OCEAN for

Appalachian Development Programs

(ADP)

Application Preparer User Guide

July 16, 2015

Version 1.0

Ohio | Department of Development

This page intentionally left blank.

Table of Contents

Document Overview

OCEAN for Appalachian Development Programs (ADP)

Welcome to OCEAN. The purpose of this user guide is to instruct you on how to navigate and user the OCEAN application software.

This guide is designed for Application Preparers for the ADP program. This guide will instruct you on how to perform the following functions in OCEAN:

- Logging in to OCEAN
- Changing your password and/or organization
- Completing an application for ADP
- Logging out of OCEAN

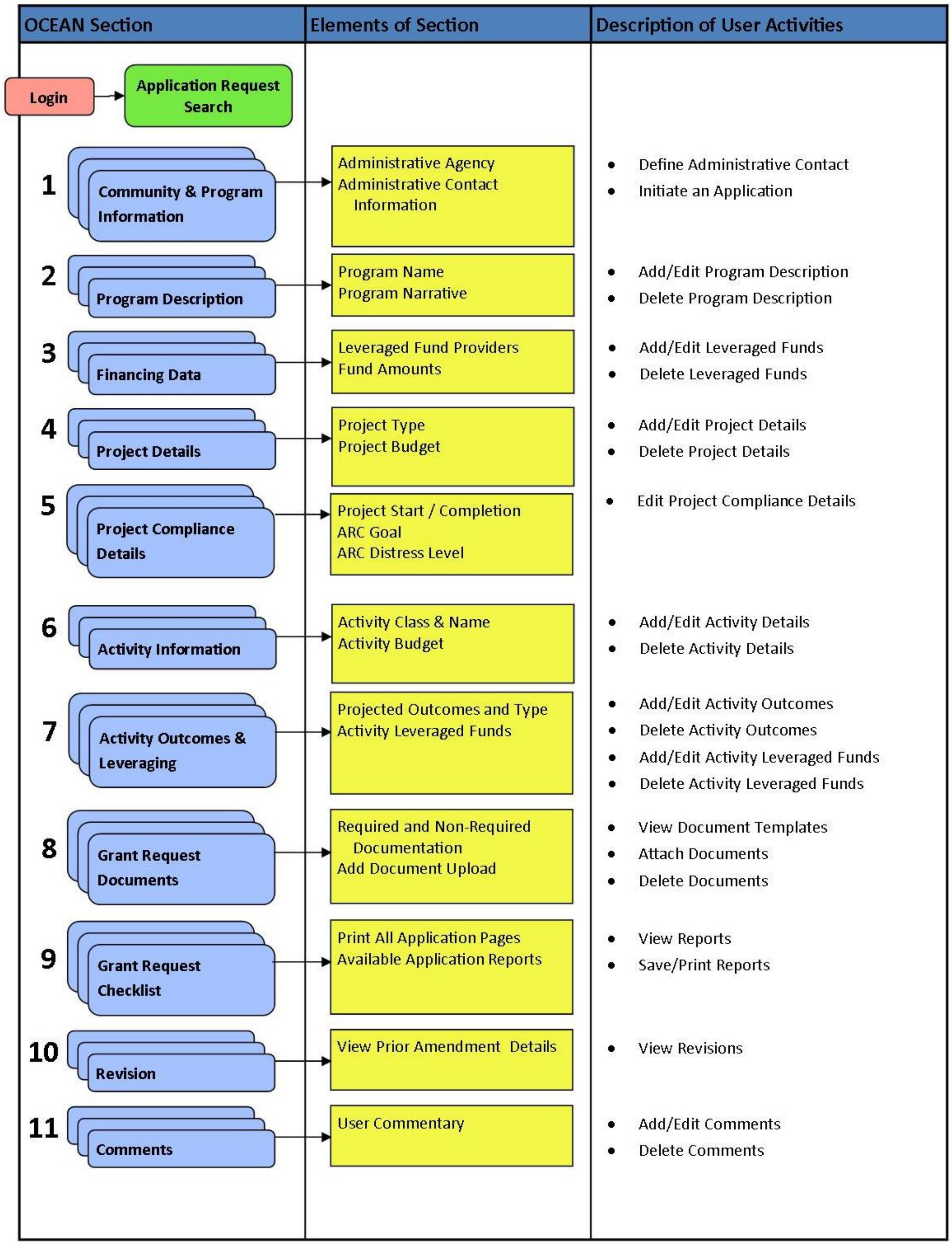
Technical Requirements

To access the OCEAN application, you will need:

- A high-speed internet connection
    - 4 MB or greater download speed
    - 1 MB or greater upload speed
    - Visit http://www.speedtest.net/ to test your current internet speeds
- Internet Explorer version 7 or greater
    - Disable pop-up blocking software

OCEAN for ADP Process Diagrams

State GOA



Federal ARC – Community Development

OCEAN Section	Elements of Section	Description of User Activities
Login → Application Request Search		
1 Community & Program Information	Administrative Agency Administrative Contact Information	• Define Administrative Contact • Initiate an Application
2 Program Description	Program Name Program Narrative	• Add/Edit Program Description • Delete Program Description
3 Financing Data	Leveraged Fund Providers Fund Amounts	• Add/Edit Leveraged Funds • Delete Leveraged Funds
4 Project Details	Project Type Project Budget National Objective	• Add/Edit Project Details • Delete Project Details
5 Project Compliance Details	Project Start / Completion ARC Goal ARC Distress Level	• Edit Project Compliance Details
6 Census Tract	County-Wide Jurisdiction Benefitting Jurisdictions Census Tracts/Block Groups LMI % Benefitting Calculation	• Add/Edit Census Tracts / Block Groups • Delete Census Tracts / Block Groups
7 Activity Information	Activity Class & Name Activity Budget Existing Need Description	• Add/Edit Activity Details • Delete Activity Details
8 Activity Outcomes & Leveraging	Projected Outcomes and Type Activity Leveraged Funds	• Add/Edit Activity Outcomes • Delete Activity Outcomes • Add/Edit Activity Leveraged Funds • Delete Activity Leveraged Funds
9 Grant Request Documents	Required and Non-Required Documentation Add Document Upload	• View Document Templates • Attach Documents • Delete Documents
10 Grant Request Checklist	Print All Application Pages Available Application Reports	• View Reports • Save/Print Reports

OCEAN Section	Elements of Section	Description of User Activities
11 Revision	View Prior Amendment Details	• View Revisions
12 Comments	User Commentary	• Add/Edit Comments • Delete Comments

Federal ARC – Economic Development

OCEAN Section	Elements of Section	Description of User Activities
Login → Application Request Search		
1 Community & Program Information	Administrative Agency Administrative Contact Information	• Define Administrative Contact • Initiate an Application
2 Program Description	Program Description Program Narrative	• Add/Edit Program Description • Delete Program Description
3 Economic Development Details	Previous Recipient and Past Awards	• Save Economic Development Details
4 Business Information	Company Information Ownership	• Add/Edit Business Information • Delete Business Information
5 Need for Assistance	Need for ARC Funds	• Save Need for Assistance
6 Impact Analysis	Criteria and Explanation Impact of Project	• Save Impact Analysis
7 Compliance Details	Compliance Details	• Save Compliance Details
8 Financing Data	Leveraged Fund Providers Fund Amounts	• Add/Edit Leveraged Funds • Delete Leveraged Funds
9 Project Details	Project Type Project Budget Project Address	• Add/Edit Project Details • Delete Project Details
10 Job Information	Existing FTEs Retained and Created Jobs	• Save Job Information • Add/Edit Job Information
11 Activity Information	Activity Class & Name Activity Budget	• Add/Edit Activity Details • Delete Activity Details
12 Activity Outcomes and Leveraging	Activity Outcomes Activity Leveraged Funds	• Add/Edit Activity Outcomes • Delete Activity Outcomes • Add/Edit Activity Leveraged Funds • Delete Activity Leveraged Funds
13 Grant Request Documents	Required and Non-Required Documentation Add Document Upload	• View Document Templates • Attach Documents • Delete Documents

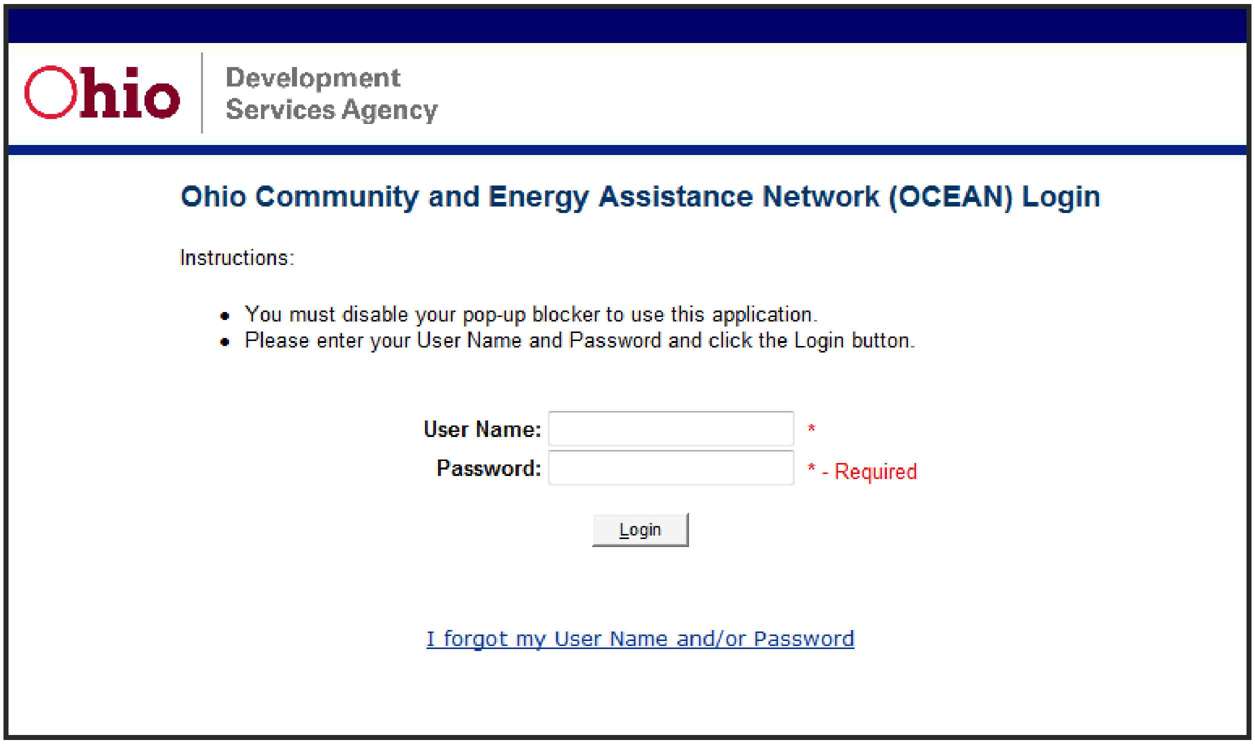
Accessing and Logging into OCEAN

Requirements for access to the OCEAN application:

- Complete the "Going Online with ODSA – OCD Intake Forms" file
    - This document must be signed by your Organization's CEO and a Notary Public
    - Submit your completed form through one of the following three options:
        - Email: scan and email completed and signed forms to David.Kale@development.ohio.gov
        - Fax: 614-955-1465 attn: David Kale
        - Mail: David Kale
77 South High Street
P.O. Box 1001
Columbus, OH 43216-1001
    - Once your forms have been received by OCD, they will be forwarded to the OCEAN Help Desk for processing. For any new User accounts created, the User will receive an email once the account has been created. The email will include a link to the OCEAN website as well as login information.
- User ID and Password

Login Screen

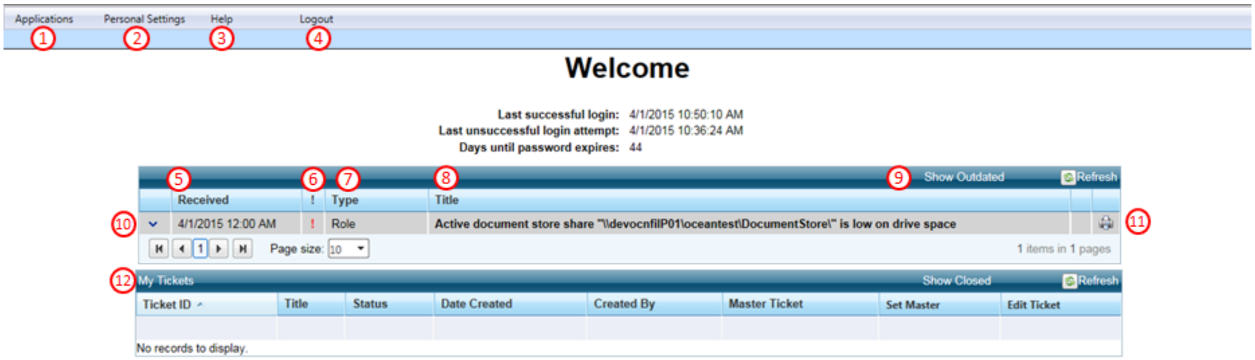
The screen below is the login screen for OCEAN.



Username and Password are required. If you forget your username or password, click on the "I forgot my User Name and/or Password" link to reset it.

OCEAN Navigation and Menu

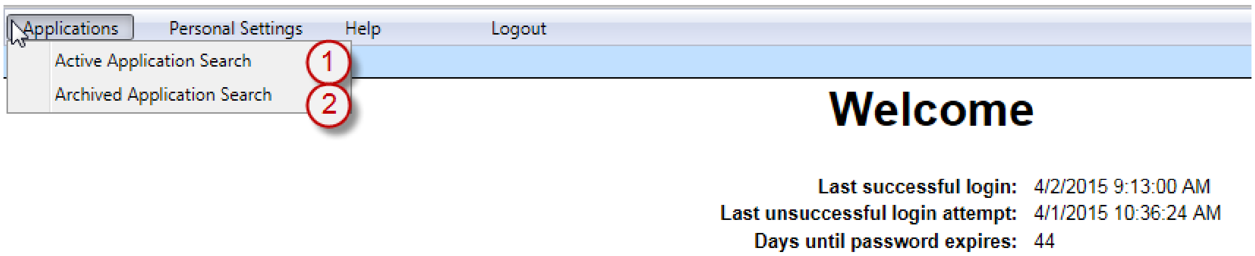
Welcome Screen and Notification Center



This is the OCEAN Welcome Screen. The Welcome Screen has the menu navigation across the top of the page. The Notification Center and My Tickets grids are also displayed.

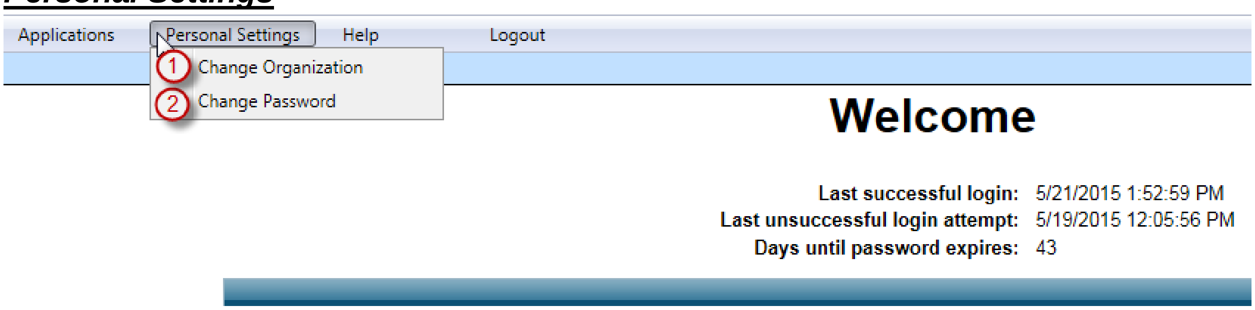
Menu/Field	Purpose
1. Applications	Used to access the OCD grant applications.
2. Personal Settings	Used to change your password and/or organization.
3. Help	Used to access grant document templates and user guide manuals.
4. Logout	Used to sign out and exit the OCEAN application.
5. Date/Time Received	Sortable column of notification messages date and time.
6. Urgency Icon	Sortable column identifying the message as urgent.
7. Type	Target audience – either system, organization, or role-based.
8. Title	Short description of the message.
9. Show/Hide Outdated	Click to reveal/hide past or outdates messages.
10. Message Line	Click on arrow to expand and view communications in regards to OCEAN.
11. Print Icon	Click to print the message to your local printer.
12. Tickets	Shows tickets entered to the OCEAN Help Desk.

Applications



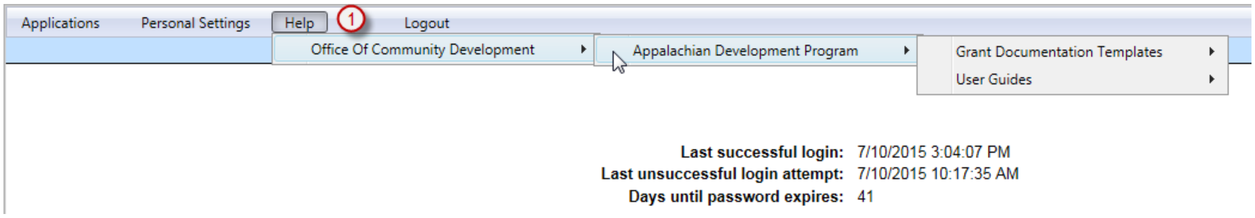
Menu	Purpose
1. Active Application Search	Choose this option to search for active applications, or to add a new application.
2. Archived Application Search	Choose this option to search for archived applications.

Personal Settings



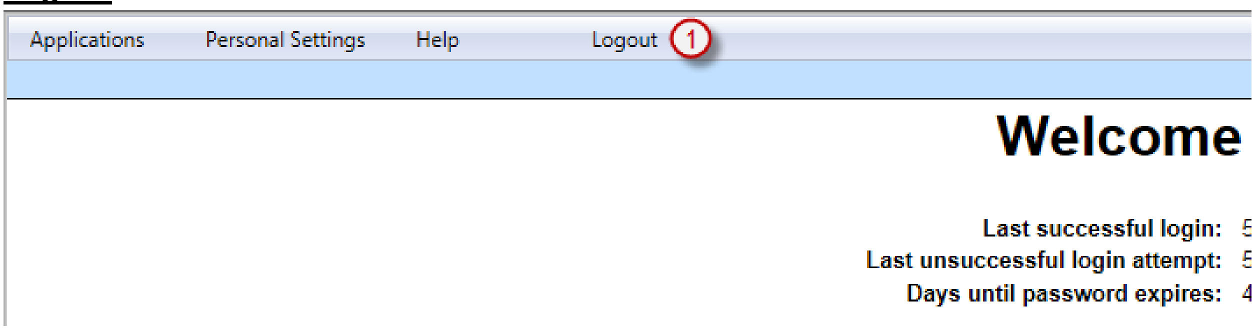
Menu	Purpose
1. Change Organization	Choose this option to navigate to a page for selecting another organization that you are working with. You will only be able to access the organizations that you have been added as an authorized user using the “Going Online with ODSA – OCD Intake Forms” file. If you have access to a single organization, then this menu option will not be available for you.
2. Change Password	Choose this option to change your OCEAN password.

Help Menu

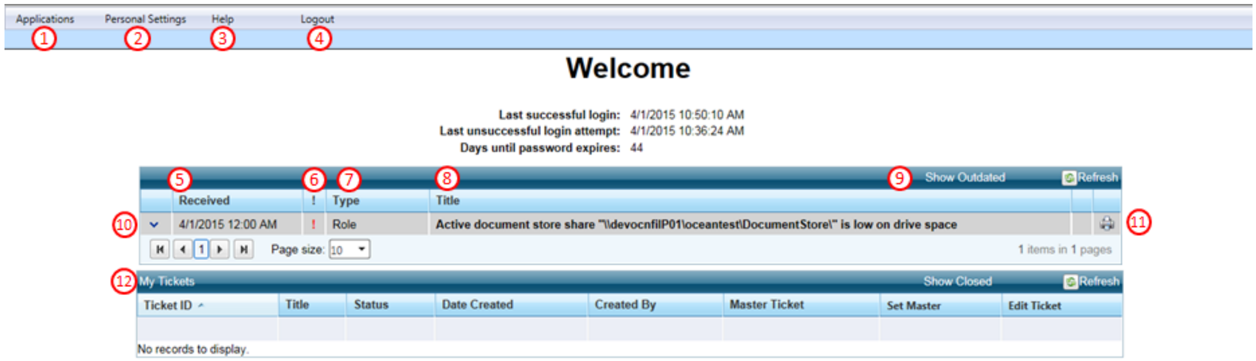


Menu	Purpose
1. Help	Choose this option to access Help menu items, including Document templates and User Guides.

Logout

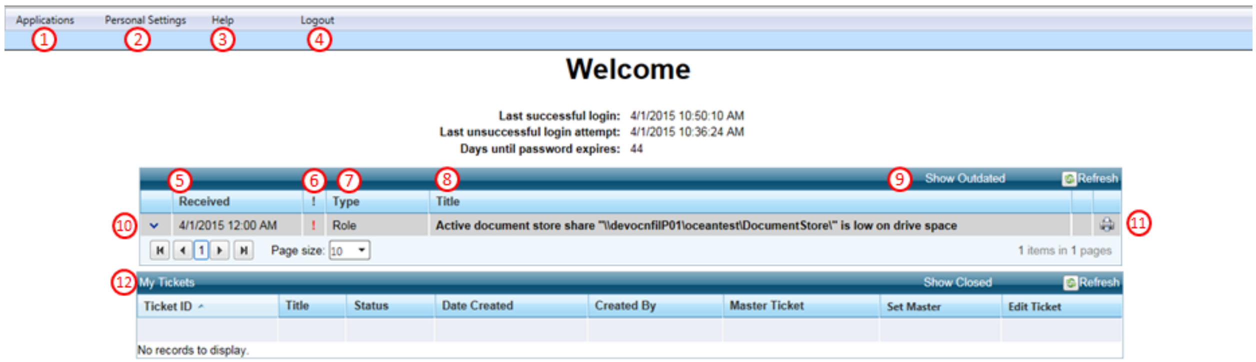


Menu	Purpose
1. Logout	Choose this option to logout and exit your session with the OCEAN application.



This is the OCEAN Welcome Screen. The Welcome Screen has the menu navigation across the top of the page. The Notification Center and My Tickets grids are also displayed.

Menu/Field	Purpose
1. Applications	Used to access the OCD grant applications.
2. Personal Settings	Used to change your password and/or organization.
3. Help	Used to access grant document templates and user guide manuals.
4. Logout	Used to sign out and exit the OCEAN application.
5. Date/Time Received	Sortable column of notification messages date and time.
6. Urgency Icon	Sortable column identifying the message as urgent.
7. Type	Target audience – either system, organization, or role-based.
8. Title	Short description of the message.
9. Show/Hide Outdated	Click to reveal/hide past or outdates messages.
10. Message Line	Click on arrow to expand and view communications in regards to OCEAN.
11. Print Icon	Click to print the message to your local printer.
12. Tickets	Shows tickets entered to the OCEAN Help Desk.



This is the OCEAN Welcome Screen. The Welcome Screen has the menu navigation across the top of the page. The Notification Center and My Tickets grids are also displayed.

Menu/Field	Purpose
1. Applications	Used to access the OCD grant applications.
2. Personal Settings	Used to change your password and/or organization.
3. Help	Used to access grant document templates and user guide manuals.
4. Logout	Used to sign out and exit the OCEAN application.
5. Date/Time Received	Sortable column of notification messages date and time.
6. Urgency Icon	Sortable column identifying the message as urgent.
7. Type	Target audience – either system, organization, or role-based.
8. Title	Short description of the message.
9. Show/Hide Outdated	Click to reveal/hide past or outdates messages.
10. Message Line	Click on arrow to expand and view communications in regards to OCEAN.
11. Print Icon	Click to print the message to your local printer.
12. Tickets	Shows tickets entered to the OCEAN Help Desk.

