organization role before you create the document or Subdocument. You will need to assign roles individually to any documents (including those in process) that existed before you assigned the role.

When you assign a role at the Parent Document level, that role will apply to any Subdocument created after the role is assigned.

7.3.1 Precedence of Document Level Roles

Roles set at the organization level serve as the user's default role on newly initiated Parent Documents (applications). However, the document level role takes precedence over the organization level role. For example, a person who is an Authorized Official at the organization level but a Reader at the document level will be limited to Reader level actions for that document.

IMPORTANT NOTE

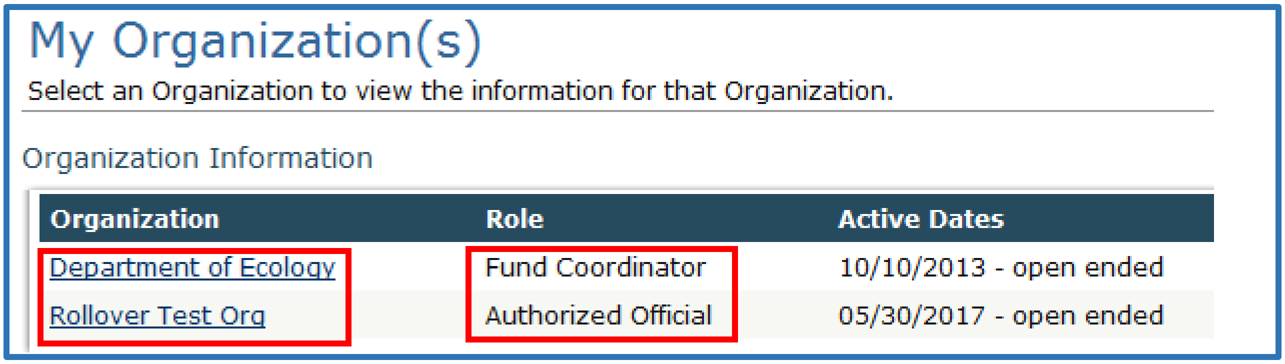
If a document was created before a user was added to the organization, an Authorized Official at the *document level* must manually add the user to any existing Parent Document(s) or Subdocument(s) they need to access.

Appendix 3 Role Permissions Table is a comprehensive look at what each role can do in EAGL.

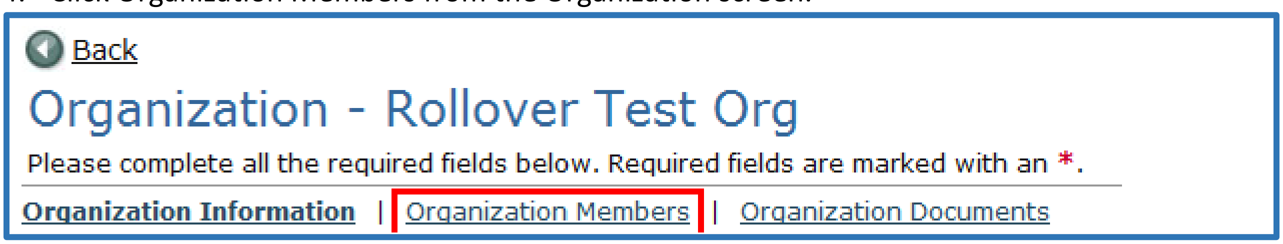
7.4 Updating Roles at the Organization Level

1. Verify that you are the Authorized Official for the Organization.
2. Choose My Organization(s) from the My Home page.

3. If you are associated with more than one organization, as in the example below, you need to choose the organization's account you want to work on. The screen will list your role in each organization.



4. Click Organization Members from the Organization screen.

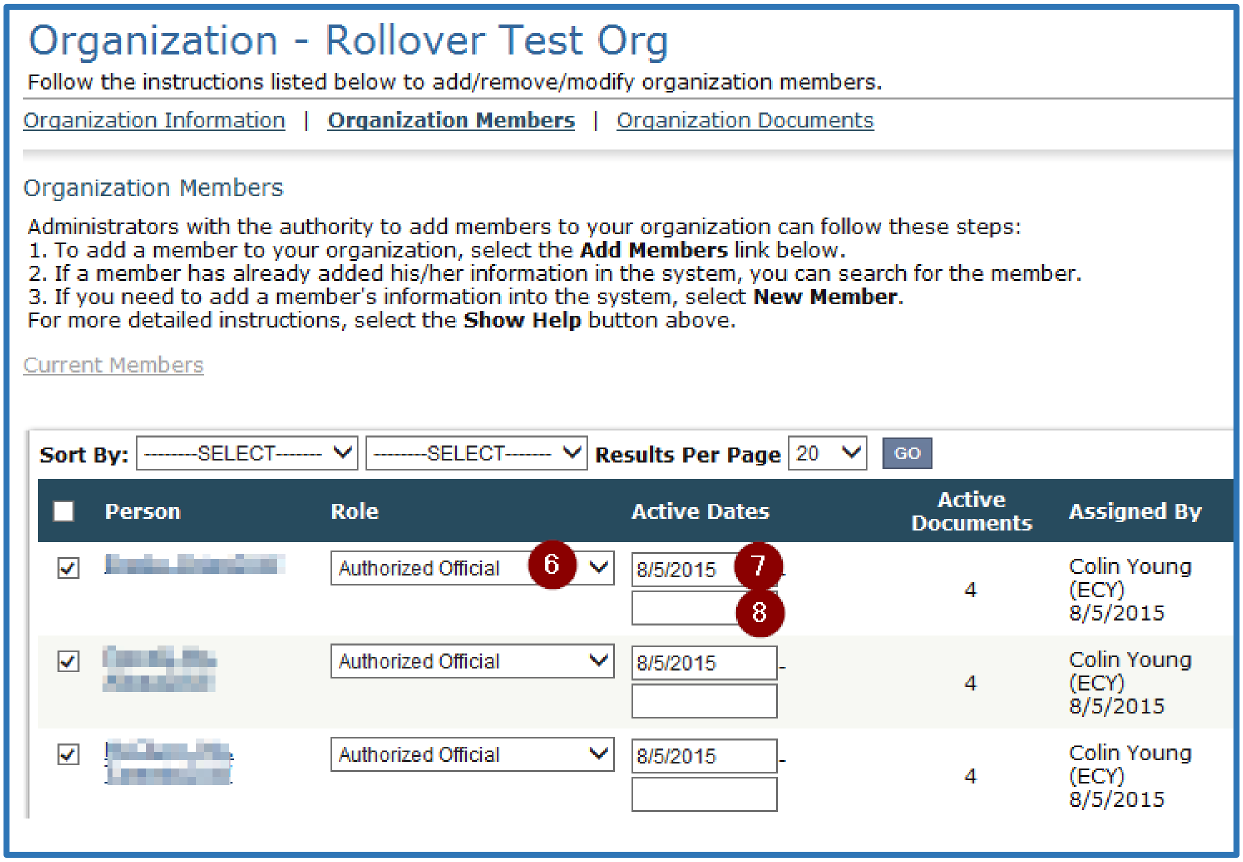


5. The top of the screen lists people currently associated with your organization, their roles, and when they became active. By default, all organization members should have a check next to their name.

IMPORTANT NOTE

If you uncheck the checkbox and click **SAVE**, the person will be deleted from your organization, and only Ecology can associate them with the organization again. For auditing purposes, do NOT uncheck anyone who has completed work for your organization in EAGL.

6. Select the role of the member from the dropdown (menu) arrow.
7. The Active Dates column has two boxes—one for the start date and one for the end date. For new roles, enter an active date in the upper box (start date) in the Active Dates column.
8. For anyone who has left your organization, enter an end date in the lower box in the Active Dates column to remove them from your organization.



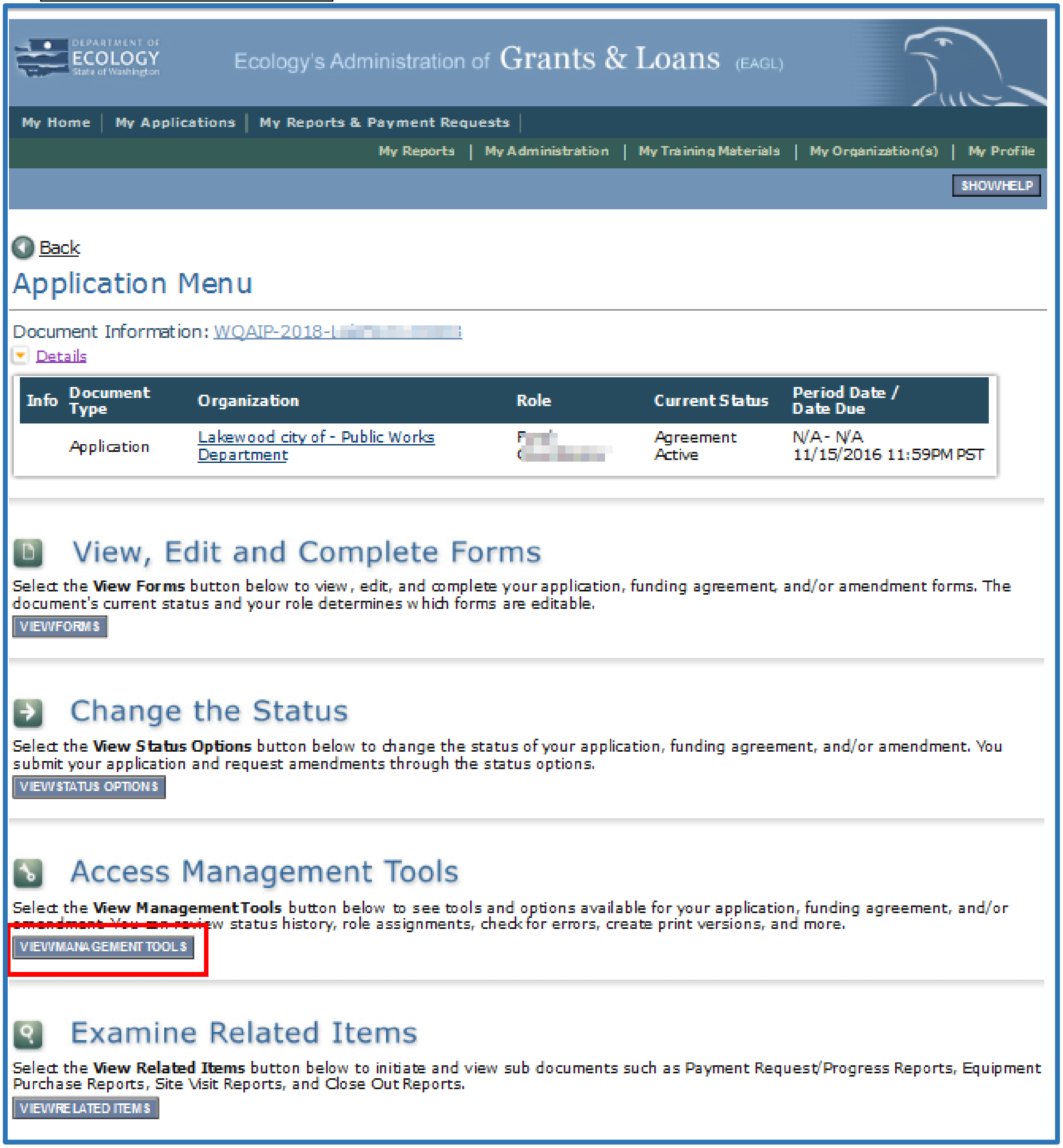
IMPORTANT NOTE

Do not uncheck the checkbox for this person; it will delete them from your organization's history.

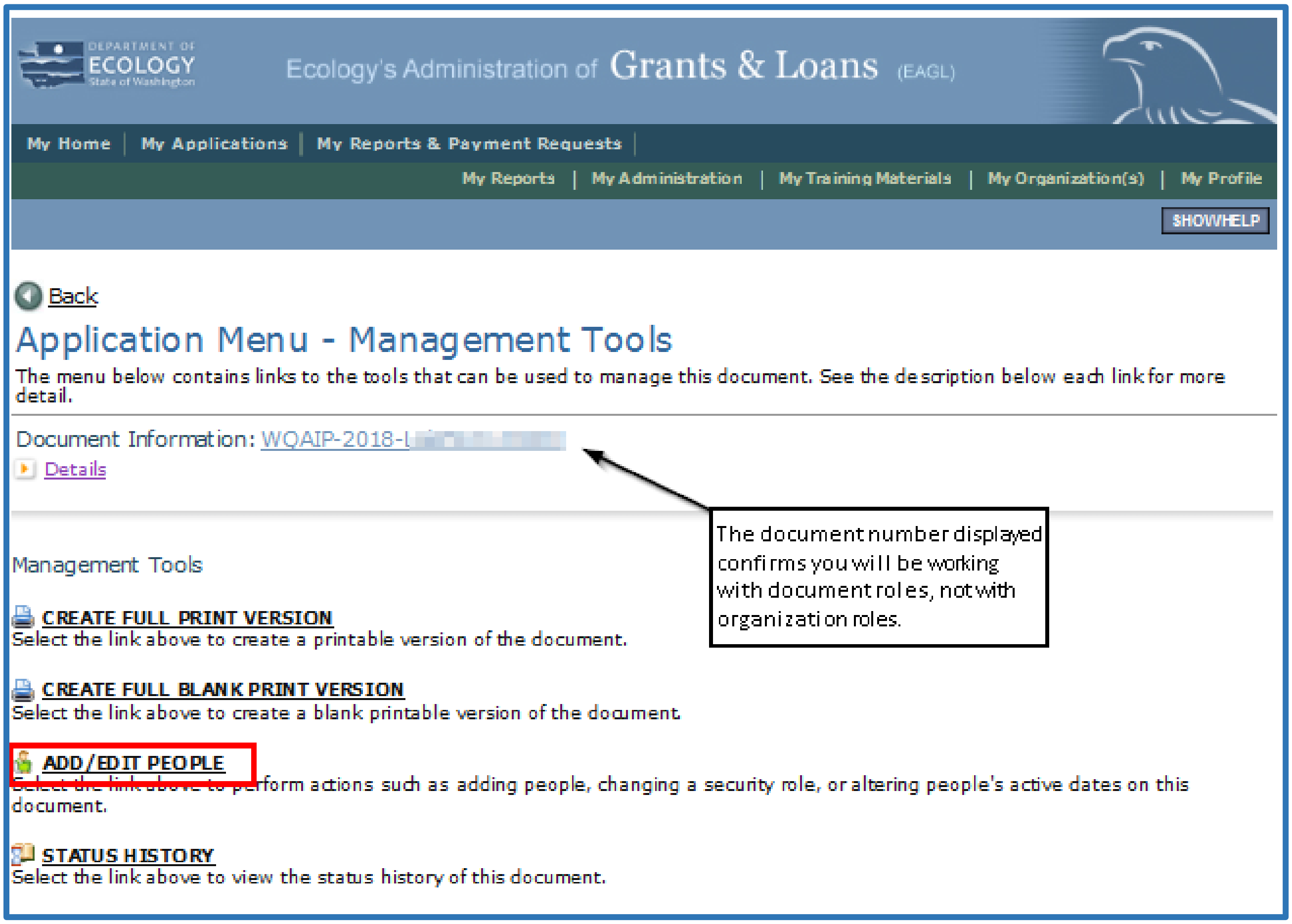
9. Click **SAVE** to update the roles.

7.5 Updating Roles at the Document Level

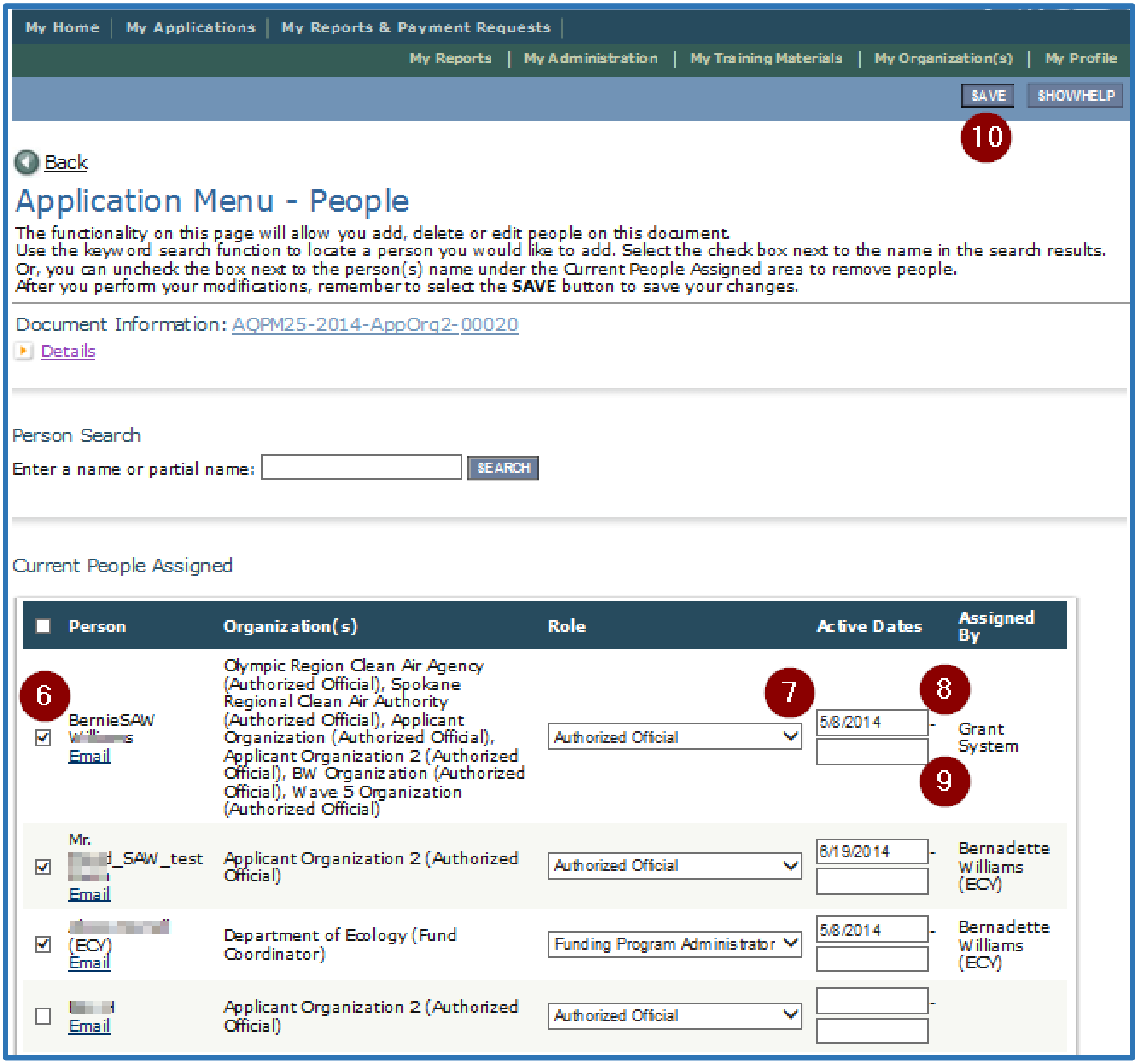
1. Verify that you are the Authorized Official for the document.
2. Search for your document from the My Applications page and select it from the results.
3. From the Application Menu, click View Management Tools (located below **Access Management Tools**).



4. Click ADD/EDIT PEOPLE.



5. Find the person you are looking for by scrolling down the list. The document's Application Menu - People screen lists all active members in an organization.
6. Check the box next to the person you want to edit.
7. Select the role from the dropdown list.
8. For new roles, enter an active date.
9. For anyone who has left your organization or for staff who are no longer associated with this project, enter an end date in the box below the Active Date to remove their role from the Parent or Subdocument. For auditing purposes, do not uncheck the checkbox for this person, because it will delete the individual and any work they completed in EAGL for your organization.
10. Click **SAVE** to update the roles.



NOTE

Users must have SAW accounts, with EAGL as a service, and be associated with the organization (Ecology associates people to their organizations) to appear in the list of available people.

IMPORTANT NOTE

Do not let your staff use or reuse another staff member's account (also referred to as hijacking an account). For example, if a member of your staff leaves your organization, do not edit the account to update it with a new person's name. New employees must get their own SAW account and EAGL access. Never share SAW or EAGL accounts.

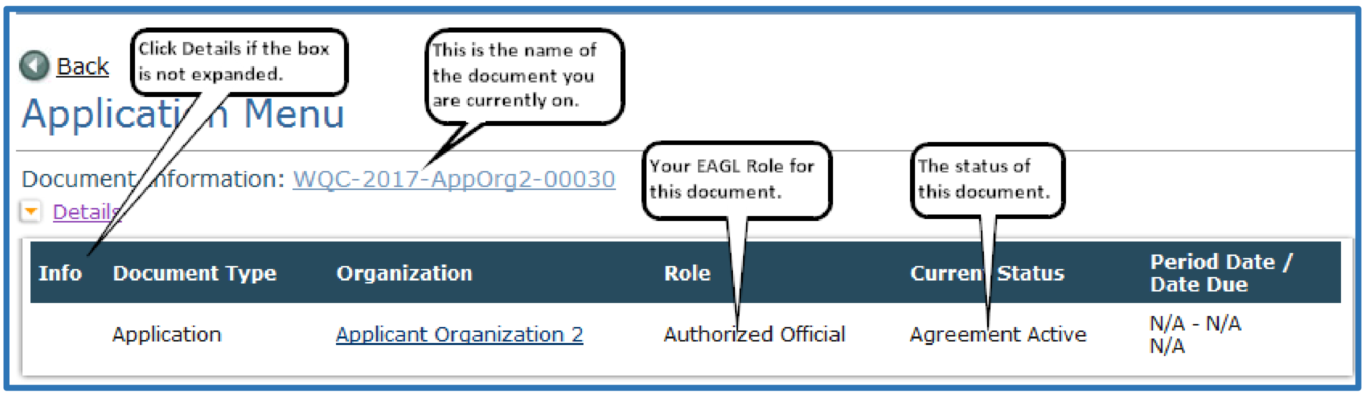
8 General Documents Overview

8.1 Menus Overview

Each Parent Document or Subdocument has a menu screen that provides four menu options for the specific document you are viewing.

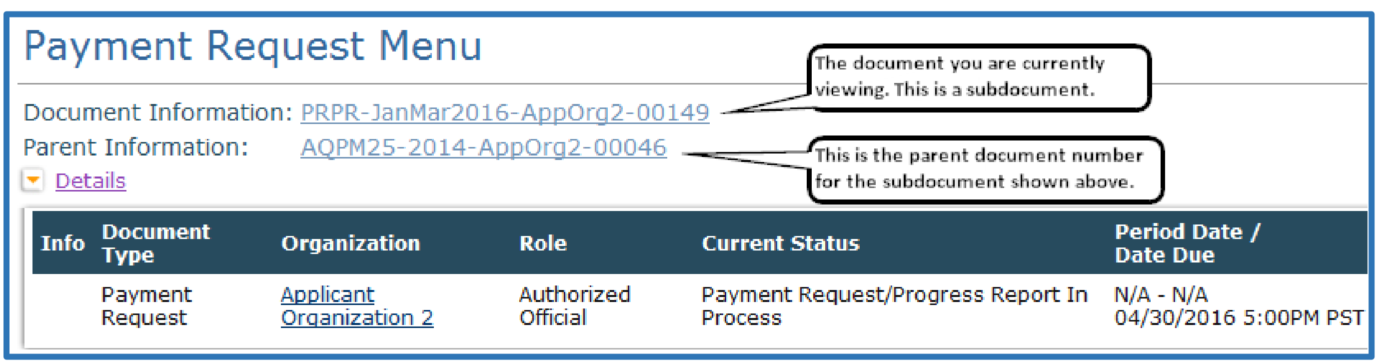
Near the top of the menu, you will see the document number and a collapsible Details box that shows high-level information about the document.

Parent Document:



If you are in a Subdocument (see below), you will see the Parent Document's number listed below the Subdocument number. The details box will display information for the Subdocument you are viewing, instead of displaying information about the Parent Document. Click on the Parent Information link to go to the Parent Document instead.

Subdocument:



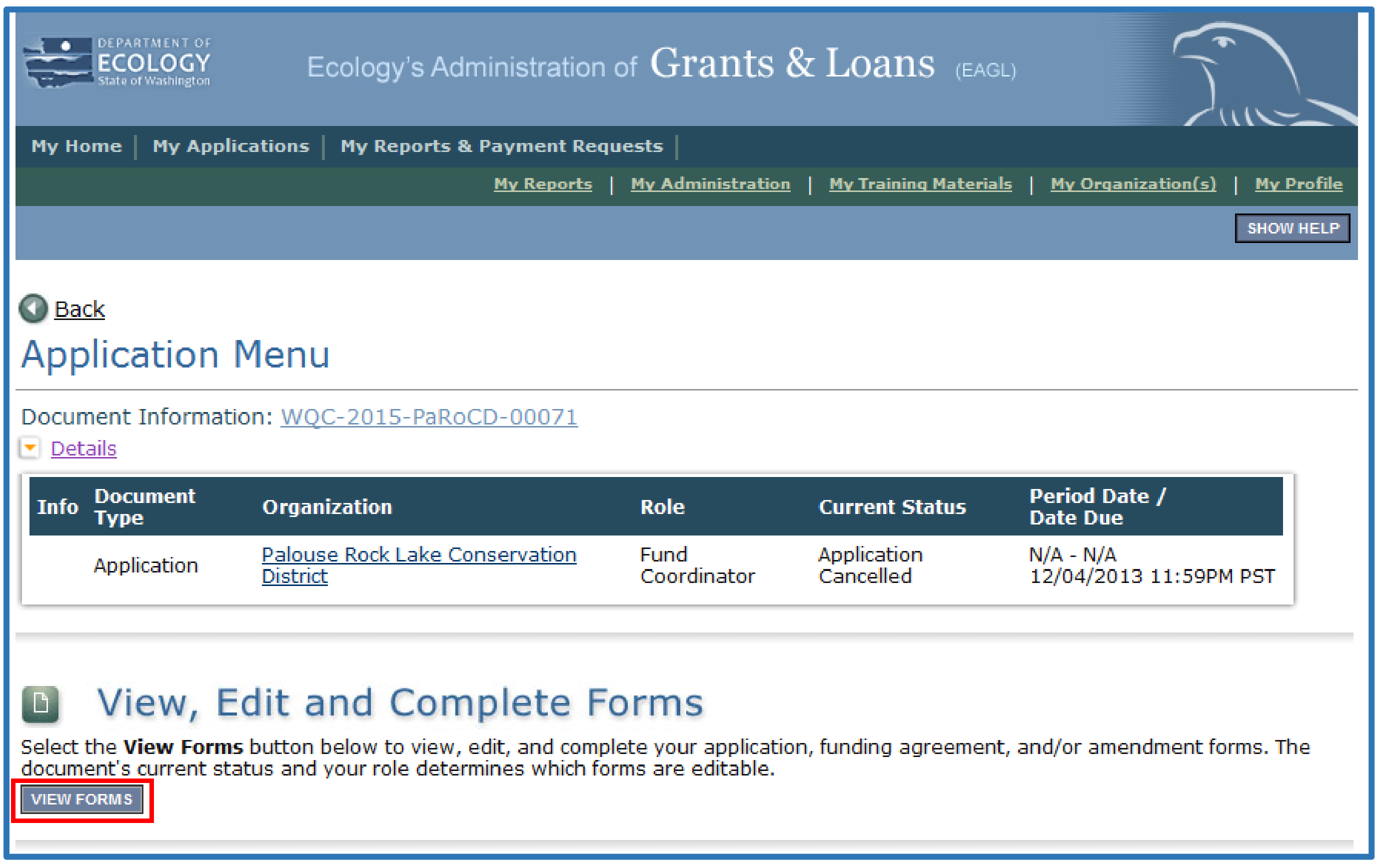
Every document menu includes the same four menu options:

View, Edit and Complete Forms	To access forms related to the document (Parent or Subdocument)
Change the Status	To move a document through the workflow
Access Management Tools	To manage a variety of administrative tasks
Examine Related Items	To create new Subdocuments or access existing ones

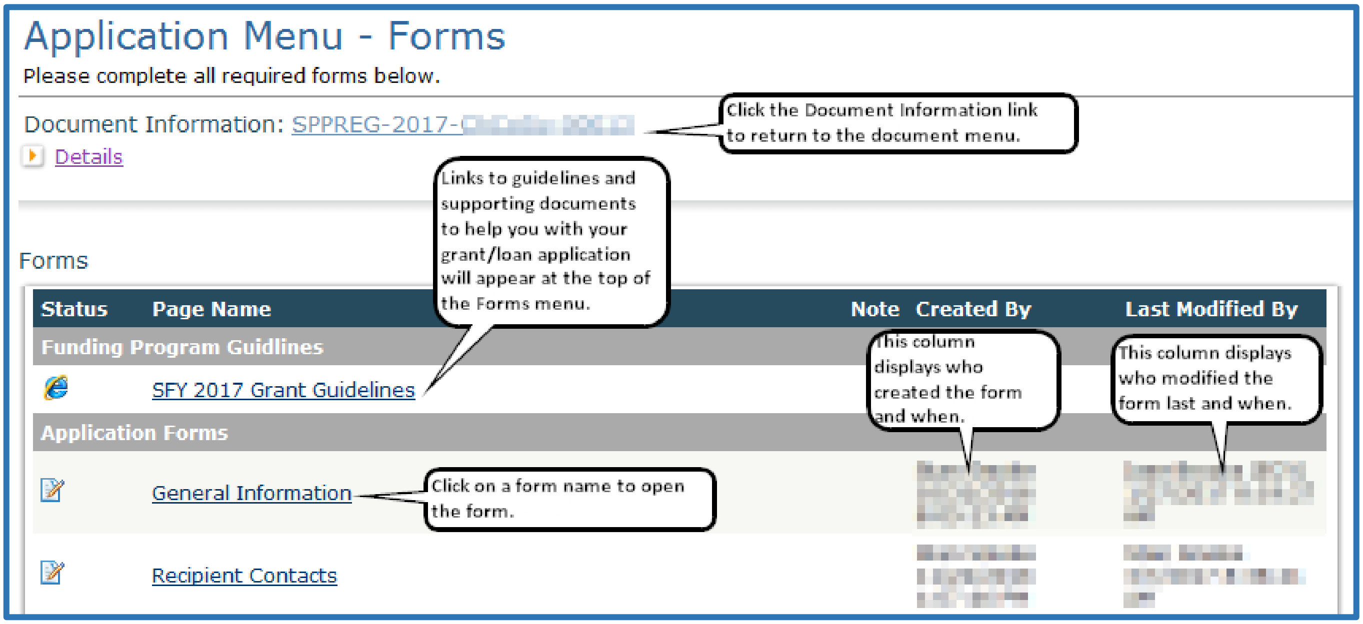
8.2 View, Edit and Complete Forms

You will do the majority of the work on any document from the **View, Edit and Complete Forms** section. This section links to all of the forms you must complete before you can submit an application, Payment Request/Progress Report, or other EAGL document.