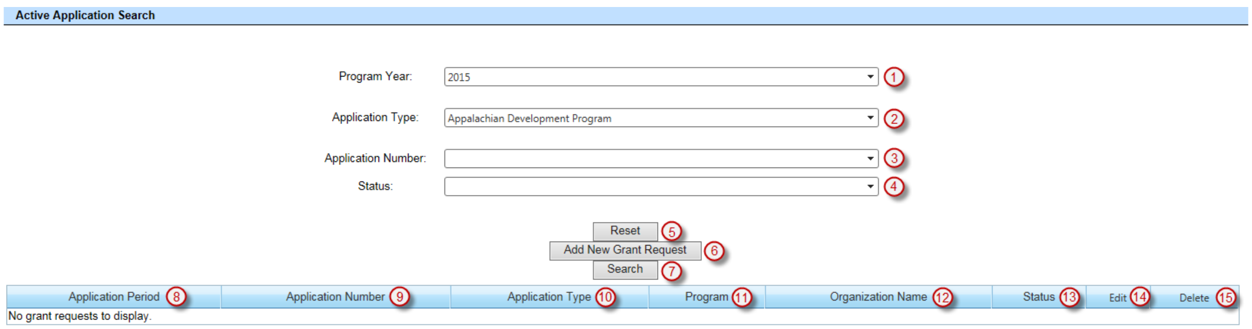
Completing an Application for ADP

The following section describes the process for creating an application for ADP in OCEAN.

To begin an application, you must first navigate to the Active Application Search page. Choose the following menus to display the Active Application Search page:

Applications → Active Application Search

Application Request Search



Button/Field	Description
1. Program Year	Use this dropdown to select the program year of an application you would like to add or search for an existing application. The dropdown contains the current year as well as the previous ten years.
2. Application Type	Use this dropdown to select the application type you would like to add or search for an existing application. The list of application types will be limited by the applications that can be created by your organization as well as your own security permissions.
3. Application Number	Use this dropdown to refine the search results to an application number for the program year and application type selected.
4. Status	Use this dropdown to refine your search results to display applications that are currently in the selected status.
5. Reset	Choose this option to reset the search criteria and begin a new search.
6. Add New Grant Request	Choose this option to begin a new grant request. Prior to clicking this button, you must first select a program year and application type. *Note: If this button is disabled, then either: 1. You have reached the maximum number of requests allowable for the program year and application type selected. or 2. It is past the application period and you can no longer create applications for the program year and application type selected.

7. Search	Choose this option to display search results based on the search criteria defined above.
8. Application Period	Displays the period when applications can be submitted to OCD.
9. Application Number	Displays a unique assigned number for your application.
10. Application Type	Displays the type of application for the record.
11. Program	Displays the program type and program name.
12. Organization Name	Displays the name of the organization that created the application request.
13. Status	Displays the current status of the application.
14. Edit	Click the pencil icon to edit the application. *Note: Applications can only be edited when they are in an 'In Process' or 'Returned for Revision' status. If they have been 'Submitted' to OCD or have been 'Approved,' then the application would open and be read only.
15. Delete	Click the red "x" icon to delete the application. *Note: Applications can only be deleted when they are in an 'In Process' status. Once they have been 'Submitted' to OCD, the applications can no longer be deleted.

The functions available from the Application Search page are listed below with steps for performing each function:

Search for an Application:

1. Select a **Program Year** and an **Application Type**.
2. Click the **Search** button.
3. Search results are displayed in the grid.

Add a New Application:

1. Select a **Program Year** and an **Application Type**.
2. Click the **Add New Grant Request** button.
3. You will navigate to the **Grant Request** page for adding a new application.

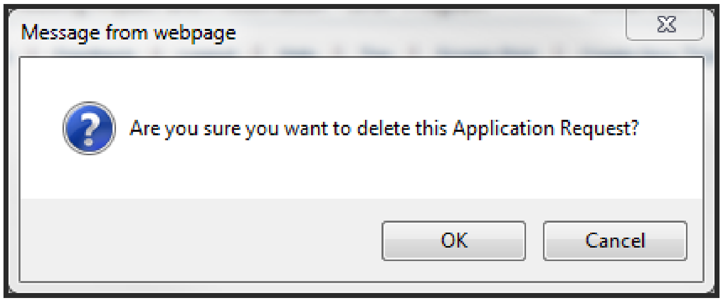
Edit an Existing Application:

1. Select a **Program Year** and an **Application Type**.
2. Click the **Search** button.
3. Search results are displayed in the grid.
4. Click the **Edit** icon next to an application that is in an 'In Process' status.
5. You will navigate to the **Grant Request** page for editing an existing application.

Delete an Existing Application:

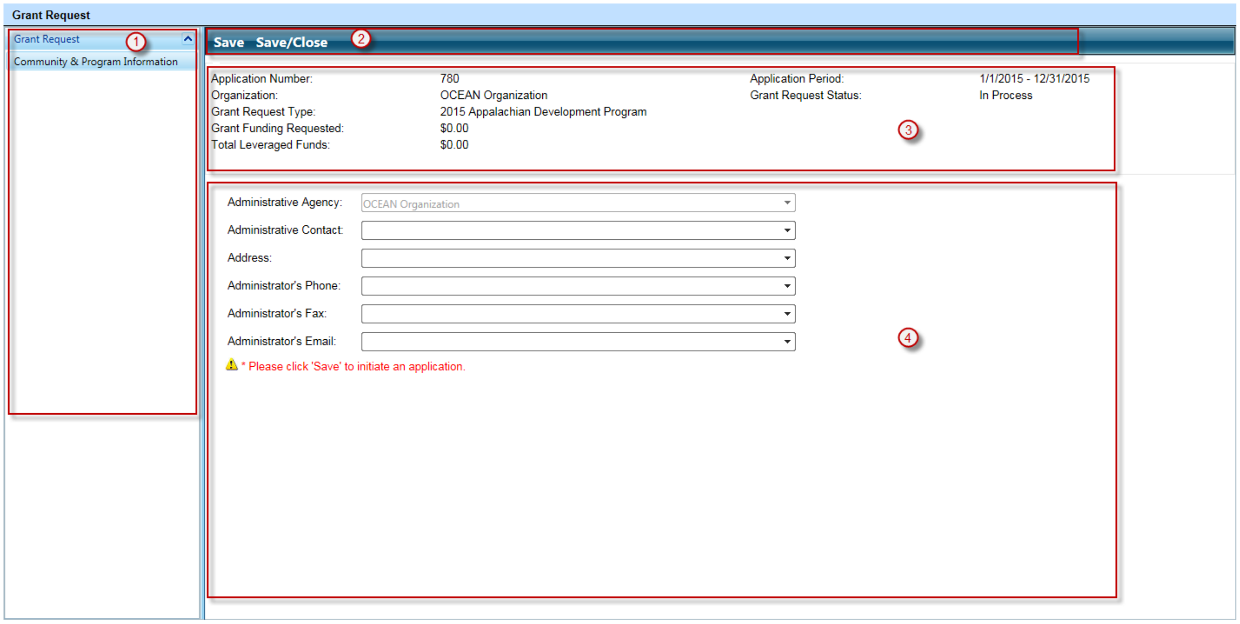
1. Select a **Program Year** and an **Application Type**.
2. Click the **Search** button.
3. Search results are displayed in the grid.

4. Click the **Delete** icon next to an application that is in an 'In Process**'** status.
5. A message displays asking if you are sure you want to delete this Application Request.



6. Click **OK** to delete the application.

Grant Request



The Grant Request process is broken into four main sections:

1. **Left Navigation Panel** – This section lists the individual pages that will be completed as part of the application process. Clicking on an item in the left navigation updates section 4 with the details to be collected.
2. **Button Bar** – These buttons allow the user to save the application as additional details are entered up until the time it is ready to be submitted. Applications that are not completed will be saved as an “In Process” status. The buttons available in the button bar include:
   - **Save** – Saves the application in an “In Process” status and runs validations on the application for Community Development. Any validation messages will be displayed for review and corrected prior to the application being ready for submission.

Validation Message	Definition
All of the documents that are required have not been attached.	A document is listed on the Grant Request Documents page that has the checkbox checked for “Required,” but no response document has been uploaded. Upload your response document to clear this validation.
Total funds across activities ($$$) must equal $$$$ for the <<provider name>> provider leveraged fund.	All activity leveraged funds must total to the amounts you defined on the Financing Data page. Reallocate leveraged funds for this provider across the appropriate activities to clear this validation.

Project <<project name>>'s activity budget totals to $$ but should be $$$.	All activity budgets must total to the overall project budget. Reallocate activity budget dollars under this project to clear this validation.
Activity <<project and activity name>> needs at least one outcome measurement.	All activities need an outcome measurement (if applicable). Click the Activity Outcomes and Leveraging link in the left navigation and associate at least one outcome in the outcomes grid to each activity that tracks outcomes.
Economic Development Details must be filled in to submit the grant request (Federal ARC – Economic Development program)	Click the Economic Development Details link in the left navigation, enter data in all fields, and click the 'Save' button.
Compliance Details must be filled in to submit the grant request (Federal ARC – Economic Development program)	Click the Compliance Details link in the left navigation, enter data in all fields, and click the 'Save' button.
Business Information must be filled in to submit the grant request (Federal ARC – Economic Development program)	Click the Business Information link in the left navigation, enter data in all fields, and click the 'Save' button.
Impact Analysis must be filled in to submit the grant request (Federal ARC – Economic Development program)	Click the Impact Analysis link in the left navigation, enter data in all fields, and click the 'Save' button.
Need for Assistance must be filled in to submit the grant request (Federal ARC – Economic Development program)	Click the Need for Assistance link in the left navigation, enter data in all fields, and click the 'Save' button.
Job Information must be filled in to submit the grant request (Federal ARC – Economic Development program)	Click the Job Information link in the left navigation, enter data in all fields, and click the 'Save' button.

Table 1

- **Save/Close** – Saves the application in an "In Process" status and returns you to the Application Request Search page.
- **Submit** – Submits the grant request.
- **Return to Search** – Returns you to the Active Application Search page.

3. **Header Details** – The header details section remains throughout the application. It gives an overview of the application, including:
    - **Application Number** – unique assigned number to the application
    - **Organization** – organization creating the application
    - **Grant Request Type** – program the application is being created for
    - **Grant Funding Requested** – total CDBG funds requested across all projects on this application
    - **Total Leveraged Funds** – total leveraged funds defined on the financing data page
    - **Application Period** – application period for submitting applications
    - **Grant Request Status** – current status of the application

- **Assigned To –** name of the administrator assigned to the grant

4. **Page Details** – This section shows the specific details to be entered for the page selected in the left navigation panel. The following pages detail each of these pages and the functions available for entering your application data.

Appalachian Development Program

There are five types of Appalachian Development Programs that you can create an application for:

- State GOA – Area Development Program
- State GOA – LDD Operating Program
- State GOA – Rapid Response Program
- Federal ARC – Community Development
- Federal ARC – Economic Development

Each program will be added as a separate application.

The following sections are broken down into these programs and will detail the process for creating each type of application.

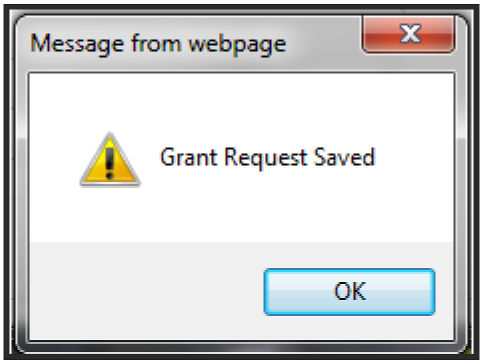
Community & Program Information

Field	Description
1. Administrative Agency	Displays your current organization as the administrative agency.
2. Administrative Contact	Use this dropdown to select the administrative contact from your organization for the SHP application.
3. Address	This dropdown will populate with the current address on record for the administrative contact selected. If multiple addresses exist for the contact selected, then you can select the correct address from the dropdown.
4. Administrator's Phone	This dropdown will populate with the current phone number on record for the administrative contact selected (if supplied). If multiple phone numbers exist for the contact selected, then you can select the correct phone number from the dropdown.
5. Administrator's Fax	This dropdown will populate with the current fax number on record for the administrative contact selected (if supplied). If multiple fax numbers exist for the contact selected, then you can select the correct fax number from the dropdown.
6. Administrator's Email	This dropdown will populate with the current email address on record for the administrative contact selected. If multiple email addresses exist for the contact selected, then you can select the correct email address from the dropdown.

The functions available from the Community & Program Information page are listed below with steps for performing each function:

Initiate an Application – Save

1. Select an **Administrative Contact** from the dropdown.
2. Verify the correct **Address** and **Email** are selected.
3. Click the **Save** button in the top button bar to initiate the application.
4. A message will display to inform you that the grant request has been saved.



5. Click **OK** in the message box to continue.
6. The remaining pages of the grant application will be displayed in the left navigation panel.

Initiate an Application – Save / Close

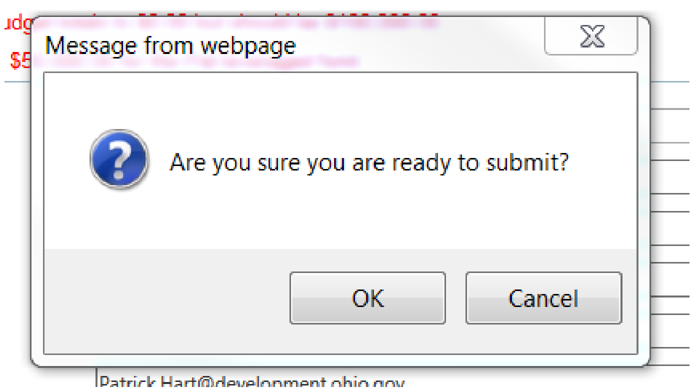
1. Select an **Administrative Contact** from the dropdown.
2. Verify the correct **Address** and **Email** are selected.
3. Click the **Save** / **Close** button in the top button bar to save the application.
4. The Active Application Search page is displayed.

Return to Application Search

1. Click the Return to Search button from the top button bar.
2. The Active Application Search page is dislayed and no information is saved.

Submit a New Application

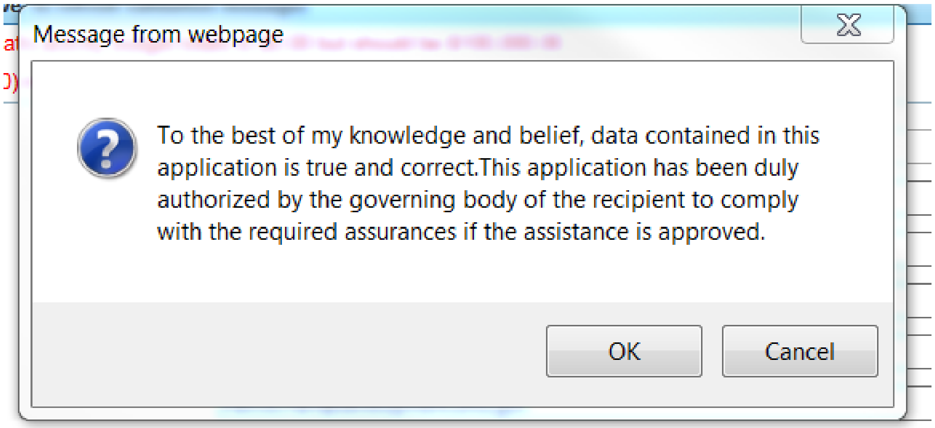
1. Select an **Administrative Contact** from the dropdown.
2. Verify the correct **Address** and **Email** are selected.
3. Click the **Submit** button in the top button bar to submit the application. Note, any validation messages must be resolved before the application can be successfully submitted.
4. A message will display to confirm the submit:



5. Click **OK** in the message box to continue.Click **Cancel** to exit from the message box with

no action taken.

6. Another message box will be displayed to confirm the accuracy of the information:



7. Click **OK** in the message box to continue. Click **Cancel** to exit from the message box with no action taken.
8. The application will be submitted when **OK** is clicked and there are no validation messages.

Cancel Initiating a New Application

1. Navigate away from the **Community & Program Information** page by selecting another menu item in the main menu bar.
2. A new application will not be created.

Program Description

Field	Description
1. Program Type	This dropdown contains a list of potential programs available for the Grant Request you are creating. Only one program can be defined for each grant request. For ADP, there are five available programs: • State GOA – Area Development Program • State GOA – LDD Development Program • State GOA – Rapid Response Program • Federal ARC – Community Development • Federal ARC – Economic Development
2. Program Name	Enter the name for the program this is used by your organization to identify the application.

The functions available from the Program Description page are listed below with steps for performing each function:

Add Program Description

1. Click on the **Add Program Description** button.
2. The grid expands for adding a new program description record.
3. Select the ‘State GOA’ Program Description and enter details for all other remaining fields.
4. Click the **Insert** button.
5. Program description details are saved.

Edit Program Description

1. Click on the **Edit** icon next to an existing program description record in the grid.
2. The grid expands for editing the program description record.
3. Edit the **Program Type** and/or **Program Name**.
4. Click the **Update** button.

5. Program description details are updated.

Cancel Adding/Editing Program Description

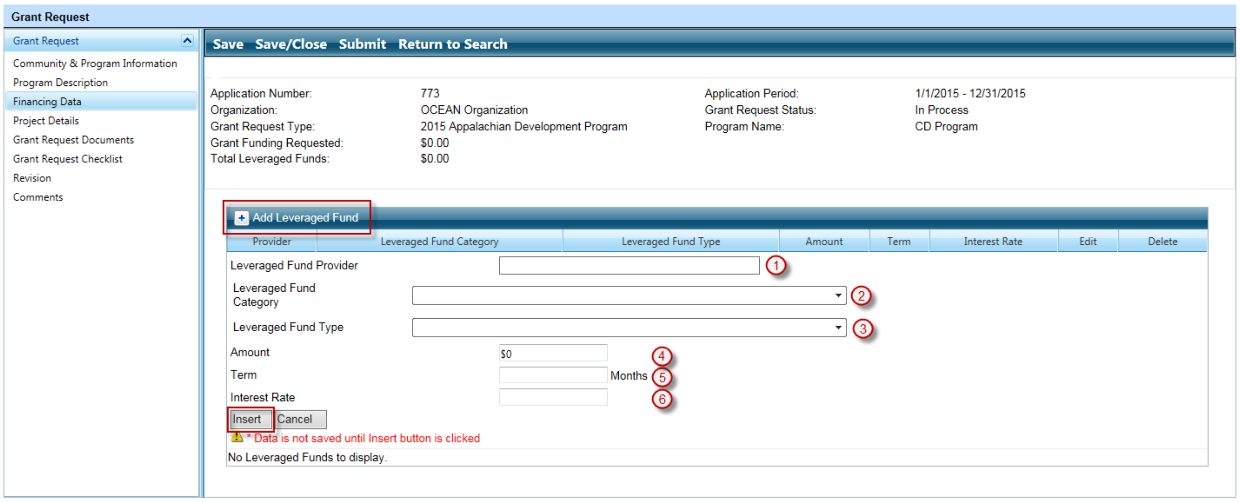
1. Click to either **Add Program Description** or **Edit** an existing program description in the grid.
2. The grid expands for adding/editing a program description.
3. Click the **Cancel** button.
4. Changes are not saved.

Delete Program Description

1. Click on the **Delete** icon next to an existing program description record in the grid.
2. Program description record is deleted from the grid. *Note: When deleting a program description, all related Project Details, Project Compliance Details, Activity Information, and Activity Outcomes and Leveraging will be deleted as well.

State GOA

Financing Data



Field	Description
1. Leveraged Fund Provider	Enter the name of the leveraged fund provider in the textbox.
2. Leveraged Fund Category	Select the category for the leveraged fund from the dropdown. Dropdown choices include: • Other Federal • Other Funds • Private Funds • State and Local Funds • Federal ARC Funds
3. Leveraged Fund Type	Select the type of leveraged fund from the dropdown. Dropdown choices include: • Grant • In Kind • Loan
4. Amount	Enter the dollar amount of leveraged funds for the provider entered.
5. Term	Displayed on in kind and loan fund types. Enter for the term of the loan or in kind expressed in months.
6. Interest Rate	Displayed on in kind and loan fund types. Enter for the rate of the loan or in kind expressed in months.

The functions available from the Financing Data page are listed below with steps for performing each function:

Edit Leveraged Fund

1. Click on the **Edit** icon next to an existing leveraged fund record in the grid.
2. The grid expands for editing the leveraged fund record.
3. Edit the leveraged fund details.
4. Click the **Update (Insert)** button.
5. Leveraged fund details are updated.

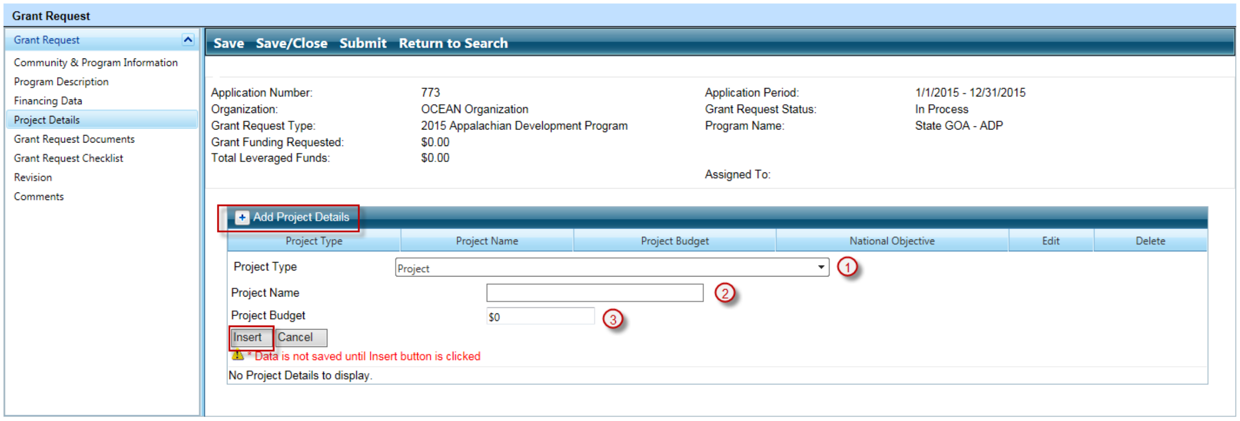
Cancel Editing Leveraged Fund

1. Click to **Edit** an existing leveraged fund in the grid.
2. The grid expands for editing a leveraged fund record.
3. Click the **Cancel** button.
4. Changes are not saved.

Delete Leveraged Fund

1. Click on the **Delete** icon next to an existing leveraged fund record in the grid.
2. Leveraged fund record is deleted from the grid. *Note: When deleting a leveraged fund, all related Activity Leveraging Funds will be deleted as well.

Project Details



Field	Description
1. Project Type	Select the project type from the dropdown. For the Appalachian Development – State GOA programs, the available project types include: • Project Only one 'Project' project can be added to each application.
2. Project Name	Enter a name for the project that uniquely identifies this project from all other Appalachian Development projects.
3. Project Budget	Enter the budget for the project. This budget is the amount of funds that are being requested from OCD.

The functions available from the Project Details page are listed below with steps for performing each function:

Add Project Detail

1. Click on the **Add Project Details** button in the grid.
2. The grid expands for adding a project detail record.
3. Enter all project detail information.
4. Click the **Insert** button.
5. Project details information is saved.
6. Repeat Steps 1 – 5 for each project on your application.

Edit Project Detail

1. Click on the **Edit** icon next to an existing project detail record in the grid.
2. The grid expands for editing the project detail record.
3. Edit the project detail information.
4. Click the **Update** button.
5. Project detail information is updated.

Cancel Adding/Editing Project Detail

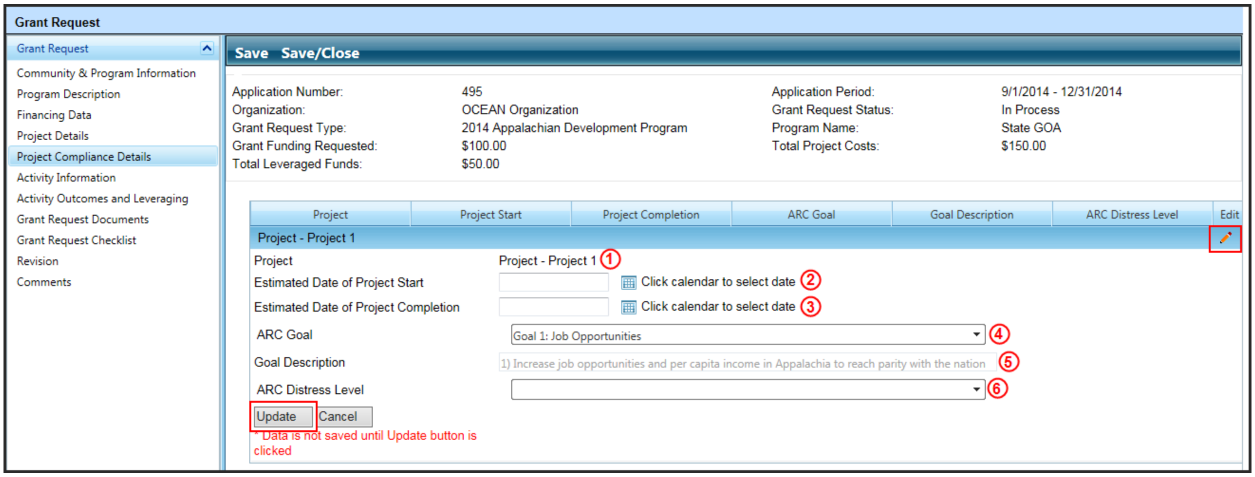
1. Click to **Add Project Details** or **Edit** an existing project detail record in the grid.
2. The grid expands for adding/editing a project detail record.
3. Click the **Cancel** button.
4. Changes are not saved.

Delete Project Detail

1. Click on the **Delete** icon next to an existing project detail record in the grid.
2. Project detail record is deleted from the grid. *Note: When deleting a project detail record, all related Project Compliance Details, Activity Information, and Activity Outcomes and Leveraging records will be deleted as well.

Project Compliance Details

This page displays all projects except Admin / Planning.



Field	**Description**
1. Project	Displays the project type and name of the project listed.
2. Estimated Date of Project Start	Click the calendar icon and select the estimated date the project is to start.
3. Estimated Date of Project Completion	Click the calendar icon and select the estimated date the project is to be completed.
4. ARC Goal	Select the ARC goal from the following options: • Goal 1: Job Opportunities • Goal 2: Human Capital • Goal 3: Infrastructure • Goal 4: Highway System
5. Goal Description	This field populates with the description of the ARC Goal selected. The following descriptions may display depending on the ARC Goal selected: • 1) Increase job opportunities and per capita income in Appalachia to reach parity with the nation • 2) Strengthen the capacity of the people of Appalachia to compete in the global economy • 3) Develop and improve Appalachia's infrastructure to make the Region economically competitive • 4) Build the Appalachian Development Highway System to reduce Appalachia's isolation
6. ARC Distress Level	Select the ARC Distress Level from the following options: • At-Risk • Attainment • Competitive • Distressed • Transitional

The functions available from the Project Compliance Details page are listed below with steps for performing each function:

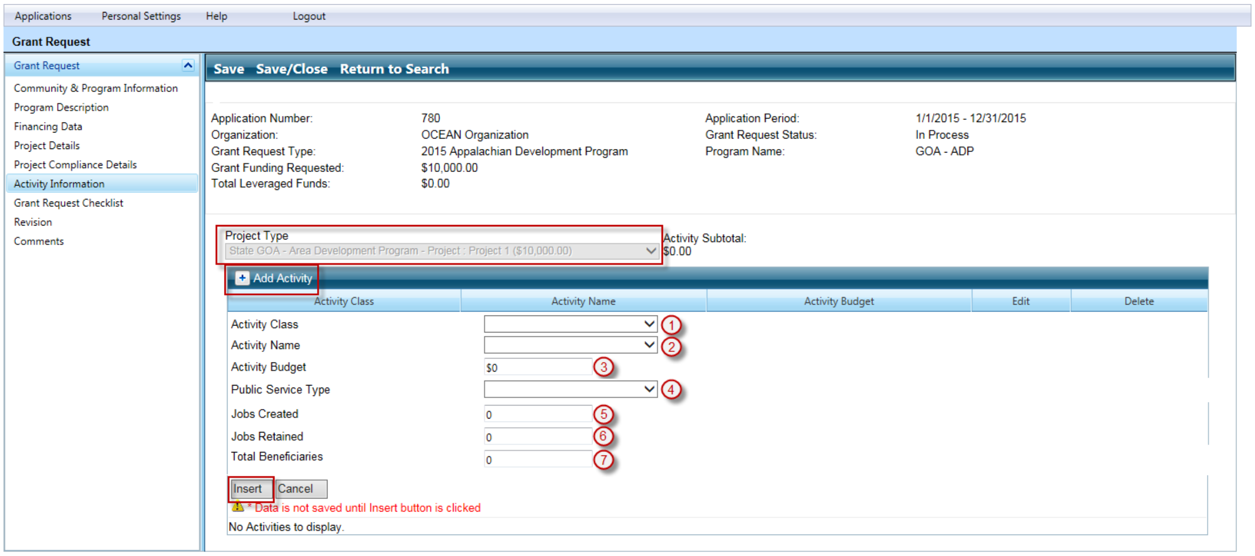
Edit Project Compliance Details

1. Click on the **Edit** icon next to an existing project compliance detail record in the grid.
2. The grid expands for editing the project compliance detail record.
3. Edit the project compliance details.
4. Click the **Update** button.
5. Project compliance details are updated.

Cancel Adding/Editing Project Compliance Details

1. Click to **Edit** an existing project compliance detail record in the grid.
2. The grid expands for editing a project compliance detail record.
3. Click the **Cancel** button.
4. Changes are not saved.

Activity Information



Field	Description
1. Activity Class	Select an activity class for the new activity.
2. Activity Name	Select the activity name from the dropdown. The dropdown choices depend on the activity class that is selected. See Table 2 below for potential activity names per activity class.
3. Activity Budget	Enter the budget for the activity. All activity budgets for the activities on the project must total up to the project budget.
4. **Public Service Type**	This field only displays when the activity class is 'Public Services.' Select the public service type from the following options: • Youth Programs and Services • Services for Disabled Persons • Services for Elderly Persons • Family and Individual Counseling • Medical and Nutrition Programs • Homeless and D.V. Services • Other Services
5. Jobs Created	When the Activity Class = "Economic Dev', this value reflects the expected number of jobs created as a whole number.
6. Jobs Retained	When the Activity Class = "Economic Dev', this value reflects the expected number of jobs retained as a whole number.
7. Total Beneficiaries	Only appears for programs of type 'State GOA – LDD Operating Program'. Enter the total number of beneficiaries for this activity.

Activity Class	Activities	
Administration	• General Admin	• Planning

Public Services	• Public Services
Economic Dev.	• Acquisition • Demolition / Clearance • Flood & Drainage Facilities • Leasehold Improvements • Machine / Cap. Equipment • Moving Costs • New Construction • Non-Capital Equipment • Off-Site Improvements • Other Costs • Parking Facilities • Private Rehabilitation • Professional Fees • Public Utilities • Sewer Fac. Improvements • Solid Waste Disposal Fac. • Street Improvements • Training / Technical Assistance • Water & Sewer Facilities • Water Fac. Improvements • Working Capital
Public Facilities	• Acquisition • Centers for Handicapped • Conversion / Rehab / Renovation • Demolition / Clearance • Disposition • Fire Protect. Fac. & Equip. • Flood & Drainage Facilities • Historic Preservation • Home / Building Repair • Homeless Facilities • Interim / Emergency Rental Asst. • Neighb. Fac / Community Ctr • Other Costs • Parking Facilities • Parks & Rec. Facilities • Private Rehabilitation • Public Rehabilitation • Public Services • Public Utilities • Senior Centers • Sewer Fac. Improvements • Sidewalk Improvements • Solid Waste Disposal Fac. • Street Improvements • Water & Sewer Facilities • Water Fac. Improvements
Operating Cost	• Admin

Table 2

The functions available from the Activity Information page are listed below with steps for performing each function:

Add Activity

1. Select a project from the **Project Type** dropdown above the activity grid (unless the type is prepopulated for you).
2. The activity grid refreshes to show all activities currently associated with the selected project.
3. Click on the **Add Activity** button in the grid.
4. The grid expands for adding an activity record.
5. Enter all activity details.
6. Click the **Insert** button.
7. Activity details are saved.

8. Repeat Steps 3 – 7 for each activity you need to add for the project type selected.
9. Repeat Steps 1 – 8 for each project type in the project dropdown until activities have been added for all projects.

Edit Activity

1. Click on the **Edit** icon next to an existing activity record in the grid.
2. The grid expands for editing the activity record.
3. Edit the activity details.
4. Click the **Update** button.
5. Activity details are updated.

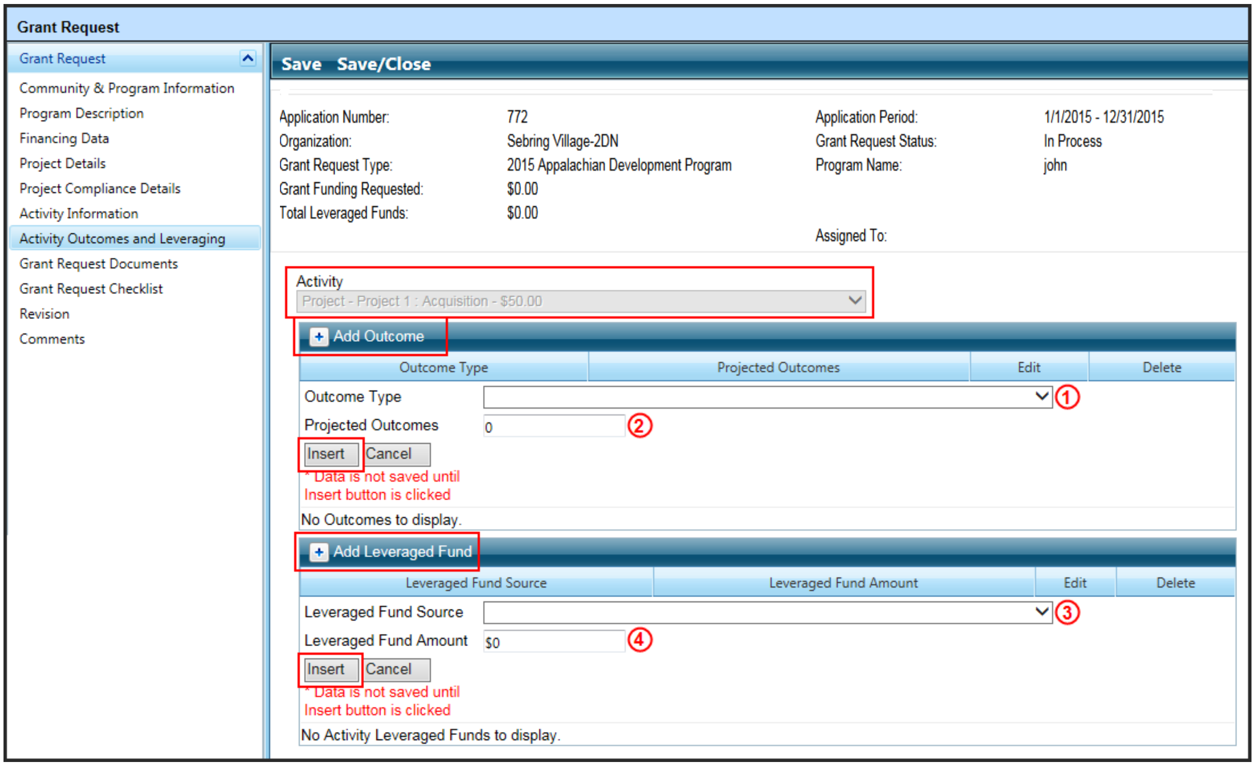
Cancel Adding/Editing Activity

1. Click to either **Add Activity** or **Edit** an existing activity record in the grid.
2. The grid expands for adding/editing an activity record.
3. Click the **Cancel** button.
4. Changes are not saved.

Delete Activity

1. Click on the **Delete** icon next to an existing activity record in the grid.
2. Activity record is deleted from the grid. *Note: When deleting an activity record, all related Activity Outcomes and Leveraging records will be deleted as well.

Activity Outcomes and Leveraging



Field	Description
1. Outcome Type	Select the outcome type from the dropdown. The dropdown choices depend on the activity that the outcome is being added for. See Table 3 below for potential outcome types per activity.
2. Projected Outcomes	Enter the projected number of outcomes for the activity.
3. Leveraged Fund Source	Select a source of leveraged funds for the activity. The dropdown choices for the leveraged fund source include a list of the leveraged fund providers defined on the financing data page.
4. Leveraged Fund Amount	Enter the amount of leveraged funds from this provider that will be funding the activity selected.

Activity	Outcomes	
Acquisition	• Acres of Land • Square Feet of Structure • Structures • Parcels	• Households Assisted • Business Buyouts • Permanent Easements/Right-of-Way
Centers for Handicapped	• Buildings Rehabbed/Constructed	
Code Enforcement	• Units Assisted or Inspected	
Conversion / Rehab / Renovation	• Square Feet of Structure	• Building Rehabbed/Constructed

Activity	Outcomes
Demolition / Clearance	• Structures Demolished
Disposition	• Acres of Land • Square Feet of Structure • Structures
Fire Protect. Fac. & Equip	• Square Feet of Structure • Buildings Rehabbed/Constructed • Vehicles Purchased • Items of Equipment Purchased • Fire Hydrants Installed
Flood & Drainage Facilities	• Linear Feet • Culverts/Catch Basins Installed • Manholes Installed • Permanent Easements/Right-of-Way
Historic Preservation	• Buildings Rehabbed/Constructed • Units Rehabbed – Owner
Home / Building Repair	• Units Repaired – Owner • Units Repaired – Rental • Buildings Repaired
Homeless Facilities	• Buildings Rehabbed/Constructed • Households Assisted
Interim / Emergency Rental Asst.	• Households Assisted
Leasehold Improvements	• Square Feet of Structure
Machine / Cap. Equipment	• Items of Equipment Purchased
Neighb. Fac / Community Ctr	• Buildings Rehabbed/Constructed
New Construction	• Square Feet of Construction • Units Constructed – Owner • Units Constructed – Rental • Units Acquired, Constructed and Sold
Non-Capital Equipment	• Items of Equipment Purchased
Parking Facilities	• Square Feet of Pavement/Landscaping • Parking Spaces
Parks & Rec. Facilities	• Acres of Land • Square Feet of Structure • Athletic Flds/Crts Installed/Repair • General Park Improvements • Items of Equip. Installed/Repaired • Restroom Facilities Installed • Linear Feet of Fencing • Ln. Ft. of Walkway
Private Rehabilitation	• Square Feet of Structure • Units Rehabbed – Owner • Units Repaired – Owner • Facades Improved • Hslds Asst. with Counseling/Education • Lead Safe Units • Units Rehabbed – Rental • Units Repaired – Rental
Public Rehabilitation	• Buildings Rehabbed/Constructed • Handicapped Ramps Installed • Restroom Facilities Installed • Elevators/Doors Installed
Public Utilities	• Utility Poles/Lines Relocated
Senior Centers	• Buildings Rehabbed/Constructed

Activity	Outcomes	
Sewer Fac. Improvements	• Items of Equip. Installed/Repaired • Linear Feet • Tap-Ins Installed	• Water/Septic Tanks/Sludge Pits Inst. • Manholes Installed • Permanent Easements/Right-of-Way
Sidewalk Improvements	• Linear Feet • Curbcuts Installed	• Linear Feet of Curbs
Solid Waste Disposal Fac.	• Items of Equip. Installed/Repaired	• Facility Constructed/Rehabbed
Street Improvements	• Linear Feet • Culverts/Catch Basins Installed • Bridges Replaced/Repaired • Traffic Control/St. Signs Installed	• Trees, Benches, Str Lights and Planters • Slips/Slides/Retain Walls Repaired • Permanent Easements/Right-of-Way • Linear Feet of Curbs
Training / Technical Assistance	• Households Assisted	
Water & Sewer Facilities	• Items of Equip. Installed/Repaired • Fire Hydrants Installed • Linear Feet • Tap-Ins Installed	• Water/Septic Tanks/Sludge Pits Inst. • Manholes Installed • Water Valves Installed • Permanent Easements/Right-of-Way
Water Fac. Improvements	• Items of Equip. Installed/Repaired • Fire Hydrants Installed • Linear Feet • Tap-Ins Installed	• Water/Septic Tanks/Sludge Pits Inst. • Wells Drilled • Water Valves Installed • Permanent Easements/Right-of-Way

Table 1

The functions available from the Activity Outcomes and Leveraging page are listed below with steps for performing each function:

Add Outcome

1. Select an activity from the **Activity** dropdown above the outcomes and/or leveraged fund grid.
2. The outcomes and/or leveraged funds grids refresh to show all current records currently associated with the selected activity.
3. Click on the **Add Outcome** button in the outcomes grid.
4. The grid expands for adding an outcome record.
5. Enter all outcome details.
6. Click the **Insert** button.
7. Outcome details are saved.
8. Repeat Steps 3 – 7 for each outcome you need to add for the activity selected.
9. Repeat Steps 1 – 8 for each activity in the activity dropdown until outcomes have been

added for all applicable activities.

Edit Outcome

1. Click on the **Edit** icon next to an existing outcome record in the grid.
2. The grid expands for editing the outcome record.
3. Edit the outcome details.
4. Click the **Update** button.
5. Outcome details are updated.

Cancel Adding/Editing Outcome

1. Click to either **Add Outcome** or **Edit** an existing outcome record in the grid.
2. The grid expands for adding/editing an outcome record.
3. Click the **Cancel** button.
4. Changes are not saved.

Delete Outcome

1. Click on the **Delete** icon next to an outcome record in the grid.
2. Outcome record is deleted from the grid.

Add Leveraged Fund

1. Select an activity from the **Activity** dropdown above the outcomes and/or leveraged fund grid.
2. The outcomes and/or leveraged fund grids refresh to show all records currently associated with the selected activity.
3. Click on the **Add Leveraged Fund** button in the leveraged funds grid.
4. The grid expands for adding a leveraged fund record.
5. Enter all leveraged fund details.
6. Click the **Insert** button.
7. Leveraged fund details are saved.
8. Repeat Steps 3 – 7 for each leveraged fund you need to add for the activity selected.
9. Repeat Steps 1 – 8 for each activity in the activity dropdown until leveraged funds have been added for all applicable activities.

Edit Leveraged Fund

1. Click on the **Edit** icon next to an existing leveraged fund record in the grid.
2. The grid expands for editing the leveraged fund record.
3. Edit the leveraged fund details.
4. Click the **Update** button.
5. Leveraged fund details are updated.

Cancel Adding/Editing Leveraged Fund

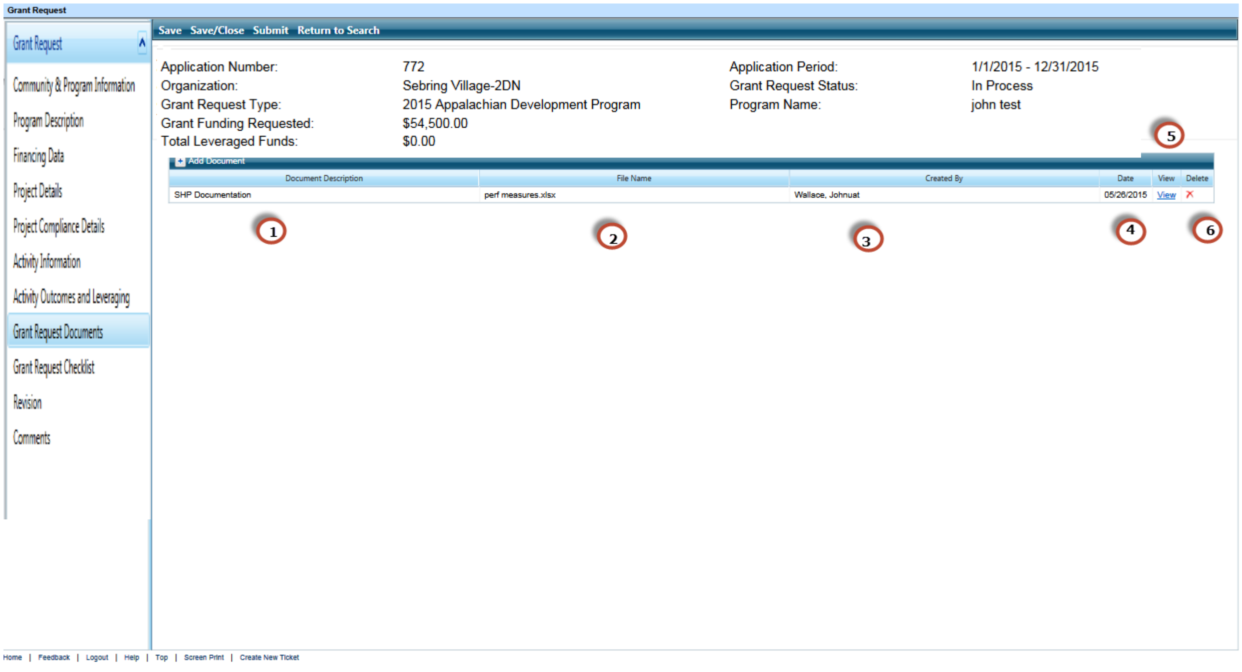
1. Click to either **Add Leveraged Fund** or **Edit** an existing leveraged fund record in the grid.
2. The grid expands for adding/editing a leveraged fund record.

3. Click the **Cancel** button.
4. Changes are not saved.

Delete Leveraged Fund

1. Click on the **Delete** icon next to a leveraged fund record in the grid.
2. Leveraged fund record is deleted from the grid.

Grant Request Documents



Field	Description
1. Document Description	Displays the name of the document that was uploaded.
2. File Name	Displays the name of the file, including the extension, that was uploaded.
3. Created By	Displays the username of the user who uploaded the file.
4. Date	Displays the date of the upload.
5. View	Use this link to view/download the document.
6. Delete	Click this icon to delete the document.

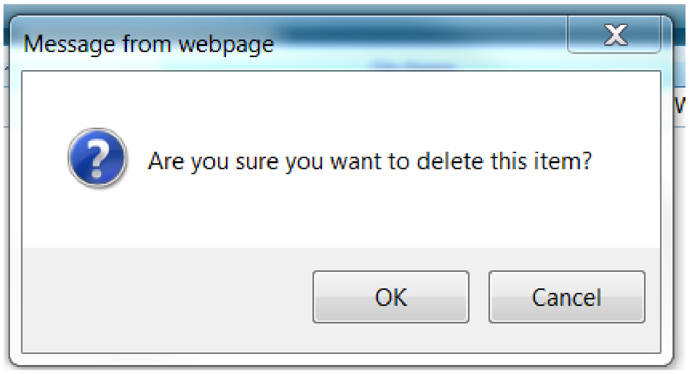
The functions available from the Grant Request Documents page are listed below with steps for performing each function:

View Document in Grant Request Documents

1. Click the **View** link next to the provided template and/or instruction form or next to your response document.
2. A new window displays with the document details displayed.
3. Click the **Open** to open the document or **Save ./ Save As** to save the document to your computer.