To edit forms, click VIEW FORMS.



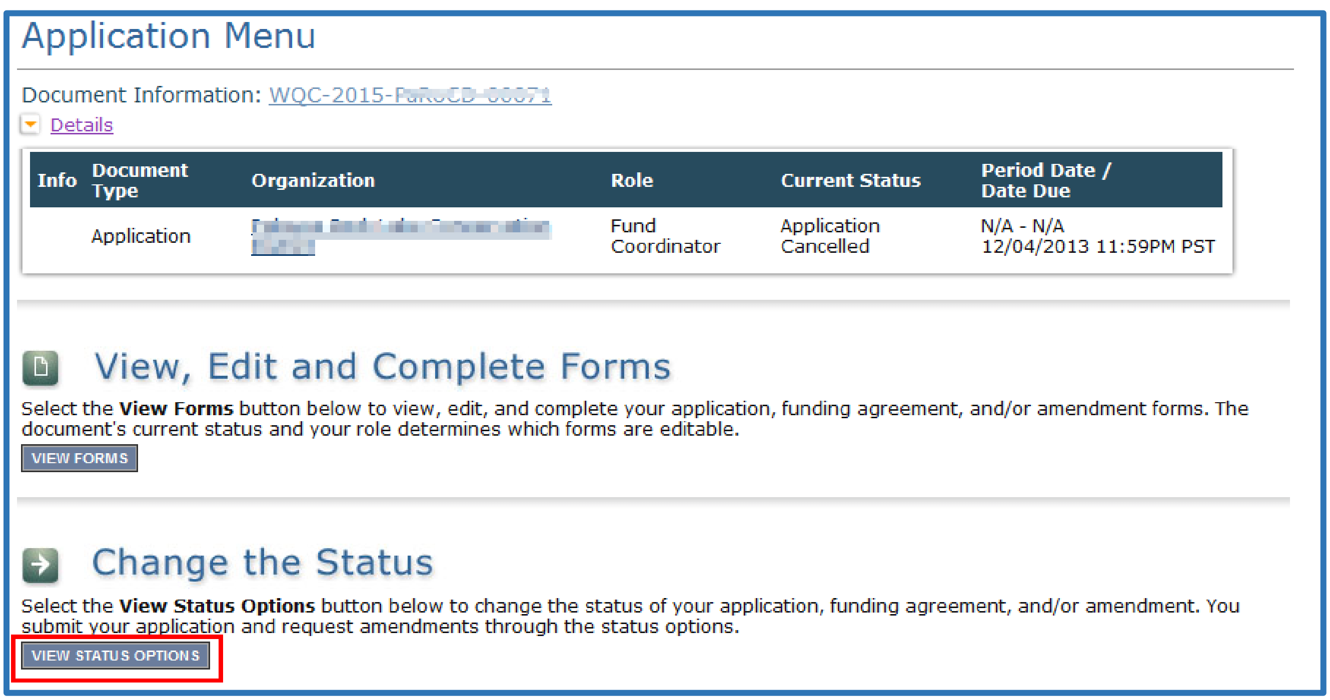
The system will display a list of forms to be completed.



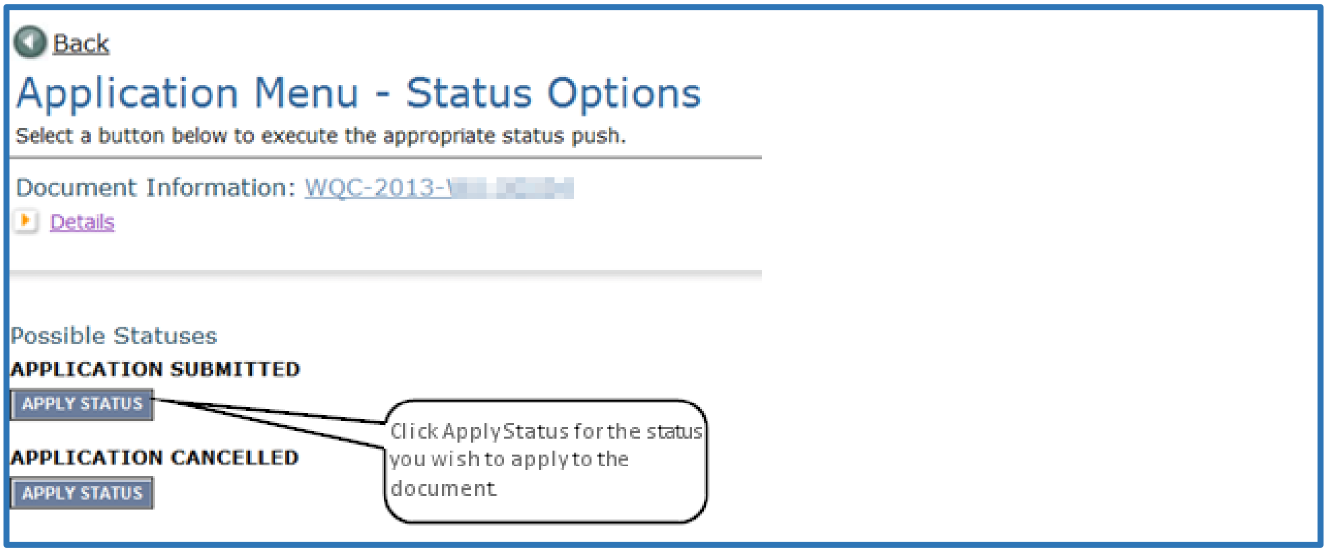
8.3 Change the Status

EAGL is a workflow system. The status of a document within the workflow determines who can do what with it. Changing a document's status moves it forward in the workflow. For example, after you complete all of the forms for a grant or loan application, you must change the application's status to submit it to Ecology for review. You will also need to change the status for other Subdocuments in the system to move them through the EAGL workflow.

To change a document's status, click VIEW STATUS OPTIONS below **Change the Status** on the Application Menu screen.

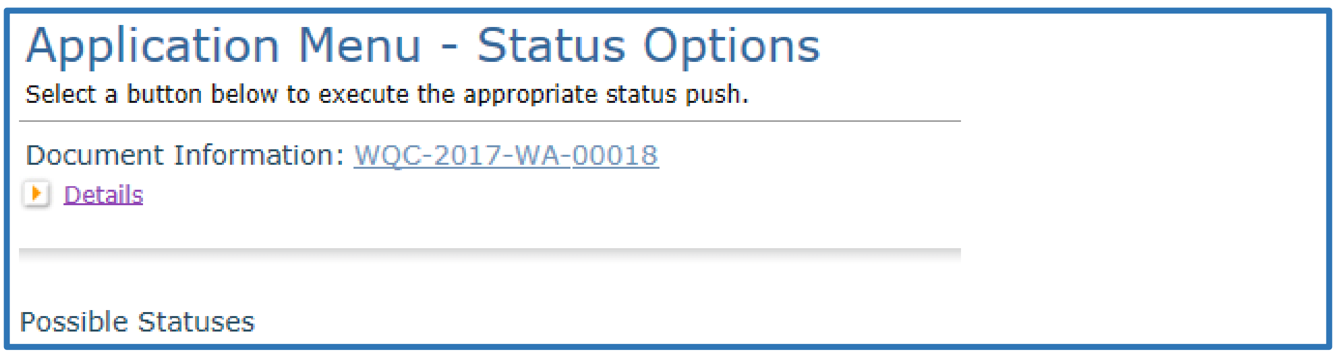


A list of possible statuses will appear.



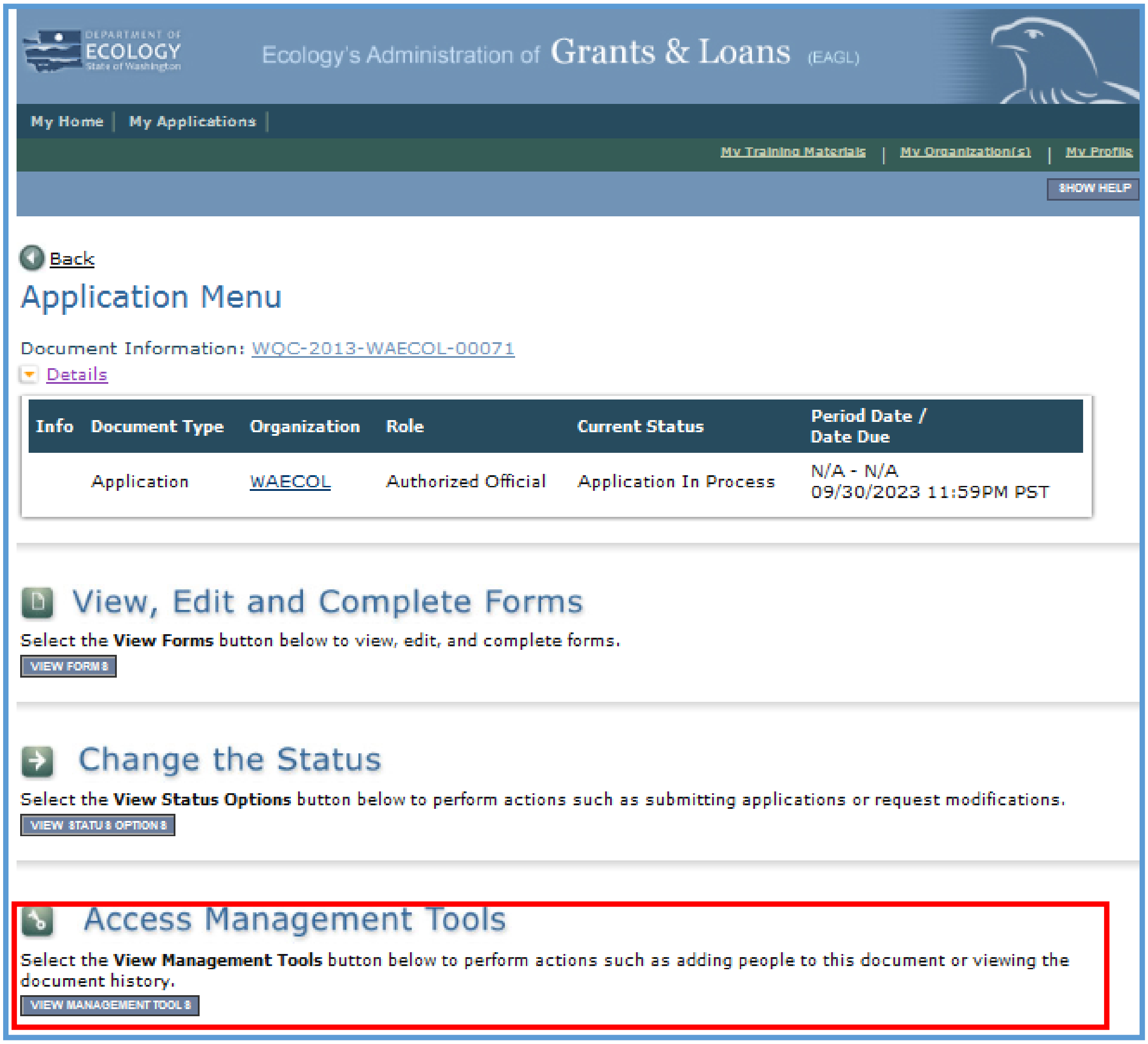
NOTE

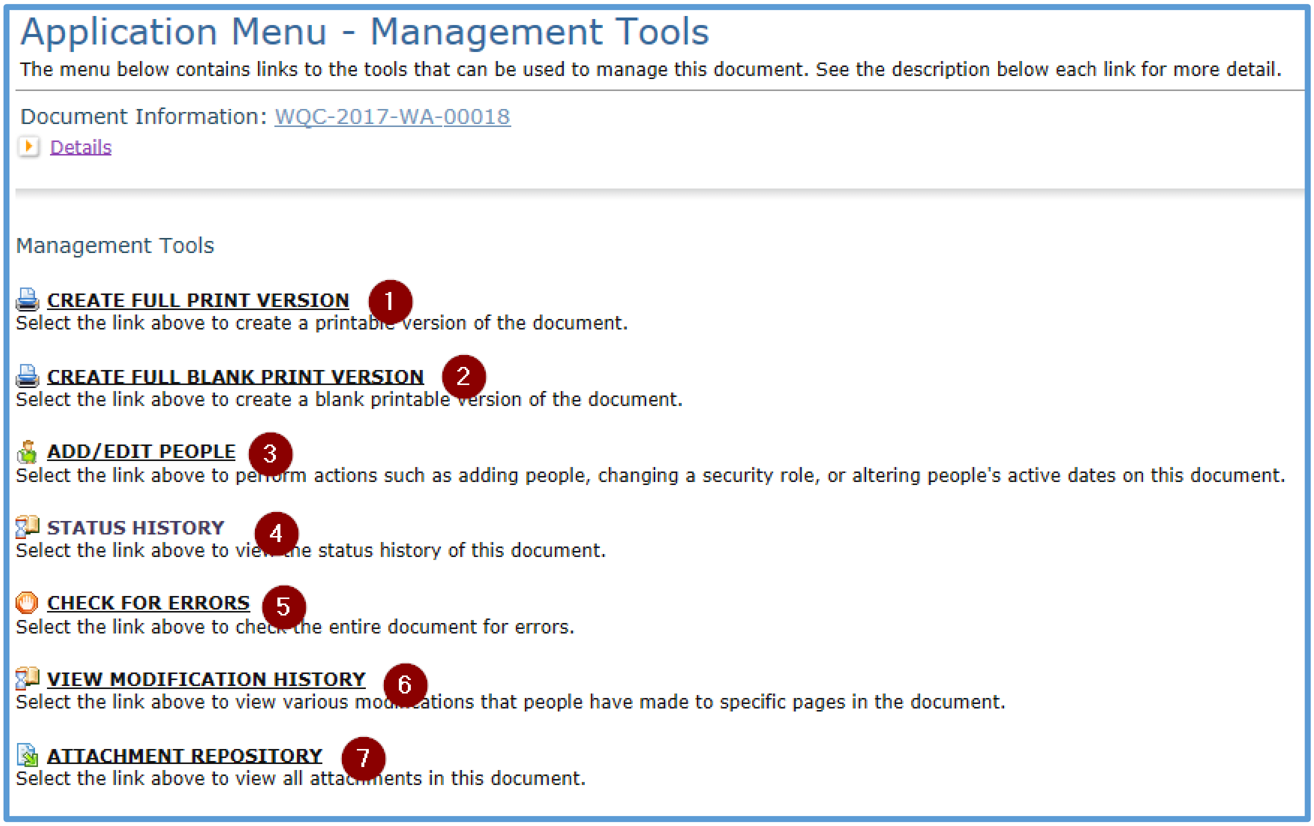
EAGL will display a message if no status options are available. You may see this message either because of your role or the document's current status.



8.4 Access Management Tools

Depending on your role, you can perform certain administrative tasks using the **Access Management Tools** menu. These tasks include assigning user roles, viewing a document's status history, or printing a PDF of the application or other document (such as a Payment Request/Progress Report).



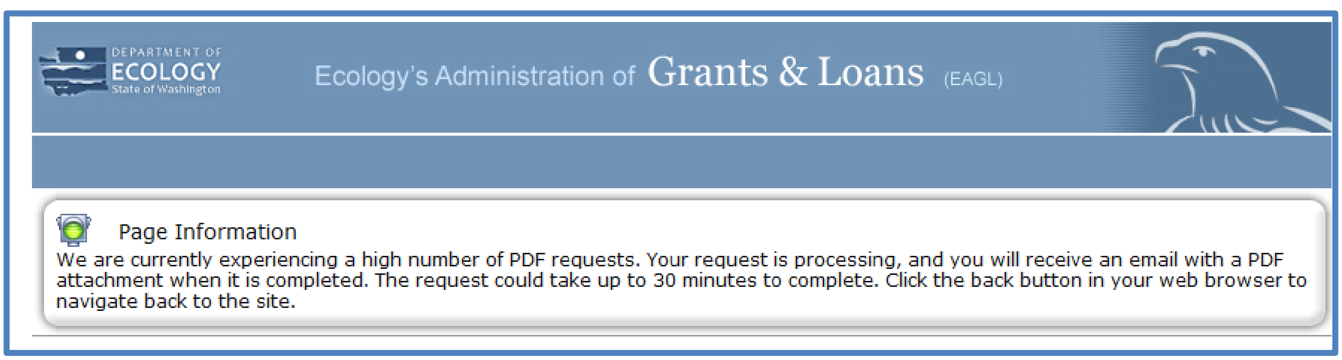


1-CREATE FULL PRINT VERSION

Click CREATE FULL PRINT VERSION to generate a PDF version of your document. The PDF will include most of the forms that currently appear on the document's form menu. Some forms may be purposely excluded from the full print version.

NOTE

If you get an error message like the one below, it is because EAGL is temporarily overloaded with requests for PDF versions of documents. Your request is put in a queue. Once EAGL is able to create your PDF document, it will send you an email with the PDF attached.



2-CREATE FULL BLANK PRINT VERSION

Click CREATE FULL BLANK PRINT VERSION to generate a blank PDF version of your document. Any information entered on the forms will not appear in the blank print version.

3-ADD/EDIT PEOPLE

Click ADD/EDIT PEOPLE to view the current role assignments on the document. All roles can view this page, *but only the Authorized Official may save changes.* All members of your organization should be displayed on this page. If a member of your organization is not listed, the user must register for EAGL. For more information about role management, see EAGL Role Permissions Overview.

4-STATUS HISTORY

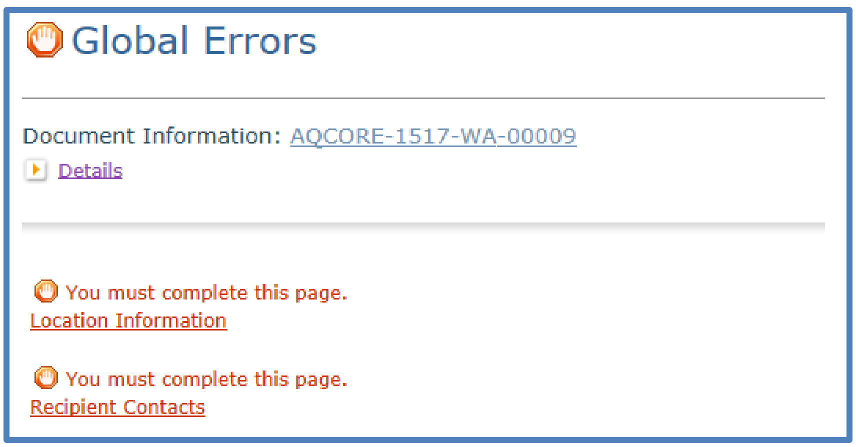
Click STATUS HISTORY to view the date and time of status changes on the document. This includes status changes by members of your organization and Ecology.

5-CHECK FOR ERRORS

To re-check your entire document for errors, click the CHECK FOR ERRORS link. This will start a global error check. If any errors are found on your forms, the form name and error message will display on the page. You can click on any of the underlined form names to return to that form.

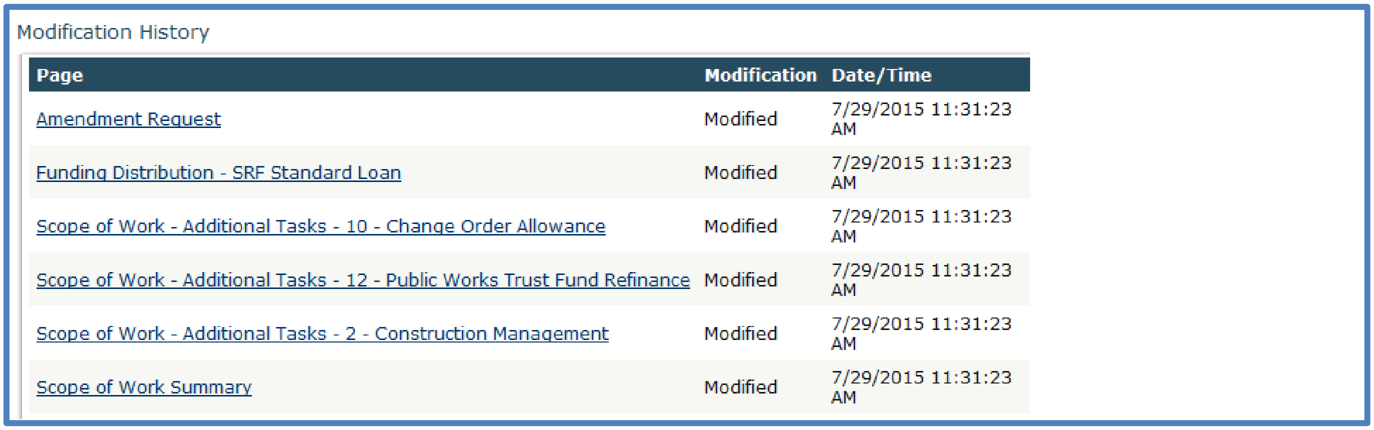
NOTE

In some cases, global errors will only appear if your role and the current status allows you to correct the errors. For example, if Ecology edits one of your forms after application submittal and causes a page error, you may see that an error exists on the form. However, the global error check may not display that error because only Ecology staff can correct it.



6-VIEW MODIFICATION HISTORY

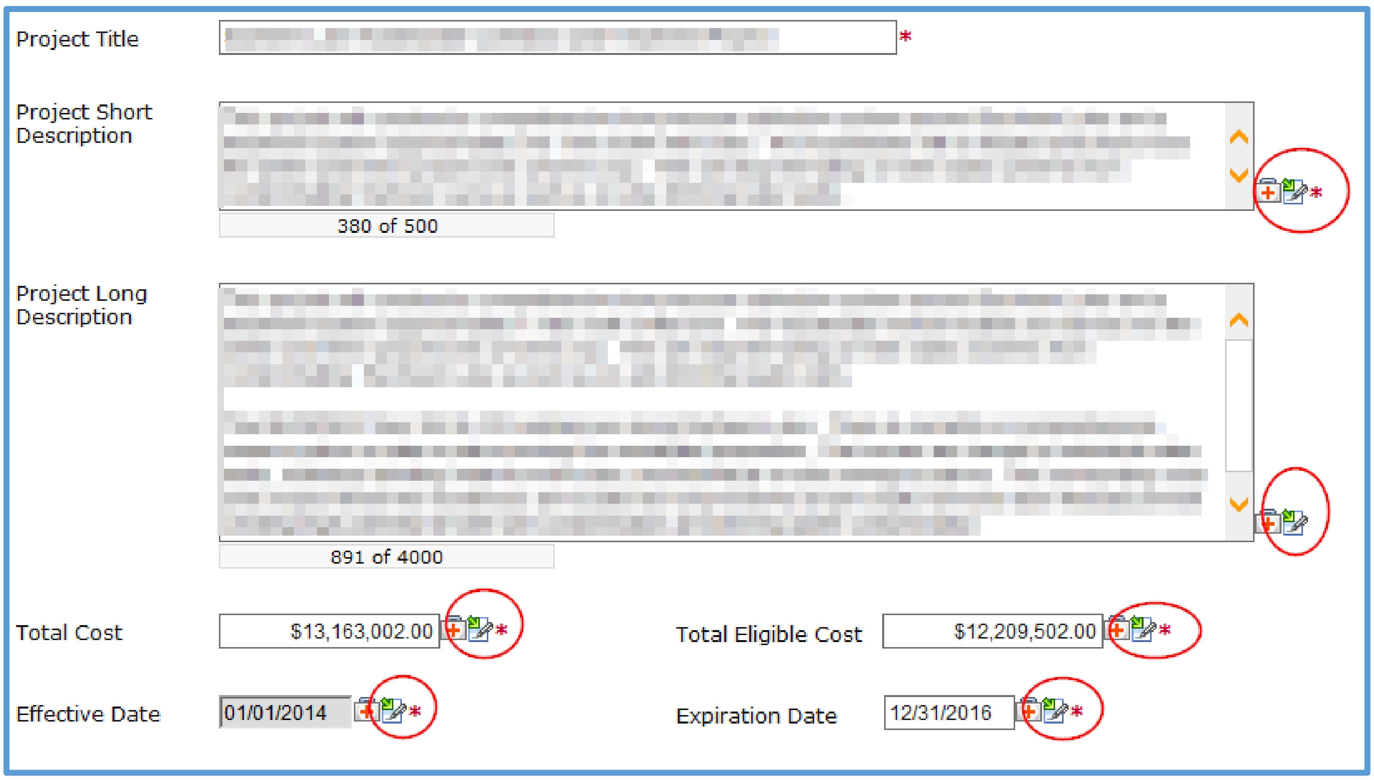
To view the history of forms and their content, click VIEW MODIFICATION HISTORY. EAGL will display a list of forms that have been modified. You may click the link to any form to view its modifications. Note that modifications displayed are dependent on the status of the document when the modifications occurred. Not all incremental modifications are displayed.



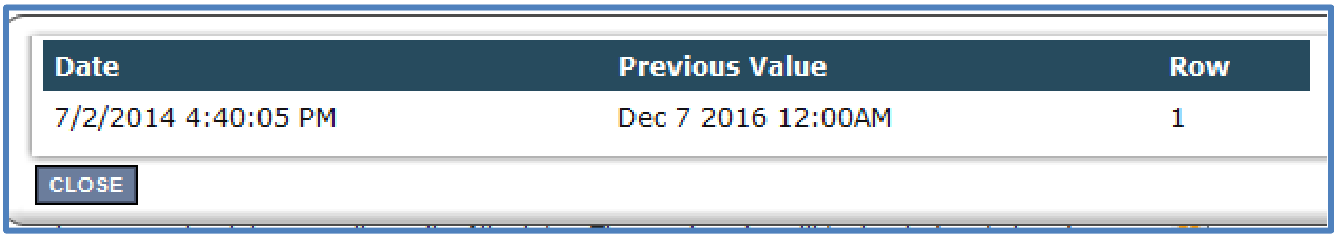
Modification History

Page	Modification	Date/Time
Amendment Request	Modified	7/29/2015 11:31:23 AM
Funding Distribution - SRF Standard Loan	Modified	7/29/2015 11:31:23 AM
Scope of Work - Additional Tasks - 10 - Change Order Allowance	Modified	7/29/2015 11:31:23 AM
Scope of Work - Additional Tasks - 12 - Public Works Trust Fund Refinance	Modified	7/29/2015 11:31:23 AM
Scope of Work - Additional Tasks - 2 - Construction Management	Modified	7/29/2015 11:31:23 AM
Scope of Work Summary	Modified	7/29/2015 11:31:23 AM

On the form that you select, an icon with a green arrow appears next to fields that have history associated with them. Click the icon to see the modifications.



After clicking the icon, a small window pops up with the modification history. You can compare the date to the document's status history to determine exact timing of the change (for example, original agreement, amendment 1, and amendment 2). You may see multiple rows if the field was modified multiple times.