Delete Document from Grant Request Documents

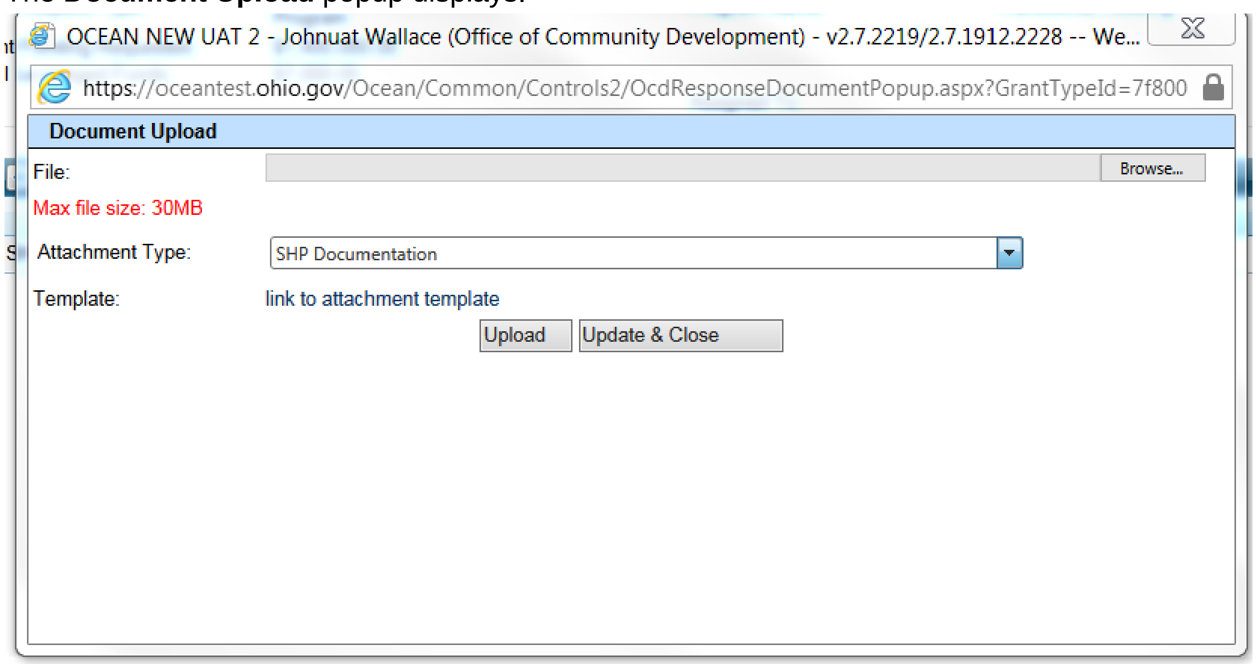
1. Click the **Delete** icon next to a document in the grant request documents grid.
2. Confirm that the document can be deleted by clicking **OK.**



3. Your response document will be deleted.

Add Document

1. Click the **Add Document** button in the documents grid to attach a file that is not listed in the grant request documents grid.
2. The **Document Upload** popup displays.

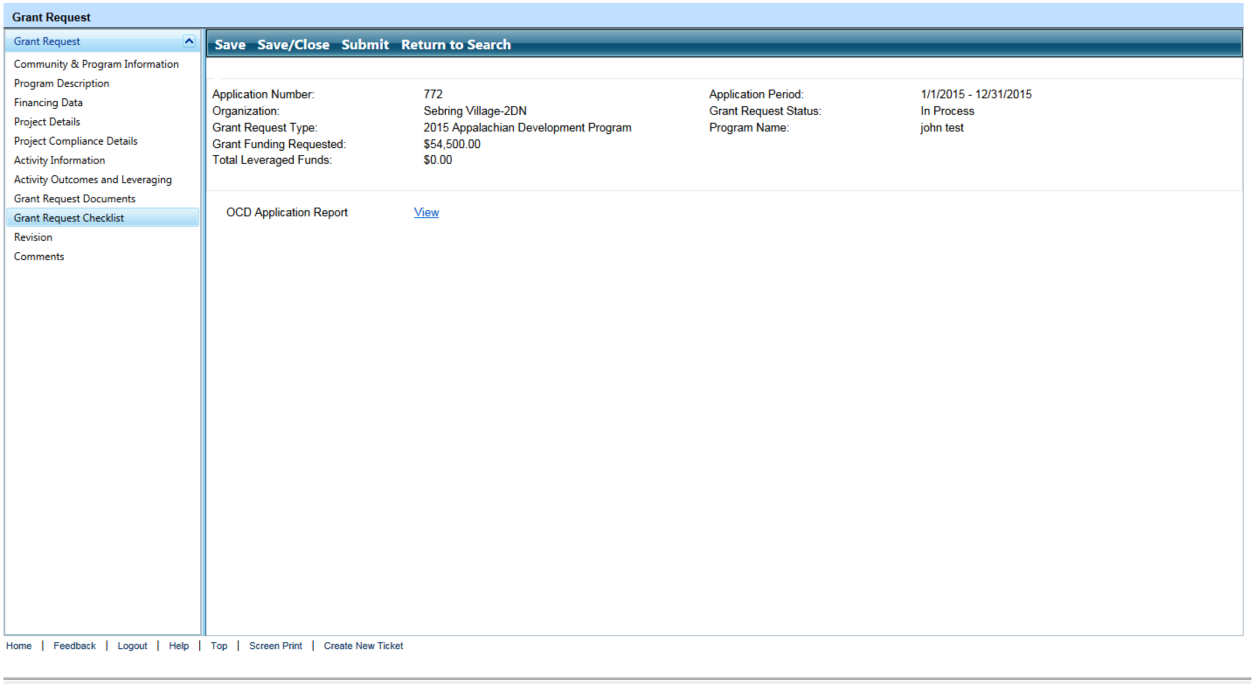


3. Click the **Upload** or **Upload and Close** buttons.
4. Click **Browse**.
5. The **Windows File Explorer** popup displays.
6. Navigate to the file you would like to attach on your local machine and click the **Open**

button.

7. The name of the file will be displayed in the **File** field on the document upload popup.
8. Select the **Attachment Type** from the dropdown list (only option available will be ‘SHP Documentation’).
9. Click the **Upload or Upload and Close** buttons to upload your document to the documents grid.

Grant Request Checklist

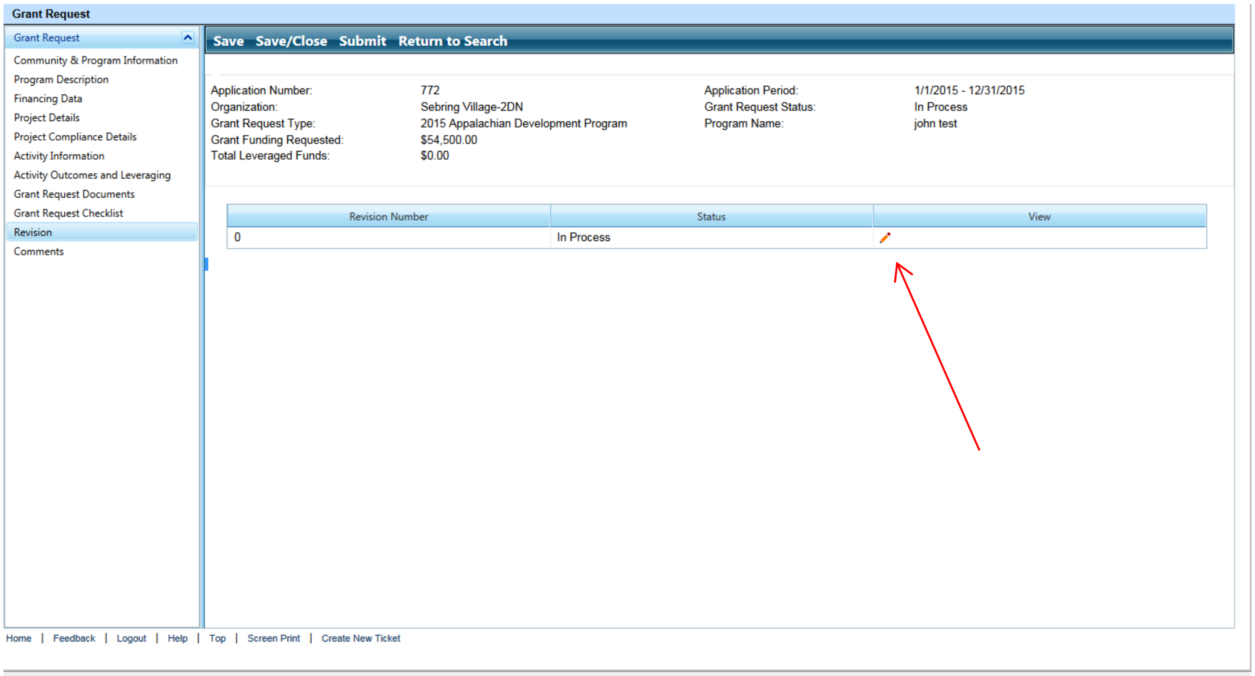


The functions available from the Grant Request Checklist page are listed below with steps for performing each function:

View

1. Click the **View** link next to the report listed on the grant request checklist page.
2. A new window displays with the report displayed.
3. Use the **Save** and **Print** icons in the window to save and/or print a copy of the report for your records.

Revision

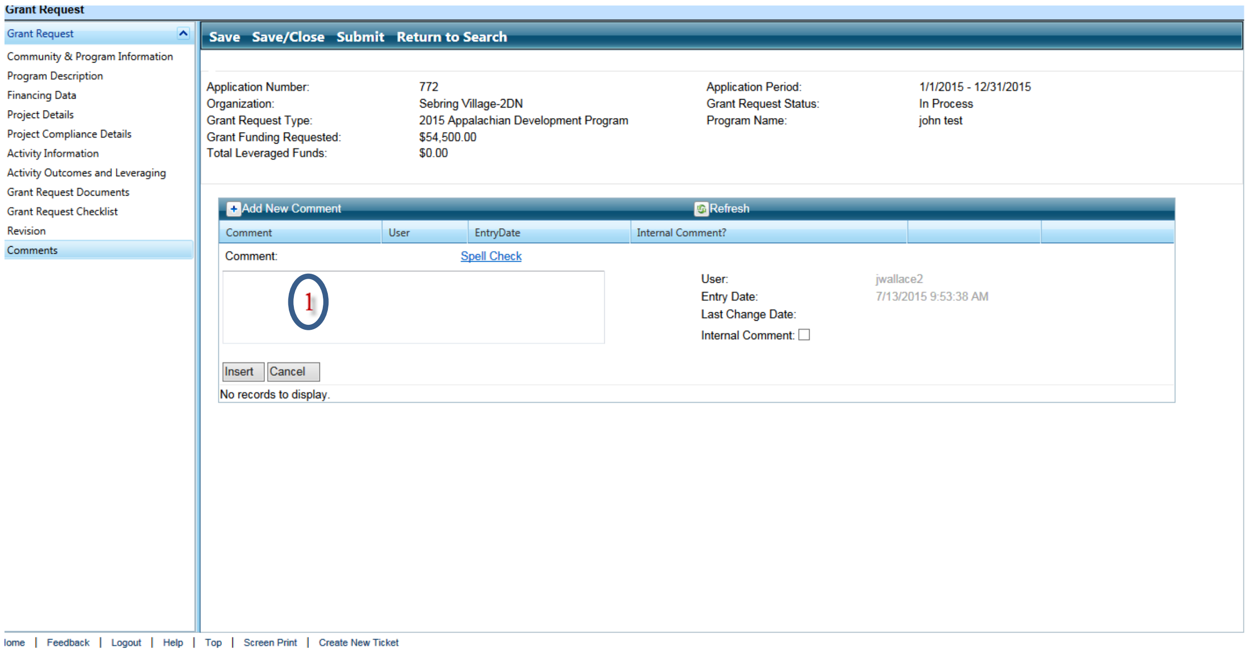


The functions available from the Revision page are listed below with steps for performing each function:

View Revision

1. Click the **View** icon next to the revision number in the grid.
2. A new window displays with the details of the revision number selected. *Note: All previous revisions will be non-editable, but data submitted in previous revisions will be available for viewing.
3. Close the window to return to the application request.

Comments



Field	Description
1. Comment	Enter a comment in the comment field. These comments will be retained with the application request along with your username, entry date, and date of any changes you made to your comments.

The functions available from the Comments page are listed below with steps for performing each function:

Add Comment

1. Click on the **Add New Comment** button in the grid.
2. The grid expands for adding a comment record.
3. Enter comment details.
4. Click the **Insert** button.
5. Comment details are saved.

Edit Comment

1. Click on the **Edit** icon next to a comment that you created. *Note: Comments can only be edited by the user who created them.
2. The grid expands for editing the comment record.
3. Edit the comment details.
4. Click the **Update** button.

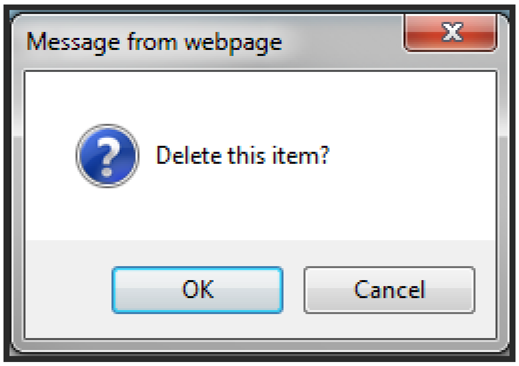
5. Comment details are updated.

Cancel Adding/Editing Comment

1. Click to either **Add New Comment** or **Edit** an existing comment record in the grid.
2. The grid expands for adding/editing a comment record.
3. Click the **Cancel** button.
4. Changes are not saved.

Delete Comment

1. Click on the **Delete** icon next to an existing comment record in the grid. *Note: Comments can only be deleted by the user who created them.
2. A message will display asking if you are sure you want to delete this item.



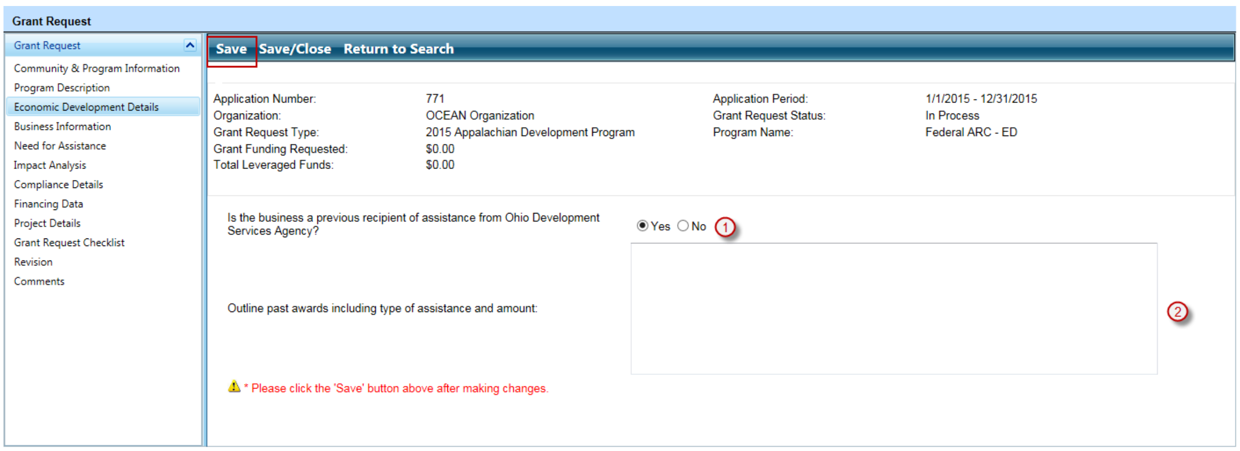
3. Click **OK**.
4. Comment record is deleted from the grid.

Federal ARC – Economic Development Program

Note, the Community & Program Information and Program Description sections are essentially the same as that done for State GOA.

Economic Development Details

The Economic Development Details page only displays after a program has been added on the Program Description page for 'Federal ARC – Economic Development'



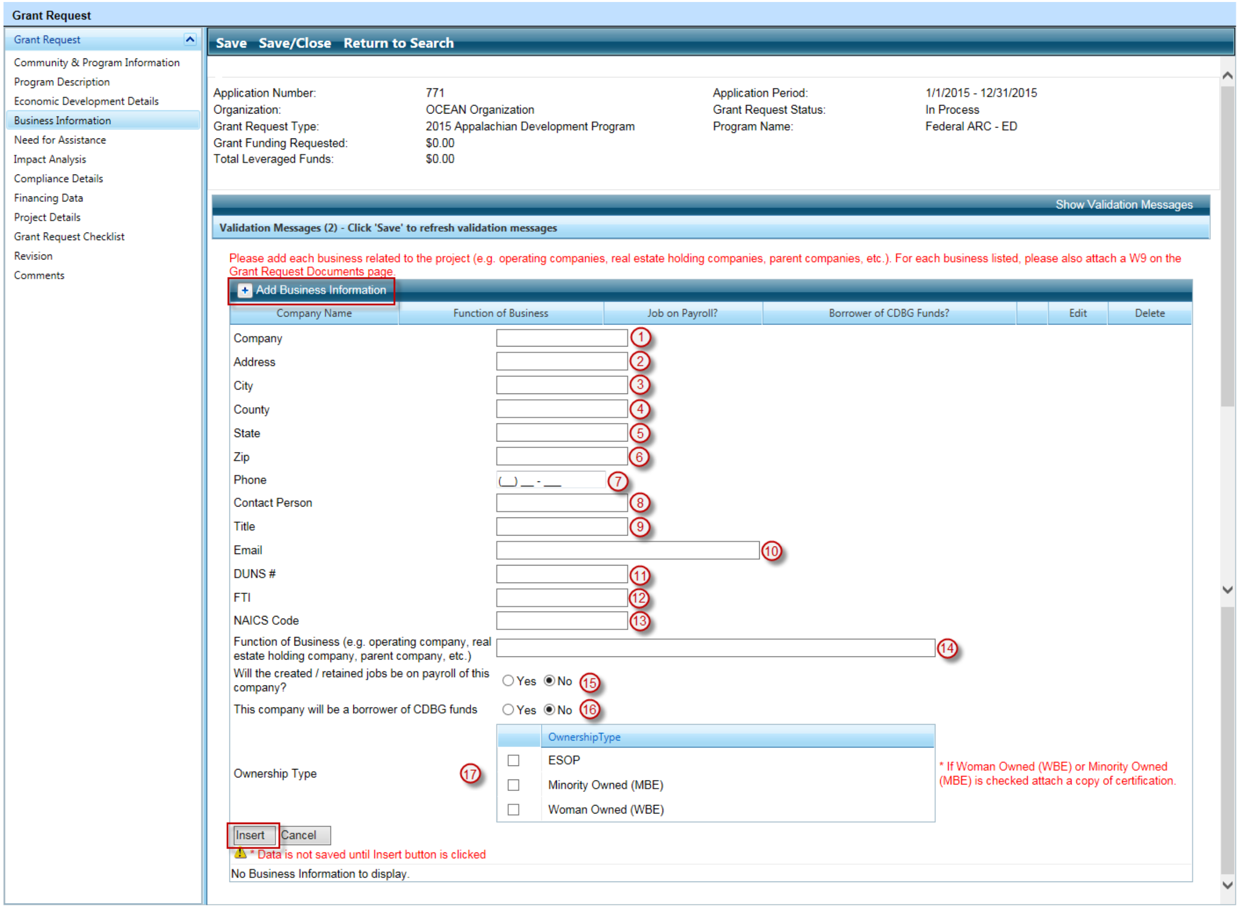
Field	Description
1. Previous Recipient of Assistance?	Select 'Yes' if the business is previous recipient of assistance from Ohio Development Services Agency.
2. Past Awards	Enter a description for the outline of past awards including type of assistance and amount. This field only appears when the user has selected 'Yes' for Field 1.

The functions available from the Economic Development Details page are listed below with steps for performing each function:

Save Economic Development Details

1. Enter **Economic Development** program data.
2. Click the **Save** button in the top button bar.

Business Information



Field	Description
1 - 6. Company Information	Enter Company Name and Address information for this Business Information record.
7. Company Phone	Enter the Business phone number.
8. Contact Person	Enter the contact person's name.
9. Title	Enter the Title of the contact person.
10. Email	Enter the Email address for the contact person.
11. DUNS #	Enter the Business DUNS Number.
12. FTI	Enter the Business Federal Tax ID Number.
13. NAICS Code	Enter the Business NAICS Code.
14. Business Function	Describe the function this business performs.
15. Jobs on Payroll	Select 'Yes' or 'No' based on the description provided.
16. Borrower of CDBG Funds?	Select 'Yes' or 'No' based on the description provided.

17. Ownership Types	Select one or multiple Ownership Types. The options include: • ESOP • Minority Owned (MBE) • Woman Owned (WBE)

Add Business Information

1. Click on the **Add Business Information** button in the grid.
2. The grid expands for adding a Business Information record.
3. Enter all Business Information details.
4. Click the **Insert** button.
5. Business Information details are saved.
6. Repeat Steps 1 – 5 for each Business Information for your grant request.

Edit Business Information

6. Click on the **Edit** icon next to an existing Business Information record in the grid.
7. The grid expands for editing the Business Information record.
8. Edit the Business Information details.
9. Click the **Update** button.
10. Business Information details are updated.

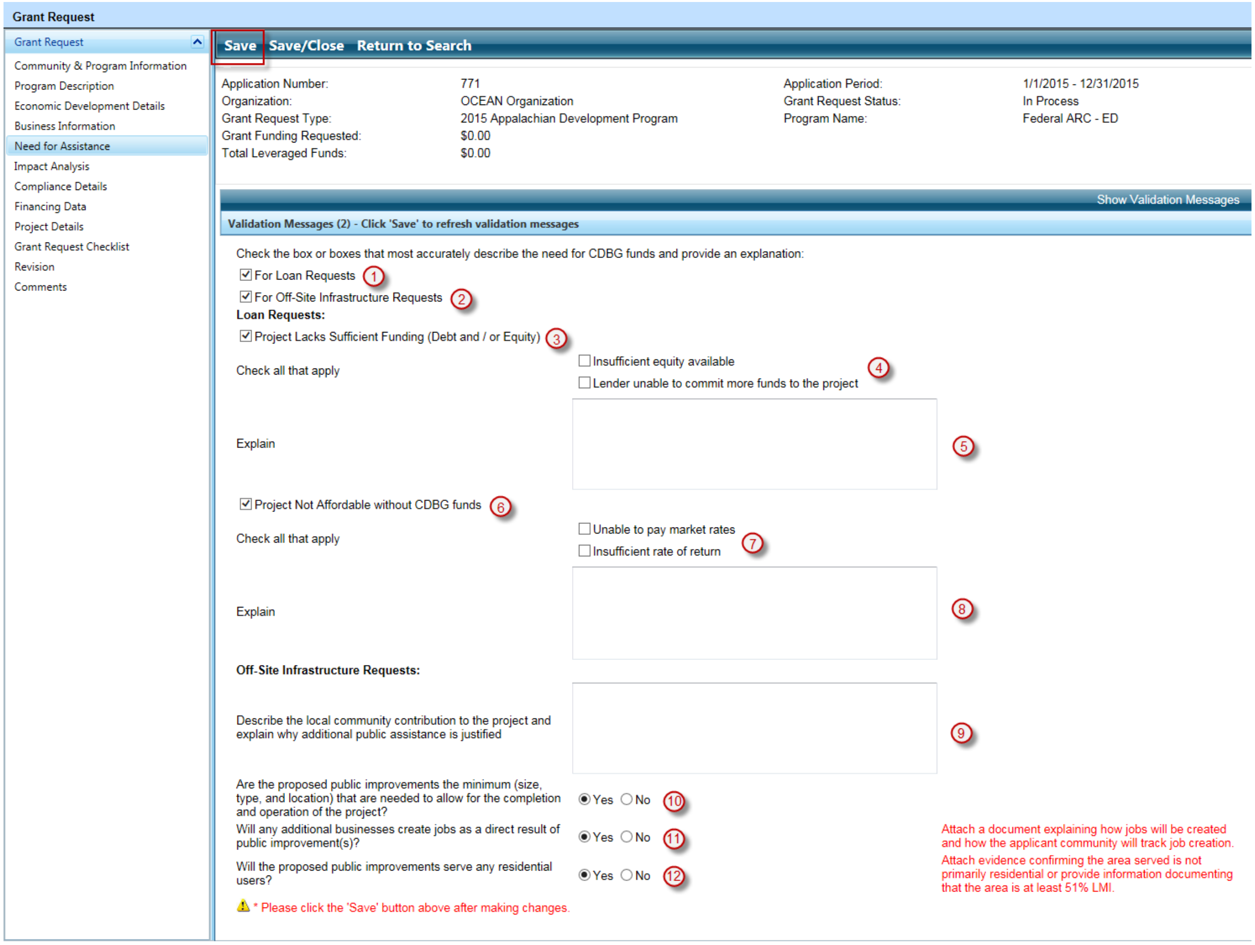
Cancel Adding/Editing Business Information

5. Click to either **Add Business Information** or **Edit** an existing Business Information in the grid.
6. The grid expands for adding/editing a Business Information record.
7. Click the **Cancel** button.
8. Changes are not saved.

Delete Business Information

3. Click on the **Delete** icon next to an existing Business Information record in the grid.
4. Business Information record is deleted from the grid

Need for Assistance



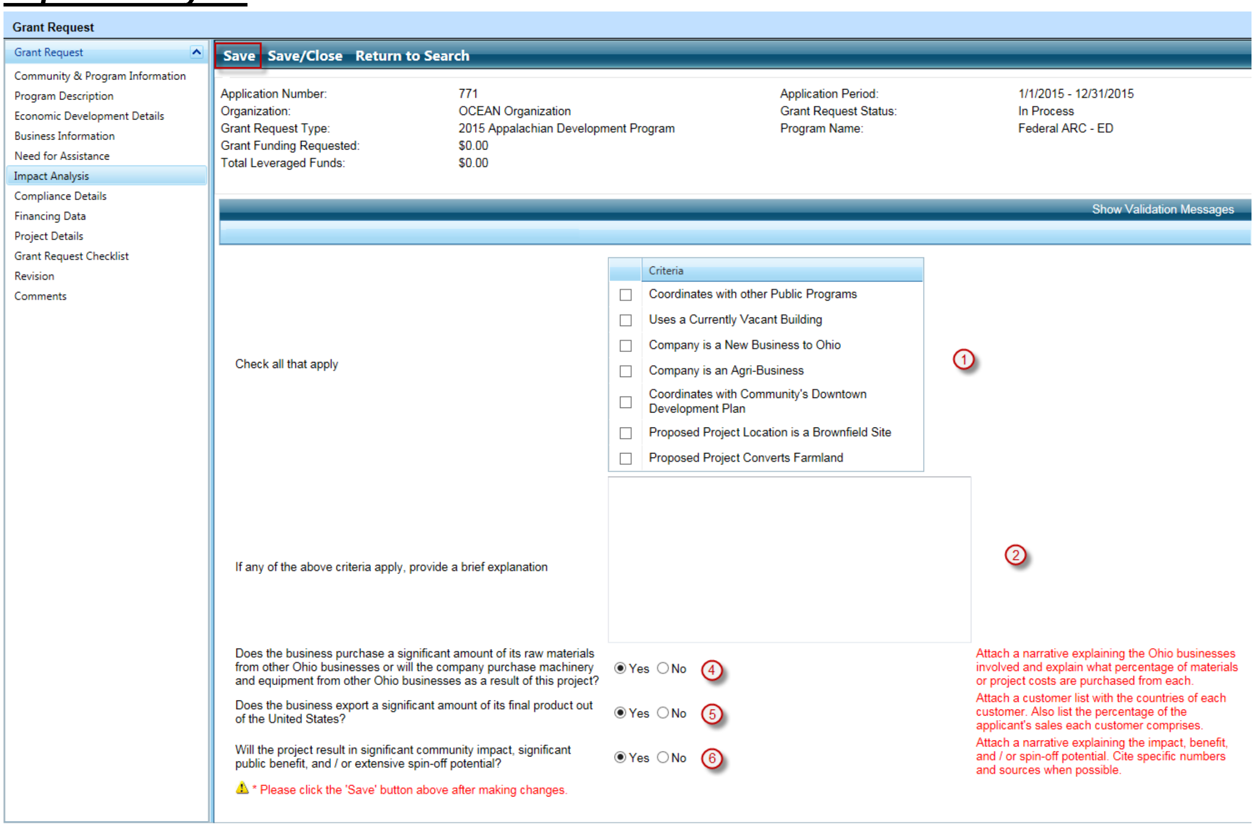
Field	Description
1. Loan Request Needs	Select if this project will need CDBG Funding for the purpose of loan requests. Once selected, fields 3 – 8 will be available.
2. Off-Site Infrastructure Requests	Select if this application will need CDBG Funding for the purpose of off-site infrastructure requests. Once selected, fields 9 - 12 will be available.
3. Project Lacks Sufficient Funding	Select if this project lacks sufficient funding. Once selected, fields 4 and 5 will be available.
4. Lacks Sufficient Funding reasons.	Select each if applicable. Only available if field 3 is selected.
5. Lacks Funding Explanation	Enter the explanation as to why sufficient funding was unavailable. Only available if field 3 is selected.
6. Not Affordable without CDBG Funding	Select if this project is not affordable without CDBG Funding. Once selected, fields 7 and 8 will be available.
7. CDBG Affordability	Select each if applicable. Only available if field 6 is selected.
8. CDBG Affordability Explanation	Enter the explanation as to why project is not affordable without CDBG funding. Only available if field 6 is selected.

9. Local Community Contribution	Describe the local community contribution to the project and explain why additional public assistance is justified. Only available if field 2 is selected.
10. Proposed Public Improvements Minimum	Select 'Yes' or 'No' based upon the description.
11. Additional Businesses Job Creation	Select 'Yes' or 'No' based upon the description.
12. Proposed Public Improvements	Select 'Yes' or 'No' based upon the description.

Save Need for Assistance Details

1. Enter **Need for Assistance** program data.
2. Click the **Save** button in the top button bar.

Impact Analysis



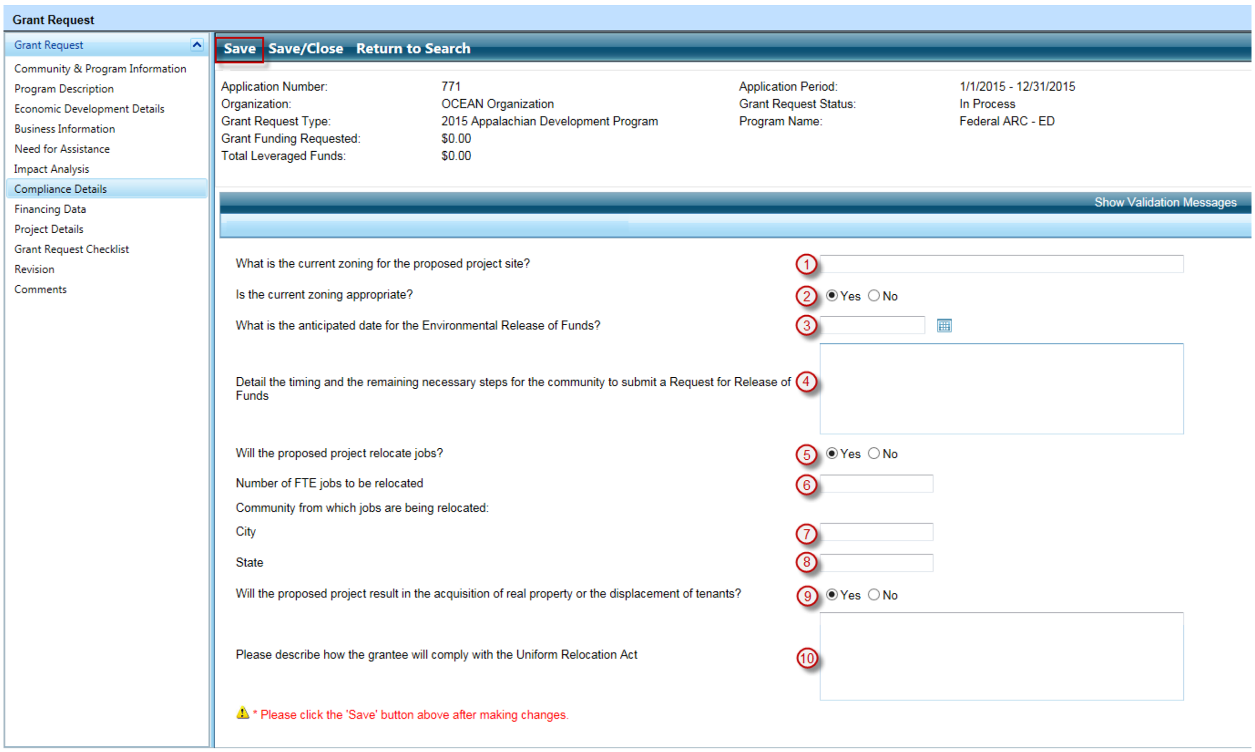
Field	Description
1. Criteria	Select all that apply.
2. Criteria Explanation	Enter an explanation for criteria selections.
3. Raw Material Purchases	Select 'Yes' or 'No' based upon the description.
4. Product Export	Select 'Yes' or 'No' based upon the description.

5. Community Impact	Select 'Yes' or 'No' based upon the description.

Save Impact Analysis Details

1. Enter **Impact Analysis** program data.
2. Click the **Save** button in the top button bar.

Compliance Details



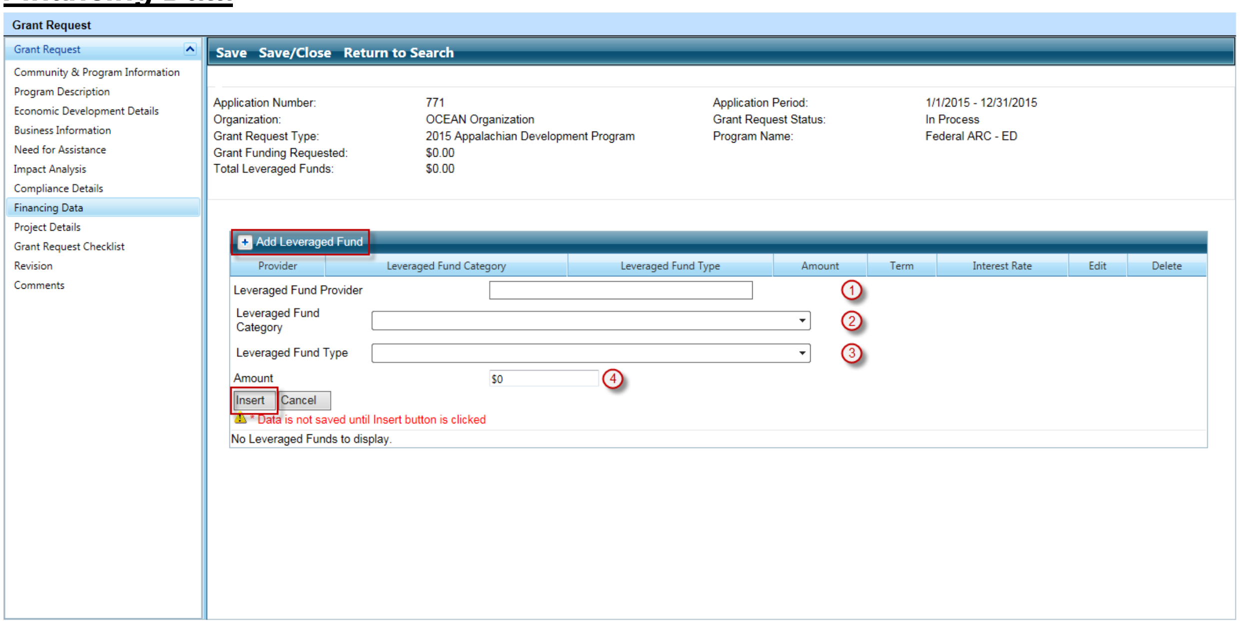
Field	Description
1. Current Zoning	Enter details for the current zoning of the proposed project site.
2. Zoning Appropriate?	Select 'Yes' or 'No' based upon the description.
3. Anticipated Environmental Release Date	Enter or select the anticipated Environmental Release of Funds date.
4. Request for Release of Funds Details.	Explain the details of the timing and the remaining necessary steps for the community to submit a Request for Release of Funds.
5. Job Relocation?	Select 'Yes' or 'No' based upon the description. Once selected, fields 6 – 8 will be available.
6. Number of FTE jobs	Enter the Number of FTE jobs to be relocated. Numeric entries only.
7. Relocation Community	Enter the community from which jobs are being relocated. Only available if user selected 'Yes' for 'Job Relocation?'

8. Relocated Job City	Enter the City where jobs are being relocated. Only available if user selected 'Yes' for 'Job Relocation?'
9. Relocated Job State	Enter the State where jobs are being relocated. Only available if user selected 'Yes' for 'Job Relocation?'
10. Acquisition of Real Property?	Select 'Yes' or 'No' based upon the description.
11. Uniform Relocation Act Compliance	Please describe how the grantee will comply with the Uniform Relocation Act. Only available if user has selected 'Yes' for 'Acquisition of Real Property' above.

Save Compliance Details

1. Enter **Compliance Details** program data.
2. Click the **Save** button in the top button bar.

Financing Data



Field	Description
1. Leveraged Fund Provider	Enter the name of the Leveraged Fund provider in the textbox.
2. Leveraged Fund Category	Select the category for the Leveraged Fund from the dropdown. Dropdown choices include: • State and Local Funds • Private Funds • Federal ARC Funds • Other Federal • Other Funds • CDBG RLF • Equity

3. Leveraged Fund Type	Select the type of Business Information from the dropdown. Dropdown choices include: • Grant • In Kind • Loan For Leveraged Funds with the 'Equity' Category, the following Dropdown choice include: • Grant
4. Amount	Enter the dollar amount of the Leveraged Fund for the provider entered.
Term (not shown)	This field only displays when 'Loan' is selected for the Leveraged Fund Type. Enter the number of months of the loan.
Interest Rate (not shown)	This field only displays when 'Loan' is selected for the Leveraged Fund Type. Enter the percentage interest rate of the loan.
Collateral (not shown)	This field only displays when 'Loan' is selected for the Leveraged Fund Type. Enter a description of the collateral for the loan.

The functions available from the Financing Data page are listed below with steps for performing each function:

Add Leveraged Fund

7. Click on the **Add Leveraged Fund** button in the grid.
8. The grid expands for adding a Leveraged Fund record.
9. Enter all Leveraged Fund details.
10. Click the **Insert** button.
11. Leveraged Fund details are saved.
12. Repeat Steps 1 – 5 for each provider of Leveraged Funds for your grant request.

Edit Leveraged Fund

11. Click on the **Edit** icon next to an existing Leveraged Fund record in the grid.
12. The grid expands for editing the Leveraged Fund record.
13. Edit the Leveraged Fund details.
14. Click the **Update** button.
15. Leveraged Fund details are updated.

Cancel Adding/Editing Leveraged Funds

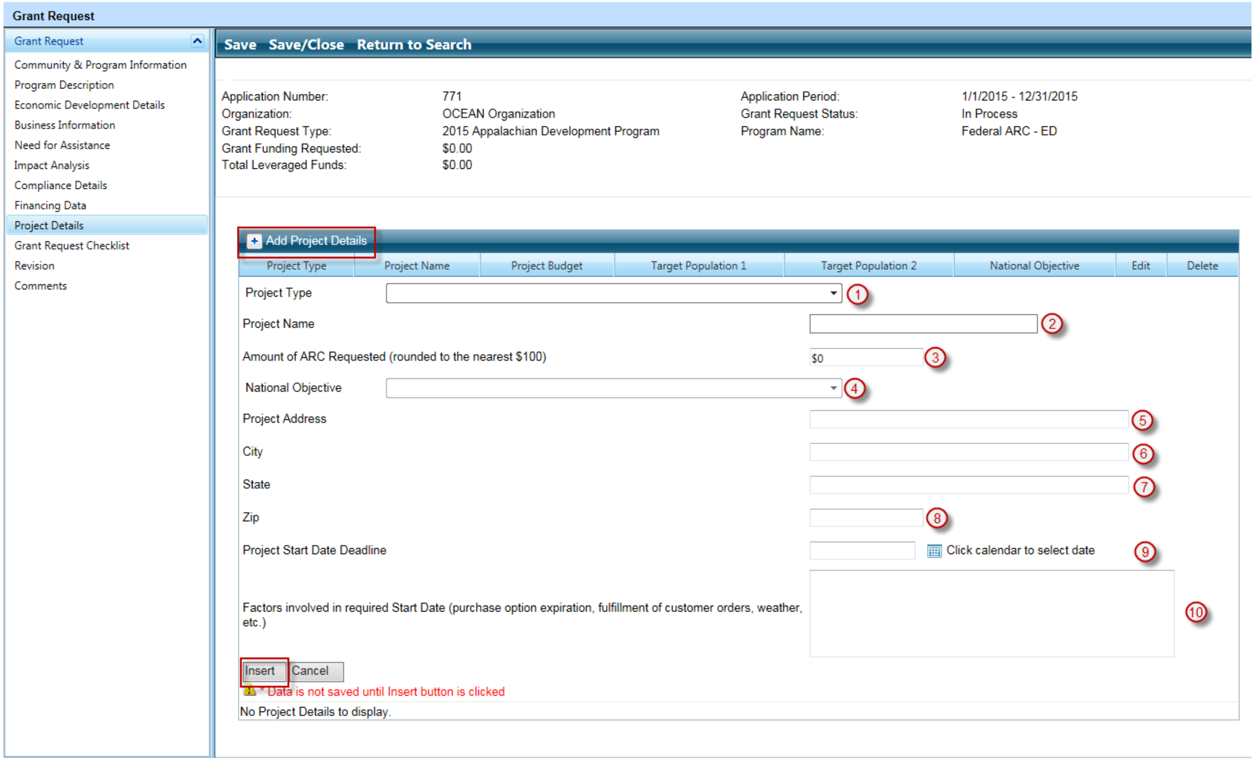
9. Click to either **Add Leveraged Fund** or **Edit** an existing Leveraged Fund in the grid.
10. The grid expands for adding/editing a Leveraged Fund record.
11. Click the **Cancel** button.
12. Changes are not saved.

Delete Leveraged Fund

5. Click on the **Delete** icon next to an existing Leveraged Fund record in the grid.
6. Leveraged Fund record is deleted from the grid. *Note: When deleting a Leveraged

Fund, all related Activity Leveraging Funds will be deleted as well.

Project Details



Field	Description
1. Project Type	Select the project type from the dropdown. For the ADP – Federal ARC – Economic Development Program, the available project types include: • Economic Development • Administration Only one 'Administration' and one 'Economic Development' project can be added to each application.
2. Project Name	Enter a name for the project that uniquely identifies this project. Administration Type project names will default to 'Administration' and are not editable.
3. Amount of ARC Requested	Enter the budget for the project. This budget is the amount of funds that are being requested from OCD.
4. National Objective	When adding projects, the National Objective will be defaulted to the following values based upon the Project Type selected: • Economic Development Type projects will default to 'Direct Benefit – Job Creation (LMJ)' • Administration Type projects will default to 'Administration' National Objectives are not editable.
5. Project Address	Enter the street address for the project. Not available for 'Administration' type projects.
6. Project City	Enter the City for the project. Not available for 'Administration' type projects.

7. Project State	Enter the State for the project. Not available for 'Administration' type projects.
8. Project Zip	Enter the Zip Code for the project. Not available for 'Administration' type projects.
9. Start Date Deadline	Enter or select the Project Start Date Deadline. Not available for 'Administration' type projects.
10. Factors Involved in Start Date	Describe the factors involved in the required Start Date determination. Not available for 'Administration' type projects.

The functions available from the Project Details page are listed below with steps for performing each function:

Add Project Detail

1. Click on the **Add Project Details** button in the grid.
2. The grid expands for adding a project detail record.
3. Enter all project detail information.
4. Click the **Insert** button.
5. Project details information is saved.
6. Repeat Steps 1 – 5 for each project on your application.

Edit Project Detail

1. Click on the **Edit** icon next to an existing project detail record in the grid.
2. The grid expands for editing the **Project Details.**
3. Edit the **Project Details** information.
4. Click the **Update** button.
5. **Project Name** and **Project Budget** information is updated.

Cancel Adding/Editing Project Detail

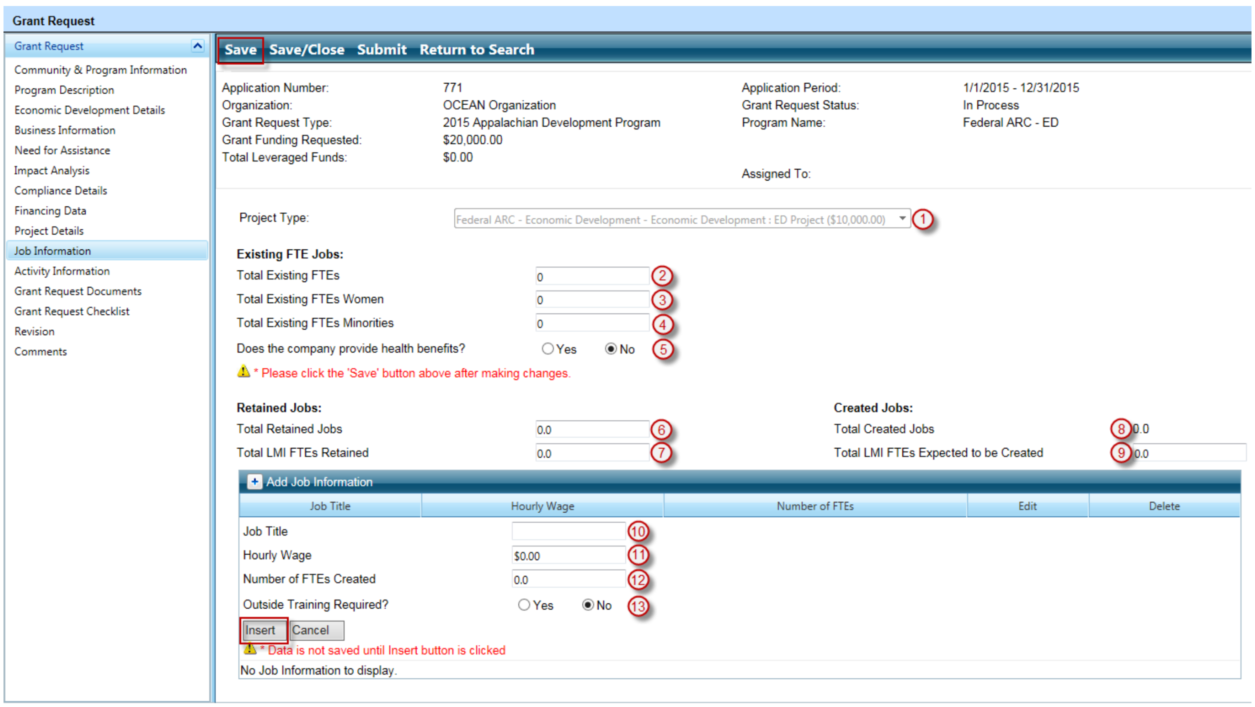
1. Click to **Add Project Details** or **Edit** an existing project detail record in the grid.
2. The grid expands for adding/editing a project detail record.
3. Click the **Cancel** button.
4. Changes are not saved.

Delete Project Detail

3. Click on the **Delete** icon next to an existing project detail record in the grid.
4. Project detail record is deleted from the grid. *Note: When deleting a project detail record, all related Job Information, Activity Information, and Activity Outcomes and Leveraging records will be deleted as well.

Job Information

Job Information contains details per project, as well as multiple Job Information records. Job Information data can be added once a project of type ‘Economic Development’ is added to the application.



Field	Description
1. Project Type	The currently selected Project.
2. Total Existing FTEs	Enter the total number existing FTEs.
3. Total Existing FTEs Women	Enter the total number existing FTEs Women.
4. Total Existing FTEs Minorities	Enter the total number existing FTEs Minorities.
5. Health Benefits?	Select ‘Yes’ if health benefits are provided.
6. Total Retained Jobs	Enter the number of Total Retained Jobs.
7. Total LMI FTEs Retained	Enter the number of Total LMI FTEs Retained.
8. Total Created Jobs	Calculated field. Represents the total number of FTEs entered in the Job Information grid below.
9. Total LMI FTSs Expected to be Created	Enter the Total LMI FTEs Expected to be Created.

Save Job Information Details

1. Enter **Job Information** program data.

2. Click the **Save** button in the top button bar.

Field	Description
10. Job Title	Enter the job title for the Job Information record.
11. Hourly Wage	Enter the Hourly Wage for the Job Information record.
12. Number of FTEs Created	Enter the total number of FTEs created. This entry will be reflected in the 'Total Created Jobs' field in the Job Information details.
13. Outside Training Required?	Select 'Yes' or 'No' based upon the description.