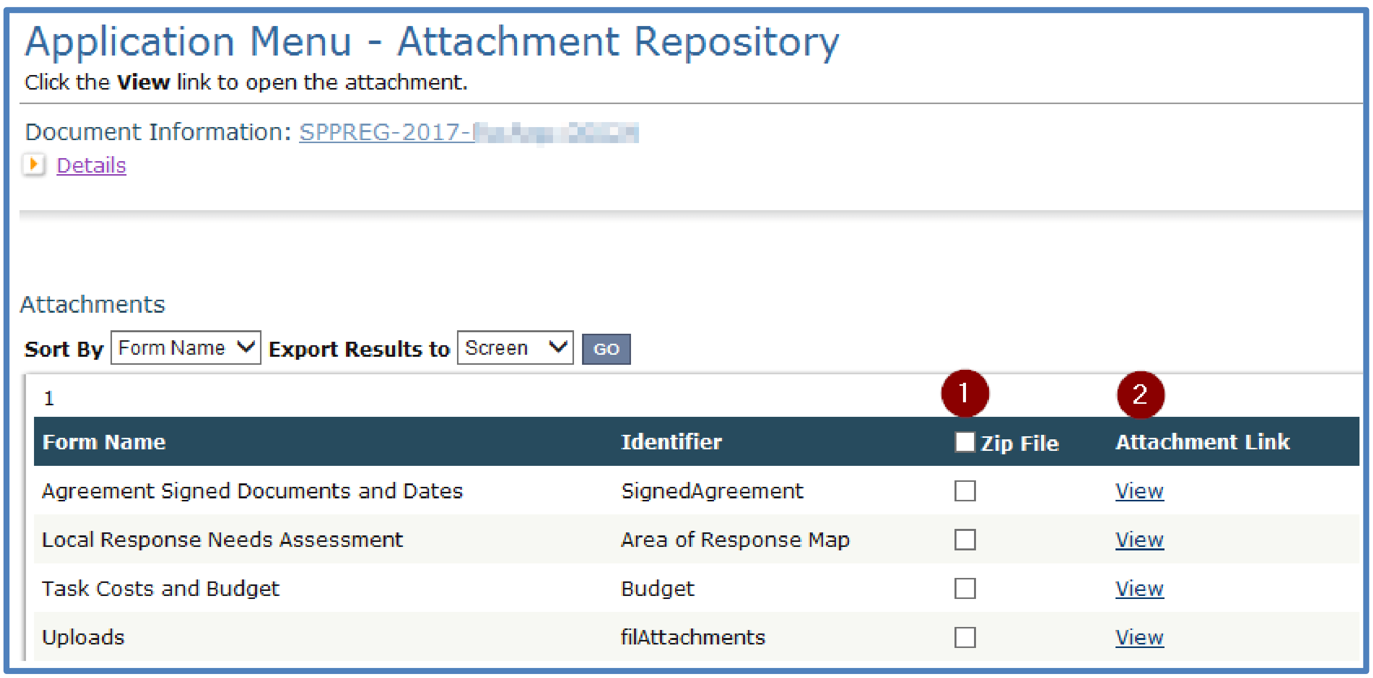
Date	Previous Value	Row
7/2/2014 4:40:05 PM	Dec 7 2016 12:00AM	1

7-ATTACHMENT REPOSITORY

Click ATTACHMENT REPOSITORY to view a list of all files uploaded to the current document and the form they were uploaded to.

- You can download copies of files (see 1 on the screenshot).
- You can view the files (see 2 on the screenshot).

You can hover your mouse over each Attachment Link to see the file name on the bottom left corner of the window.



Application Menu - Attachment Repository

Click the **View** link to open the attachment.

Document Information: SPPREG-2017-[redacted]

Details

Attachments

Sort By Form Name **Export Results to** Screen GO

1

Form Name	Identifier	Zip File	Attachment Link
Agreement Signed Documents and Dates	SignedAgreement		View
Local Response Needs Assessment	Area of Response Map		View
Task Costs and Budget	Budget		View
Uploads	filAttachments		View

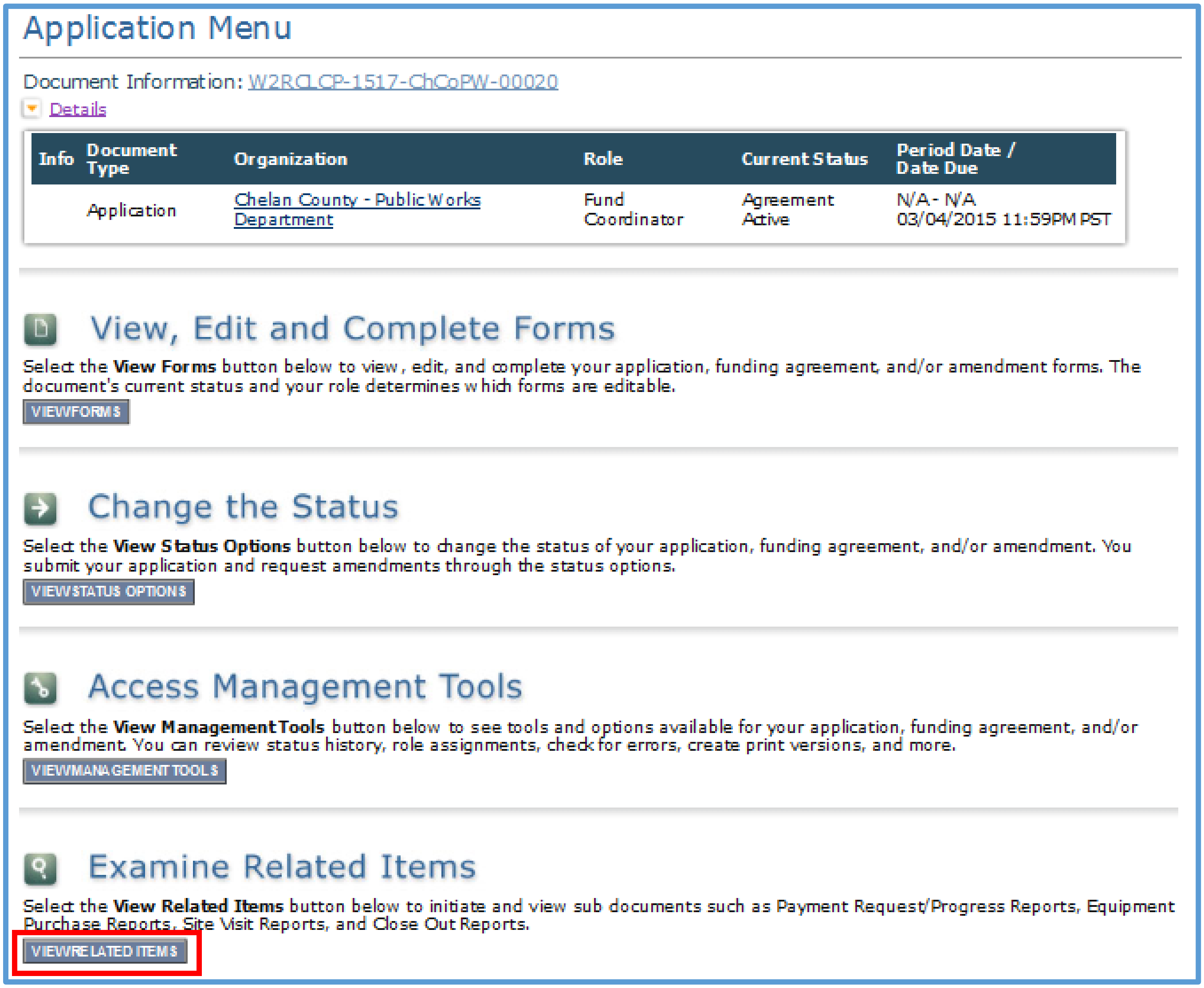
NOTE

Each Parent Document and Subdocument has its own attachment repository.

8.5 Examine Related Items

The **Examine Related Items** section is where you create and view Subdocuments related to your Parent Document. Subdocuments include Payment Request/Progress Reports, Equipment Purchase Reports, and the Recipient Close Out Report.

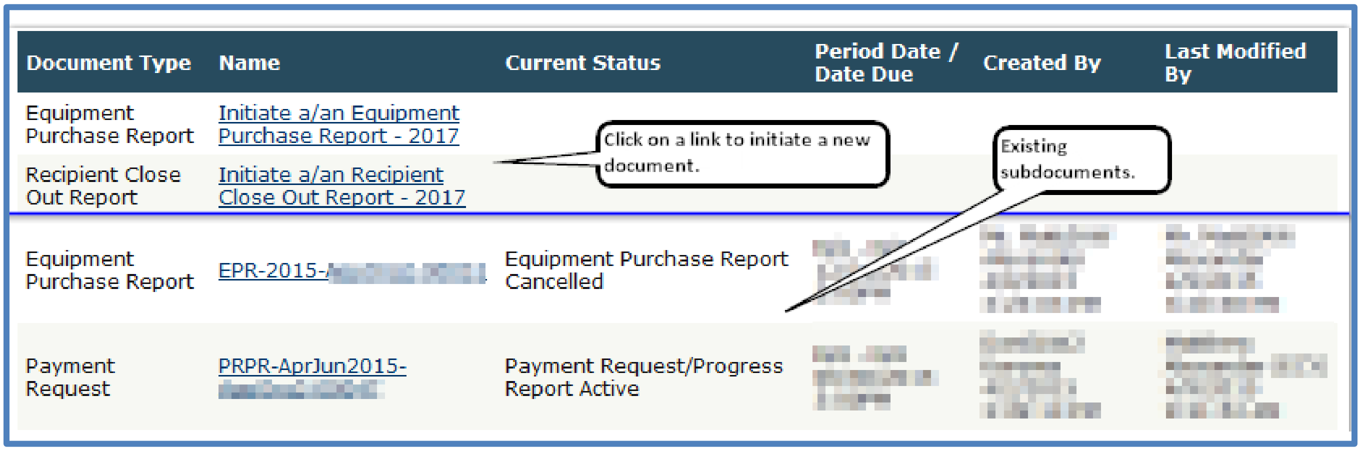
To view items related to your document, click VIEW RELATED ITEMS from the Application Menu (or Subdocument menu) screen.



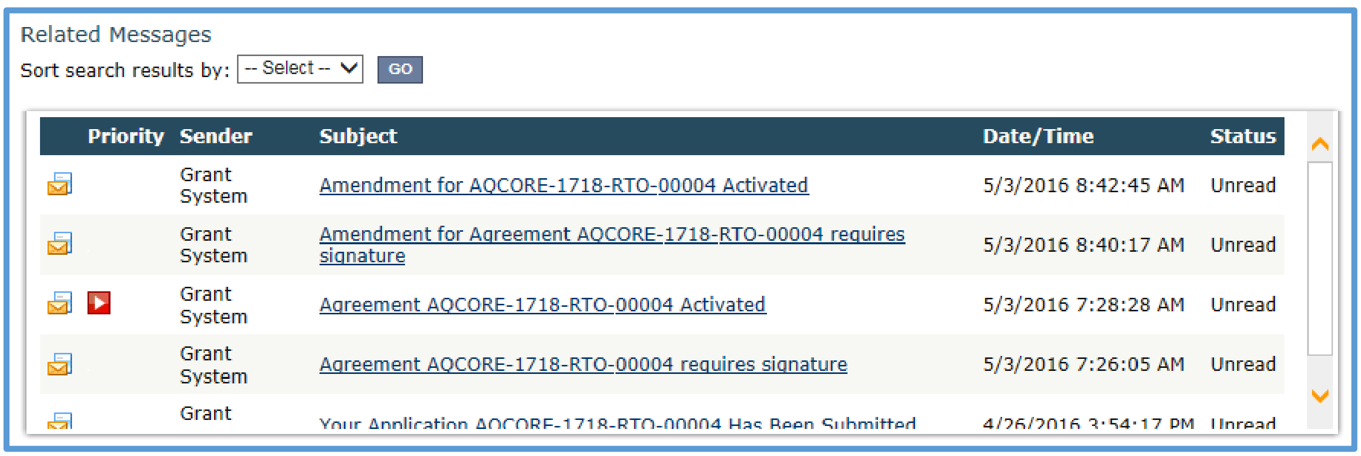
The top portion of the Related Items screen displays related documents. You will see links to initiate or create new Subdocuments (if allowed by your role and the document's current status), along with links to existing Subdocuments.

NOTE

Subdocuments will not necessarily appear in order by date created, numerically, or alphabetically. You can sort the order of Related Documents by type, name, status, name of person who created it, or name of person who last modified it. Click GO after you make your selection.



The bottom portion of the screen displays system messages related to the document you are viewing. Who receives system messages depends on document roles at the time the message is sent. You can sort the order of Related Messages by priority, sender, subject, date/time, or status.



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9 Applying for a Grant or Loan

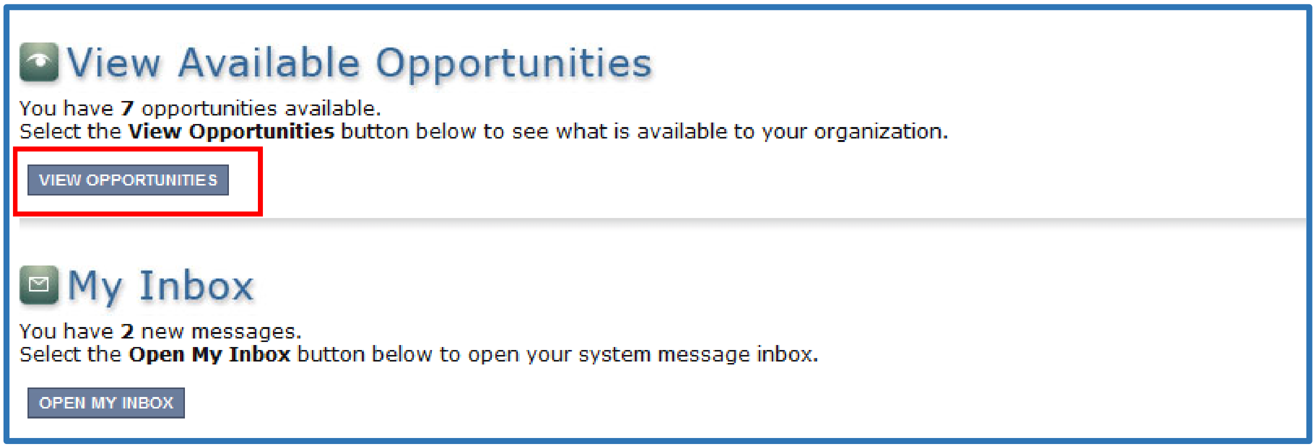
ROLE CHECK

To perform the actions in this section, you must be in one of the following roles:

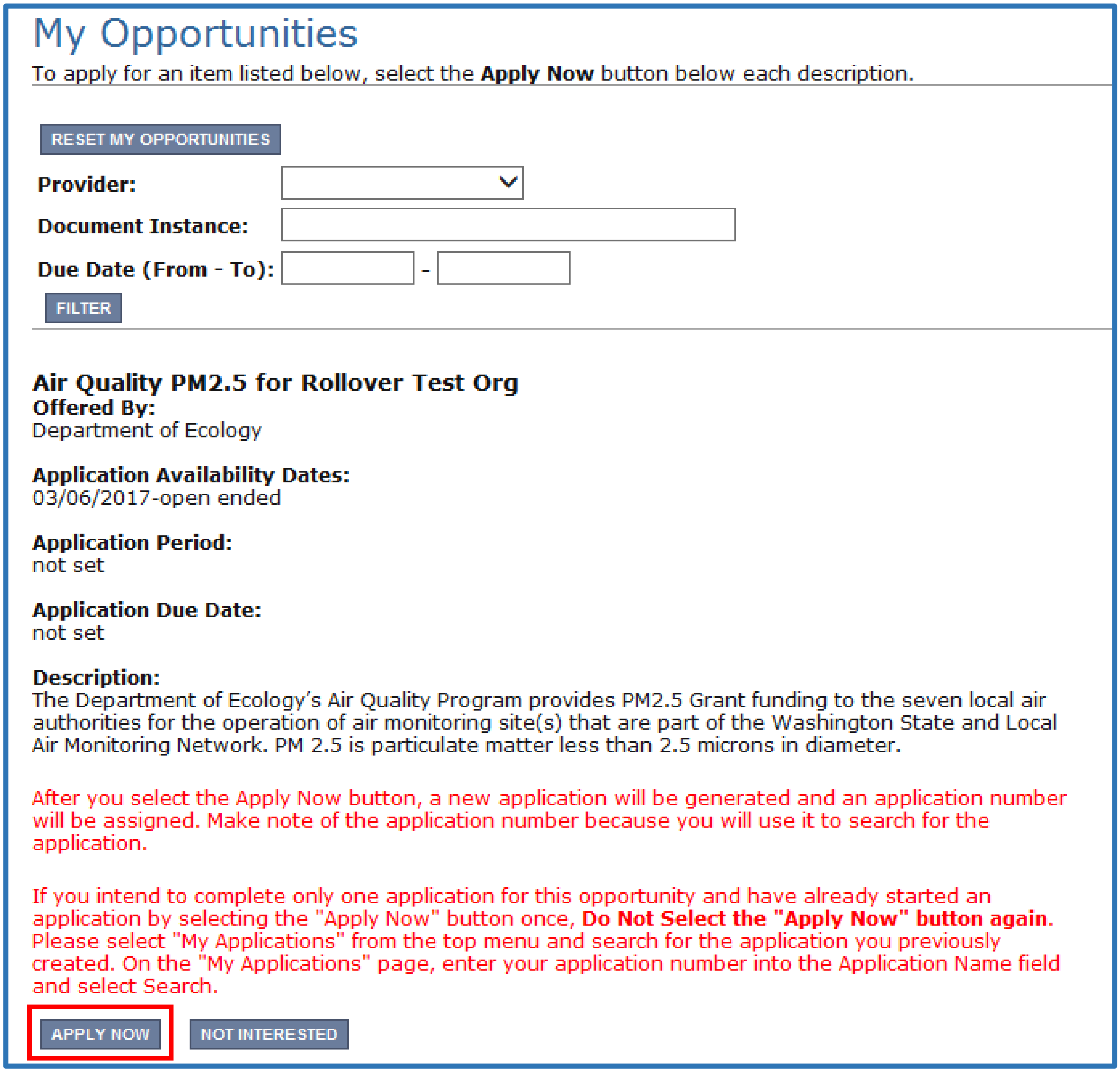
- Authorized Official
- Contractor

9.1 Viewing Available Opportunities and Starting an Application

To apply for a funding opportunity, click View Available Opportunities from your EAGL Home page.



The system will display a list of funding programs on the My Opportunities page. Review the description of the Funding Opportunity, and if eligible, click APPLY NOW to begin the application process.



My Opportunities

To apply for an item listed below, select the **Apply Now** button below each description.

RESET MY OPPORTUNITIES

Provider:

Document Instance:

Due Date (From - To): -

FILTER

Air Quality PM2.5 for Rollover Test Org

Offered By:
Department of Ecology

Application Availability Dates:
03/06/2017-open ended

Application Period:
not set

Application Due Date:
not set

Description:
The Department of Ecology's Air Quality Program provides PM2.5 Grant funding to the seven local air authorities for the operation of air monitoring site(s) that are part of the Washington State and Local Air Monitoring Network. PM 2.5 is particulate matter less than 2.5 microns in diameter.

After you select the Apply Now button, a new application will be generated and an application number will be assigned. Make note of the application number because you will use it to search for the application.

If you intend to complete only one application for this opportunity and have already started an application by selecting the "Apply Now" button once, **Do Not Select the "Apply Now" button again**. Please select "My Applications" from the top menu and search for the application you previously created. On the "My Applications" page, enter your application number into the Application Name field and select Search.

APPLY NOW NOT INTERESTED

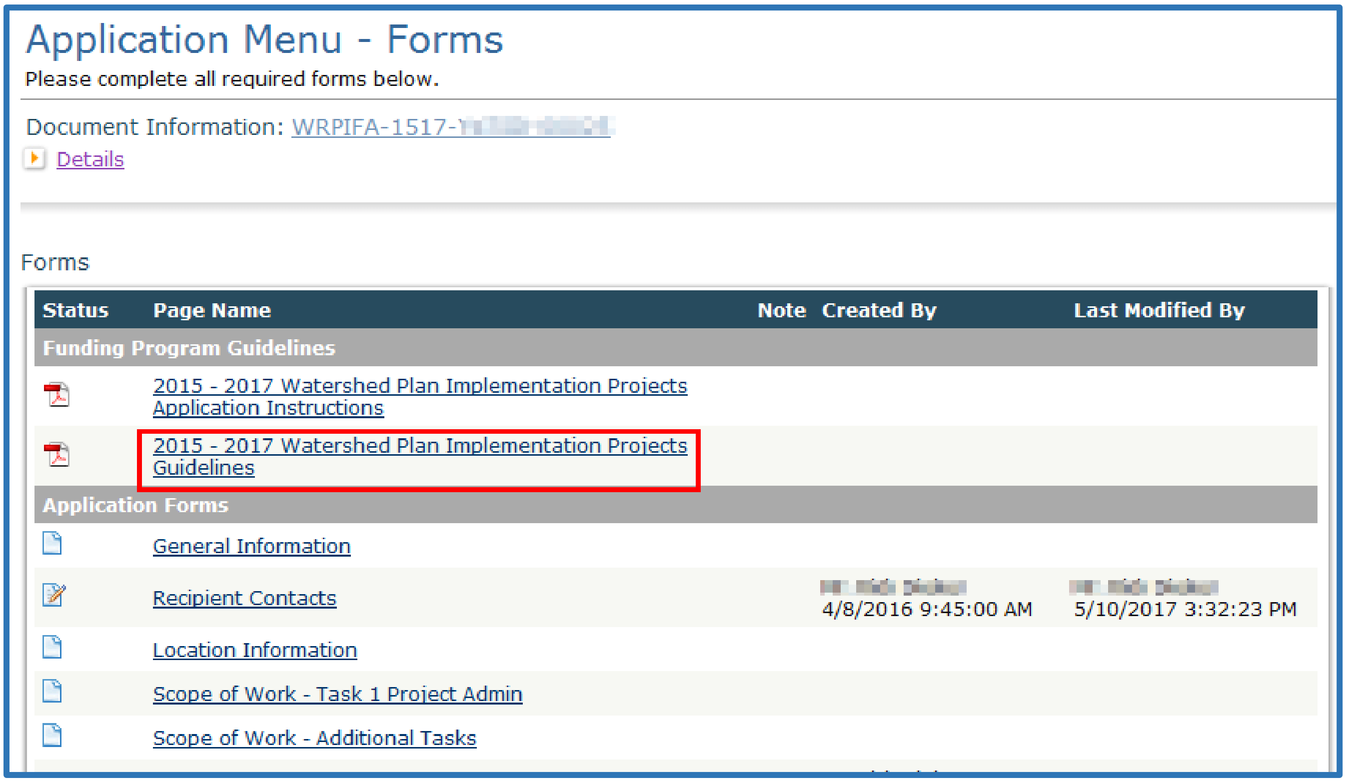
9.2 Completing Application Forms

ROLE CHECK

To perform the actions in this section, you must be in one of the following roles:

- Authorized Official
- Contractor
- Recipient Project Manager
- Writer

You can get to the application forms through the **View, Edit and Complete Forms** menu of your document. Contact the funding program if you have questions about the application or application process. You will find a link to the funding program guidelines above the list of Application Forms. The funding program guidelines include contact information for Ecology staff for the funding opportunity.



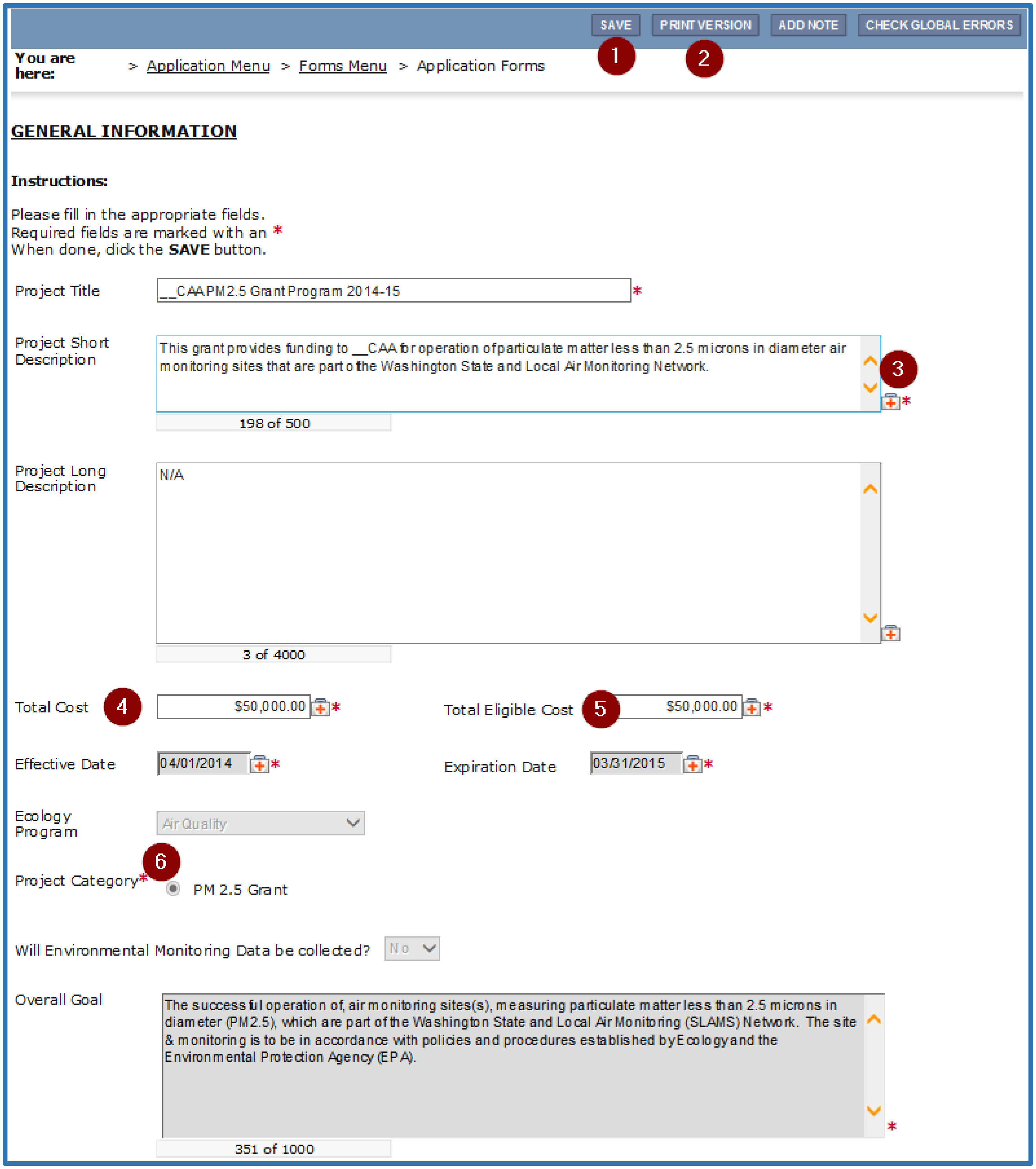
9.2.1 General Information Form

The general information form is used to collect basic information about your project, such as the dates, costs, and overall project description.

See detailed screenshot on the next page.

1. Click **SAVE** to save your work at any time. You do not need to complete all questions before saving the form. Save often to prevent losing work. The system will time out after approximately 20 minutes of inactivity.
2. Click PRINT VERSION to generate a PDF version of the current form and any data that has been entered. This option is not available on all forms.
3. Hover over the first aid kit icon for more help on completing a field.

4. Total Cost is the total eligible cost plus other non-Ecology financial assistance and other funding sources.
5. Total Eligible Cost is the financial assistance from Ecology plus any local match you are contributing.
6. Some funding opportunities have multiple project categories. Check with your funding opportunity for details on each category.



9.2.2 Recipient Contacts Form

NOTE

All contacts (including any Authorized Signatories) must be registered EAGL users.

Recipient Contacts are the people Ecology interacts with for the application, agreement negotiation, and other grant or loan processes. A user's *title* on the Recipient Contacts form is independent from their system role and does not affect system role assignment in any way**.** The Authorized Official still sets the roles for the organization.

Contact information is collected on the application's Recipient Contacts form.

Project Manager – The person designated by the organization to be the main contact for project management issues related to the grant or loan.

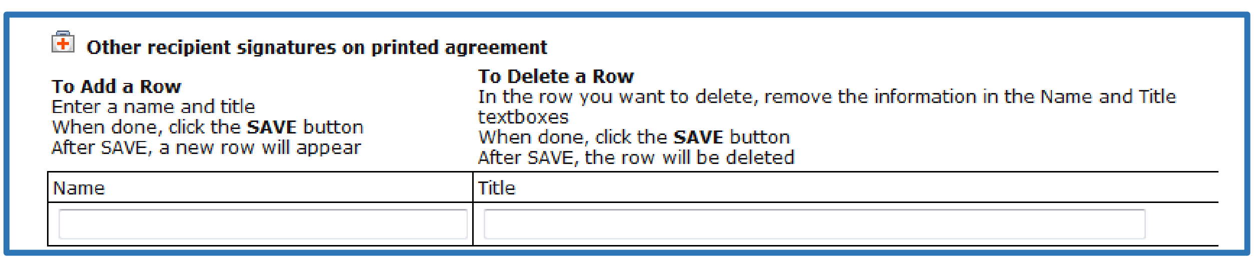
Authorized Signatory [1]– The person designated by the organization to sign a grant or loan agreement and amendments. This person must be an authorized representative of your organization and must be authorized to legally bind your organization to agreements. The name of the person identified as the Authorized Signatory on the Recipient Contacts form will appear in the signature block of the agreement. The Authorized Signatory must have a SAW account and be an authorized EAGL user.