Add Job Information

7. Click on the **Add Job Information** button in the grid.
8. The grid expands for adding a Job Information record.
9. Enter all project detail information.
10. Click the **Insert** button.
11. Project details information is saved.
12. Repeat Steps 1 – 5 for each project on your application.

Edit Job Information

6. Click on the **Edit** icon next to an existing project detail record in the grid.
7. The grid expands for editing the **Job Information.**
8. Edit the **Job Information** information.
9. Click the **Update** button.
10. **Job Information** is updated.

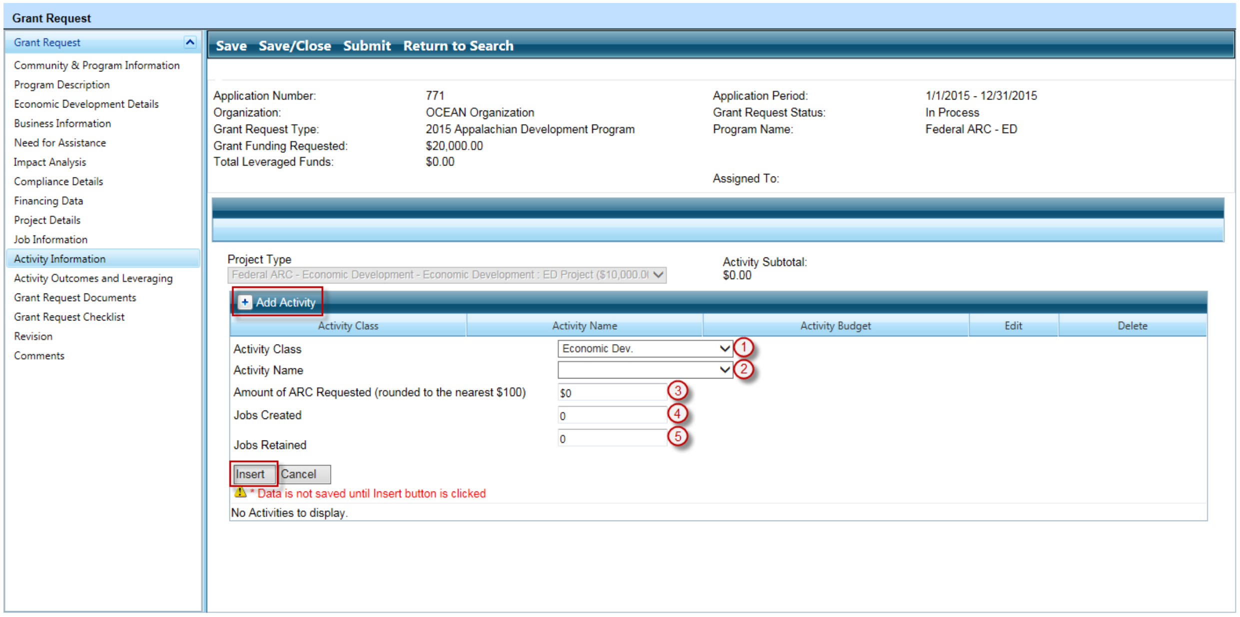
Cancel Adding/Editing Job Information

5. Click to **Add Job Information** or **Edit** an existing Job Information record in the grid.
6. The grid expands for adding/editing a Job Information record.
7. Click the **Cancel** button.
8. Changes are not saved.

Delete Job Information

5. Click on the **Delete** icon next to an existing Job Information record in the grid.
6. Job Information record is deleted from the grid.

Activity Information



Field	Description
1. Activity Class	Select an activity class for the new activity. If the activity is being entered for an Administration project type, then the available activity class options include: • Administration If the activity is being entered for an Economic Development project type, then the available activity class options include: • Economic Dev.
2. Activity Name	Select the activity name from the dropdown. The dropdown choices depend on the activity class that is selected. See the table below for potential activity names per activity class.
3. Amount of ARC Requested	Enter the Amount of ARC Requested for the activity. All activity budgets for the activities on the project must total up to the project budget.
4. Jobs Created	Enter the number of jobs created by this activity. This option only appears for Activity Classes of type 'Economic Dev.'
5. Jobs Retained	Enter the number of jobs retained by this activity. This option only appears for Activity Classes of type 'Economic Dev.'

Activity Class	Activities
Administration	• General Admin

Economic Dev.	• Acquisition • Flood & Drainage Facilities • Machine / Cap. Equipment • New Construction • Off-Site Improvements • Professional Fees • Sewer Fac. Improvements • Street Improvements • Water Fac. Improvements • Working Capital	• Demolition / Clearance • Leasehold Improvements • Moving Costs • Non-capital Equipment • Other Costs • Parking Facilities • Private Rehabilitation • Public Utilities • Sidewalk Improvements • Solid Waste Disposal Fac. • Training / Technical Assistance • Water and Sewer Facilities

The functions available from the Activity Information page are listed below with steps for performing each function:

Add Activity

1. Select a project from the **Project Type** dropdown above the activity grid.
2. The activity grid refreshes to show all activities currently associated with the selected project.
3. Click on the **Add Activity** button in the grid.
4. The grid expands for adding an activity record.
5. Enter all activity details.
6. Click the **Insert** button.
7. Activity details are saved.
8. Repeat Steps 3 – 7 for each activity you need to add for the project type selected.
9. Repeat Steps 1 – 8 for each project type in the project dropdown until activities have been added for all projects.

Edit Activity

1. Click on the **Edit** icon next to an existing activity record in the grid.
2. The grid expands for editing the activity record.
3. Edit the activity details.
4. Click the **Update** button.
5. Activity details are updated.

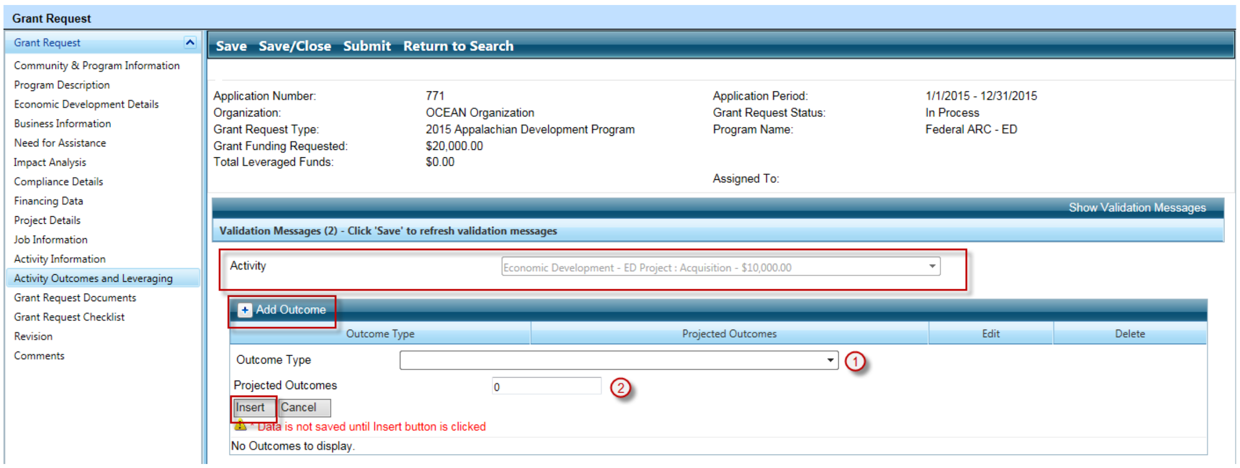
Cancel Adding/Editing Activity

1. Click to either **Add Activity** or **Edit** an existing activity record in the grid.
2. The grid expands for adding/editing an activity record.
3. Click the **Cancel** button.
4. Changes are not saved.

Delete Activity

1. Click on the **Delete** icon next to an existing activity record in the grid.
2. Activity record is deleted from the grid. *Note: When deleting an activity record, all related Activity Compliance Details and Activity Outcomes and Leveraging records will be deleted as well.

Activity Outcomes and Leveraging



Field	Description
1. Outcome Type	Select the outcome type from the dropdown. The dropdown choices depend on the activity that the outcome is being added for. See the table below for potential outcome types per activity.
2. Projected Outcomes	Enter the projected number of outcomes for the activity.

The following activities do not require Activity Outcomes:

- Moving Costs
- Off-Site Improvements
- Other Costs
- Professional Fees

Activity	Outcomes	
Acquisition	• Acres of Land • Square Feet of Structure • Structures • Parcels	• Households Assisted • Business Buyouts • Permanent Easements/Right-of-Way
Demolition / Clearance	• Structures Demolished	

Activity	Outcomes	
Flood & Drainage Facilities	• Linear Feet • Culverts/Catch Basins Installed	• Manholes Installed • Permanent Easements/Right-of-Way
Leasehold Improvements	• Square Feet of Structure	
Machine / Cap. Equipment	• Items of Equipment Purchased	
New Construction	• Square Feet of Construction • Units Constructed – Owner	• Units Constructed – Rental • Units Acquired, Constructed and Sold
Non-capital Equipment	• Items of Equipment Purchased	
Parking Facilities	• Square Feet of Pavement/Landscaping	• Parking Spaces
Private Rehabilitation	• Square Feet of Structure • Units Rehabbed – Owner • Units Repaired – Owner • Facades Improved	• Hslds Asst. with Counseling/Education • Lead Safe Units • Units Rehabbed – Rental • Units Repaired – Rental
Public Utilities	• Utility Poles/Lines Relocated	
Sewer Fac. Improvements	• Items of Equip. Installed/Repaired • Linear Feet • Tap-Ins Installed	• Water/Septic Tanks/Sludge Pits Inst. • Manholes Installed • Permanent Easements/Right-of-Way
Sidewalk Improvements	• Linear Feet • Curb cuts Installed	• Linear Feet of Curbs
Solid Waste Disposal Fac.	• Items of Equip. Installed/Repaired	• Facility Constructed/Rehabbed
Street Improvements	• Linear Feet • Culverts/Catch Basins Installed • Bridges Replaced/Repaired • Traffic Control/St. Signs Installed	• Trees, Benches, Str Lights and Planters • Slips/Slides/Retain Walls Repaired • Permanent Easements/Right-of-Way • Linear Feet of Curbs
Training / Technical Assistance	• Households Assisted	
Water & Sewer Facilities	• Items of Equip. Installed/Repaired • Fire Hydrants Installed • Linear Feet • Tap-Ins Installed	• Water/Septic Tanks/Sludge Pits Inst. • Manholes Installed • Water Valves Installed • Permanent Easements/Right-of-Way
Water Fac. Improvements	• Items of Equip. Installed/Repaired • Fire Hydrants Installed • Linear Feet • Tap-Ins Installed	• Water/Septic Tanks/Sludge Pits Inst. • Wells Drilled • Water Valves Installed • Permanent Easements/Right-of-Way

Activity	Outcomes
Working Capital	• Businesses / Organizations Assisted

The functions available from the Activity Outcomes and Leveraging page are listed below with steps for performing each function:

Add Outcome

1. Select an activity from the **Activity** dropdown above the outcomes and/or Business Information grid.
2. The outcomes and/or Business Informations grids refresh to show all current records currently associated with the selected activity.
3. Click on the **Add Outcome** button in the outcomes grid.
4. The grid expands for adding an outcome record.
5. Enter all outcome details.
6. Click the **Insert** button.
7. Outcome details are saved.
8. Repeat Steps 3 – 7 for each outcome you need to add for the activity selected.
9. Repeat Steps 1 – 8 for each activity in the activity dropdown until outcomes have been added for all applicable activities.

Edit Outcome

1. Click on the **Edit** icon next to an existing outcome record in the grid.
2. The grid expands for editing the outcome record.
3. Edit the outcome details.
4. Click the **Update** button.
5. Outcome details are updated.

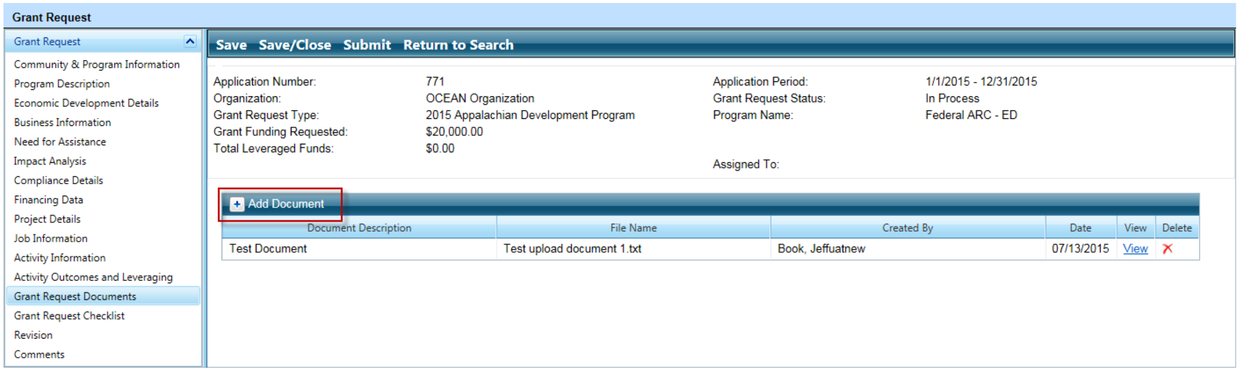
Cancel Adding/Editing Outcome

1. Click to either **Add Outcome** or **Edit** an existing outcome record in the grid.
2. The grid expands for adding/editing an outcome record.
3. Click the **Cancel** button.
4. Changes are not saved.

Delete Outcome

1. Click on the **Delete** icon next to an outcome record in the grid.
2. Outcome record is deleted from the grid.

Grant Request Documents



Field	Description
1. File Name	Displays the name of the file you uploaded.
2. Description	Displays the name of the template and/or instruction form document uploaded by OCD for your use in completing the application attachments.
3. Created By	Displays the username of the user who uploaded the response document.
4. Date	Displays the date the response document was uploaded.
5. View	Use this second link to view/download your completed template or instruction form.
6. Delete	Click this icon to delete your response document.

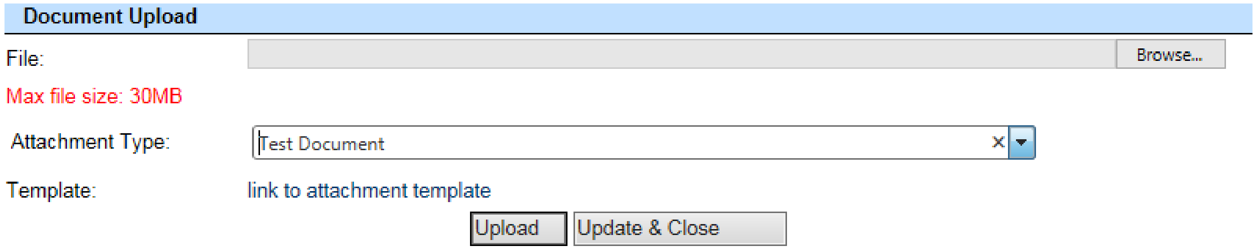
The functions available from the Grant Request Documents page are listed below with steps for performing each function:

View Document in Grant Request Documents

1. Click the **View** link next to your response document.
2. A new window displays with the document details displayed.
3. Click the **File → Save As** menu option to save a copy of the document to your computer or close the window to return to the grant request documents page.

Attach Document in Grant Request Documents

1. Click the **Add Document** button in the grant request documents grid.
2. The **Document Upload** popup displays.



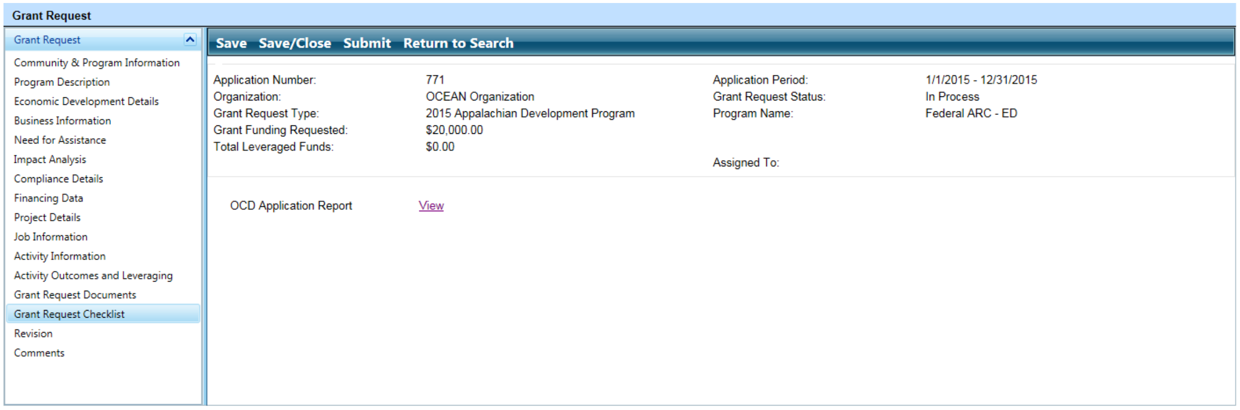
*Note: If the attachment type selected is for a project or activity, then you will be required to select the project and/or activity to attach the document to. These will be shown by additional dropdowns on the document upload popup above.

3. Click the **Browse** button.
4. The **Windows File Explorer** popup displays.
5. Navigate to the file you would like to attach on your local machine and click the **Open** button.
6. The name of the file will be displayed in the **File** field on the document upload popup.
7. Select the **Attachment Type** from the dropdown list (this is a list of documents from OCD). You can click on the “link to attachment template” to view the document from OCD.
8. Enter a **Comment** for your document.
9. Click the **Upload** button to attach your document to the grant application.
10. You may upload additional documents by selecting another **Application Type** and attaching the appropriate file. Once all documents are uploaded, click the **Update & Close** button to close the window and refresh the document list.

Delete Document from Grant Request Documents

1. Click the **Delete** icon next to a document in the grant request documents grid.
2. Your response document will be deleted.

Grant Request Checklist

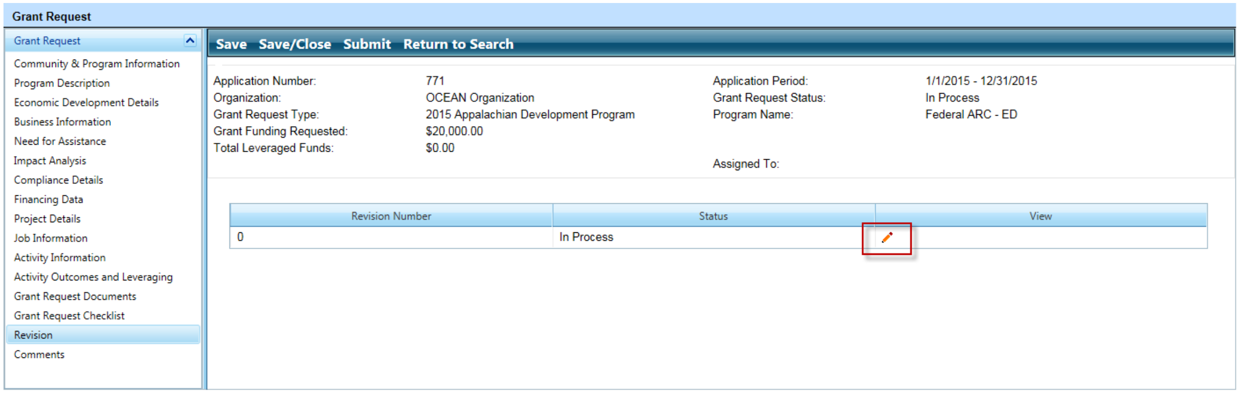


The functions available from the Grant Request Checklist page are listed below with steps for performing each function:

View

1. Click the **View** link next to the report listed on the grant request checklist page.
2. A new window displays with the report displayed.
3. Use the **Save** and **Print** icons in the window to save and/or print a copy of the report for your records.

Revision

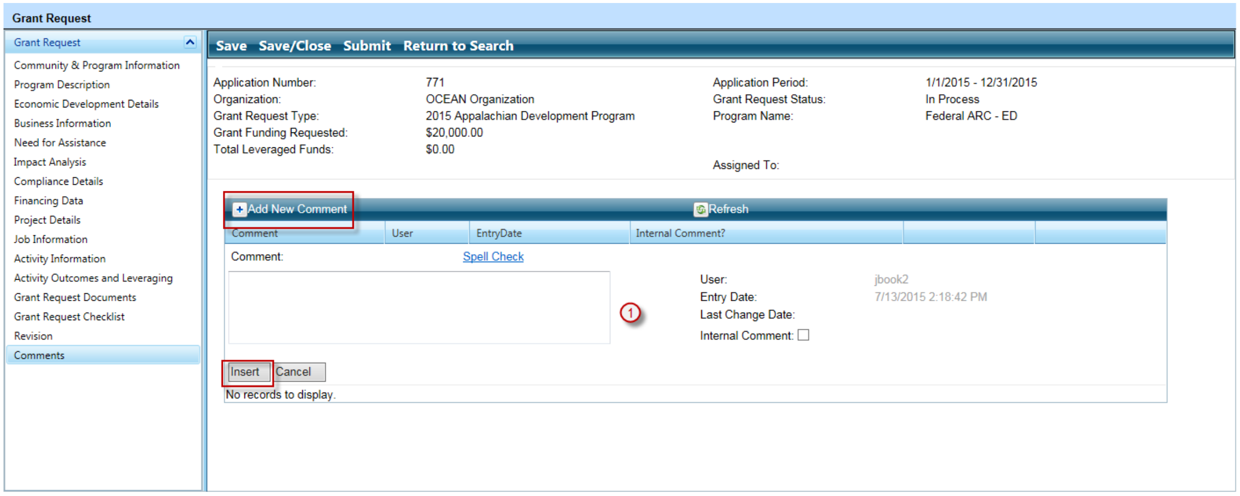


The functions available from the Revision page are listed below with steps for performing each function:

View Revision

1. Click the **View** icon next to the revision number in the grid.
2. A new window displays with the details of the revision number selected. *Note: All previous revisions will be non-editable, but data submitted in previous revisions will be available for viewing.
3. Close the window to return to the application request.

Comments



Field	Description
1. Comment	Enter a comment in the comment field. These comments will be retained with the application request along with your username, entry date, and date of any changes you made to your comments.

The functions available from the Comments page are listed below with steps for performing each function:

Add Comment

1. Click on the **Add New Comment** button in the grid.
2. The grid expands for adding a comment record.
3. Enter comment details.
4. Click the **Insert** button.
5. Comment details are saved.

Edit Comment

1. Click on the **Edit** icon next to a comment that you created. *Note: Comments can only be edited by the user who created them.
2. The grid expands for editing the comment record.
3. Edit the comment details.
4. Click the **Update** button.
5. Comment details are updated.

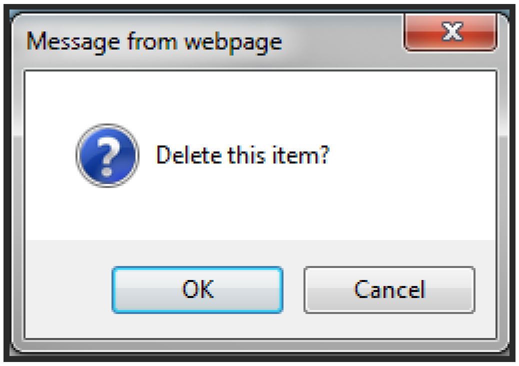
Cancel Adding/Editing Comment

1. Click to either **Add New Comment** or **Edit** an existing comment record in the grid.
2. The grid expands for adding/editing a comment record.
3. Click the **Cancel** button.

4. Changes are not saved.

Delete Comment

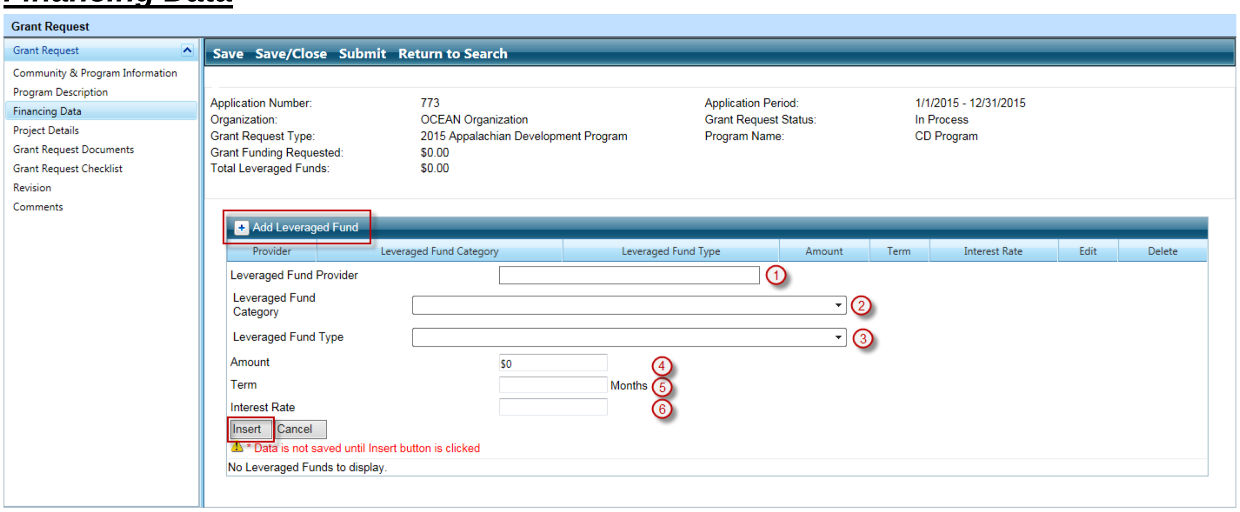
1. Click on the **Delete** icon next to an existing comment record in the grid. *Note: Comments can only be deleted by the user who created them.
2. A message will display asking if you are sure you want to delete this item.



1. Click **OK**.
2. Comment record is deleted from the grid.

Federal ARC – Community Development Program

Financing Data



Field	Description
1. Leveraged Fund Provider	Enter the name of the leveraged fund provider in the textbox.

2. Leveraged Fund Category	Select the category for the leveraged fund from the dropdown. Dropdown choices include: • Federal ARC Funds • Other Federal • Other Funds • Private Funds • State and Local Funds
3. Leveraged Fund Type	Select the type of leveraged fund from the dropdown. Dropdown choices include: • Grant • In Kind • Loan
4. Amount	Enter the dollar amount of leveraged funds for the provider entered.
5. Term	This field only displays when 'Loan' is selected for the Leveraged Fund Type. Enter the number of months of the loan.
6. Interest Rate	This field only displays when 'Loan' is selected for the Leveraged Fund Type. Enter the percentage interest rate of the loan.

The functions available from the Financing Data page are listed below with steps for performing each function:

Add Leveraged Fund

1. Click on the **Add Leveraged Fund** button in the grid.
2. The grid expands for adding a leveraged fund record.
3. Enter all leveraged fund details.
4. Click the **Insert** button.
5. Leveraged fund details are saved.
6. Repeat Steps 1 – 5 for each provider of leveraged funds for your grant request.

Edit Leveraged Fund

1. Click on the **Edit** icon next to an existing leveraged fund record in the grid.
2. The grid expands for editing the leveraged fund record.
3. Edit the leveraged fund details.
4. Click the **Update** button.
5. Leveraged fund details are updated.

Cancel Adding/Editing Leveraged Fund

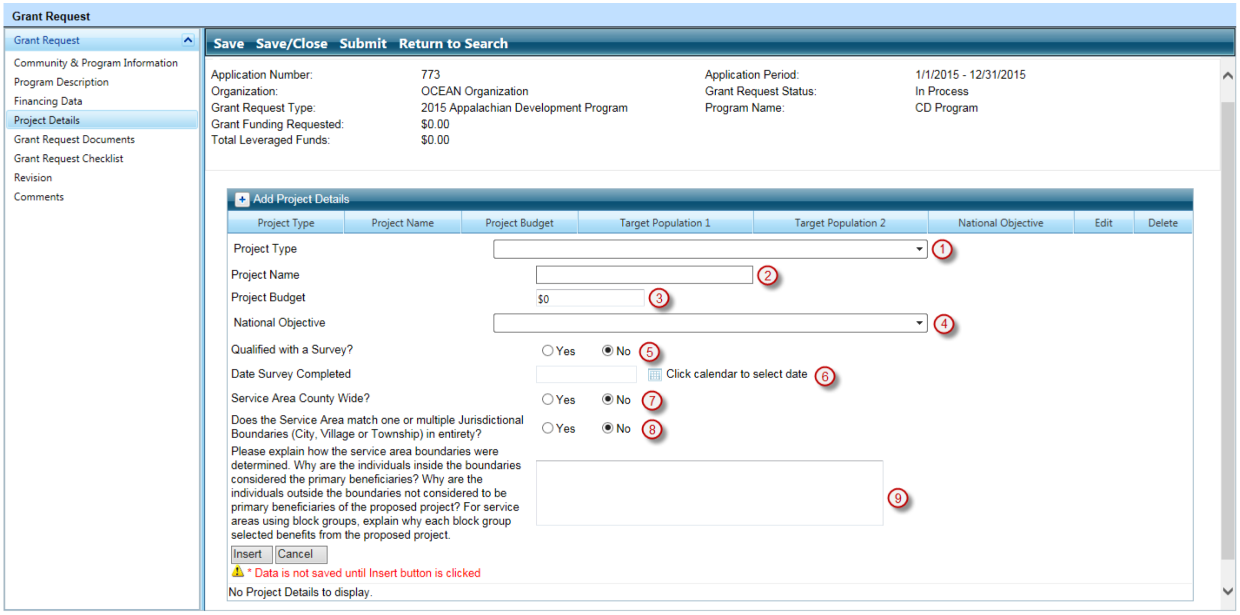
1. Click to either **Add Leveraged Fund** or **Edit** an existing leveraged fund in the grid.
2. The grid expands for adding/editing a leveraged fund record.
3. Click the **Cancel** button.
4. Changes are not saved.

Delete Leveraged Fund

7. Click on the **Delete** icon next to an existing leveraged fund record in the grid.

8. Leveraged fund record is deleted from the grid. *Note: When deleting a leveraged fund, all related Activity Leveraging Funds will be deleted as well.

Project Details



Field	Description
1. Project Type	Select the project type from the dropdown. For the Community Development – C.D. Allocation program, the available project types include: • Admin / Fair Housing / Planning • Project Only one 'Admin / Fair Housing / Planning' project and one 'Project' project can be added to each application.
2. Project Name	Enter a name for the project that uniquely identifies this project from all other Community Development projects.
3. Project Budget	Enter the budget for the project. This budget is the amount of funds that are being requested from OCD.
4. National Objective	When adding an Administration / Fair Housing project, the National Objective field will default to 'F/H and Administration' and not be editable. For all other projects, the available National Objectives include: • Area Wide Benefit (LMA) • Direct Benefit – Job Creation (LMJ) • Direct Benefit – Housing (LMH) • Limited Clientele (LMC) • Slum & Blight (SBA)
5. Qualified with a Survey	This field only displays if 'Area Wide Benefit (LMA)' is chosen for the National Objective. Select yes or no if the project is being qualified with a survey.
6. **Date Survey Completed**	This field only displays if 'Area Wide Benefit (LMA)' is chosen for the National Objective and is enabled if you have selected 'Yes' for Qualified with a Survey. Click the calendar icon and select the date the survey was completed.

7. Service Area County Wide	This field only displays if the National Objective is one of the following: • Area Wide Benefit (LMA) • Slum & Blight (SBA) • Limited Clientele (LMC) If 'Yes' is selected, then all the census tracts and block groups will populate on the Census Tract page for that county, along with the LMI Universal population for each block group.
8. Does the Service Area Match	This field only displays if the National Objective is one of the following: • Area Wide Benefit (LMA) • Slum & Blight (SBA) • Limited Clientele (LMC) and the service area is not county wide. This selection will only be editable for Area Wide Benefit (LMA) National Objectives. Select 'Yes' if the service area for this project matches one or multiple Jurisdictional Boundaries in entirety.
Benefiting Jurisdiction (City / Village) or Township (now shown above)	This field only displays if the National Objective is one of the following: • Area Wide Benefit (LMA) • Slum & Blight (SBA) • Limited Clientele (LMC), the service area is not county wide, and 'Yes' is selected for 'Does the Service Area Match'. This selection will limit the choices of benefiting jurisdictions on the Census Tract page.
9. Service Area Boundary Explanation	This field only displays if the National Objective is one of the following: • Area Wide Benefit (LMA) • Slum & Blight (SBA) • Limited Clientele (LMC) Use this area to explain how the service area boundaries were determined. An entry is required.
Estimated Number of Beneficiaries (Persons) (not shown above)	This field only displays if the National Objective is one of the following: • Direct Benefit – Job Creation (LMJ) • Direct Benefit – Housing (LMH) Enter the estimated number of beneficiaries for the project.
Percent LMI (not shown above)	This field only displays if the National Objective is one of the following: • Direct Benefit – Job Creation (LMJ) • Direct Benefit – Housing (LMH) This field will always default to 100% and not be editable.
Slum & Blight Type (not shown above)	This field only displays if 'Slum & Blight (SBA)' is chosen for the National Objective. Select spot or area for the slum & blight type.

The functions available from the Project Details page are listed below with steps for performing each function:

Add Project Detail

1. rClick on the **Add Project Details** button in the grid.
2. The grid expands for adding a project detail record.
3. Enter all project detail information.
4. Click the **Insert** button.
5. Project details information is saved.
6. Repeat Steps 1 – 5 for each project on your application.

Edit Project Detail

1. Click on the **Edit** icon next to an existing project detail record in the grid.
2. The grid expands for editing the **Project Name** and **Project Budget.** Any edits for other project detail information will require the project to be deleted and created again.
3. Edit the **Project Name** or the **Project Budget** information.
4. Click the **Update** button.
5. **Project Name** and **Project Budget** information is updated.

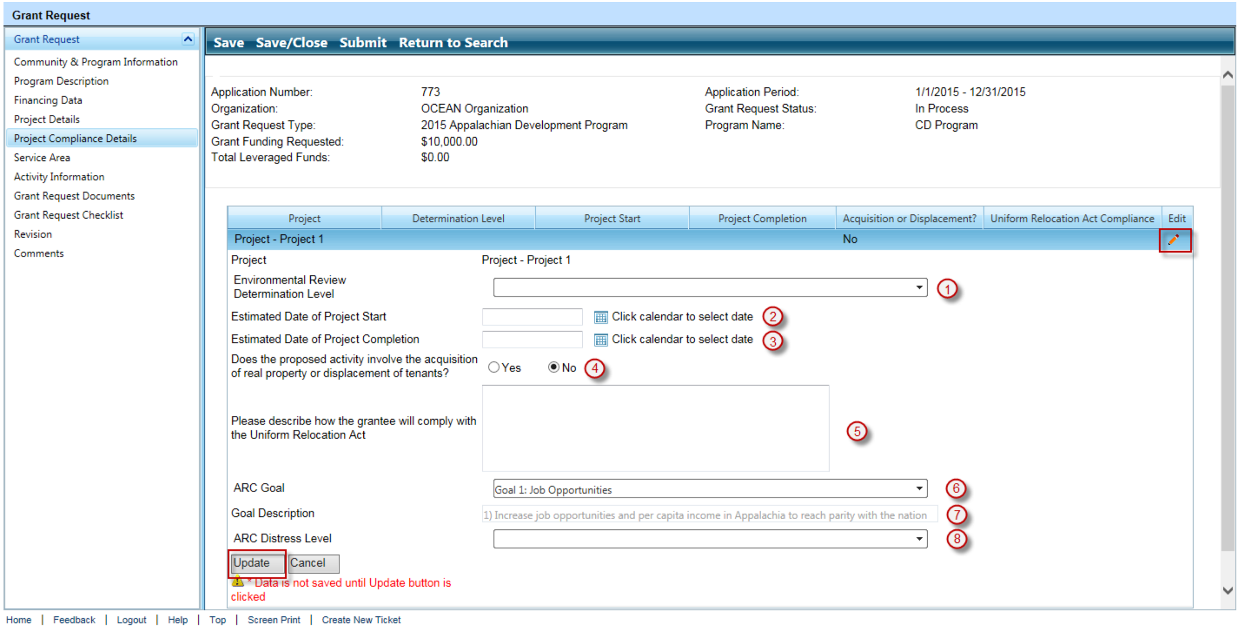
Cancel Adding/Editing Project Detail

1. Click to **Add Project Details** or **Edit** an existing project detail record in the grid.
2. The grid expands for adding/editing a project detail record.
3. Click the **Cancel** button.
4. Changes are not saved.

Delete Project Detail

1. Click on the **Delete** icon next to an existing project detail record in the grid.
2. Project detail record is deleted from the grid. *Note: When deleting a project detail record, all related Activity Information, Activity Compliance Details, and Activity Outcomes and Leveraging records will be deleted as well.

Project Compliance Details



Field	Description
1. Environmental Review Determination Level	Select the Environmental Review Determination Level. Options include the following: • Categorically Excluded Subject to 58.5 • Continuing Relevance • Environmental Assessment • Exempt
2. Estimated Date of Project Start	Enter or select the estimated start date for the project.
3. Estimated Date of Project Completion	Enter or select the estimated completion date for the project.
4. Involve Acquisition?	Select 'Yes' or 'No' based upon the description.
5. Uniform Relocation Act Description	Describe how the grantee will comply with the Uniform Relocation Act.
6. ARC Goal	Select from the following: • Goal 1: Job Opportunities • Goal 2: Human Capital • Goal 3: Infrastructure • Goal 4: Highway Systems
7. Goal Description	This field will populate once a selection is made for the ARC Goal above. This field in not editable.

8. ARC Distress Level	Select from the following: • At-Risk • Attainment • Competitive • Distressed • Transitional

Edit Project Compliance Details

1. Click the edit icon to open the Project Compliance grid for editing.
2. Edit the Project Compliance Details.
3. Click the Update button

Cancel Adding/Editing Project Compliance Details

1. Click to **Edit** an existing project compliance detail record in the grid.
2. The grid expands for adding/editing a project compliance detail record.
3. Click the **Cancel** button.
4. Changes are not saved.

Service Area

The Census Tract page only displays after a project has been added on the Project Details page with a National Objective of the following types:

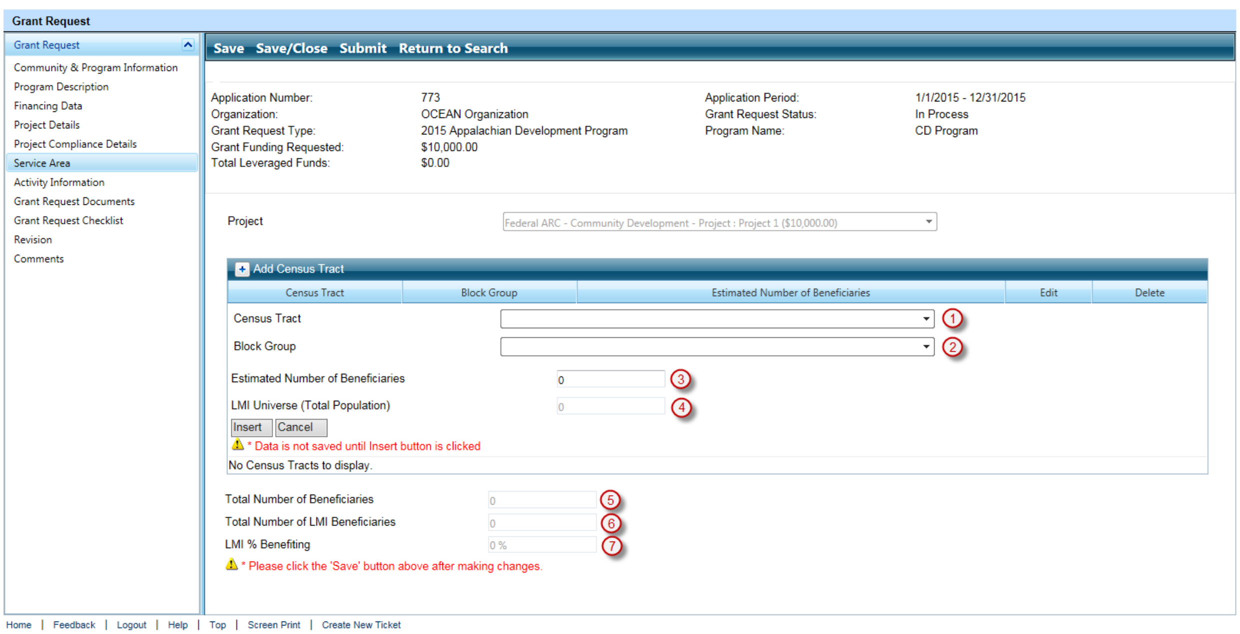
- Area Wide Benefit (LMA)
- Slum & Blight (SBA)
- Limited Clientele (LMC)

The page will display differently depending on the selections on the Project Details page. Use the table below to determine which screen will display for each scenario:

National Objective	Conditions	View
Area Wide Benefit (LMA)	**Service Area County Wide** is 'Yes'	Census Tract / Block Group View
Area Wide Benefit (LMA)	**Service Area County Wide** is 'No' **Does the Service Area Match** is 'Yes'	Census Tract – Benefiting Jurisdiction View
Area Wide Benefit (LMA)	**Service Area County Wide** is 'No' **Does the Service Area Match** is 'No'	Census Tract / Block Group View
Slum & Blight (SBA) or Limited Clientele (LMC)	**Service Area County Wide** is 'Yes'	Census Tract / Block Group View
Slum & Blight (SBA) or Limited Clientele (LMC)	**Service Area County Wide** is 'No'	Census Tract – Benefiting Jurisdiction View

Service Area – Census Tract / Block Group View

The Census Tract grid will not display for Slum & Blight (SBA) or Limited Clientele (LMC) projects. The **Total Population of Service Area, LMI Population of Service Area,** and **LMI % Benefiting** fields will be calculated from census data and populated for these projects.



Field	Description
1. Census Tract Number	Contains a list of census tracts applicable to the county of the organization. Select a census tract from the dropdown.
2. Block Group	Contains a list of block groups for the census tract number selected. Select the block group.
3. Estimated Number of Beneficiaries	Enter the number of people benefitting for the census tract and block group selected. *Note: Entry cannot exceed the amount listed in item #4, LMI Population.
4. LMI Universe (Total Population)	This populates from census data for the selected Census Tract and Block Group

5. Total Number of Beneficiaries	This field is editable for projects that are qualified with a survey, otherwise the Total Population of Service Area displays the total population of the service area as added for each census tract and block group.
6. Total Number of LMI Beneficiaries	This field is editable for projects that are qualified with a survey, otherwide the LMI Population of Service Area equals the LMI population for each census tract and block group added.
7. LMI % Benefiting	This is a calculated field and is not editable. The LMI % Benefiting equals the LMI Population of the Service Area divided by the Total Population of the Service Area.

Add Census Tract

1. Select a project from the **Project Type** dropdown above the census tract grid.
2. The census tract grid refreshes to show all census tract currently associated with the selected project.
3. Click on the **Add Census Tract** button in the grid.
4. The grid expands for adding a census tract record.
5. Select a census tract and block group.
6. Click the **Insert** button.
7. census tracts are saved.
8. Repeat Steps 3 – 7 for each census tract you need to add for the project type selected.

Edit Benefiting Jurisdiction

1. Click on the **Edit** icon next to an existing census tract record in the grid.
2. The grid expands for editing the census tract record.
3. Edit the census tract selection.
4. Click the **Update** button.
5. The census tract is updated.

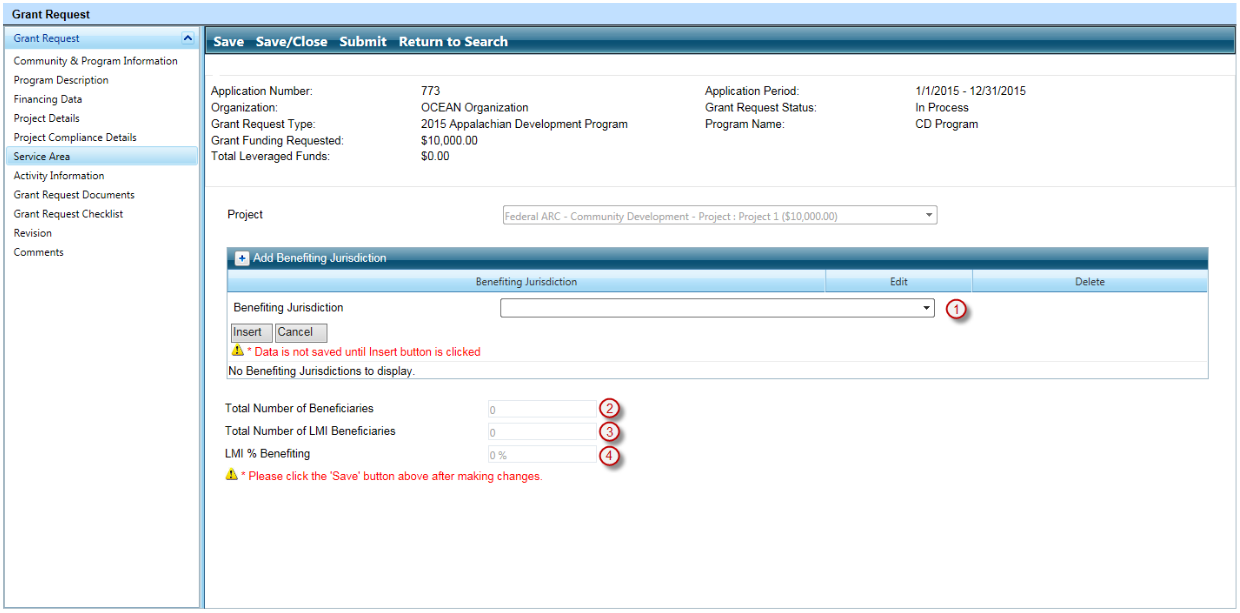
Cancel Adding/Editing Benefiting Jurisdiction

1. Click to either **Add Census Tract** or **Edit** an existing benefiting jurisdiction record in the grid.
2. The grid expands for adding/editing a census tract record.
3. Click the **Cancel** button.
4. Changes are not saved.

Delete Census Tract

1. Click on the **Delete** icon next to an existing census tract record in the grid.
2. The census tract record is deleted from the grid.

Census– Benefiting Jurisdiction View



Field	Description
1. Benefiting Jurisdiction	Contains a list of jurisdictions for the county of the organization. This list is filtered by the selection of **Benefiting Jurisdiction (City / Village) or Township** on the project details page.
2. Total Number of Beneficiaries	This field is editable for projects that are qualified with a survey, otherwise the Total Population of Service Area displays the total population of the service area for each benefiting jurisdiction added.
3. Total Number of LMI Beneficiaries	This field is editable for projects that are qualified with a survey, otherwise the LMI Population of Service Area equals the LMI population for each benefiting jurisdiction added.
4. LMI % Benefiting	This is a calculated field and is not editable. The LMI % Benefiting equals the LMI Population of the Service Area divided by the Total Population of the Service Area.

Add Benefiting Jurisdiction

1. Select a project from the **Project Type** dropdown above the benefiting jurisdiction grid.
2. The benefiting jurisdiction grid refreshes to show all benefiting jurisdictions currently associated with the selected project.
3. Click on the **Add Benefiting Jurisdiction** button in the grid.
4. The grid expands for adding a benefiting jurisdiction record.
5. Select a benefiting jurisdiction. *Note: Only one benefiting jurisdiction can be added for Slum & Blight (SBA) or Limited Clientele (LMC) projects.
6. Click the **Insert** button.

7. Benefiting jurisdictions are saved.
8. Repeat Steps 3 – 7 for each benefiting jurisdiction you need to add for the project type selected.

Edit Benefiting Jurisdiction

1. Click on the **Edit** icon next to an existing benefiting jurisdiction record in the grid.
2. The grid expands for editing the benefiting jurisdiction record.
3. Edit the benefiting jurisdiction selection.
4. Click the **Update** button.
5. The benefiting jurisdiction is updated.