Billing Contact – The person designated by the applicant organization to be the main contact for billing issues related to the grant and loan.

Other recipient signatures on printed agreement – If you choose to have additional signatories to your agreement, you may add them at the bottom of the Recipient Contacts form. Their names will appear below the Authorized Signatory in the signature block of the agreement. Additional signatories do not need to have a SAW or EAGL account.

To add other signatories, go to the document (application/funding agreement):

1. Click VIEW FORMS below **View, Edit and Complete Forms**.
2. Click Recipient Contacts.
3. Scroll down to find "Other recipient signatures on printed agreement."
4. Enter the name and/or title of each person you want to add as a signatory on the document.



5. Click **SAVE** (this will also add another line for one more additional signatory).

[1] The contact type **Authorized *Signatory*** is independent of the system role **Authorized *Official*.** The person designated as the Authorized Signatory can have any system role, including Reader.

9.2.3 Location Information Form

The Location Information form collects information about the location of the project work. The form asks whether your project is statewide. If it is not statewide, you must provide locations and estimated percentages of the amount of work that you will complete in each location. You will identify:

- Ecology Region
- County
- Congressional District
- Legislative District
- WRIAs (Water Resource Inventory Areas)

If your project is in more than one geographic area (for example, more than one county), you must estimate the percentage in each; totals must equal 100 percent.

9.2.4 Scope of Work Form

The Scope of Work form is used to capture task information for your project. You must identify the task title, task cost, task description, task expected outcomes, task goal statement, recipient task coordinator, and any related deliverables. Some funding opportunities may include prefilled Scope of Work forms for common tasks, such as project administration. The content of these prefilled tasks are standardized across the funding opportunity for all agreements.

9.2.5 Scope of Work Summary

The Scope of Work Summary rolls up task cost information from all the scope of work forms. Data entry is not required on this form; it displays the sum of all task costs and ensures the sum of task costs match the total eligible costs of your project. You will need to review information on this form and click **SAVE**.

9.2.6 Uploads

The Uploads form is used to upload various documents and files during the lifetime of your project. For each upload, you must provide a file description. See funding program guidelines for specific requirements and expectations.

9.2.7 Other Forms

A funding opportunity application may include other forms than those described above. Refer to the application instructions for your funding opportunity for specific guidance on additional required forms.

9.3 Check for Errors

You should thoroughly review your application before you submit it to Ecology for review. EAGL's global error check can help with this process. See the Check for Errors section within **Access Management Tools** (Access Management Tools in this manual) for specifics. Another option is to check each individual form as you complete it by clicking CHECK GLOBAL ERRORS near the top right of the screen.

9.4 Submitting or Canceling Your Application

ROLE CHECK

To perform the actions in this section, you must be in the following role:

- Authorized Official

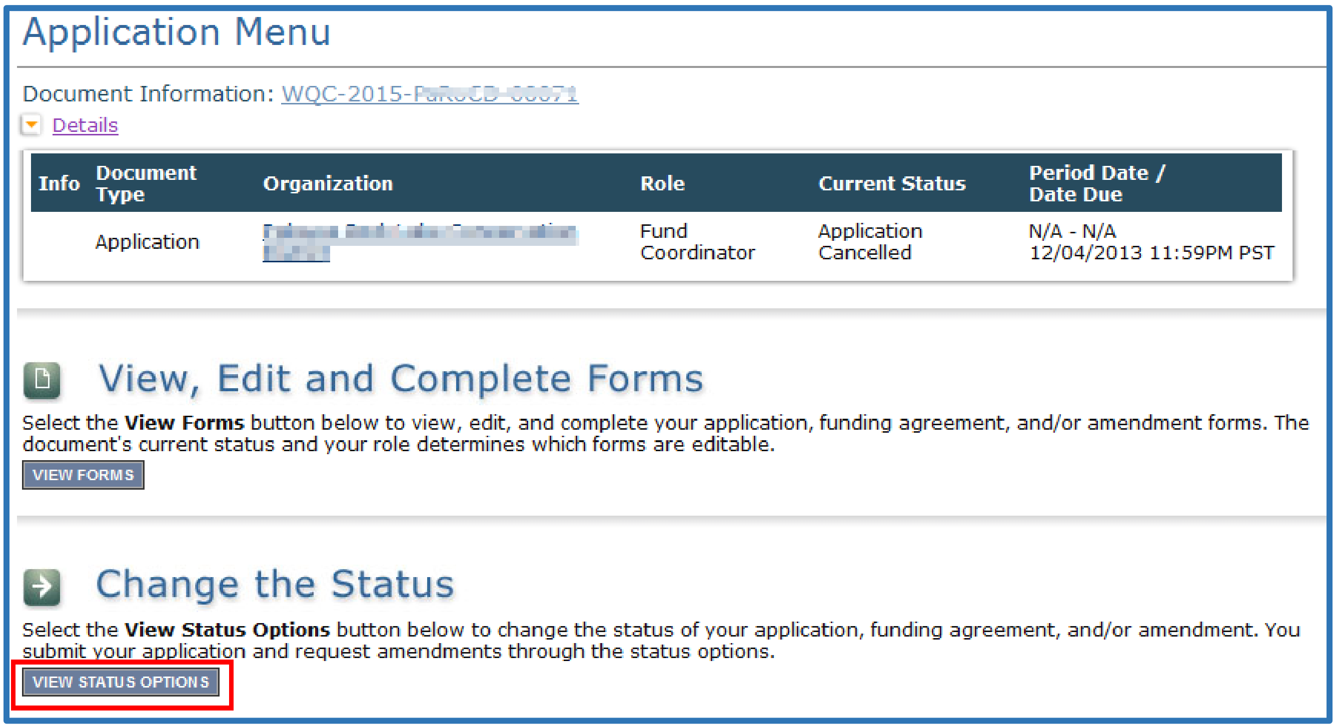
STATUS CHECK

To perform the actions in this section, your document must be in the following status:

- **Application in Process**

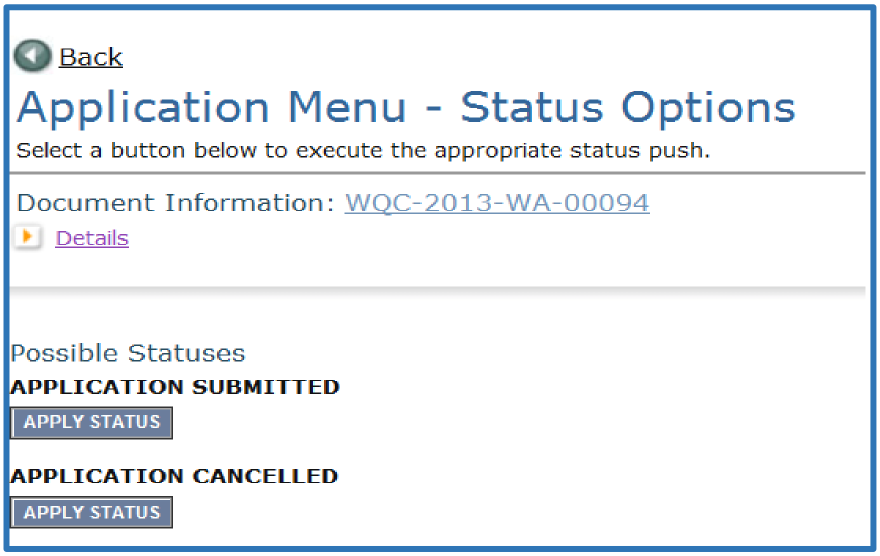
Once you have completed all forms and resolved any global errors, the Authorized Official submits the application by changing the status.

1. Click VIEW STATUS OPTIONS below **Change the Status** in the Application Menu. If the system displays the message "There are no available status options at this time," you don't have the right role to change the application status.



2. Click APPLY STATUS below **Application Submitted** to submit your application.
3. Click APPLY STATUS below **Application Cancelled** to cancel your application.

IMPORTANT NOTE
If you click APPLY STATUS for **Application Cancelled**, you will lose all information in the current application. Contact your Ecology Financial Manager if you need to recover your information.

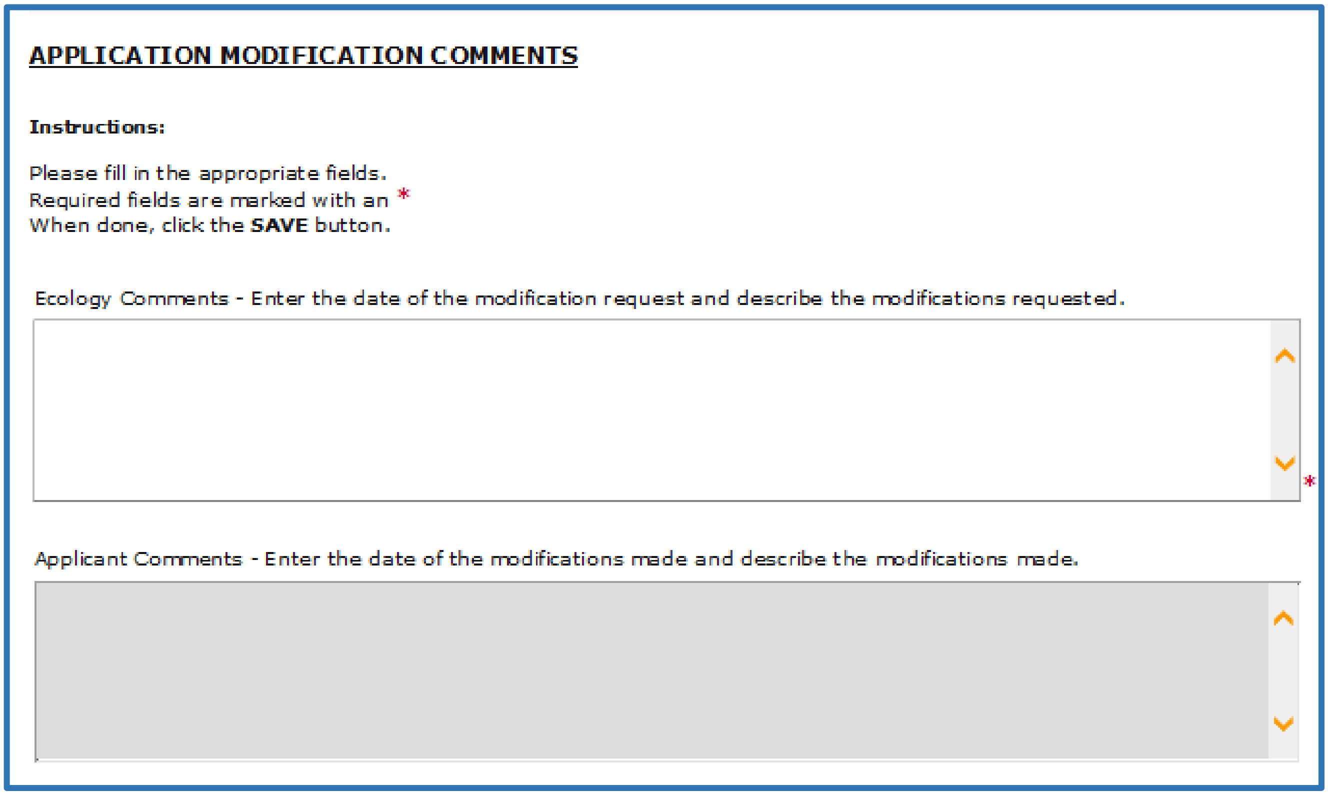


4. Once you have submitted an application, you will receive an email from EAGL confirming that Ecology has received the application.

9.5 Modifying Returned Applications

Ecology may return your application for modifications. Returning an application for modifications unlocks all of the forms within the application so you can modify them.

1. Review the APPLICATION MODIFICATION COMMENTS form. Ecology staff will describe any requested changes in the Ecology Comments section. Contact the Ecology staff member if you have questions about the requested modifications.
2. Make the requested changes to the application.
3. Add your comments to the APPLICATION MODIFICATION COMMENTS form in the Applicant Comments section.
4. Resubmit your application by changing the status. Follow the instructions for Submitting an application.



9.6 What to Expect after Submitting your Application

Once Ecology receives your application, it will be processed (reviewed, screened, evaluated, etc.) according to the funding program guidelines. If your project is funded, the Authorized Official for your organization will receive notification from EAGL (**Application Funded** status will be assigned to your application) and the funding program.

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10 Agreements

10.1 Drafting your Agreement

You will work with your Ecology staff outside of EAGL to finalize the agreement language.

NOTE

While the agreement is working its way through Ecology, the status of the agreement will be **Agreement in Review** until it gets to the **Agreement Requires Signature** status. You can contact your Ecology Financial Manager for information about the progress of the agreement at any time.

10.2 Signing Your Agreement

Once the Authorized Official for your grant or loan receives the EAGL-generated **Agreement Requires Signature** email, complete the steps below:

1. Review and update the Recipients Contact form. See Recipient Contacts Form for instructions.
2. Review the Final Grant (or Loan) Agreement and print two copies for signature. To do this:
   a. From the Application Menu, click VIEW FORMS below **View, Edit and Complete Forms**.
   b. Click the icon below the Agreement gray bar.
   c. Carefully review the agreement and contact your Ecology Financial Manager if you need to make changes.
   d. Print two copies of the final agreement for signature. If your organization requires more than one signed original, print additional copies.
3. Have all copies signed by your Authorized Signatory(ies).
4. Mail signed agreements with original signature(s) to your Ecology Financial Manager. (See information in the next section for details.)
5. Confirm organization roles assigned to the agreement.

NOTE

It is important that each member of your organization who will be working on the grant or loan is assigned to the appropriate role. Review the EAGL Role Permissions Overview.

10.3 Sending Your Signed Agreement to Ecology

Check with your Ecology Financial Manager before mailing the agreement. In most cases, you will mail it to:

<<Ecology Contact>>
Department of Ecology
<<Ecology Program Name>>
PO Box 47600
Olympia, WA 98504-7600

If you need to express mail or overnight your agreement, send it to this address:

<<Ecology Contact>>
Department of Ecology
<<Ecology Program Name>>
300 Desmond DR SE
Lacey, WA 98503

10.4 What to Expect After Mailing the Agreement

Once Ecology receives your signed agreement, Ecology's signatory will sign. One fully signed original copy will be returned to your organization via U.S. Mail. Ecology's Fiscal Office will keep the other original copy. Ecology's Fiscal Office will activate the agreement in EAGL. You can then begin submitting Payment Request/Progress Reports and other Subdocuments.

NOTE
There will be a lag between the time you mail your signed agreement to Ecology and the time the agreement is activated. Contact your Ecology Financial Manager if you have questions.

11 Amendments

11.1 Starting the Amendment Process

ROLE CHECK

To perform the actions in this section, you must be in the following role:

- Authorized Official

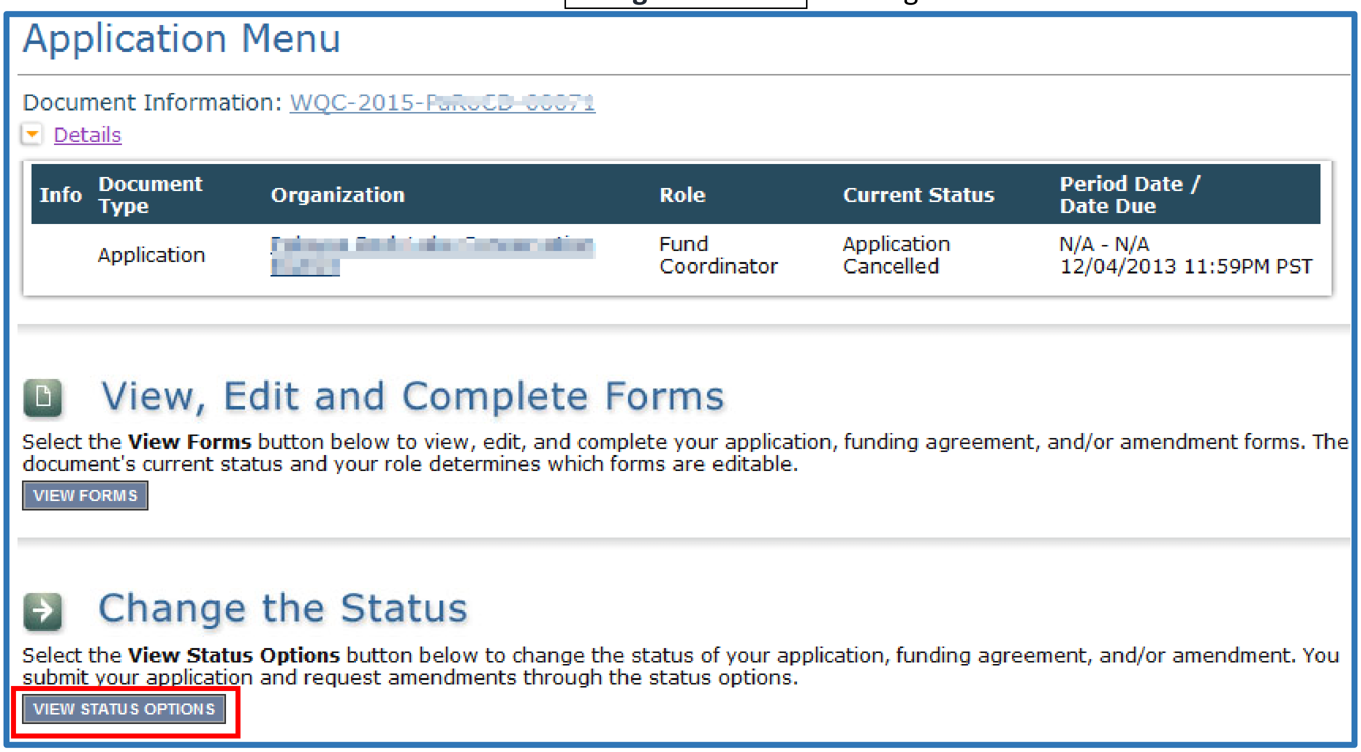
STATUS CHECK

To perform the actions in this section, your document must be in the following status:

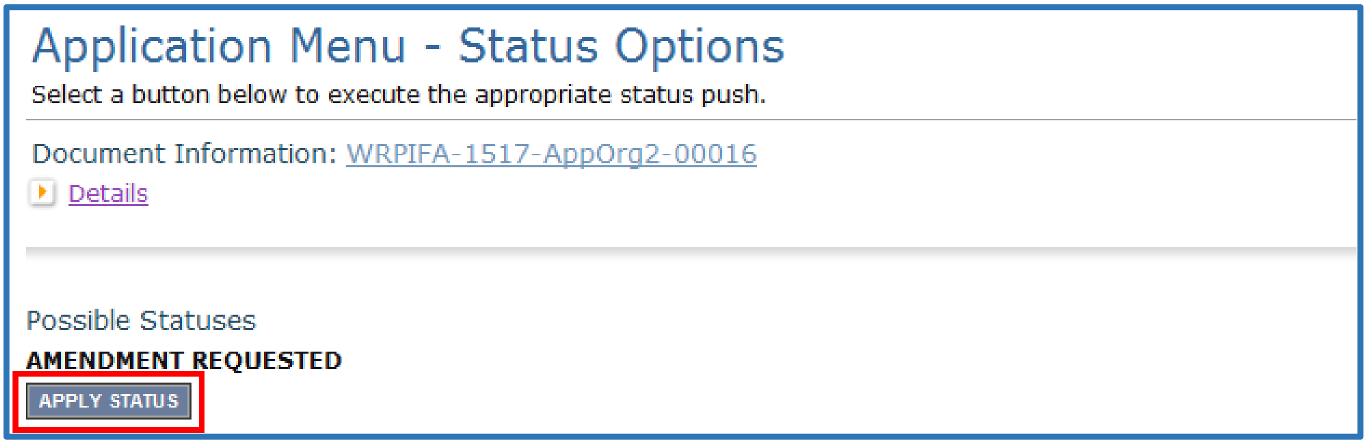
- **Agreement Active**

A recipient or an Ecology Financial Manager or project manager may request an amendment to an agreement.

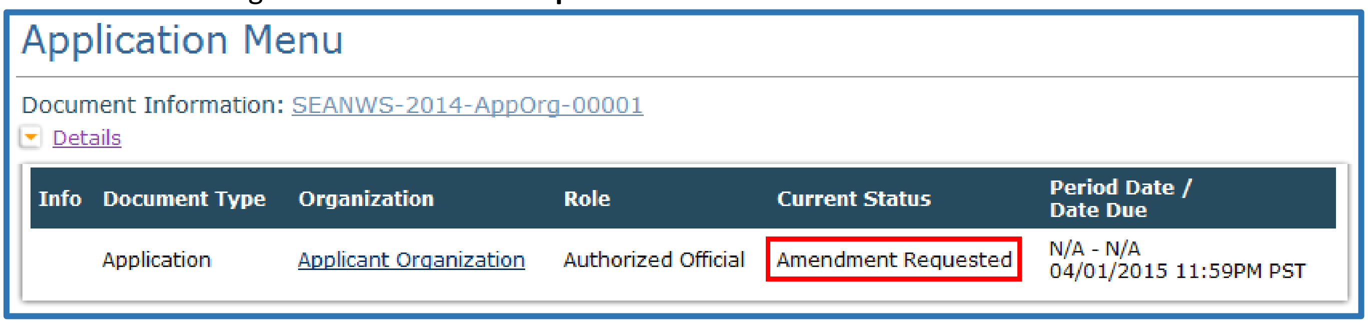
1. Navigate to the Application Menu page for the agreement you want to amend. (See Finding Your Applications/Agreements.)
2. Click VIEW STATUS OPTIONS below the **Change the Status** heading.



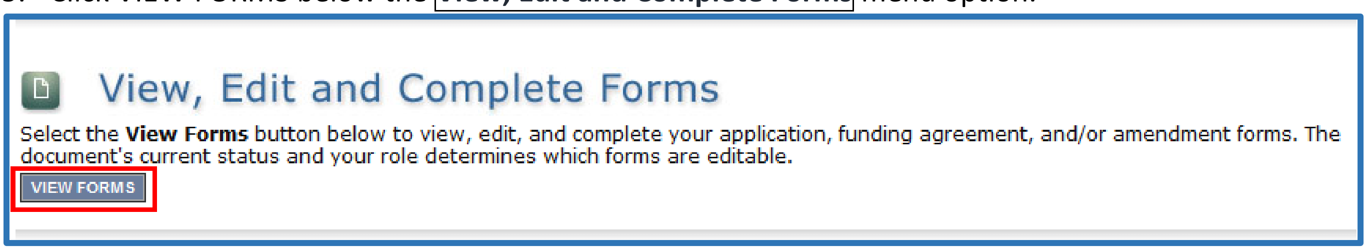
3. This choice takes you to the Application Menu - Status Options. Click APPLY STATUS below **AMENDMENT REQUESTED.**



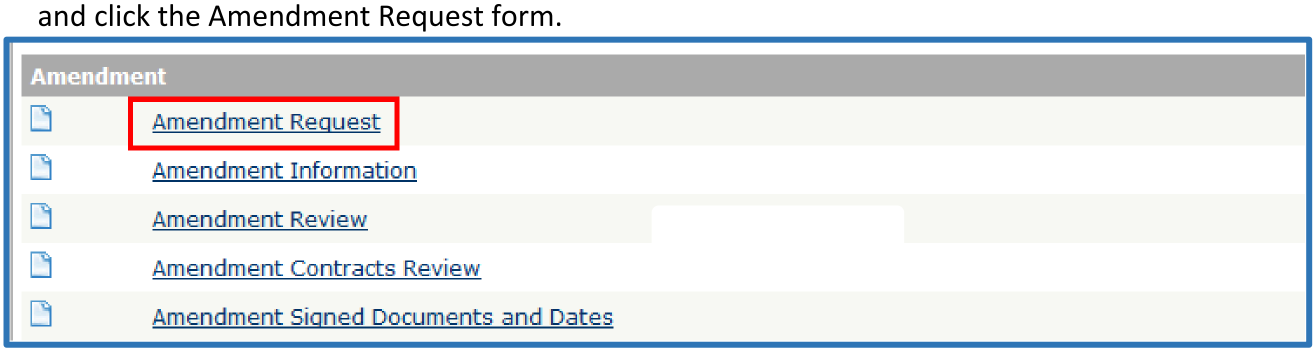
4. When you return to the Application Menu, you will see that the current status in the Application Menu has changed to **Amendment Requested**.



5. Click VIEW FORMS below the **View, Edit and Complete Forms** menu option.



6. The Application Menu - Forms screen will appear. Scroll down to the last section called Amendment and click the Amendment Request form.



7. The Amendment Request form is a cumulative record of all requested amendments. Complete the form, describing the amendment you are requesting. Be as specific as possible. Because this form is cumulative, do not delete any entries from earlier amendments.

AMENDMENT REQUEST

Instructions:

Please fill in the appropriate fields.
Required fields are marked with an *
When done, click the **SAVE** button.

* Describe the type and reason for amendment.

Amendment 1: We would like to amend the budget to focus loan dollars toward completely refinancing the PWTF Construction loan as originally intended in the funding application.

Amendment 2: We would like to amend the budget to restore funding to elements #2 and #10. Reducing the repayment to the PWTF to $5,856,629.77 would allow us to restore $160,000.00 to Element #2 for a total revised SRF loan amount of $202,608.35 and restore $165,6329.98 to Element #10 for a total revised SRF loan amount of $381,602.92. These changes do not effect the total loan or grant amounts but will allow for additional payments of change orders and construction management to finish out the project and maximizing the use of funds.
Budget chart has been uploaded to general uploads.

Ecology Comments

Amendment 1:This amendment request from the recipient also includes: "The reason for moving the large amount from the alternative to admin is that as the construction project has moved forward there have been several systems found that are threats to public health. (flowing onto the ground, into the lake, or destroyed when found in the public right of way). If we can allow those systems to connect to our system and flow to the lift station, we can then pump the lift station as needed until the lagoon liners are installed. The additional funds will be used to pay for disposal fees."

Amendment 2:

11.2 Drafting your Amendment

You will work with your Ecology staff outside of EAGL to finalize the amendment language.

NOTE

While the amendment is working its way through Ecology, the status of your agreement will be **Amendment in Review** until it gets to the **Amendment Requires Signature** status. You can contact your Ecology Financial Manager for information about the progress of the amendment at any time.

IMPORTANT NOTE

Once an agreement is in **Amendment Initiated** status, you may not submit Payment Request/Progress Reports until the amendment is signed and activated.

If you are planning to submit a Payment Request/Progress Report, notify your Ecology Financial Manager so they can hold your requested amendment in **Amendment Approved** status until you submit the reimbursement request.

11.3 Signing Your Amendment

Once the Authorized Official for your agreement receives the email from EAGL indicating that the **Amendment Requires Signature**, complete the steps below.

1. Review the Final Grant (or Loan) Amendment and print for signature.
    a. From the Application Menu, click VIEW FORMS below **View, Edit and Complete Forms**.
    b. Click the icon below the Amendment gray bar.
    c. Carefully review the amendment and contact your Ecology Project Manager if you need to make changes.
    d. Print two copies of the final amendment for signature. If your organization requires more than one signed original, print additional copies.
2. Have all originals signed by your Authorized Signatory(ies).
3. Mail signed amendments with original signature(s) to your Ecology Project Manager. See Sending Your Signed Agreement to Ecology for mailing information.

11.4 What to Expect After Mailing the Amendment

Once Ecology receives your signed amendment, Ecology's signatory will sign. One fully signed original copy will be returned to your organization via U.S. Mail. Ecology's Fiscal Office will keep the other original copy. Ecology's Fiscal Office will activate the amendment and the agreement in EAGL. You can then begin submitting Payment Request/Progress Reports and other Subdocuments.

NOTE

There will be a lag between the time you mail your signed amendment to Ecology and the time the amendment is activated. Contact your Ecology Financial Manager if you have questions.

12 Payment Request/Progress Reports

You will submit Payment Request/Progress Reports (PRPR) through EAGL. Each PRPR consists of both a Payment Request form and Progress Report form. You may only submit requests for reimbursements (payment requests) once a month. Ecology requires you to submit a Progress Report form at least quarterly and with each payment request.

Refer to your grant or loan agreement, funding program guidelines, or funding program staff for specific guidance.

12.1 Initiating a Payment Request/Progress Report (PR/PR)

ROLE CHECK

To perform the actions in this section, you must be in one of the following roles:

- Authorized Official
- Recipient Financial Officer (Payment Request)
- Project Manager (Progress Report)

STATUS CHECK

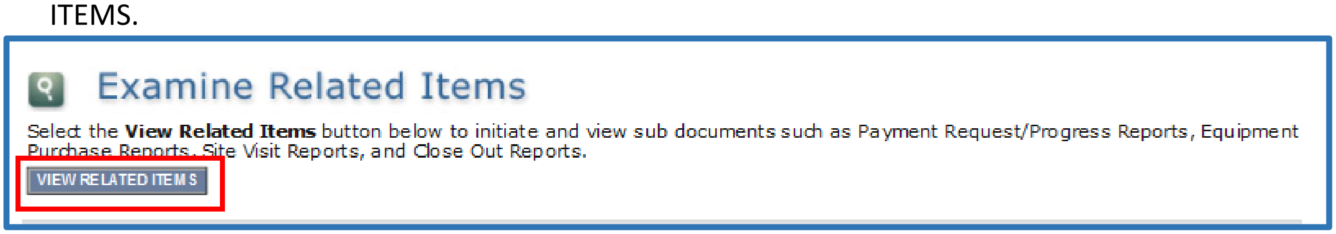
To initiate a PRPR, your Parent Document must be in one of the following statuses:

- **Agreement Executed**
- **Agreement Active**
- **Amendment Requested**
- **Amendment Request Approved**
- **Amendment Active**

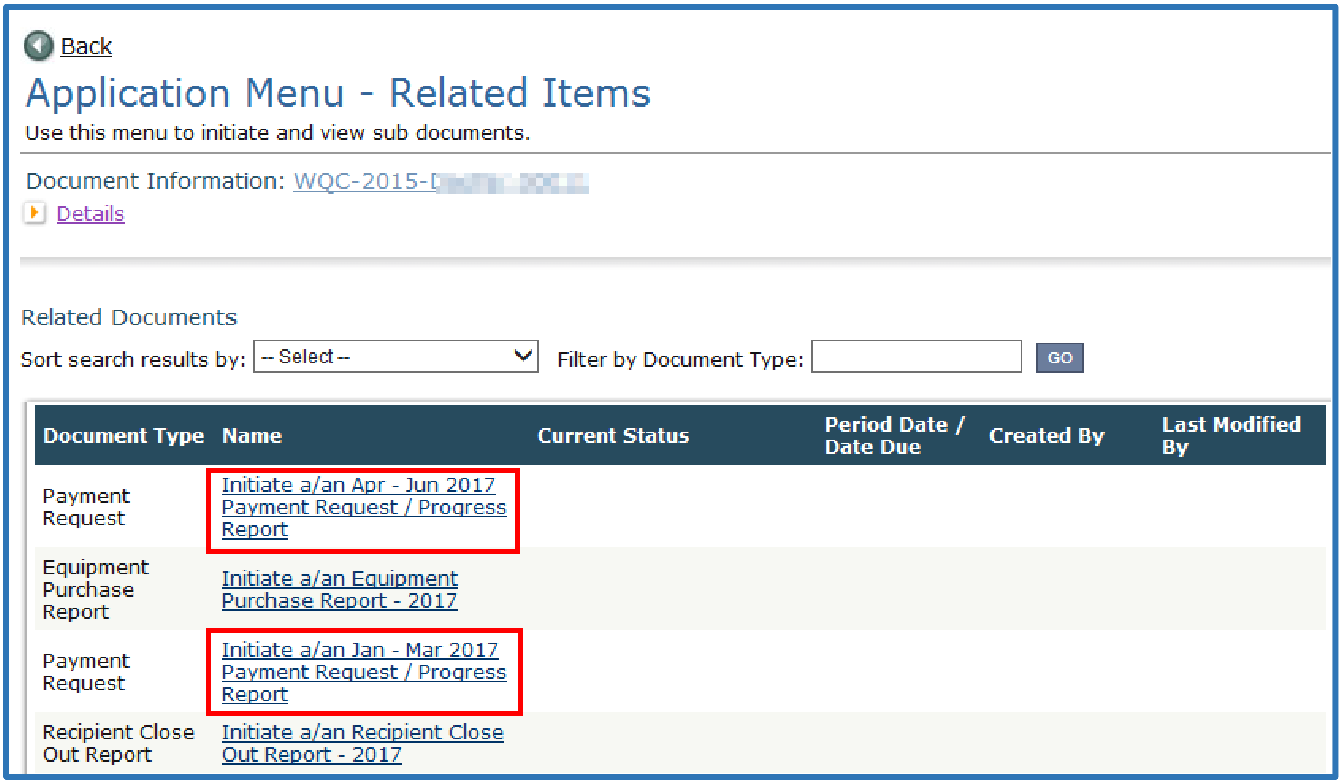
No other PRPRs on the Parent Document can be pending. This means all PRPRs must be in one of the following statuses before you can initiate a new PRPR:

- **Payment Request/Progress Report Cancelled**
- **Payment Request/Progress Report Denied**
- **Payment Request/Progress Report Approved**
- **Payment Request/Progress Report Active**

1. Below the **Examine Related Items** menu option on the Application Menu page, click VIEW RELATED ITEMS.



2. From the list of Related Documents on the Application Menu – Related Items page, click Initiate a/an (appropriate quarter) Payment Request/Progress Report to create a new PRPR.



NOTE

Each PRPR has a title/name that refers to a particular quarter of the year. A PRPR is available for six months—beginning the first day of the quarter it's named for, through the last day of the following quarter. You may start the PRPR within the time period of the PRPR title, but you do NOT have to complete it within that time period. Once started, that PRPR will be available to you until it's submitted. Keep in mind, you can have costs earlier than the start of the titled quarter (in case you need to pick up costs that may have been missed or didn't receive a bill in time to claim it on the PRPR submitted for the time period the work was done).

You may have eligible expenditures that fall outside the date range provided in the title/name. As long as those costs were incurred after the funding agreement effective date and before the funding agreement expiration or funding distribution completion dates, EAGL will allow you to include them in the request. Choose the title/name that best fits the quarter you are requesting reimbursement in. Check with your funding program staff for specific instructions or if you have questions.

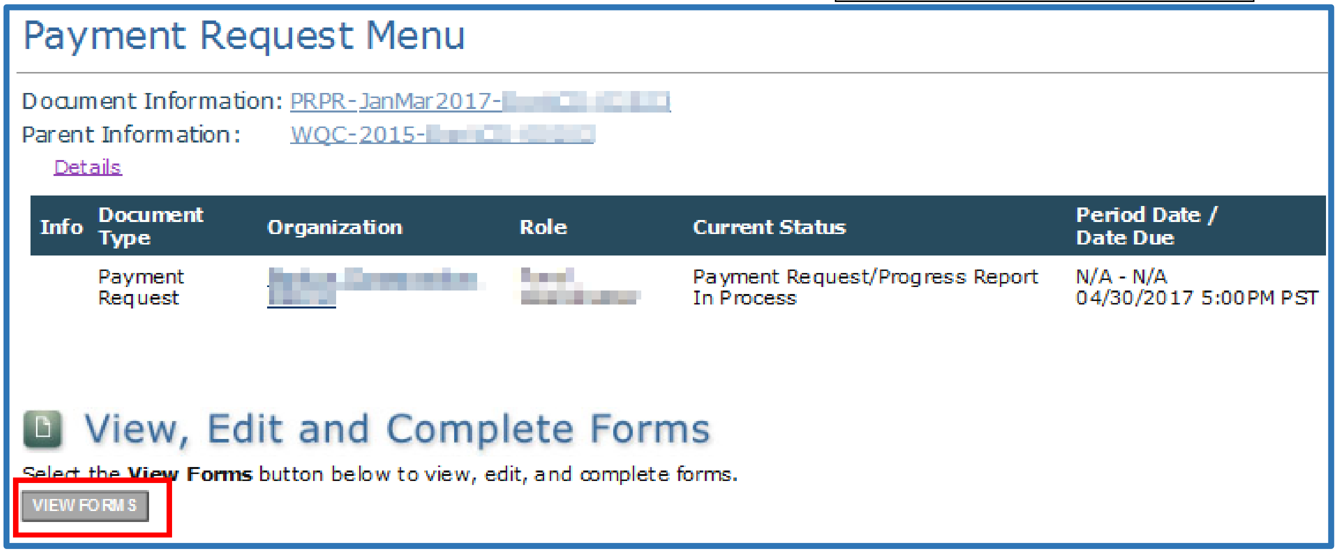
12.2 Completing the Payment Request Form

ROLE CHECK

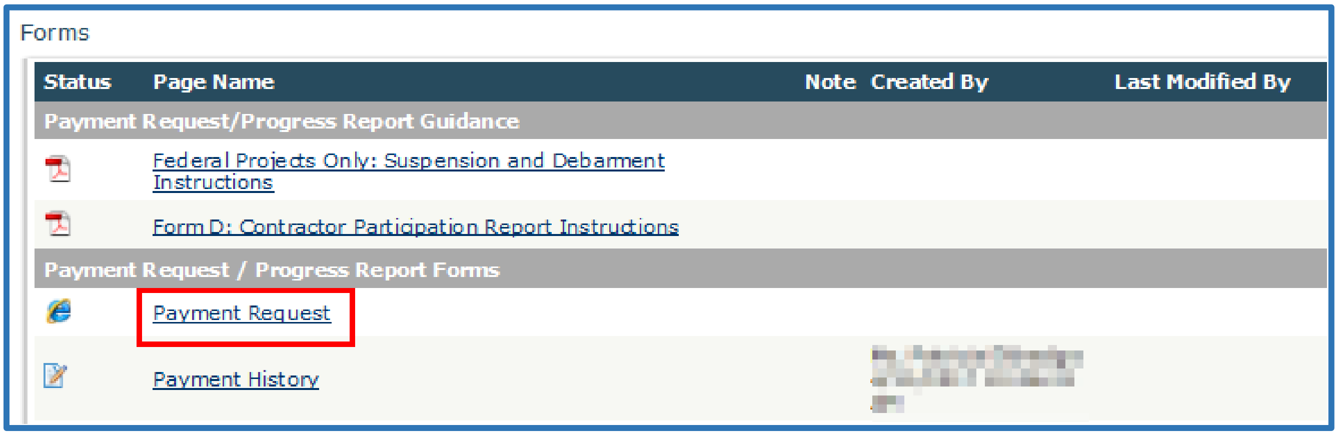
To perform the actions in this section, you must be in one of the following roles:

- Authorized Official
- Recipient Financial Officer
- Writer

1. From the Payment Request Menu, click VIEW FORMS below **View, Edit and Complete Forms**.

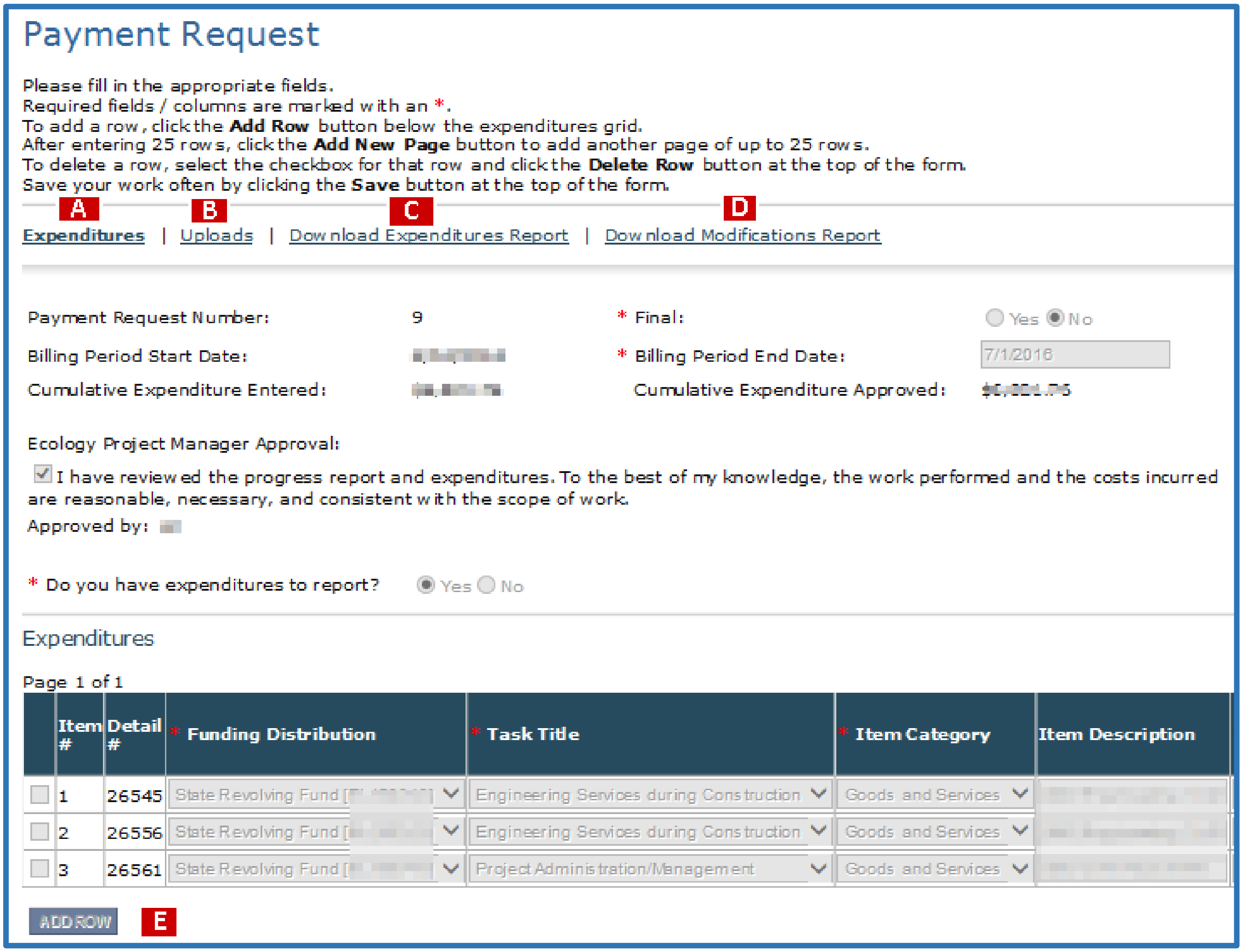


2. In the Forms menu, click on Payment Request.



3. Complete the Payment Request form. If you have expenditures to report, list them on the Expenditures page and upload supporting documentation (receipts, etc.) on the Uploads page. Be sure to click **SAVE** at each step.
   Refer to the letters in the screenshot below:
   A. Click Expenditures to view or add to the expenditures for this payment request.
   B. Click Uploads to view or add supporting documentation to this payment request.
   C. Click Download Expenditures Report to download an Excel file of all the line items entered for this payment request. You can use this option to check your work. The spreadsheet allows you to view and manipulate what you have entered. You can then make the appropriate changes by cutting/pasting from the spreadsheet to the Expenditures form (A).
   D. Click Download Modifications Report to view any modification Ecology has made to your original payment request. This report is available once your payment request is being reviewed by Ecology.
   E. Each page of expenditures can list 25 line items.

- When a page reaches 25 items, the ADD ROW button (shown in the screenshot) is replaced with ADD PAGE.
- Click ADD PAGE to continue adding expenditures.
- You are limited to eight pages of expenditures (200 line items). If you meet this limit, the ADD ROW and ADD PAGE buttons will no longer be available. Contact your Ecology funding program staff to determine how to proceed if you think your expenditures:
    a. May take multiple pages (verify if each expenditure needs to be listed separately).
    b. Will be over eight pages.


Payment Request

Please fill in the appropriate fields.
Required fields / columns are marked with an *.
To add a row, click the **Add Row** button below the expenditures grid.
After entering 25 rows, click the **Add New Page** button to add another page of up to 25 rows.
To delete a row, select the checkbox for that row and click the **Delete Row** button at the top of the form.
Save your work often by clicking the **Save** button at the top of the form.

A B C D

Expenditures | Uploads | Download Expenditures Report | Download Modifications Report

Payment Request Number:	9	* Final:	Yes / No
Billing Period Start Date:	[redacted]	* Billing Period End Date:	7/1/2016
Cumulative Expenditure Entered:	[redacted]	Cumulative Expenditure Approved:	[redacted]

Ecology Project Manager Approval:
I have reviewed the progress report and expenditures. To the best of my knowledge, the work performed and the costs incurred are reasonable, necessary, and consistent with the scope of work.
Approved by: [redacted]

* Do you have expenditures to report? Yes No

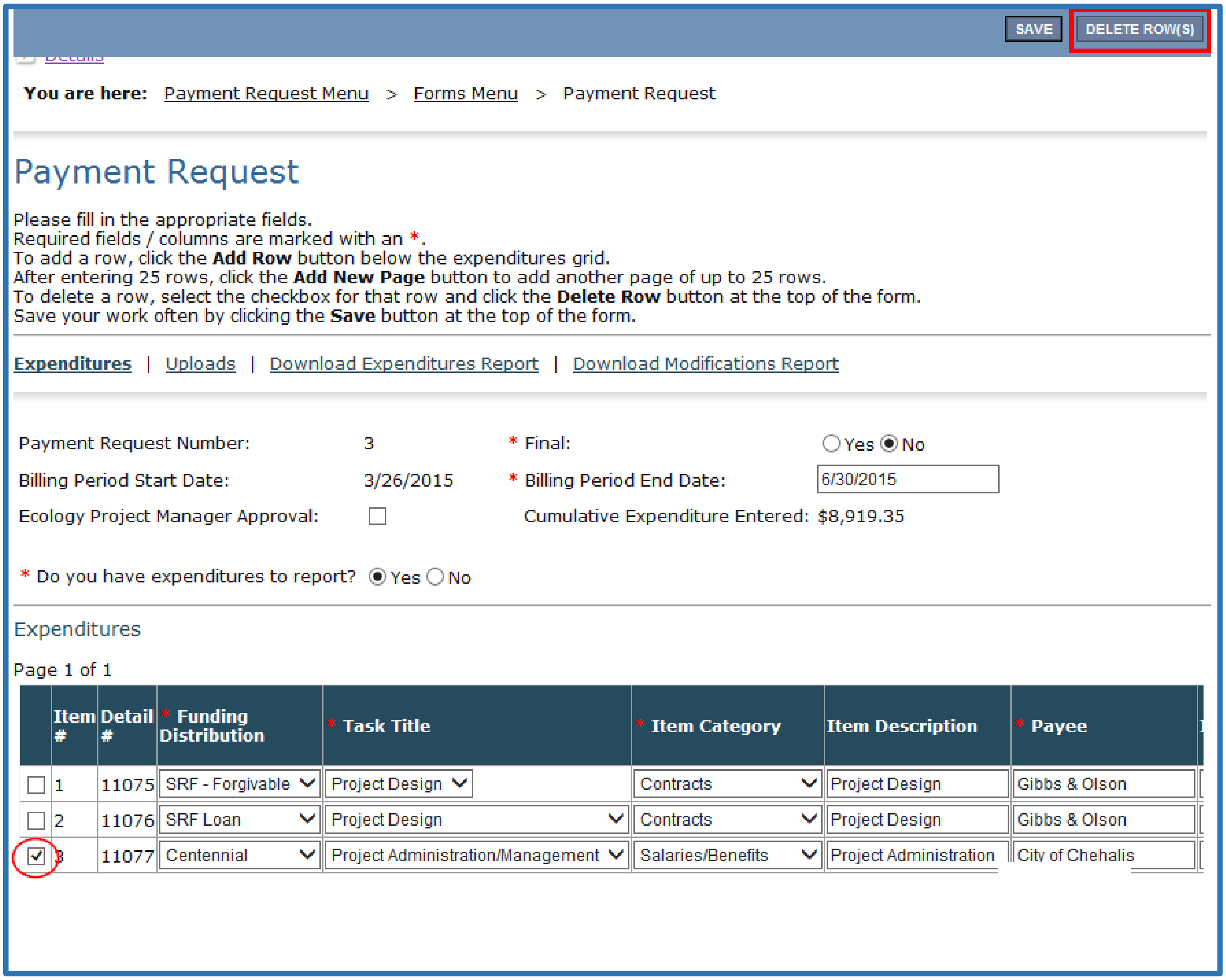
Expenditures

Page 1 of 1

	Item #	Detail #	* Funding Distribution	* Task Title	* Item Category	Item Description
☐	1	26545	State Revolving Fund [redacted]	Engineering Services during Construction	Goods and Services	[redacted]
☐	2	26556	State Revolving Fund [redacted]	Engineering Services during Construction	Goods and Services	[redacted]
☐	3	26561	State Revolving Fund [redacted]	Project Administration/Management	Goods and Services	[redacted]

ADD ROW E

4. To delete a line item, check the box next to the item and click DELETE ROW(S):



SAVE DELETE ROW(S)

You are here: Payment Request Menu > Forms Menu > Payment Request

Payment Request

Please fill in the appropriate fields.
Required fields / columns are marked with an *.
To add a row, click the **Add Row** button below the expenditures grid.
After entering 25 rows, click the **Add New Page** button to add another page of up to 25 rows.
To delete a row, select the checkbox for that row and click the **Delete Row** button at the top of the form.
Save your work often by clicking the **Save** button at the top of the form.

Expenditures | Uploads | Download Expenditures Report | Download Modifications Report

Payment Request Number: 3 * Final: ○ Yes ◉ No

Billing Period Start Date: 3/26/2015 * Billing Period End Date: 6/30/2015

Ecology Project Manager Approval: ☐ Cumulative Expenditure Entered: $8,919.35

* Do you have expenditures to report? ◉ Yes ○ No

Expenditures

Page 1 of 1

	Item #	Detail #	* Funding Distribution	* Task Title	* Item Category	Item Description	* Payee
☐	1	11075	SRF - Forgivable	Project Design	Contracts	Project Design	Gibbs & Olson
☐	2	11076	SRF Loan	Project Design	Contracts	Project Design	Gibbs & Olson
☑	3	11077	Centennial	Project Administration/Management	Salaries/Benefits	Project Administration	City of Chehalis

12.2.1 Detailed Description of Expenditures Grid

Use the following column descriptions as you enter your expenditures in the grid.

Expenditures Grid Details	
Column Name	**Description**
Funding Distribution	The funding distribution (budget) you are billing to. Contact your Ecology Financial Manager if you are unsure which funding distribution to use if your agreement has more than one.
Task Title	The task you are seeking reimbursement for. The list of available tasks is filtered based on the funding distribution you select.
Item Category	The category that describes the purpose of the item.
Item Description	A brief description of the item purchased.
Payee	The person or organization that was paid for the item.
Invoice Number	The invoice or identifying number (not purchase order number) associated with the item purchased, if any.
Date Incurred Start	The start date for the cost or date work first began. See Important Note below.
Date Incurred End	The end date for the cost or work ended. See Important Note below.
Amount	The amount paid for the item.
Expenditure Type	How the payee was paid. Options include Cash, In-Kind Interlocal, and In-Kind Other. In-Kind options are only available for projects with a match requirement.

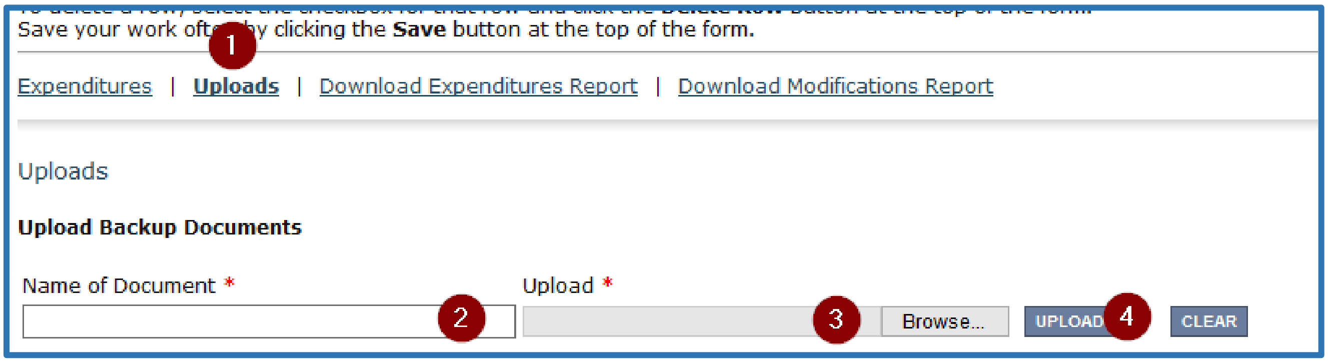
IMPORTANT NOTE

- *Date Incurred Start* must be on or after the funding effective date of the funding distribution selected.
- *Date Incurred End* must be on or before the Billing Period End Date entered.
- *Date Incurred End* must also be on or before the funding expiration date of the funding distribution selected.

12.2.2 Uploading Documents to the Payment Request

1. On the Payment Request form screen, click the Uploads link.
2. Enter a description for your upload. For quick reference, make your document name clear and easily recognizable.
3. Browse to the file you wish to upload.
4. Click Upload to upload your file. For easier review, enter uploads in the order the charges appear.

NOTE
If you make a mistake while uploading a file, and a page error appears, you can click CLEAR to clear the page error and try again.



12.3 Completing the Payment History Form

ROLE CHECK
To perform the actions in this section, you must be in one of the following roles:
• Authorized Official
• Recipient Financial Officer
• Writer

You do not need to enter any data on this form. The Payment History form shows the cumulative amount reimbursed (approved) to date. By clicking **SAVE**, you are indicating that you have checked this page to ensure the information is accurate, and the expenditures you requested in previously approved PRPRs are within budget.

NOTE
Any requests that change the existing budget should be negotiated with and approved by Ecology before you submit a PRPR.

Once Ecology approves your current request, the amount approved will be added to the cumulative amount. The Payment History form can be viewed from any PRPR submitted for this agreement, and the information will always include the most recent budget and the cumulative amount approved to date.

The form also shows the history of disbursements for your agreement. The disbursement amount is calculated automatically based on budget and match rules.

1. In the Forms Menu, click PAYMENT HISTORY.
2. Review the information on this page and click **SAVE**.

SAVE | PRINT VERSION | ADD NOTE | CHECK GLOBAL ERRORS

Page Information
The information has been saved.

Back

Document Information: PRPR-JanMar2016-[redacted]

Parent Information: AQPM25-2014-App[redacted]

Details

You are here: > Payment Request Menu > Forms Menu > Payment Request / Progress Report Forms

PAYMENT HISTORY

Cumulative Approved Expenditures

NOTE: Any expenditures not yet approved are not included in the table below.

Funding Title	Task Title	Cumulative Approved Cash Expenditures	Cumulative Approved In Kind Interlocal Expenditures	Cumulative Approved In Kind Other Expenditures	Total Cumulative Approved Expenditures	Task Budget	Budget Variance	Eligible Costs
Grant Number 1 [EG140096]	Monitor Air Station	$0.00	$0.00	$0.00	$0.00	$5,000.00	$5,000.00	$0.00
Grant Number 1 [EG140096]	Project Admin	$0.00	$0.00	$0.00	$0.00	$2,000.00	$2,000.00	$0.00
Grant Number 1 [EG140096]: Distribution Total		**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$7,000.00**	**$7,000.00**	**$0.00**
Grant Number 2 [EG140097]	Monitor Air Station	$0.00	$0.00	$0.00	$0.00	$35,000.00	$35,000.00	$0.00
Grant Number 2 [EG140097]	Project Admin	$0.00	$0.00	$0.00	$0.00	$8,000.00	$8,000.00	$0.00
Grant Number 2 [EG140097]: Distribution Total		**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$43,000.00**	**$43,000.00**	**$0.00**
Grand Total		**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$50,000.00**	**$50,000.00**	**$0.00**

Disbursement History

NOTE: The amount shown in the Disbursement Amount column has not been disbursed to the recipient until the status column shows "Payment Request / Progress Report Active"

Payment Request #	Disbursement Amount	Payment Request Status
1	$0	Payment Request/Progress Report Denied
2		Payment Request/Progress Report In Process

12.4 Completing Form D: Contractor Participation Report

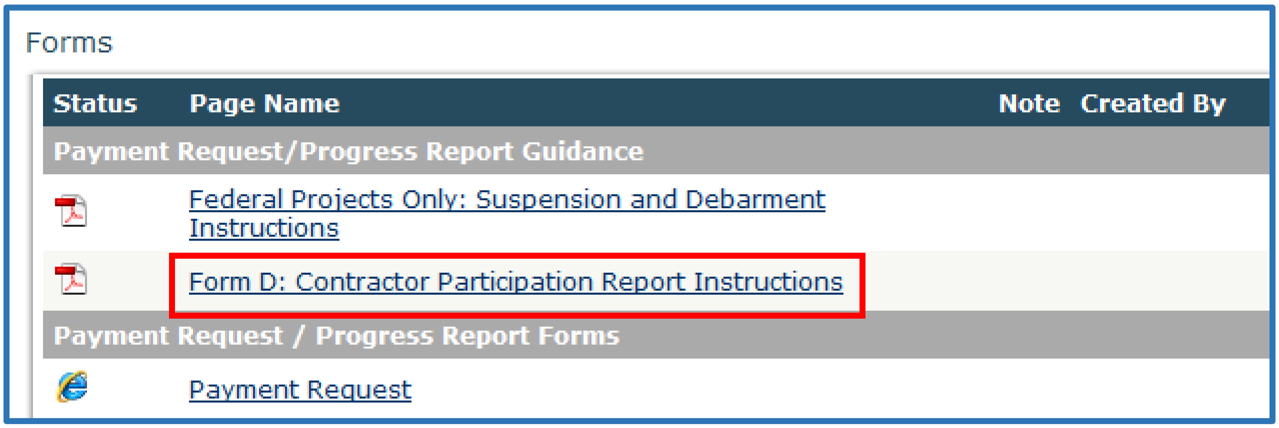
ROLE CHECK

To perform the actions in this section, you must be in one of the following roles:

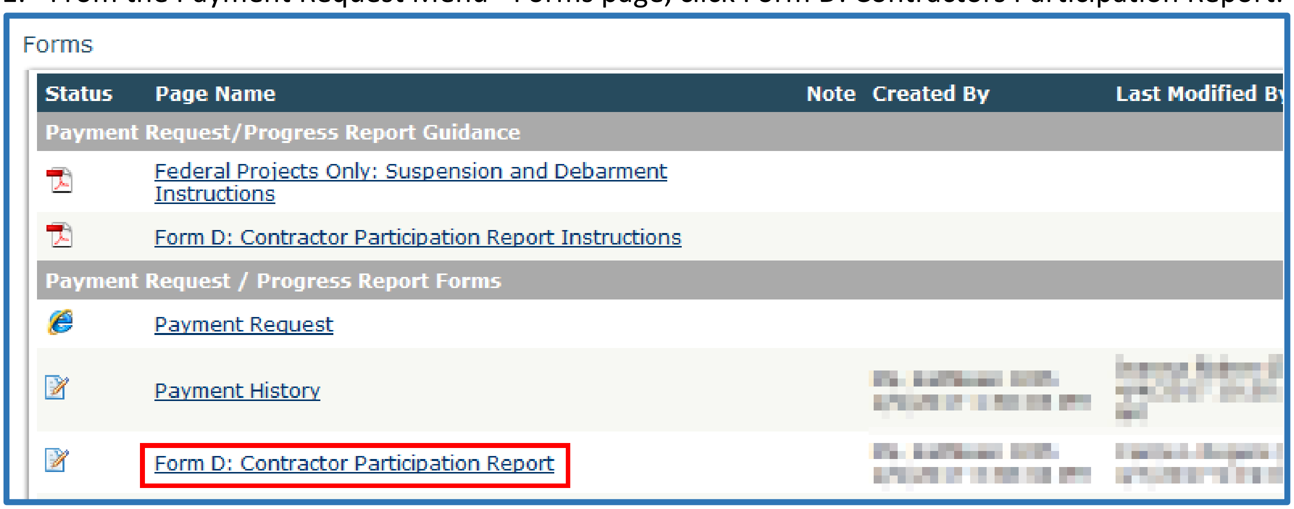
- Authorized Official
- Recipient Financial Officer
- Writer

You must submit a Form D with all PRPRs. Form D is available inside EAGL; Ecology uses it to report on contractor diversity for state and federally funded projects.