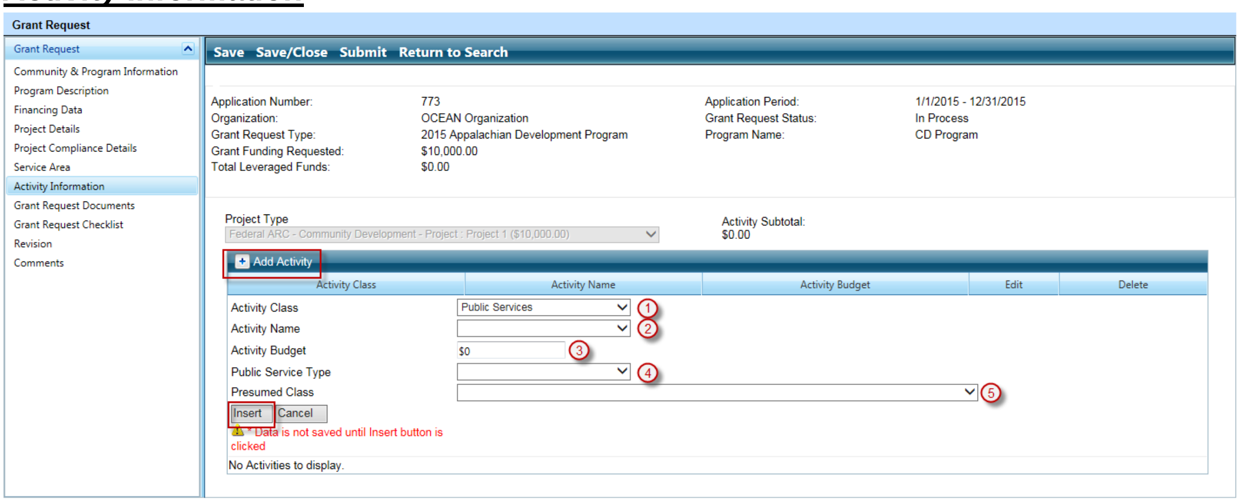
Cancel Adding/Editing Benefiting Jurisdiction

1. Click to either **Add Benefiting Jurisdiction** or **Edit** an existing benefiting jurisdiction record in the grid.
2. The grid expands for adding/editing a benefiting jurisdiction record.
3. Click the **Cancel** button.
4. Changes are not saved.

Delete Benefiting Jurisdiction

1. Click on the **Delete** icon next to an existing benefiting jurisdiction record in the grid.
2. The benefiting jurisdiction record is deleted from the grid.

Activity Information



Field	Description
1. Activity Class	Select an activity class for the new activity. If the activity is being entered for an Admin / Fair Housing / Planning project type, then the available activity class options include: • Fair Housing • Administration If the activity is being entered a Project project type, then the available activity class options include: • Public Services • Housing • Economic Dev. • Public Facilities
2. Activity Name	Select the activity name from the dropdown. The dropdown choices depend on the activity class that is selected. See the table below for potential activity names per activity class.
3. Activity Budget	Enter the budget for the activity. All activity budgets for the activities on the project must total up to the project budget.
4. Public Service Type	This field only displays when the activity class is 'Public Services.' Select the public service type from the following options: • Youth Programs and Services • Services for Disabled Persons • Services for Elderly Persons • Family and Individual Counseling • Medical and Nutrition Programs • Homeless and D.V. Services • Other Services
5. Presumed Class	This field only displays when the project selected for the project type dropdown has a 'Limited Clientele (LMC)' National Objective. Select the presumed class from the following options: • Abused Children • Battered Spouses • Elderly Persons • Severely Disabled Adults • Homeless Persons • Illiterate Adults • Persons Living with Aids • Migrant Farm Workers • Activity is of such a nature and is in such a location that is can be concluded clients are primarily LMI • Required documentation of income and family size to document at least 51% of the clientele are LMI

Activity Class	Activities	
Administration	• General Admin	• Planning

Public Services	• Public Services
Public Facilities	• Acquisition • Centers for Handicapped • Conversion / Rehab / Renovation • Demolition / Clearance • Disposition • Fire Protect. Fac. & Equip. • Flood & Drainage Facilities • Historic Preservation • Home / Building Repair • Homeless Facilities • Interim / Emergency Rental Asst. • Neighb. Fac / Community Ctr • Other Costs • Parking Facilities • Parks & Rec. Facilities • Private Rehabilitation • Public Rehabilitation • Public Services • Public Utilities • Senior Centers • Sewer Fac. Improvements • Sidewalk Improvements • Solid Waste Disposal Fac. • Street Improvements • Water & Sewer Facilities • Water Fac. Improvements

The functions available from the Activity Information page are listed below with steps for performing each function:

Add Activity

1. Select a project from the **Project Type** dropdown above the activity grid.
2. The activity grid refreshes to show all activities currently associated with the selected project.
3. Click on the **Add Activity** button in the grid.
4. The grid expands for adding an activity record.
5. Enter all activity details.
6. Click the **Insert** button.
7. Activity details are saved.
8. Repeat Steps 3 – 7 for each activity you need to add for the project type selected.
9. Repeat Steps 1 – 8 for each project type in the project dropdown until activities have been added for all projects.

Edit Activity

1. Click on the **Edit** icon next to an existing activity record in the grid.
2. The grid expands for editing the activity record.
3. Edit the activity details.
4. Click the **Update** button.
5. Activity details are updated.

Cancel Adding/Editing Activity

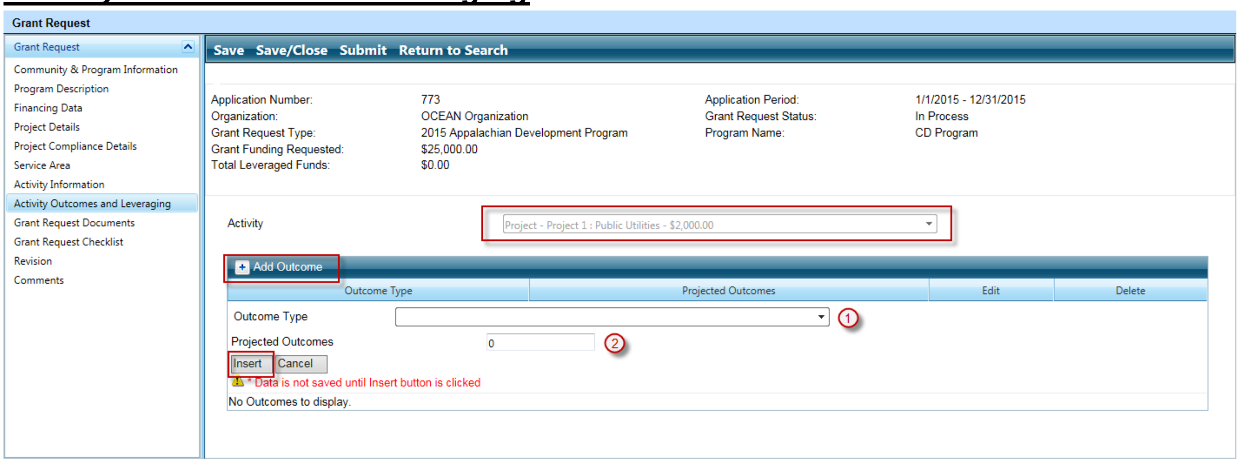
5. Click to either **Add Activity** or **Edit** an existing activity record in the grid.
6. The grid expands for adding/editing an activity record.

7. Click the **Cancel** button.
8. Changes are not saved.

Delete Activity

1. Click on the **Delete** icon next to an existing activity record in the grid.
2. Activity record is deleted from the grid. *Note: When deleting an activity record, all related Activity Compliance Details and Activity Outcomes and Leveraging records will be deleted as well.

Activity Outcomes and Leveraging



Field	Description
1. Outcome Type	Select the outcome type from the dropdown. The dropdown choices depend on the activity that the outcome is being added for. See the table below for potential outcome types per activity.
2. Projected Outcomes	Enter the projected number of outcomes for the activity.

Activity	Outcomes	
Acquisition	• Acres of Land • Square Feet of Structure • Structures • Parcels	• Households Assisted • Business Buyouts • Permanent Easements/Right-of-Way
Centers for Handicapped	• Buildings Rehabbed/Constructed	
Conversion / Rehab / Renovation	• Square Feet of Structure	• Building Rehabbed/Constructed
Demolition / Clearance	• Structures Demolished	
Disposition	• Acres of Land • Square Feet of Structure	• Structures

Activity	Outcomes	
Fire Protect. Fac. & Equip	• Square Feet of Structure • Buildings Rehabbed/Constructed • Vehicles Purchased	• Items of Equipment Purchased • Fire Hydrants Installed
Flood & Drainage Facilities	• Linear Feet • Culverts/Catch Basins Installed	• Manholes Installed • Permanent Easements/Right-of-Way
Historic Preservation	• Buildings Rehabbed/Constructed	• Units Rehabbed – Owner
Home / Building Repair	• Units Repaired – Owner • Units Repaired – Rental	• Buildings Repaired
Homeless Facilities	• Buildings Rehabbed/Constructed	• Households Assisted
Interim / Emergency Rental Asst.	• Households Assisted	
Neighb. Fac / Community Ctr	• Buildings Rehabbed/Constructed	
Parking Facilities	• Square Feet of Pavement/Landscaping	• Parking Spaces
Parks & Rec. Facilities	• Acres of Land • Square Feet of Structure • Athletic Flds/Crts Installed/Repair • General Park Improvements	• Items of Equip. Installed/Repaired • Restroom Facilities Installed • Linear Feet of Fencing • Ln. Ft. of Walkway
Private Rehabilitation	• Square Feet of Structure • Units Rehabbed – Owner • Units Repaired – Owner • Facades Improved	• Hslds Asst. with Counseling/Education • Lead Safe Units • Units Rehabbed – Rental • Units Repaired – Rental
Public Services	• Buildings Rehabbed/Constructed • Handicapped Ramps Installed	• Restroom Facilities Installed • Elevators/Doors Installed
Public Utilities	• Utility Poles/Lines Relocated	
Senior Centers	• Buildings Rehabbed/Constructed	
Sewer Fac. Improvements	• Items of Equip. Installed/Repaired • Linear Feet • Tap-Ins Installed	• Water/Septic Tanks/Sludge Pits Inst. • Manholes Installed • Permanent Easements/Right-of-Way
Sidewalk Improvements	• Linear Feet • Curbcuts Installed	• Linear Feet of Curbs
Solid Waste Disposal Fac.	• Items of Equip. Installed/Repaired	• Facility Constructed/Rehabbed

Activity	Outcomes	
Street Improvements	• Linear Feet • Culverts/Catch Basins Installed • Bridges Replaced/Repaired • Traffic Control/St. Signs Installed	• Trees, Benches, Str Lights and Planters • Slips/Slides/Retain Walls Repaired • Permanent Easements/Right-of-Way • Linear Feet of Curbs
Water & Sewer Facilities	• Items of Equip. Installed/Repaired • Fire Hydrants Installed • Linear Feet • Tap-Ins Installed	• Water/Septic Tanks/Sludge Pits Inst. • Manholes Installed • Water Valves Installed • Permanent Easements/Right-of-Way
Water Fac. Improvements	• Items of Equip. Installed/Repaired • Fire Hydrants Installed • Linear Feet • Tap-Ins Installed	• Water/Septic Tanks/Sludge Pits Inst. • Wells Drilled • Water Valves Installed • Permanent Easements/Right-of-Way

The functions available from the Activity Outcomes and Leveraging page are listed below with steps for performing each function:

Add Outcome

1. Select an activity from the **Activity** dropdown above the outcomes and/or leveraged fund grid.
2. The outcomes and/or leveraged funds grids refresh to show all current records currently associated with the selected activity.
3. Click on the **Add Outcome** button in the outcomes grid.
4. The grid expands for adding an outcome record.
5. Enter all outcome details.
6. Click the **Insert** button.
7. Outcome details are saved.
8. Repeat Steps 3 – 7 for each outcome you need to add for the activity selected.
9. Repeat Steps 1 – 8 for each activity in the activity dropdown until outcomes have been added for all applicable activities.

Edit Outcome

1. Click on the **Edit** icon next to an existing outcome record in the grid.
2. The grid expands for editing the outcome record.
3. Edit the outcome details.
4. Click the **Update** button.
5. Outcome details are updated.

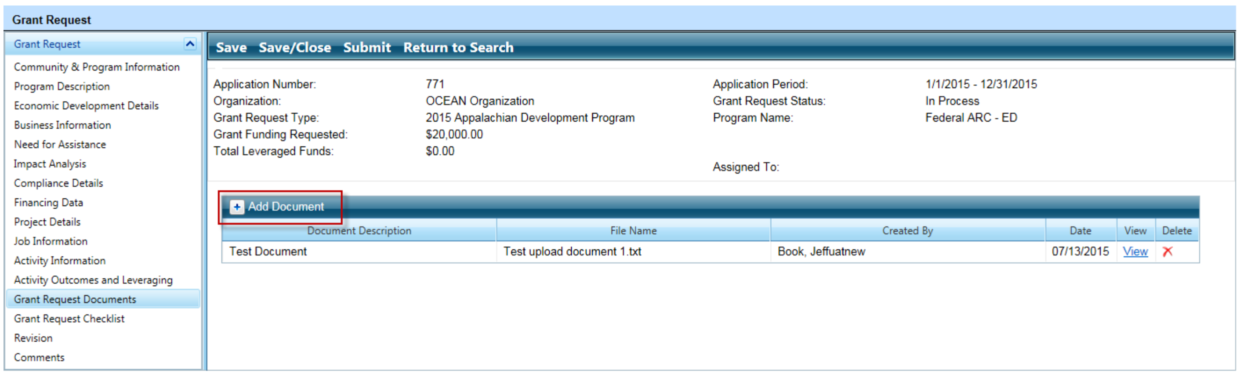
Cancel Adding/Editing Outcome

1. Click to either **Add Outcome** or **Edit** an existing outcome record in the grid.
2. The grid expands for adding/editing an outcome record.
3. Click the **Cancel** button.
4. Changes are not saved.

Delete Outcome

1. Click on the **Delete** icon next to an outcome record in the grid.
2. Outcome record is deleted from the grid.

Grant Request Documents



Field	Description
1. File Name	Displays the name of the file you uploaded.
2. Description	Displays the name of the template and/or instruction form document uploaded by OCD for your use in completing the application attachments.
3. Created By	Displays the username of the user who uploaded the response document.
4. Date	Displays the date the response document was uploaded.
5. View	Use this second link to view/download your completed template or instruction form.
6. Delete	Click this icon to delete your response document.

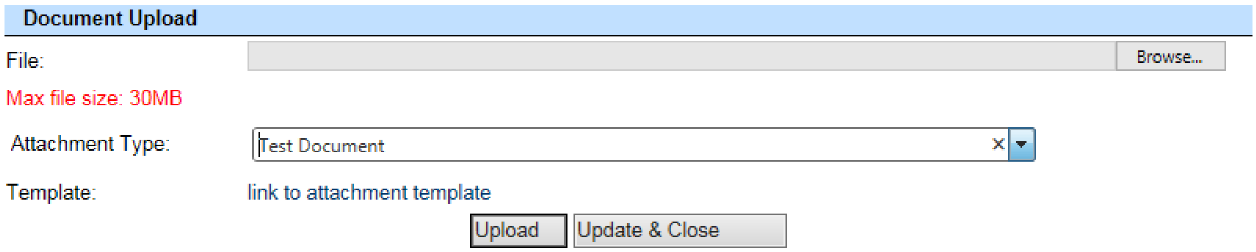
The functions available from the Grant Request Documents page are listed below with steps for performing each function:

View Document in Grant Request Documents

1. Click the **View** link next to your response document.
2. A new window displays with the document details displayed.
3. Click the **File → Save As** menu option to save a copy of the document to your computer or close the window to return to the grant request documents page.

Attach Document in Grant Request Documents

1. Click the **Add Document** button in the grant request documents grid.
2. The **Document Upload** popup displays.



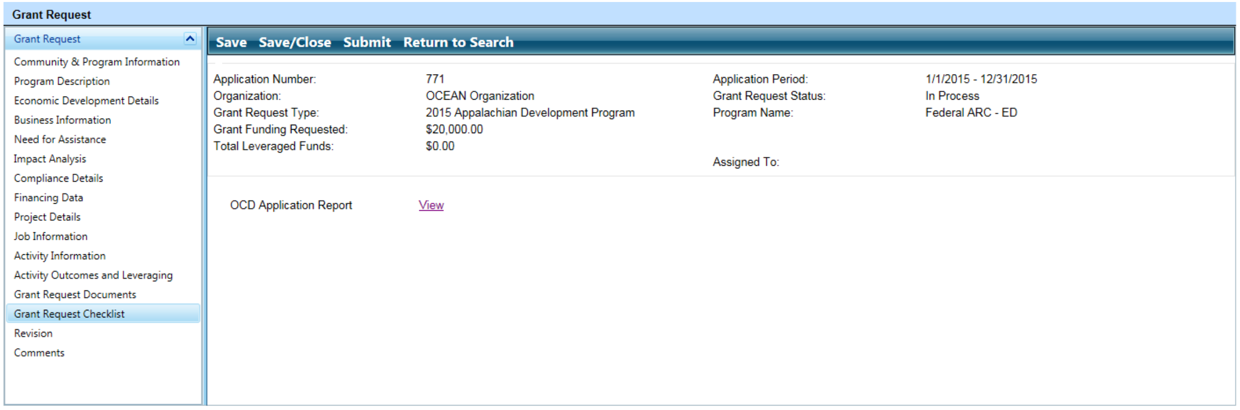
*Note: If the attachment type selected is for a project or activity, then you will be required to select the project and/or activity to attach the document to. These will be shown by additional dropdowns on the document upload popup above.

3. Click the **Browse** button.
4. The **Windows File Explorer** popup displays.
5. Navigate to the file you would like to attach on your local machine and click the **Open** button.
6. The name of the file will be displayed in the **File** field on the document upload popup.
7. Select the **Attachment Type** from the dropdown list (this is a list of documents from OCD). You can click on the "link to attachment template" to view the document from OCD.
8. Enter a **Comment** for your document.
9. Click the **Upload** button to attach your document to the grant application.
10. You may upload additional documents by selecting another **Application Type** and attaching the appropriate file. Once all documents are uploaded, click the **Update & Close** button to close the window and refresh the document list.

Delete Document from Grant Request Documents

1. Click the **Delete** icon next to a document in the grant request documents grid.
2. Your response document will be deleted.

Grant Request Checklist

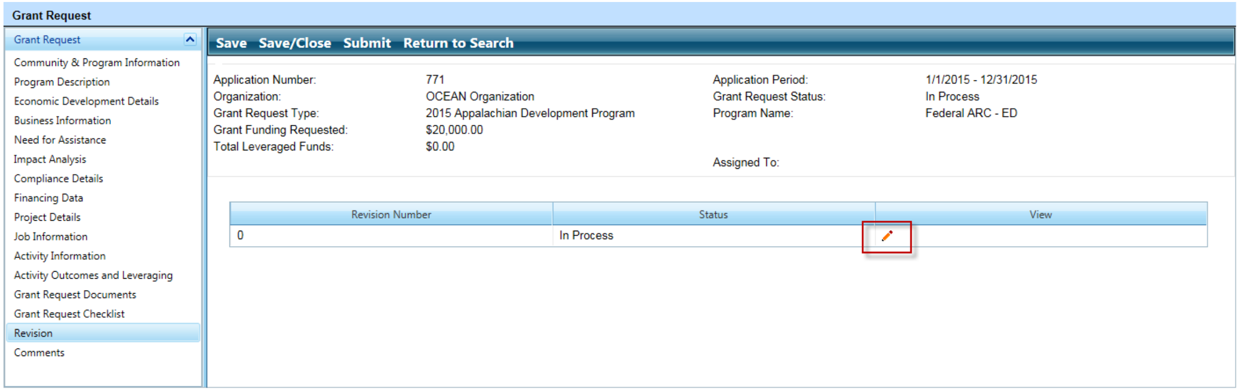


The functions available from the Grant Request Checklist page are listed below with steps for performing each function:

View

1. Click the **View** link next to the report listed on the grant request checklist page.
2. A new window displays with the report displayed.
3. Use the **Save** and **Print** icons in the window to save and/or print a copy of the report for your records.

Revision

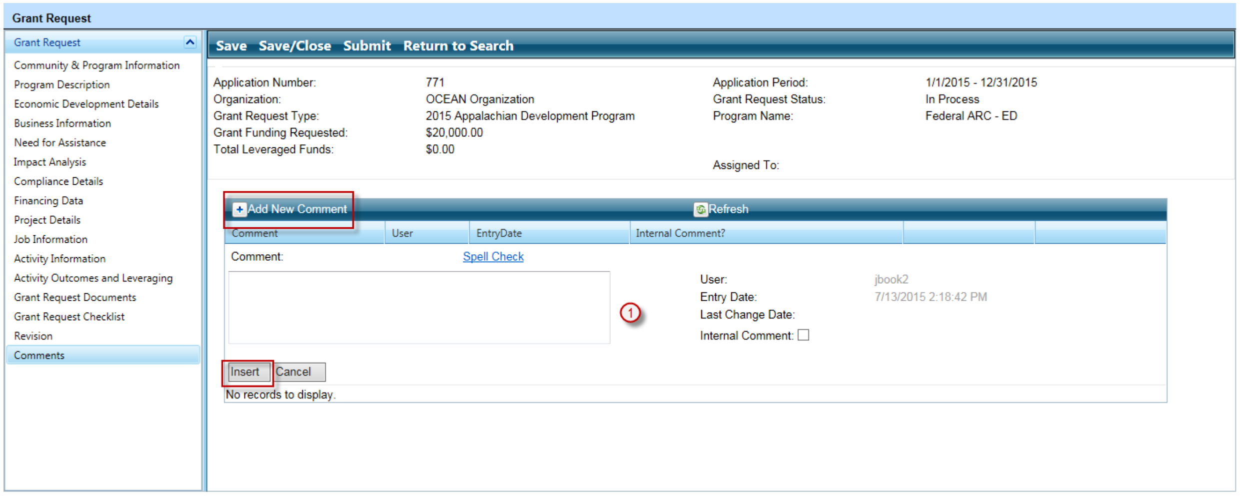


The functions available from the Revision page are listed below with steps for performing each function:

View Revision

1. Click the **View** icon next to the revision number in the grid.
2. A new window displays with the details of the revision number selected. *Note: All previous revisions will be non-editable, but data submitted in previous revisions will be available for viewing.
3. Close the window to return to the application request.

Comments



Field	Description
1. Comment	Enter a comment in the comment field. These comments will be retained with the application request along with your username, entry date, and date of any changes you made to your comments.

The functions available from the Comments page are listed below with steps for performing each function:

Add Comment

1. Click on the **Add New Comment** button in the grid.
2. The grid expands for adding a comment record.
3. Enter comment details.
4. Click the **Insert** button.
5. Comment details are saved.

Edit Comment

1. Click on the **Edit** icon next to a comment that you created. *Note: Comments can only be edited by the user who created them.
2. The grid expands for editing the comment record.
3. Edit the comment details.
4. Click the **Update** button.
5. Comment details are updated.

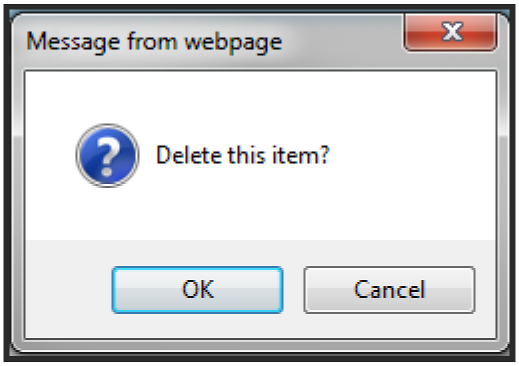
Cancel Adding/Editing Comment

1. Click to either **Add New Comment** or **Edit** an existing comment record in the grid.
2. The grid expands for adding/editing a comment record.
3. Click the **Cancel** button.

4. Changes are not saved.

Delete Comment

1. Click on the **Delete** icon next to an existing comment record in the grid. *Note: Comments can only be deleted by the user who created them.
2. A message will display asking if you are sure you want to delete this item.



3. Click **OK**.
4. Comment record is deleted from the grid.