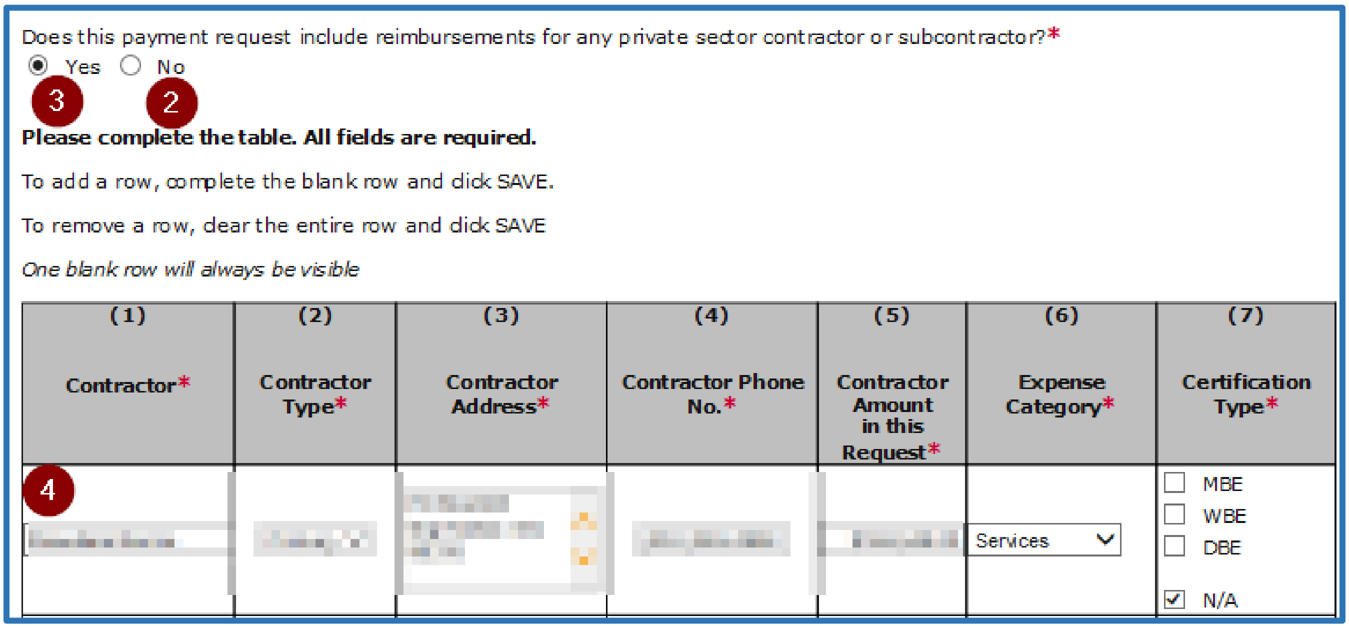
For the most up-to-date guidance on completing Form D, read the Contractor Participation Report Instructions. They're linked at the top of the Payment Request forms menu.



1. From the Payment Request Menu - Forms page, click Form D: Contractors Participation Report.



2. If your PRPR does not include a request for reimbursement for private sector contractors or subcontractors, click No in response to the question; then click **SAVE** (at the top right of the screen). Form D is now complete.
3. If your PRPR does include a request for reimbursement for private sector contractors or subcontractors, click Yes.
4. List ALL primary and subcontractors on separate rows and complete each column. Primary and subcontractors include all private entities you have a contract with (primary contractors) and all entities that the primary contractor has contracted with (subcontractors). Examples include engineering firms, construction contractors, and consultants.
5. Click **SAVE** when you are finished entering your data or if you leave the page for any reason.


Does this payment request include reimbursements for any private sector contractor or subcontractor?*

Yes No

3 2

Please complete the table. All fields are required.

To add a row, complete the blank row and click SAVE.

To remove a row, clear the entire row and click SAVE

One blank row will always be visible

(1) Contractor*	(2) Contractor Type*	(3) Contractor Address*	(4) Contractor Phone No.*	(5) Contractor Amount in this Request*	(6) Expense Category*	(7) Certification Type*
4					Services	MBE WBE DBE N/A

IMPORTANT NOTE

If your project includes any federal funds, you must also complete a SAM search for any contractor prior to signing the contract. Documentation of this search must be maintained in your files and may be required to be uploaded to EAGL (check with your funding program staff for specific instructions). You only need to do a SAM search once for each contractor during the course of the project. You can find detailed instructions in the *Federal Project Only: Suspension and Debarment* document. The link to those instructions is at the top of the forms lists on the Payment Request Menu – Forms page.

NOTE

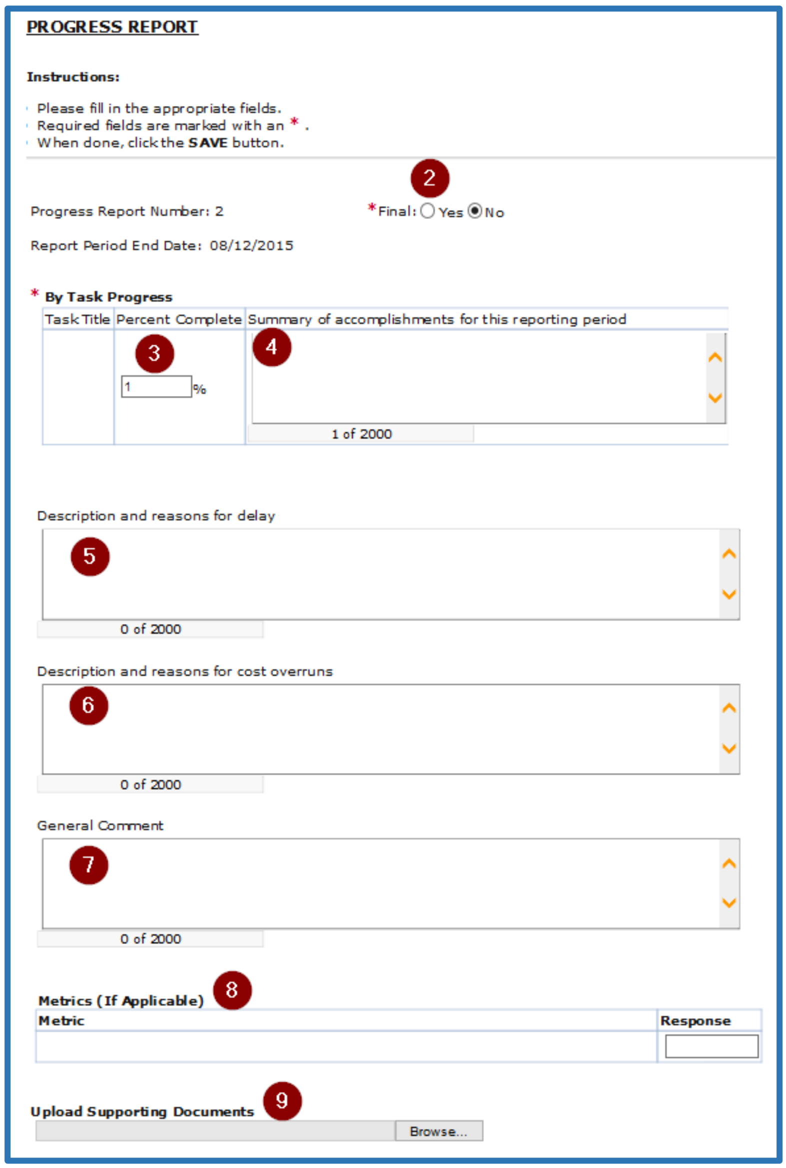
SAM is the federal government's System for Award Management. SAM is a database that, among other things, tracks which organizations are excluded from receiving federal funds.

12.5 Completing the Progress Report Form

ROLE CHECK
To perform the actions in this section, you must be in one of the following roles: • Authorized Official • Recipient Project Manger • Writer

The Progress Report form is used to document progress made on your agreement's tasks within a given reporting period. You must submit a Progress Report form with each Payment Request, or at least quarterly. You will provide an estimated percentage of completion and brief summary of accomplishments for each task. Additional fields are provided if you need to report progress in more detail.

1. From the Payment Request Menu - Forms page, click PROGRESS REPORT.
2. On the Progress Report form, check the appropriate button to identify whether this report is the Final one for the project.
3. Estimate the percentage of work complete for each task in the By Task Progress section.
4. Provide a summary of the accomplishments for each task for this reporting period.
5. Provide a description and reasons behind any delay.
6. Provide a description and reasons for any cost overruns.
7. Add any General Comments.
8. Add metrics if applicable. Report metrics from within the current reporting period only. Do not report any metrics cumulatively.
9. Upload any supporting documents (this may include pictures, contractor updates, etc.)
10. Click **SAVE.**



12.6 Submitting a Payment Request/Progress Report (PRPR)

ROLE CHECK

To perform the actions in this section, you must be in one of the following roles:

- Authorized Official
- Recipient Financial Officer (Payment Request)
- Recipient Project Manager (Progress Report)

STATUS CHECK

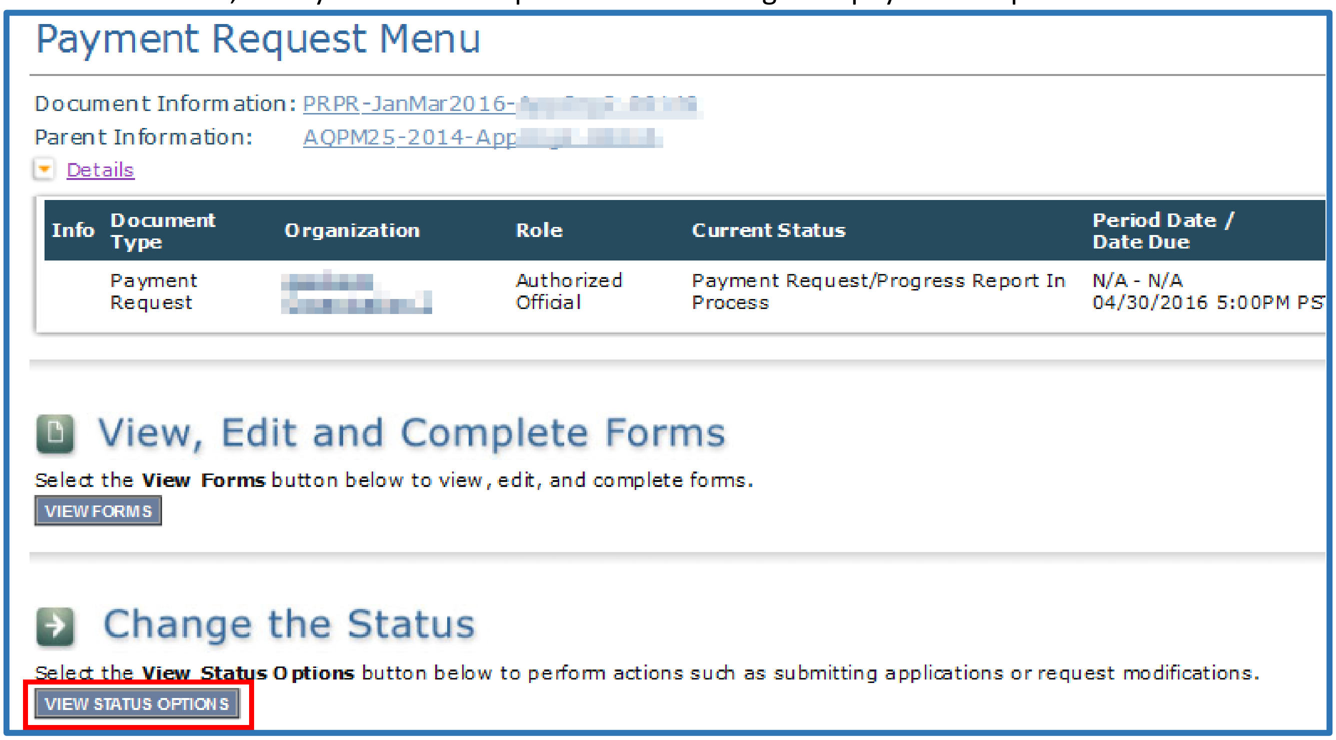
To submit a PRPR, your Parent Document must be in one of the following statuses:

- **Agreement Active**
- **Amendment Active**

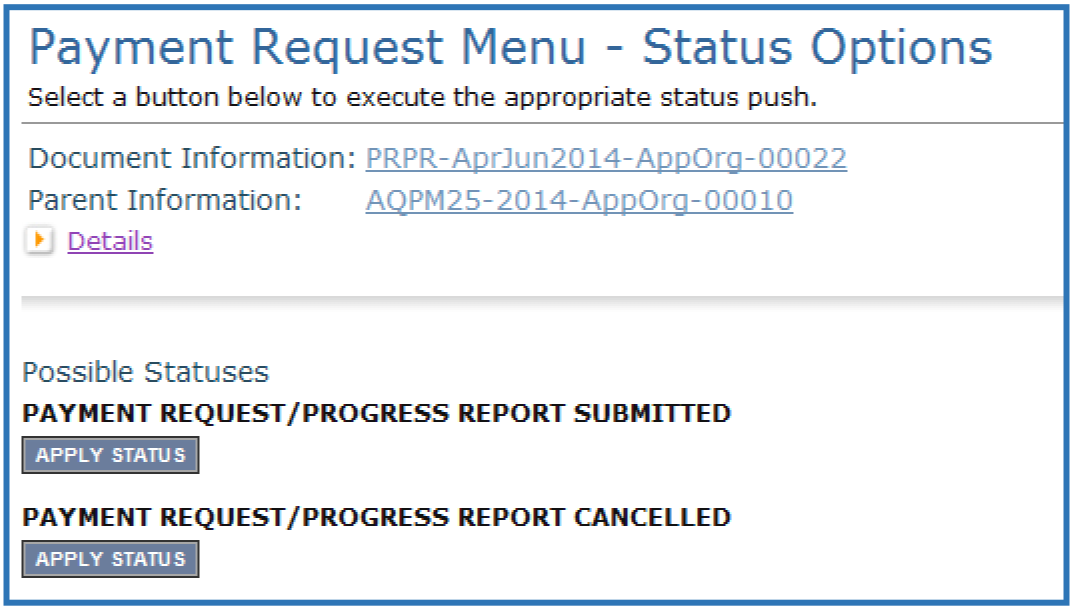
All previously submitted PRPRs associated with the agreement must be in the following status:

- **Payment Request/Progress Report Active**

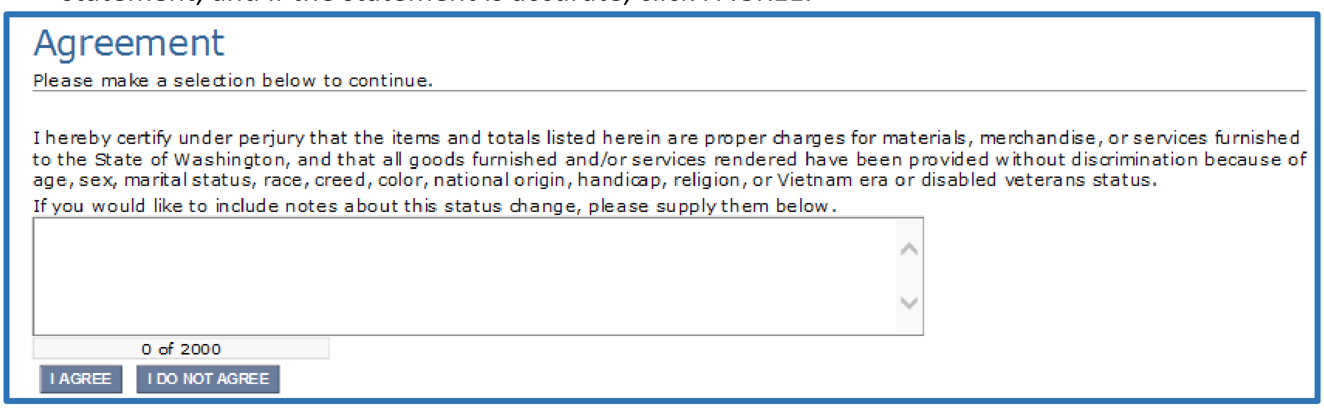
1. On the Payment Request Menu, below Change the Status, click VIEW STATUS OPTIONS. Note: If this menu is blank, then you don't have permission to change the payment request's status.



2. Click APPLY STATUS below **Payment Request/Progress Report Submitted** to submit your PRPR.
3. Click APPLY STATUS below **Payment Request/Progress Report Cancelled** to cancel your PRPR.



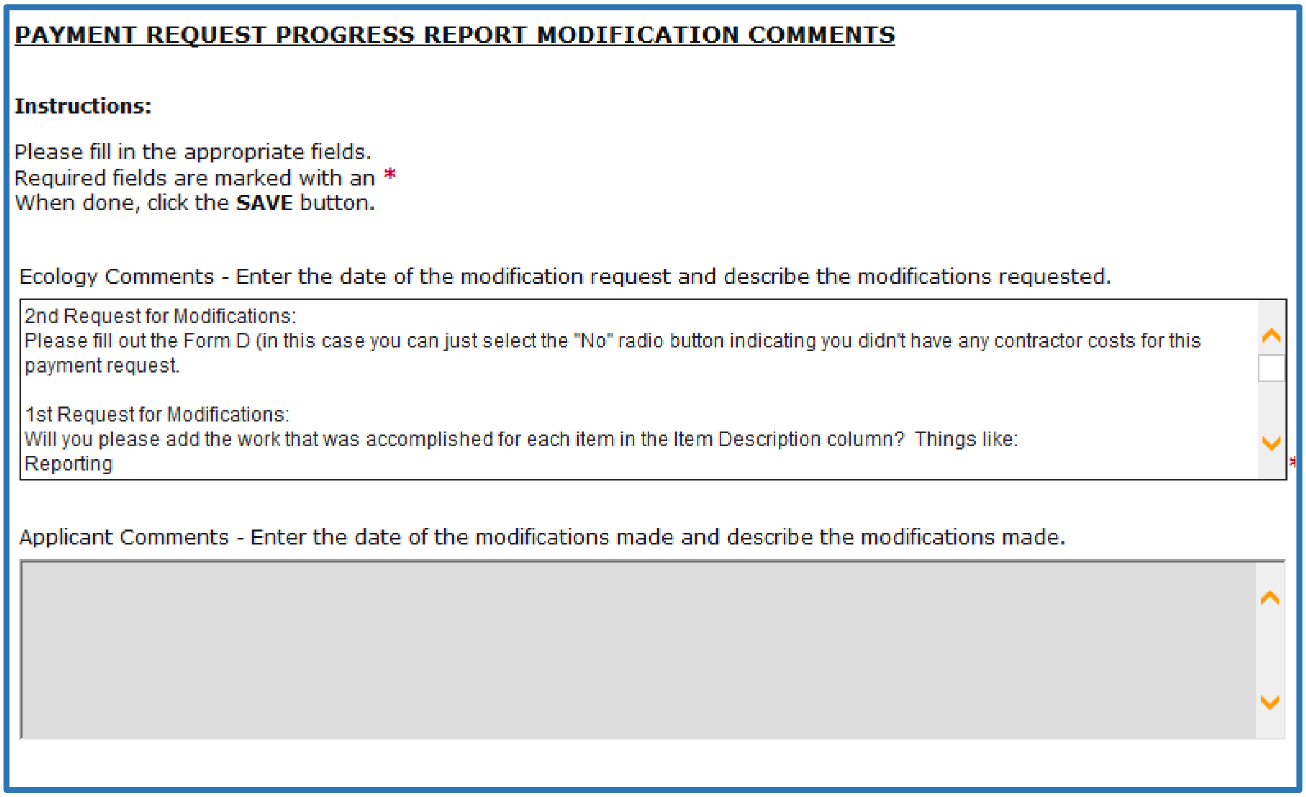
4. If you submit your PRPR, EAGL will display a screen with an Agreement statement. Read the statement, and if the statement is accurate, click I AGREE.



12.7 Modifying a Returned PRPR

Ecology may return your PRPR for modifications; if this happens, you will receive an email notification. When a PRPR is returned for modifications, all of the forms within the PRPR are unlocked so you can modify them. If Ecology has approved any of the line items in the expenditure report, those items will be locked, and you will not be able to modify them. All the backup documents submitted with the original request will also be locked, and you will not be able to remove them. Uploads cannot be removed, because they may contain supporting documentation for costs already submitted.

1. Review the PAYMENT REQUEST PROGRESS REPORT MODIFICATION COMMENTS form. Your Ecology Financial or Project Manager will describe any requested changes in the Ecology Comments section. Contact your Financial or Project Manager if you have questions about the requested modifications.
2. Make the requested modifications to the PRPR.
3. Add your comments to the PAYMENT REQUEST PROGRESS REPORT MODIFICATION COMMENTS form in the Applicant Comments section.
4. Resubmit your PRPR by changing the status. Follow the instructions for submitting a PRPR in Submitting a Payment Request/Progress Report.


PAYMENT REQUEST PROGRESS REPORT MODIFICATION COMMENTS

Instructions:

Please fill in the appropriate fields.
Required fields are marked with an *
When done, click the **SAVE** button.

Ecology Comments - Enter the date of the modification request and describe the modifications requested.

2nd Request for Modifications:
Please fill out the Form D (in this case you can just select the "No" radio button indicating you didn't have any contractor costs for this payment request.

1st Request for Modifications:
Will you please add the work that was accomplished for each item in the Item Description column? Things like:
Reporting

Applicant Comments - Enter the date of the modifications made and describe the modifications made.

13 Equipment Purchase Reports (EPR)

You must submit an Equipment Purchase Report (EPR) if you purchase any equipment or property that has a useful life of more than one year and is valued at more than $5,000.

13.1 Initiating an Equipment Purchase Report (EPR)

ROLE CHECK

To perform the actions in this section, you must be in one of the following roles:

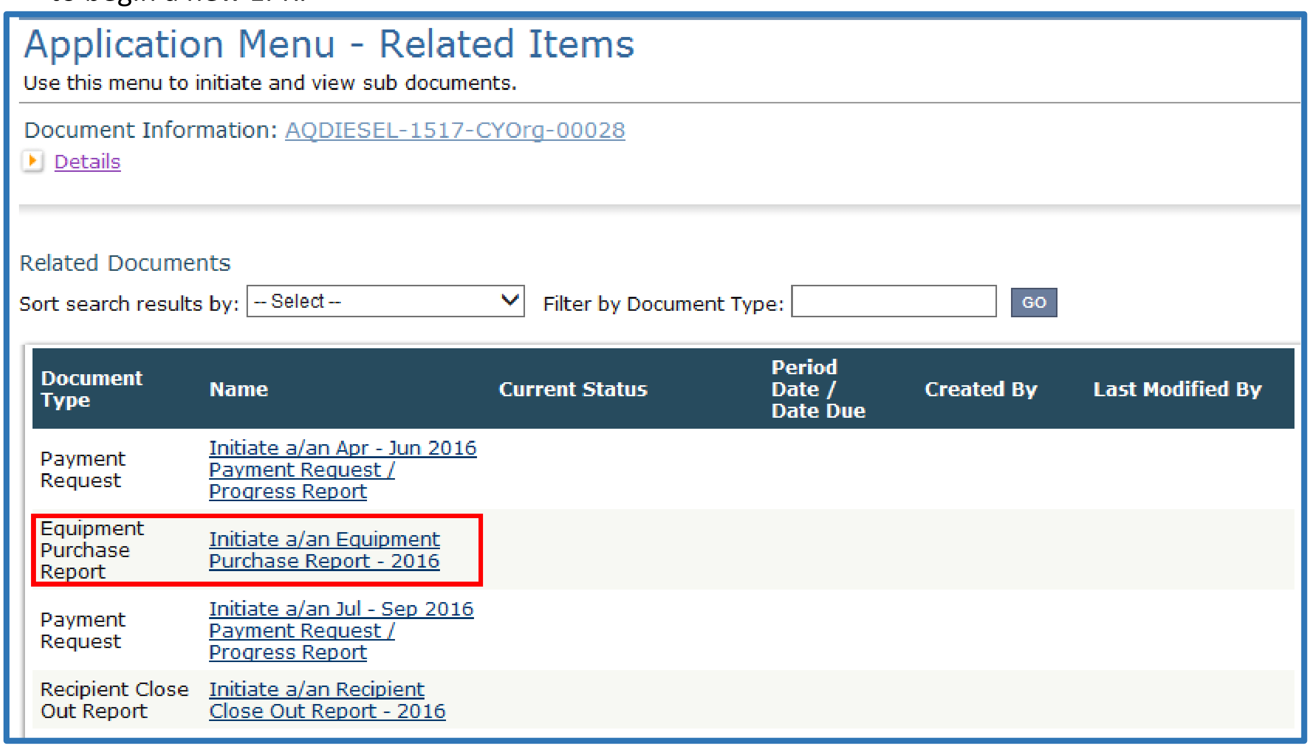
- Authorized Official
- Recipient Project Manager

STATUS CHECK

To initiate a PRPR, your Parent Document must be in one of the following statuses:

- **Agreement Executed**
- **Agreement Active**
- Any amendment status

1. On the Application Menu page, click VIEW RELATED ITEMS below the **Examine Related Items** menu option.
2. From the Application Menu - Related Items screen, click Initiate a/an Equipment Purchase Report to begin a new EPR.



Application Menu - Related Items

Use this menu to initiate and view sub documents.

Document Information: AQDIESEL-1517-CYOrg-00028

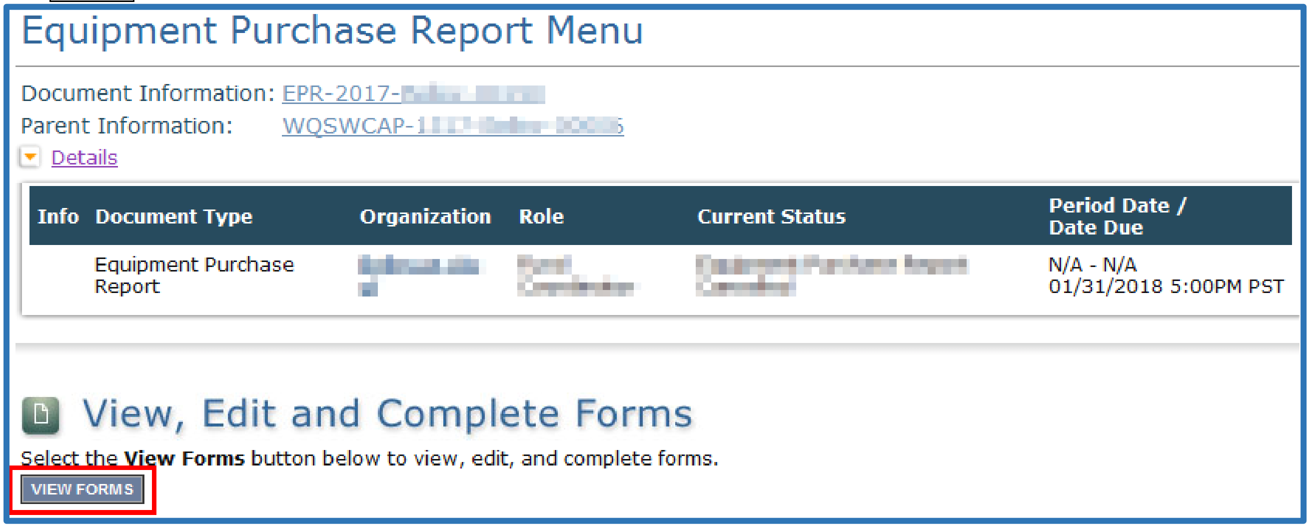
Details

Related Documents

Sort search results by: -- Select -- Filter by Document Type: GO

Document Type	Name	Current Status	Period Date / Date Due	Created By	Last Modified By
Payment Request	Initiate a/an Apr - Jun 2016 Payment Request / Progress Report				
Equipment Purchase Report	Initiate a/an Equipment Purchase Report - 2016				
Payment Request	Initiate a/an Jul - Sep 2016 Payment Request / Progress Report				
Recipient Close Out Report	Initiate a/an Recipient Close Out Report - 2016				

3. From the Equipment Purchase Report Menu, click VIEW FORMS below View, Edit and Complete **Forms**.



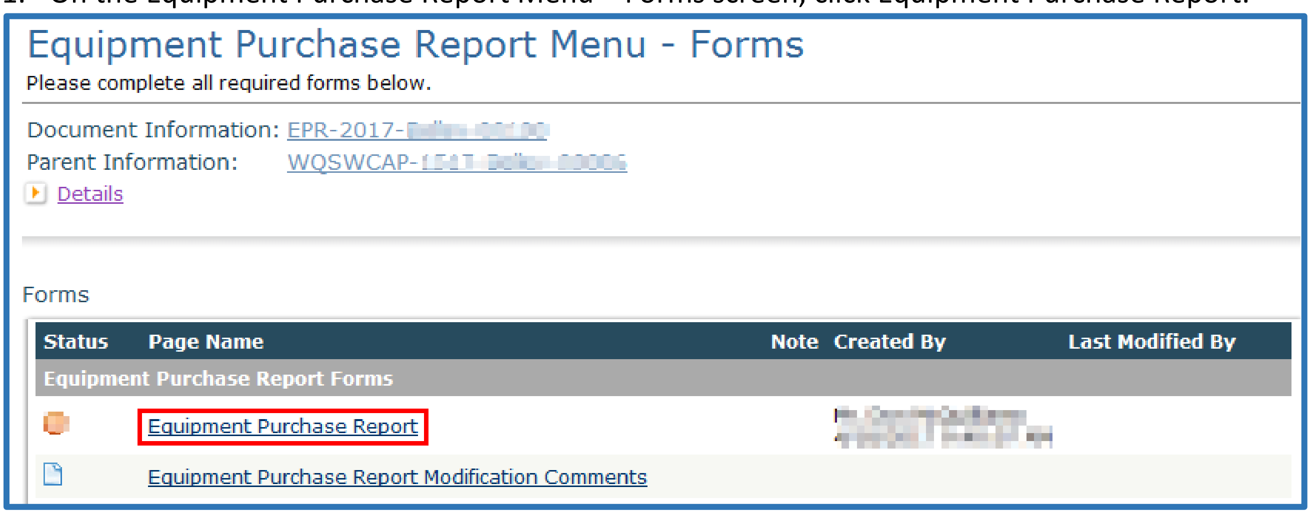
13.2 Completing the Equipment Purchase Report Form

ROLE CHECK

To perform the actions in this section, you must be in one of the following roles:

- Authorized Official
- Recipient Project Manager
- Writer

1. On the Equipment Purchase Report Menu – Forms screen, click Equipment Purchase Report.



2. Complete the Equipment Purchase Report form by filling in the requested information about the equipment or property.

Back

Document Information: EPR-2014-AppOrg2-00038

Parent Information: AQCORE-1517-AppOrg2-00009

Details

You are here: > Equipment Purchase Report Menu > Forms Menu > Equipment Purchase Report Forms

EQUIPMENT PURCHASE REPORT

Instructions:

Fill out this form when any equipment is purchased during the life of the agreement that falls into one of the following categories:
* Property (including equipment) with a useful life of more than one year and valued at more than $5,000
Required fields are marked with an *
When done, click the **SAVE** button.

Equipment Purchase Report Number 1

* Identifying number
* Equipment Description
0 of 500
* Name of Title Holder
* Vendor Name
* Equipment Location
* Equipment Received Date
* Purchase Price
* % Paid by Ecology %

3. Click **SAVE** (at the top of the screen) when you are finished. If there is missing information or an error was found, EAGL will display an error message telling you what is missing or incorrect.

NOTE

The gray box is for Ecology use only. Communicate with your Ecology Project Manager about where the equipment will reside when the project is completed.

For Ecology Use Only

Disposition

The RECIPIENT is retaining items with no further compensation to the DEPARTMENT because it is needed for continued operation, maintenance, or monitoring of the project or other projects administered through the DEPARTMENT or projects compatible with the originally intended use

The RECIPIENT has no further use for the items for the original or comparable projects. They are selling or retaining the equipment and have or will pay the DEPARTMENT an amount equal to the grant funded share of the current fair market value, sale proceeds, or other amount agreed upon by the DEPARTMENT's financial manager

The DEPARTMENT has requested the RECIPIENT transfers the title and possession of the items to [person's name, program], who is eligible under existing statutes and the RECIPIENT has or will be compensated in an amount equal to its share of the current fair market value or other amount agreed upon by the RECIPIENT

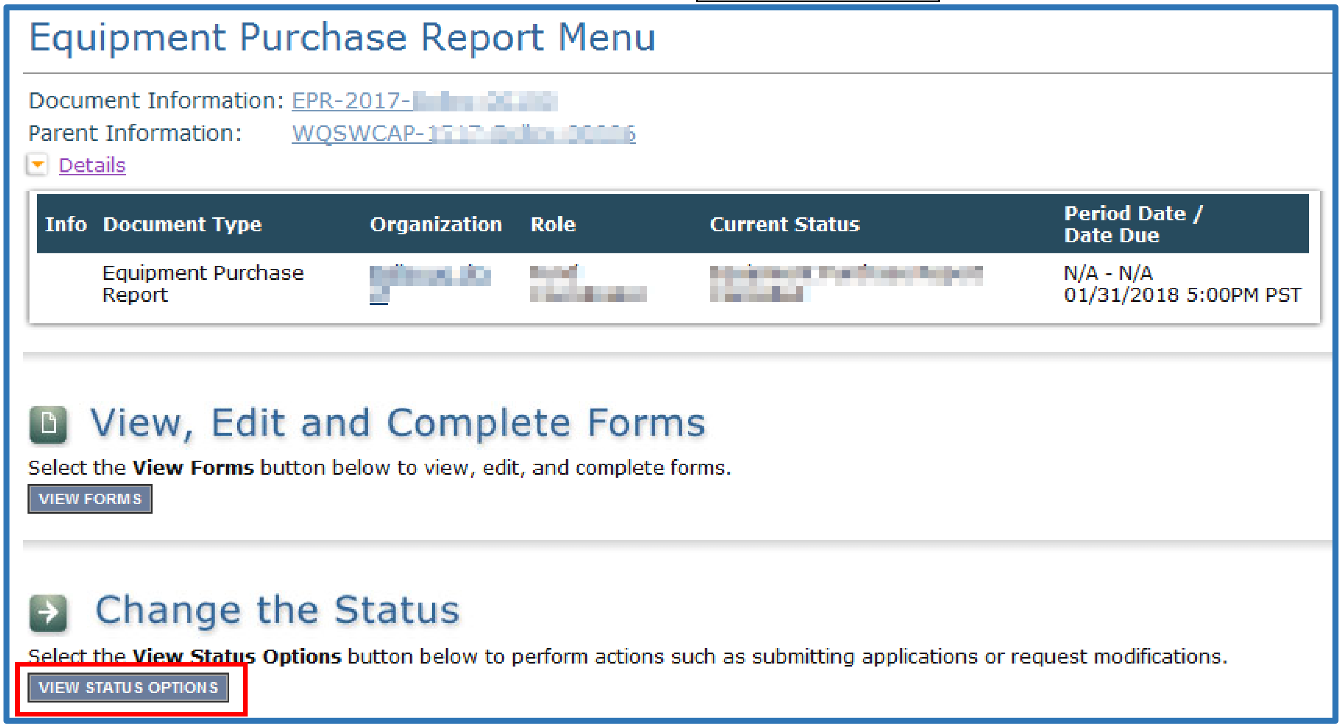
13.3 Submitting an Equipment Purchase Report

ROLE CHECK

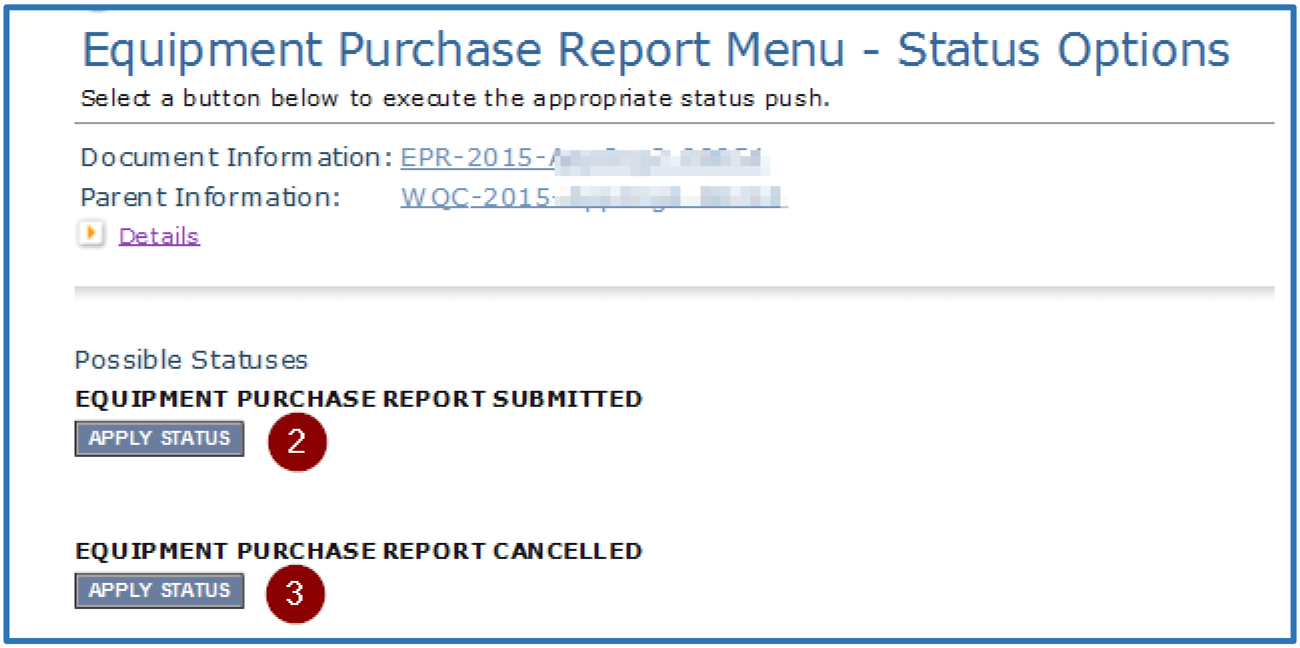
To perform the actions in this section, you must be in one of the following roles:

- Authorized Official
- Recipient Project Manager

1. On the Equipment Purchase Report Menu, below **Change the Status**, click VIEW STATUS OPTIONS.



2. On the Equipment Purchase Report Menu – Status Options screen, click APPLY STATUS below EQUIPMENT PURCHASE REPORT SUBMITTED to submit your EPR.
3. Click Apply Status below EQUIPMENT PURCHASE REPORT CANCELLED to cancel your EPR.



NOTE

If this menu is blank, then you don’t have permission to change the Equipment Purchase Report’s status.

13.4 Modifying a Returned Equipment Purchase Report

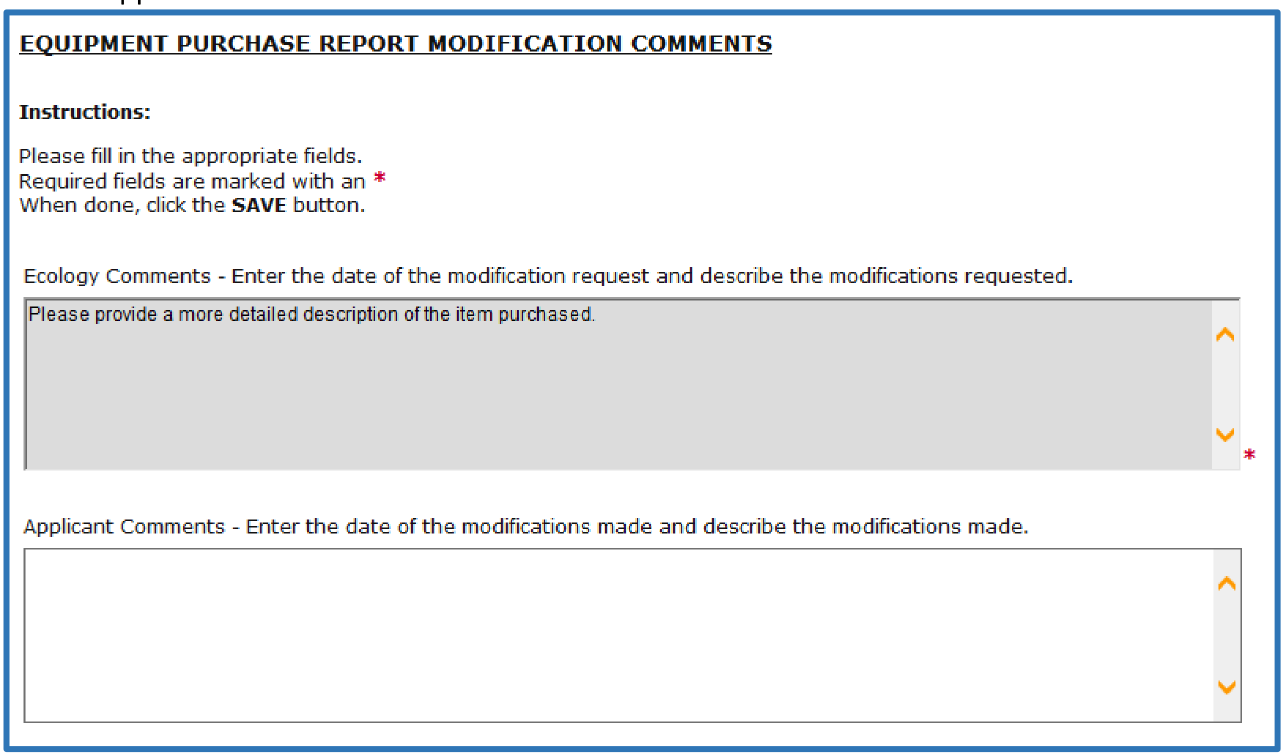
ROLE CHECK

To perform the actions in this section, you must be in one of the following roles:

- Authorized Official
- Recipient Project Manager

Ecology may return your Equipment Purchase Report for modifications.

1. Navigate to the Equipment Purchase Report Menu page. You can get there by clicking the link in the EAGL notification or by searching using My Reports & Payment Requests.
2. Click VIEW FORMS below **View, Edit and Complete Forms**.
3. Click the link to the EQUIPMENT PURCHASE REPORT MODIFICATION COMMENTS form. Your Ecology Financial or Project Manager will describe any requested changes in the Ecology Comments section. Contact your Financial or Project Manager if you have questions about the requested modifications.
4. Make the requested modifications to the EPR.
5. Add your comments to the EQUIPMENT PURCHASE REPORT MODIFICATION COMMENTS form in the Applicant Comments section.


EQUIPMENT PURCHASE REPORT MODIFICATION COMMENTS

Instructions:

Please fill in the appropriate fields.
Required fields are marked with an *
When done, click the **SAVE** button.

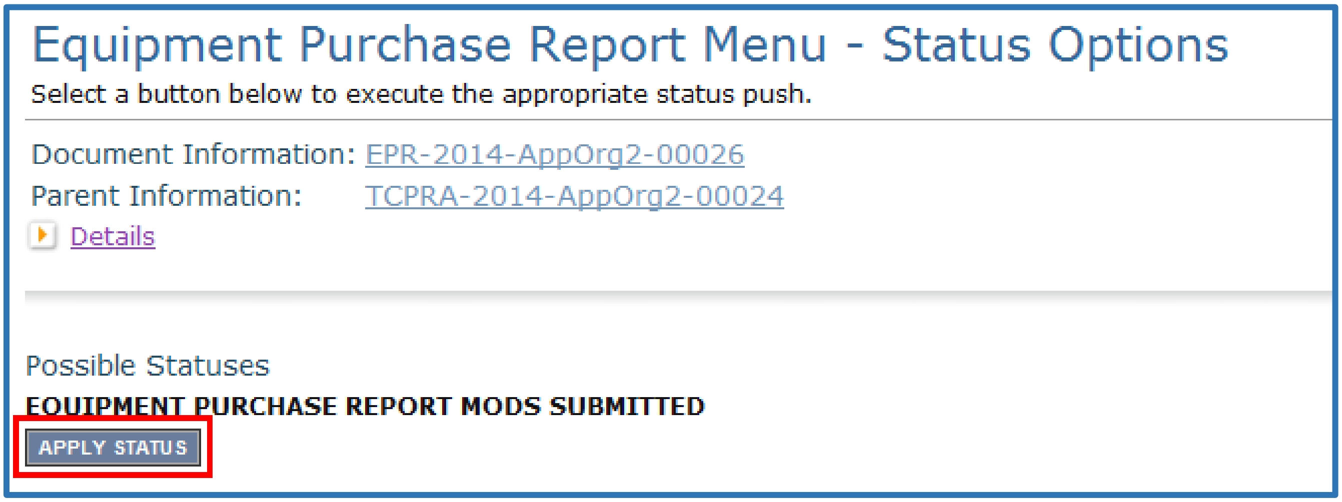
Ecology Comments - Enter the date of the modification request and describe the modifications requested.

Please provide a more detailed description of the item purchased.

*

Applicant Comments - Enter the date of the modifications made and describe the modifications made.

6. Resubmit your EPR by changing the status. Follow the instructions for Submitting an EPR in Submitting an Equipment Purchase Report.



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14 Recipient Close Out Report

When your agreement is coming to a close, you must submit a Recipient Close Out Report. The Recipient Close Out Report collects information about task outcomes, challenges, and other information.

14.1 Initiating a Recipient Close Out Report

ROLE CHECK

To perform the actions in this section, you must be in one of the following roles:

- Authorized Official
- Recipient Project Manager

STATUS CHECK

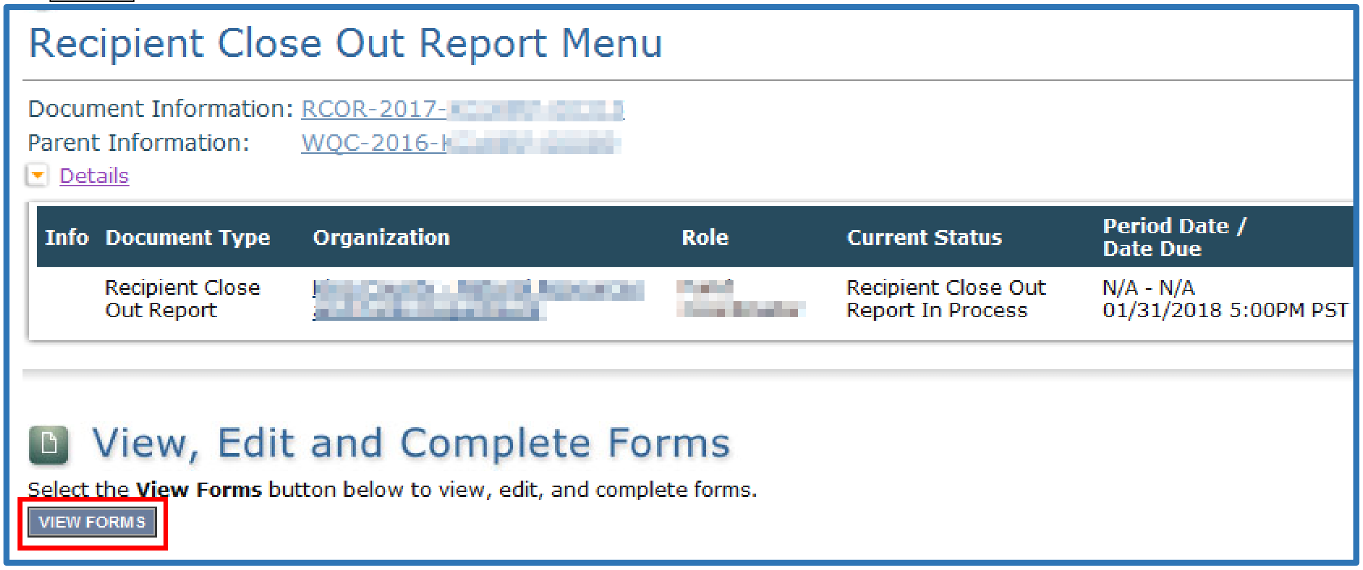
To initiate a Recipient Close Out Report (RCOR), your Parent Document must be in the following status:

- **Agreement Active**

1. To initiate a Recipient Close Out Report, first verify that you are in one of the roles listed above and that your document is in the correct status.
2. Verify that you have submitted a Payment Request/Progress Report that is marked Final.
3. From the **Examine Related Items** menu option on the Application Menu page, click VIEW RELATED ITEMS.
4. From the Application Menu - Related Items screen, click on the Initiate a/an Recipient Close Out Report - <Year> link.

Document Type	Name	Current Status	Period Date / Date Due
Payment Request	Initiate a/an Apr - Jun 2016 Payment Request / Progress Report		
Equipment Purchase Report	Initiate a/an Equipment Purchase Report		
Payment Request	Initiate a/an Jul - Sep 2016 Payment Request / Progress Report		
Payment Request	Initiate a/an Oct - Dec 2014 Payment Request / Progress Report		
Recipient Close Out Report	Initiate a/an Recipient Close Out Report - 2016		

5. From the Recipient Close Out Report Menu, click VIEW FORMS below **View, Edit and Complete Forms**.



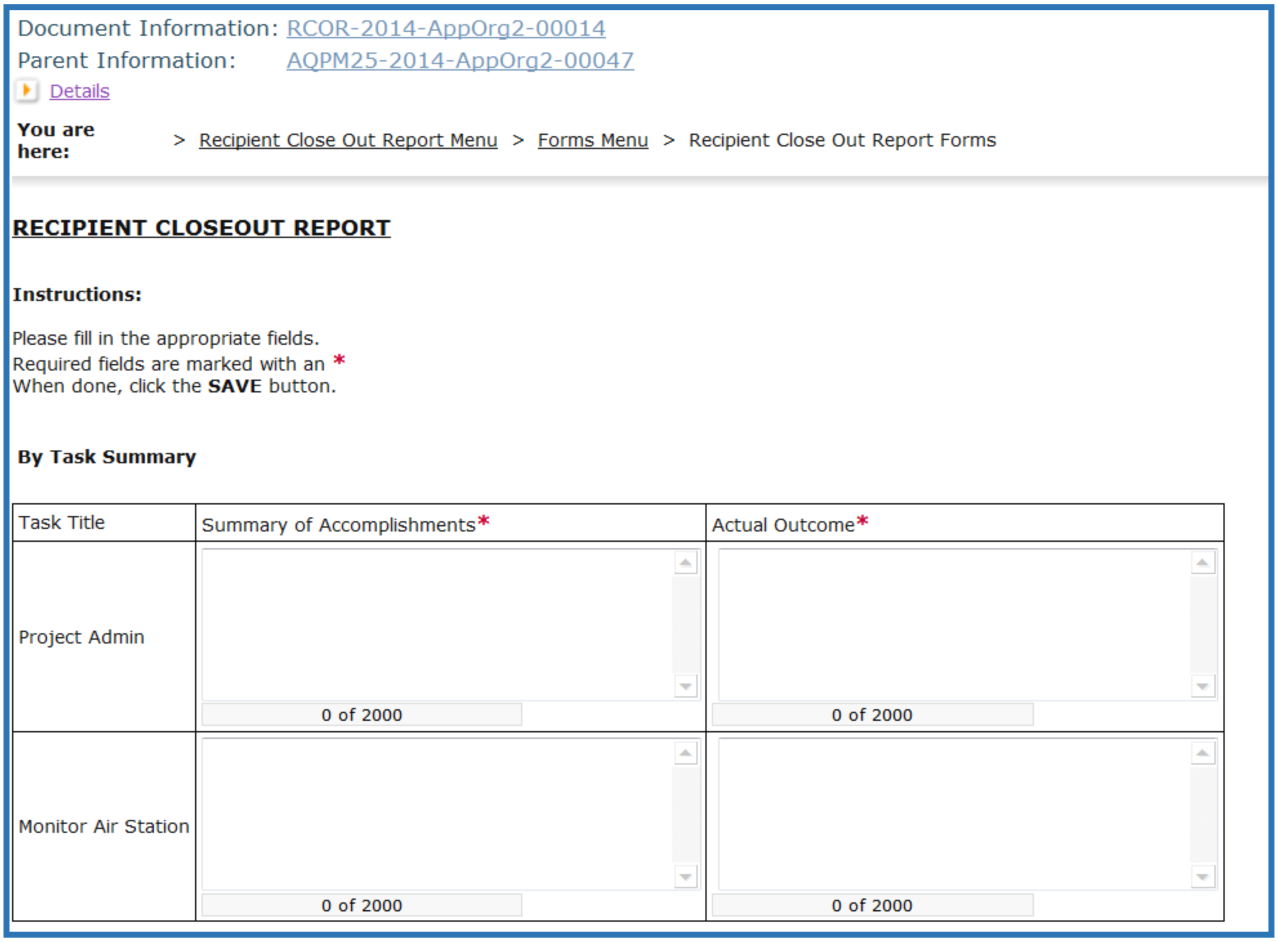
14.2 Completing the Recipient Close Out Report Form

ROLE CHECK

To perform the actions in this section, you must be in one of the following roles:

- Authorized Official
- Recipient Project Manager
- Writer

1. In the Forms Menu, click the link for the Recipient Close Out Report form.
2. The form lists all of the tasks from your agreement. You can use the Overall Summary section at the bottom of the form to note information that is not related to a particular task.
3. Click **SAVE** when you have completed the form. If there is missing information, or an error was found, EAGL will display an error message telling you what is missing or incorrect.



Document Information: RCOR-2014-AppOrg2-00014
Parent Information: AQPM25-2014-AppOrg2-00047
Details

You are here: > Recipient Close Out Report Menu > Forms Menu > Recipient Close Out Report Forms

RECIPIENT CLOSEOUT REPORT

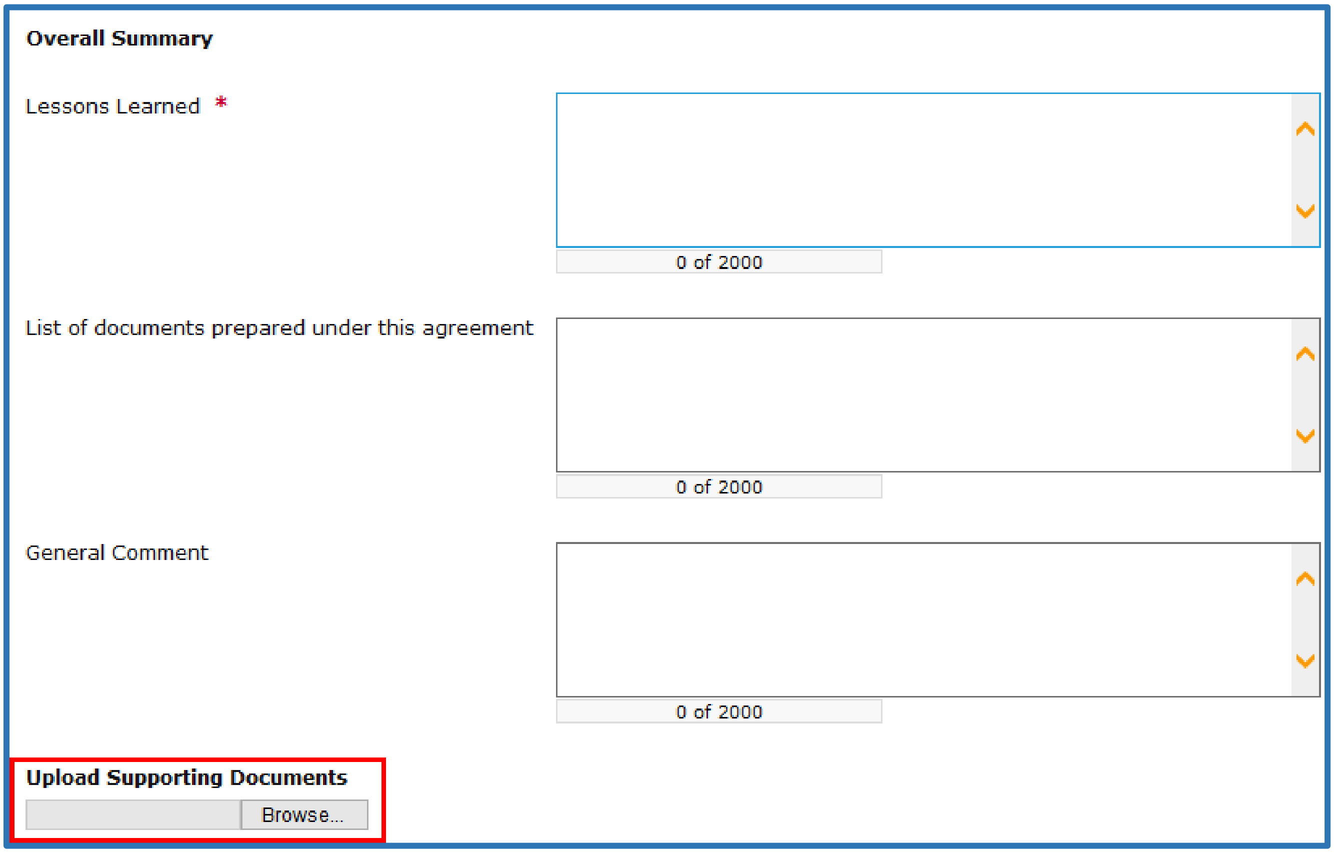
Instructions:

Please fill in the appropriate fields.
Required fields are marked with an *
When done, click the **SAVE** button.

By Task Summary

Task Title	Summary of Accomplishments*	Actual Outcome*
Project Admin	0 of 2000	0 of 2000
Monitor Air Station	0 of 2000	0 of 2000

4. You can upload supporting documents, such as pictures, data, and outreach and education publications, using the Browse button below Upload Supporting Documents. To upload more than one document, click **SAVE,** and another blank upload field will appear.



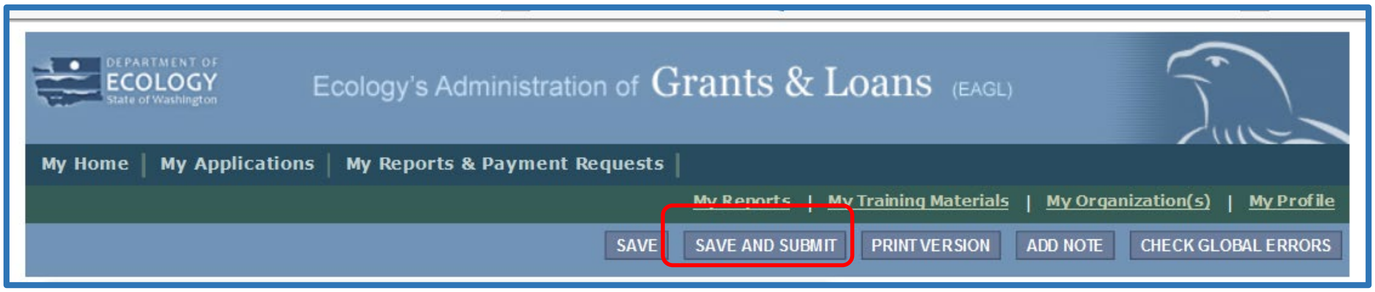
5. Click **SAVE** when you are finished entering data and uploading supporting documents.

14.3 Submitting a Recipient Close Out Report

ROLE CHECK
To perform the actions in this section, you must be in one of the following roles: • Authorized Official • Recipient Project Manager

NOTE
EAGL allows recipients to submit the Recipient Close Out Report using a **SAVE AND SUBMIT** button instead of changing the status of the document.

1. In the Recipient Close Out Report Menu - Forms, click the link for the Recipient Close Out Report form. If you have just completed the form (using the steps in Section 14.2), you will already be on this screen.
2. Click **SAVE AND SUBMIT** to submit your Close Out Report to Ecology.



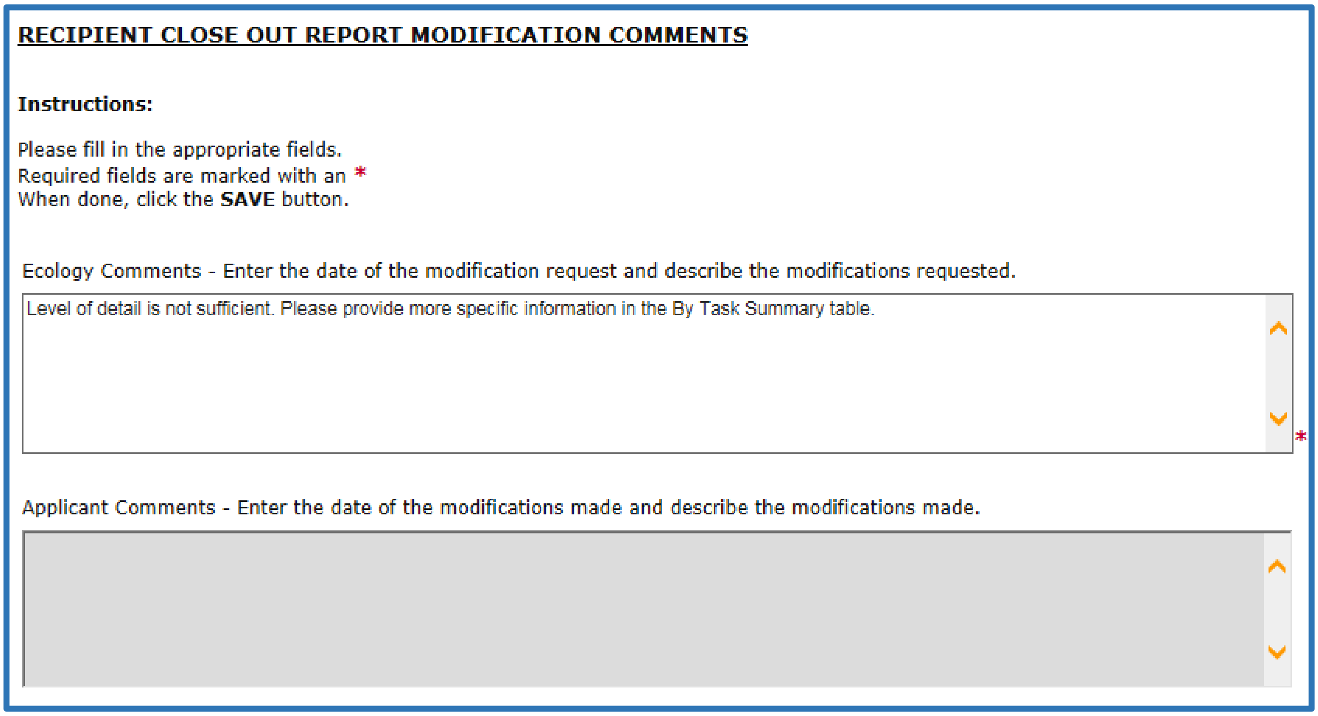
14.4 Modifying a Returned Recipient Close Out Report

Ecology may return your Recipient Close Out Report for modifications.

NOTE
The same role restrictions apply to the modification process as in completing the report. See Sections 14.2 and 14.3 to verify that your role will permit you to complete each step.

1. Review the RECIPIENT CLOSE OUT REPORT MODIFICATION COMMENTS form. Your Ecology Financial or Project Manager will describe any requested modifications in the Ecology Comments section. Contact your Financial or Project Manager if you have questions about the requested modifications.
2. Make the requested modifications to the Recipient Close Out Report.
3. Click **SAVE** on the Recipient Close Out Report form.

4. On the RECIPIENT CLOSE OUT REPORT MODIFICATION COMMENTS form, add your comments in the Applicant Comments section.
5. Click **SAVE** on the RECIPIENT CLOSE OUT REPORT MODIFICATION COMMENTS form**.**
6. Click **SAVE AND SUBMIT** to submit your modified Recipient Close Out Report to Ecology.



RECIPIENT CLOSE OUT REPORT MODIFICATION COMMENTS

Instructions:

Please fill in the appropriate fields.
Required fields are marked with an *
When done, click the **SAVE** button.

Ecology Comments - Enter the date of the modification request and describe the modifications requested.

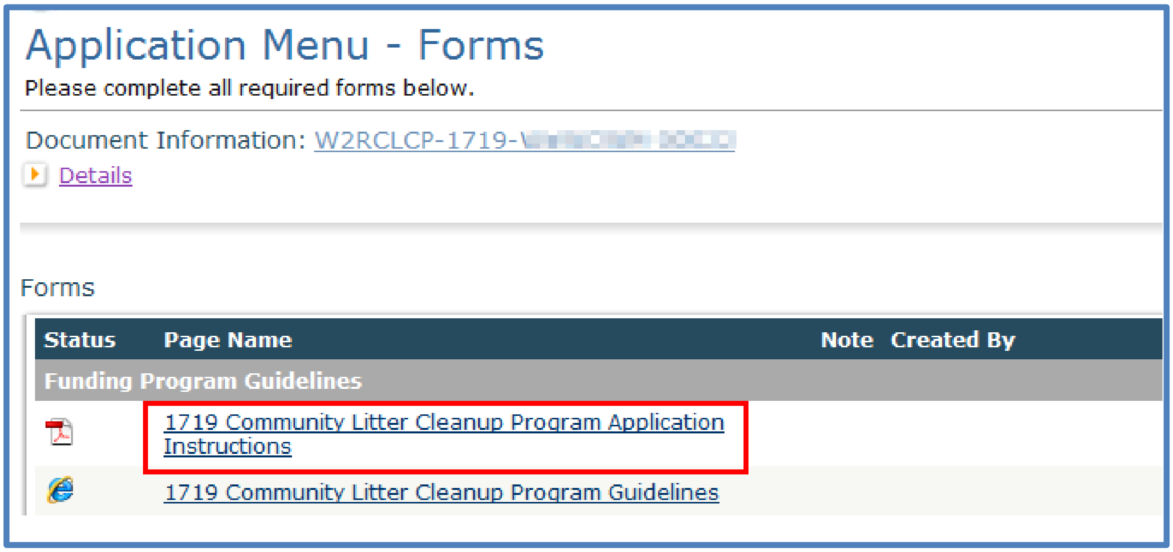
Level of detail is not sufficient. Please provide more specific information in the By Task Summary table. *

Applicant Comments - Enter the date of the modifications made and describe the modifications made.

15 Questions

Specific funding program or EAGL questions

You can find contact information in the application instructions at the top of the Forms Menu on your application (Parent Document).



Secure Access Washington questions

Secure Access Washington Help Desk:

Hours: 24/7
Phone: 1-888-241-7597
Self-Service: https://secureaccess.wa.gov/

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Appendix 1 - Quick Steps for EAGL Processes

Find Applications/Agreements (Parent Documents)....i

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Find Applications/Agreements (Parent Documents)

To find Parent Documents in the system:

Option 1 – via My Applications

1. Click on the My Applications link on the top blue navigation bar.
2. On the SEARCH screen, we recommend you enter no search criteria or only enter the last five digits of your document number.
3. Click SEARCH. Your search results will be displayed under the SEARCH boxes. Click on any document name to open the document.

Option 2 – via My Organization(s)

1. Click My Organization(s) from the dark green navigation bar.
2. If your account is associated with multiple organizations, the My Organization(s) screen will appear. Click on the name of the organization you wish to review. If you are not associated with multiple organizations, you will go directly to the Organization Details page instead.
3. From the Organization Details page, click Organization Documents to see a list of documents associated with your organization.

Find Subdocuments

1. Click on the My Reports & Payment Requests link on the top blue navigation bar.
2. We recommend you select the type of Subdocument you are looking for (Report & Payment Request Type) and enter the last five digits in the Reports & Payment Requests Name field, if you know it.
3. Click SEARCH.
4. Another option is to leave the SEARCH criteria blank and click SEARCH to get a list of all Subdocuments from your organization.
5. Your search results will appear below the SEARCH boxes. Click on the Subdocument's name to open the Subdocument.

Update your Profile

1. From the Home page, click My Profile on the right side of the screen.
2. Update the form with current information.
3. Click **SAVE.**

Update Your Organization's Information

1. From your Home page, click My Organization(s).
2. Click on the organization you want to edit if more than one appears.
3. Update the form with current information.
4. Click **SAVE.**

Manage Roles

At the Organization Level:

1. Verify that you are the Authorized Official for the *Organization*.
2. Choose My Organization(s) from the My Home page.
3. If you are associated with more than one organization, you must choose the organization you want to work on. Your role in each organization will be listed on the screen.
4. Click the Organization Members from the Organization screen.
5. Select the role of the member from the dropdown (menu) arrow.
6. The Active Dates column has two boxes—one for the start date (upper box) and one for the end date (lower box). For new roles, enter an active date in the upper box (start date).
7. For anyone who has left your organization, enter an end date in the lower box in the Active Dates column to remove them from your organization. For auditing purposes, do not uncheck the checkbox for this person.
8. Click **SAVE** to update the roles.

At the Document Level:

1. Verify that you are the Authorized Official for the *Document*.
2. Search for your document from the My Applications page and select it from the results.
3. From the Application Menu, click View Management Tools (located below **Access Management Tools**).
4. Click Add/Edit People.
5. Find the person you are looking for by using the SEARCH tool or scrolling down the list.
6. Check the box next to the person you want to edit.
7. Select the role from the dropdown list.
8. For new roles, enter an active date.
9. For anyone who has left your organization or for staff who are no longer associated with this project, enter an end date in the box below the Active Date to remove their role from the Parent or Subdocument. For auditing purposes, do not uncheck the checkbox for this person.
10. Click **SAVE** to update the roles.

Add Signatories

If you want more than one person to sign an agreement, you need to add signatories.

1. Go to the document (application/funding agreement).
2. Click VIEW FORMS below **View, Edit and Complete Forms**.
3. Click Recipient Contacts.
4. Scroll down to find "Other recipient signatures on printed agreement."
5. Enter the name and/or title of each person you want to add as a signatory on the document.
6. Click **SAVE** (saves and opens up another line to add another name).

Submit or Cancel a Document (Change Status)

1. Click VIEW STATUS OPTIONS below **Change the Status** in the document menu. Note: If this menu is blank, you don't have permission to change the document status.
2. Click APPLY STATUS below (Document Title) Submitted to submit your document.
3. Click APPLY STATUS below (Document Title) Cancelled to cancel your document.

NOTE

EAGL allows recipients to submit the Recipient Close Out Report using a **SAVE AND SUBMIT** button instead of changing the status of the document.

Modify a Returned Document

Ecology may return your document for modifications. These instructions apply for any returned document (application, payment request, equipment purchase report, or close out report).

1. Review the (Document Title) Modification Comments form. Your Ecology Financial Manager or Project Manager will describe any requested changes in the Ecology Comments section. Contact your Financial or Project Manager if you have questions about the requested modifications.
2. Make the requested changes to the document.
3. Add your comments to the (Document Title) Modification Comments form in the Applicant Comments section.
4. Resubmit your document by changing the status.

Amend an Agreement

5. Navigate to the Application Menu page for the agreement you want to amend. (See Finding Your Applications/Agreements.)
6. Click VIEW STATUS OPTIONS below the **Change the Status** heading.
7. This choice takes you to the Application Menu - Status Options. Click APPLY STATUS below Amendment Requested.
8. Click VIEW FORMS below the **View, Edit and Complete Forms** menu option.
9. The Application Menu - Forms screen will appear. Scroll down to the last section called Amendment and click the Amendment Request form.
10. The Amendment Request form is a cumulative record of all requested amendments. Complete the form, describing the amendment you are requesting. Be as specific as possible. Because this form is cumulative, do not delete any entries from earlier amendments.
11. Work with your Ecology staff to amend your agreement outside of EAGL.
12. Once the Authorized Official for your agreement receives the email from EAGL indicating that the Amendment Requires Signature, review the Final Grant Amendment and print for signature.
    a. From the Application Menu, click VIEW FORMS below **View, Edit and Complete Forms**.
    b. Click the icon below the Amendment gray bar.
    c. Carefully review the amendment and contact your Ecology Project Manager if you need to make changes.

    d. Print two copies of the final amendment for signature. If your organization requires more than one signed original, print additional copies.
13. Have all originals signed by your Authorized Signatory(ies).
14. Mail signed amendments with original signature(s) to your Ecology Project Manager. See Sending Your Signed Agreement to Ecology for mailing information.

Complete a Payment Request/Progress Report (PRPR)

1. Follow the steps for finding an Application/Agreement.
2. Confirm that the document is in a status that permits you to initiate a PRPR.
3. Confirm that you have a role that permits you to initiate a PRPR.
4. Below the **Examine Related Items** menu option on the Application Menu page, click VIEW RELATED ITEMS.
5. From the list of Related Documents on the Application Menu –Related Items page, click Initiate a/an (appropriate quarter) PRPR to create a new PRPR.
6. From the Payment Request/Progress Report menu, click VIEW FORMS below **View, Edit and Complete Forms**.
7. In the Forms Menu, click on the link to the Payment Request form.
    a. Complete the Payment Request form. If you have expenditures to report, list them on the Expenditures page.
    b. Click **SAVE**.
    c. Click on the Uploads link and upload supporting documentation (receipts, etc.) to the Uploads page.
    d. Click **SAVE**.
8. When you have completed the Payment Request form, click Payment History from the Payment Request Menu – Forms page. Review the information on this page and click **SAVE**. (You do not need to edit this form.)
9. Go to Form D and click Yes or No, depending on if you are required to complete Form. Follow the instructions in the guidance document linked at the top of the Payment Request Menu – Forms page. Complete Form D and click **SAVE.**
10. In the Forms Menu, click Progress Report.
    a. Complete the Progress Report form.
    b. Upload any supporting documents to the Progress Report form.
    c. Report metrics from within the current reporting period only. Do not report any metrics cumulatively.
    d. Click **SAVE.**

Complete an Equipment Purchase Report

1. On the Application Menu page, click VIEW RELATED ITEMS below the **Examine Related Items** menu option.
2. From the Application Menu - Related Items screen, click on the Initiate a/an Equipment Purchase Report link to begin a new EPR.

3. From the Equipment Purchase Report Menu, click VIEW FORMS below **View, Edit and Complete Forms**.
4. On the Equipment Purchase Report Menu – Forms screen, click the link to the Equipment Purchase Report form.
5. Complete the Equipment Purchase Report. Fill in the requested information about the equipment or property.
6. Click **SAVE** (at the top of the screen) when you are finished. If information is missing information or an error was found, EAGL will display an error message indicating what is missing or incorrect.

Complete a Recipient Close Out Report

1. To initiate a Recipient Close Out Report, first verify that you are in one of the roles listed in Initiating a Recipient Close Out Report and that your document is in the correct status.
2. Verify that you have submitted a Payment Request/Progress Report that is marked Final.
3. From the **Examine Related Items** menu option on the Application Menu page, click VIEW RELATED ITEMS.
4. From the Application Menu - Related Items screen, click on the Initiate a/an Recipient Close Out Report - <Year> link.
5. From the Recipient Close Out Report Menu, click VIEW FORMS below **View, Edit and Complete Forms**.
6. In the Forms Menu, click the link for the Recipient Close Out Report form.
7. The form lists all of the tasks from your agreement. You can use the overall summary section at the bottom of the form to note information that is not related to a particular task.
8. Click **SAVE** when you are finished. If there is missing information or an error was found, EAGL will display an error message telling you what is missing or incorrect.
9. You can upload supporting documents such as pictures, data, and outreach and education publications, using the Browse button below Upload Supporting Documents. To upload more than one document, click **SAVE,** and another blank upload field will appear.
10. Click **SAVE** when you are finished entering data and uploading supporting documents.

Appendix 2 - FAQs

Finding Funding Opportunities

#1 Q. How do I know what grant and loan programs I am eligible to apply for?

#1 A: See Applying for a Grant or Loan for information on finding funding opportunities in EAGL. Please see the Grant and Loan website at https://ecology.wa.gov/About-us/How-we-operate/Grants-loans/Find-a-grant-or-loan for a complete list of funding opportunities.

Adding and Editing People

#1 Q: How do I remove a member of our organization who no longer works for us?

#1 A: See Updating Roles at the Organization Level for instructions. This information is also in the Quick Steps appendix.

#2 Q: How do I change the role of one of my organization members?

#2 A: See Managing Roles at the Organization Level or Managing Roles at the Document Level for instructions. This information is also in the Quick Steps appendix.

#3 Q: How do I change the role of one of my organization members on a document?

#3 A: See Managing Roles at the Document Level for instructions. This information is also in the Quick Steps appendix.

Applications

#1 Q: What is the easiest way to search for an application?

#1 A: On the My Applications page, click SEARCH, and EAGL will pull the documents connected to your organization. See Finding Your Applications/Agreements for details. This information is also in the Quick Steps appendix.

#2 Q: Can an application be recovered after an applicant cancels it?

#2 A: Yes. Contact your Ecology Financial Manager.

#3 Q: Can we add a shortcut to our application in EAGL?

#3 A: No. You must search for an application on either the My Applications page or through My Organization in EAGL.

#4 Q: Can an applicant reuse their application during the next funding cycle?

#4 A: It depends. If EAGL will allow you to roll over data from a previous application cycle, the system will provide you with instructions for this process when you apply for the opportunity.

#5 Q: What forms can Ecology staff edit at any time?

#5 A: Ecology staff can edit Location and Recipient Contacts Forms at any time and in any status after the application is submitted, except in agreement close out statuses.

#6 Q: If an application modification is required, do I have to resave all of the forms before they are resubmitted?

#6 A: You have to save any forms where changes were made, and any forms that were dependent on information from the forms that were changed. EAGL will prompt you or you'll receive an error message for any unsaved pages.

EAGL System Technical Questions

#1 Q: Do Ecology employees, applicants, and recipients have to stay out of EAGL between 2:00 p.m. to 3:00 p.m. on Mondays?

#1 A: Yes. EAGL undergoes routine system maintenance during this time. If you work during this time period, you may lose data.

#2 Q: Why is the SAVE button located at the top of the screen?

#2 A: The **SAVE** button is designed to be at the top of the screen so that it can be found in the same location on every page in the system (if the page can be edited). As you scroll through long forms, the SAVE button will follow you down the page so that is always easily accessible.

#3 Q: How does the system back button work?

#3 A: Generally, the system back button will take you to the previous screen. In some situations, the back button may take you several screens back rather than to your most recent page. To avoid this, we recommend that you use the "You are here:" links (breadcrumbs) or the document number links. See Basic Navigation for more information.

#4 Q: How do I open a second window in EAGL?

#4 A**:** The EAGL Database does not support the use of multiple windows.

#5 Q: What happens if I copy text into EAGL without using notepad?

#5 A: EAGL only accepts plain text characters in all boxes and data entry fields. If any other formatting makes its way into a text box, the system may not accept it, and you may lose text.

#6 Q: Instead of using Notepad, can we save text on a Word document as plain text and copy and paste that into EAGL?

#6 A: Yes, as long as there are no wingdings or special characters. Times New Roman and Arial are the preferred fonts to work with in EAGL. Helvetica is appropriate when using a MAC.

#7 Q: How do you log off EAGL?

#7 A: Closing the browser automatically logs you off.

#8 Q: Can I have the user manual open and work on my document at the same time in EAGL?

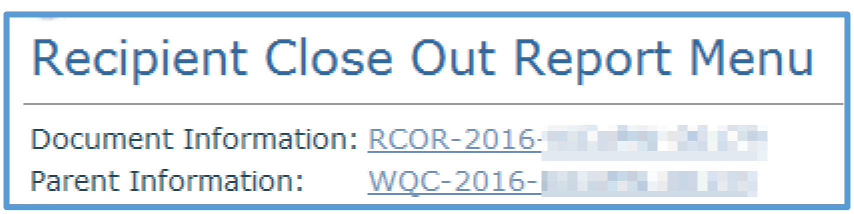
#8 A: Yes. You can do this by right clicking on the link to the User Manual and selecting open a new window to view the User Manual while you fill out the application.

#9 Q: What is the difference between a document number, a Parent Document number, and a Subdocument number?

#9 A: Every document in EAGL has a document number. The terms “document number” or “document information” in EAGL refer to the document currently being viewed and is not an indication of its relationship to an agreement.

The terms “Parent Document number” or “Parent information” refer to the main application/agreement. Payment requests, site visit reports, equipment purchase reports, etc., are not Parent Documents; they are Subdocuments to the Parent Document.

The terms “Subdocument number” and “Subdocument” are not used in EAGL, but are used by Ecology staff to refer to a document belonging to a Parent Document, such as a payment request, site visit report, or close out report. You can tell that you are working on a Subdocument if EAGL displays both a document number (the Subdocument) and a Parent Document number (Parent information), as shown below.



Environmental Data

#1 Q: How do I know if I should collect environmental data?

#1 A: This varies by funding program. Please see your application instructions or consult your Ecology program Fund Coordinator.

Recipient Contacts Form

#1 Q: What does an applicant do if they have more than one official that needs to sign a grant agreement?

#1 A: You may have additional signatories for your agreement. See Recipient Contacts Form for details on this question.

#2 Q: Which member of an applicant organization should be assigned the Authorized Signatory role on the Recipient Contacts form?

#2 A: The Authorized Signatory should be the person who is primarily responsible for authorizing and signing an agreement.

#3 Q: When is the last opportunity for an applicant to edit the Recipient Contacts form?

#3 A: The recipient can edit the Recipient Contacts form up until the application has been submitted. The Recipient Contacts form can also be edited by the Authorized Official prior to signing an agreement, when the document is in **Agreement requires signature** status.

#4 Q: How do we get additional members from my organization to appear in the drop down list on the Recipient Contacts form?

#4 A: Additional members must register in SAW and have their EAGL account approved. Their names will appear once they are set up in EAGL.

Location Form

#1 Q: Is it really important that the location information be accurate on the Location form?

#1 A: Yes. Ecology frequently answers questions from interested parties about the location of grant work. The location information will also be used to summarize grant and loan results agencywide for the public.

#2 Q: Why do we need to save to add another region or legislative district on the Location form?

#2 A: This is a part of the system functionality. When you click **SAVE**, it adds another row for data entry.

#3 Q: What forms can Ecology staff edit at any time?

#3 A: Ecology staff can edit the Location and Recipient Contacts forms at any time, once the document has reached the **Agreement Initiated** status. These forms remain editable unless the agreement is closed or declined.

#4 Q: Will EAGL populate information from other resources, like the Integrated Site Information System or Facility/Site? If a program requires Lat/Long (for example), shouldn't it come from Facility/Site to maintain accuracy?

#4 A: No, EAGL will not allow other systems to populate EAGL forms. Links are provided for identifying Lat/Long and Environmental Information Management (EIM) data. Ecology staff will verify accuracy.

Payment Request/Progress Reports

#1 Q: Is there a required due date for payment requests?

#1 A: EAGL does not enforce a due date on payment requests. The system labels payment requests by quarter, and each quarter's payment request is available from the start of the quarter to the end of the following quarter. For example, January-March payment requests are available until the end of June.

Once a payment request has been initiated, the recipient may take as much time as needed to submit it. Although EAGL does not enforce a due date, you should follow the terms set in your agreement.

#2 Q: When are final payment requests due?

#2 A: Generally, final payment requests are due within 30 days after the agreement expires. You should always refer to your agreement for specifics.

Scope of Work – Additional Tasks Form

#1 Q: What amount should be entered under costs for tasks? Total eligible or Ecology's share?

#1 A: Each task should be entered as total eligible cost.

- Total eligible cost = Ecology's share + Recipient match

#2 Q: What is total project cost?

#2 A: The total project cost reflects the entire cost of the project, including any outside funding not being used as required match.

- Total eligible cost + Outside funds = Total project cost

#3 Q: Why is the Additional Scope of Work form called "additional?"

#3 A: Most of Ecology's grant programs use a pre-populated task form for the tasks that are required for all projects, such as Project Administration. The Additional Scope of Work form is used to capture any tasks beyond those that are pre-populated for the agreement.

Uploads

#1 Q: Can we get a list of documents and records that need to be uploaded to EAGL?

#1 A: The documents that need to be uploaded vary by funding program. Please contact the appropriate funding program for more details on required documents.

#2 Q: Can I view all of the documents I have uploaded to EAGL?

#2 A: See the information in the Uploading Documents section for details on this question. In general, the attachment repository shows all uploads on a specific document, not all uploads associated with an agreement or Parent Document.

Appendix 3 - Role Permissions Table

What your role allows you to do in EAGL:	Document Roles					
	Authorized Official	Contractor	Recipient Project Manager	Recipient Financial Officer	Writer	Reader
Applications & Amendments (Parent Documents)						
Control Access to Applications	X					
Read Application Forms	X	X	X	X	X	X
Edit Forms when Application in Process	X	X	X		X	
Initiate Applications	X	X				
Submit Applications	X					
Cancel Applications	X					
Initiate Amendments	X					
Payment Request/Progress Reports						
Initiate Payment Request/ Progress Report	X		X	X		
Read Payment Request/ Progress Report	X	X	X	X	X	X
Edit Payment Request/ Progress Report	X		**Progress Report Only**	**Payment Request/ Form D Only**	X	
Submit Payment Request/ Progress Report	X		X	X		
Cancel Payment Request/ Progress Report	X		X	X		
Equipment Purchase Reports (EPR) & Close Out Reports						
Initiate EPRs & Close Out Reports	X		X			
Read EPRs & Close Out Reports	X	X	X	X	X	X
Edit EPRs & Close Out Reports	X		X		X	
Submit EPRs & Close Out Reports	X		X			
Cancel EPRs & Close Out Reports	X		X			

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