OCEAN for

Community Development Programs

(CD)

Application Approver

User Guide

April 3, 2015

2015 Version

Ohio Department of Development

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Table of Contents

Document Overview

OCEAN for Community Development Programs (CD)

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 CD 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 Community Development
- Submitting an application for Community Development
- Logging out of OCEAN

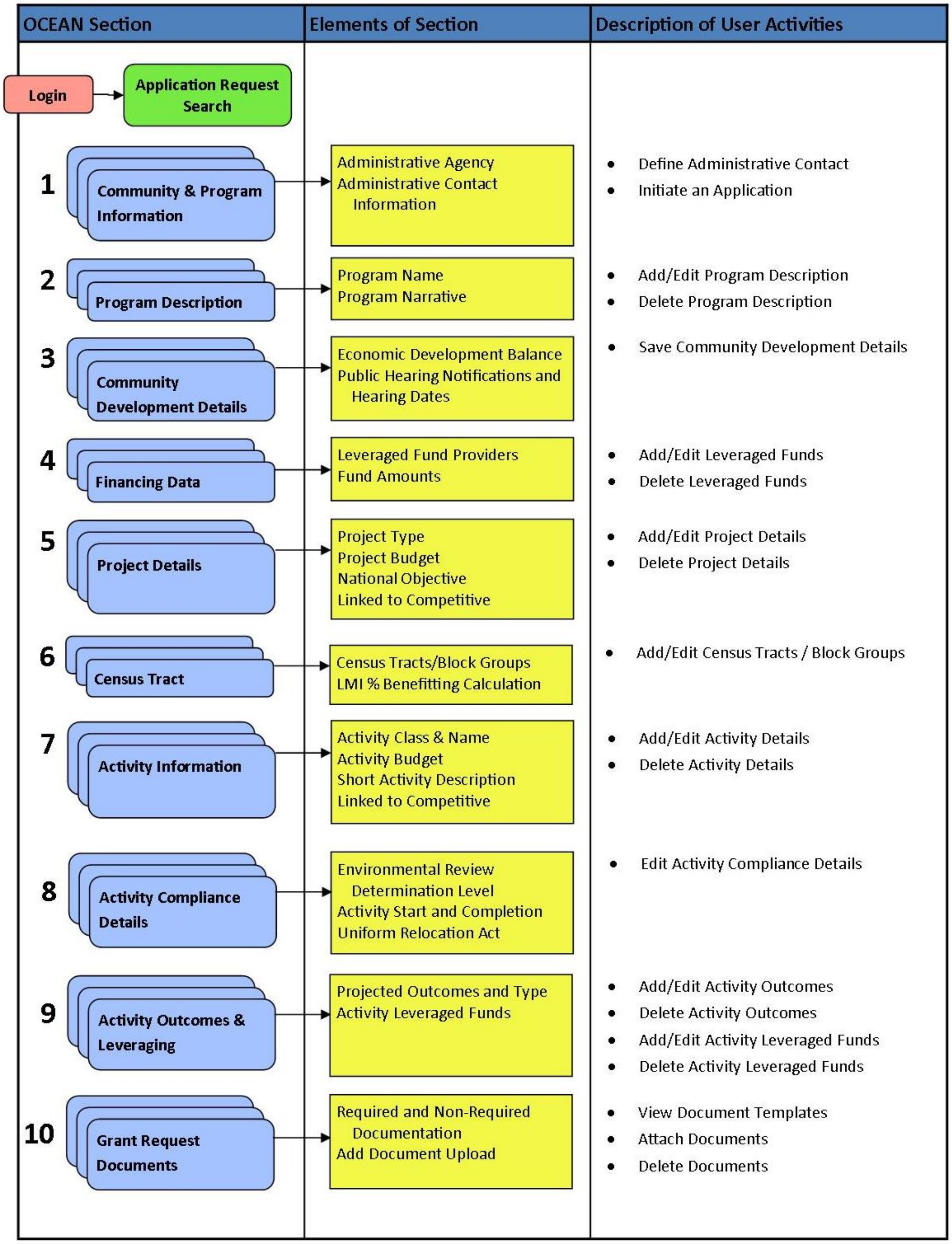
Technical Requirements

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 CD Process Diagrams

C.D. Allocation Program

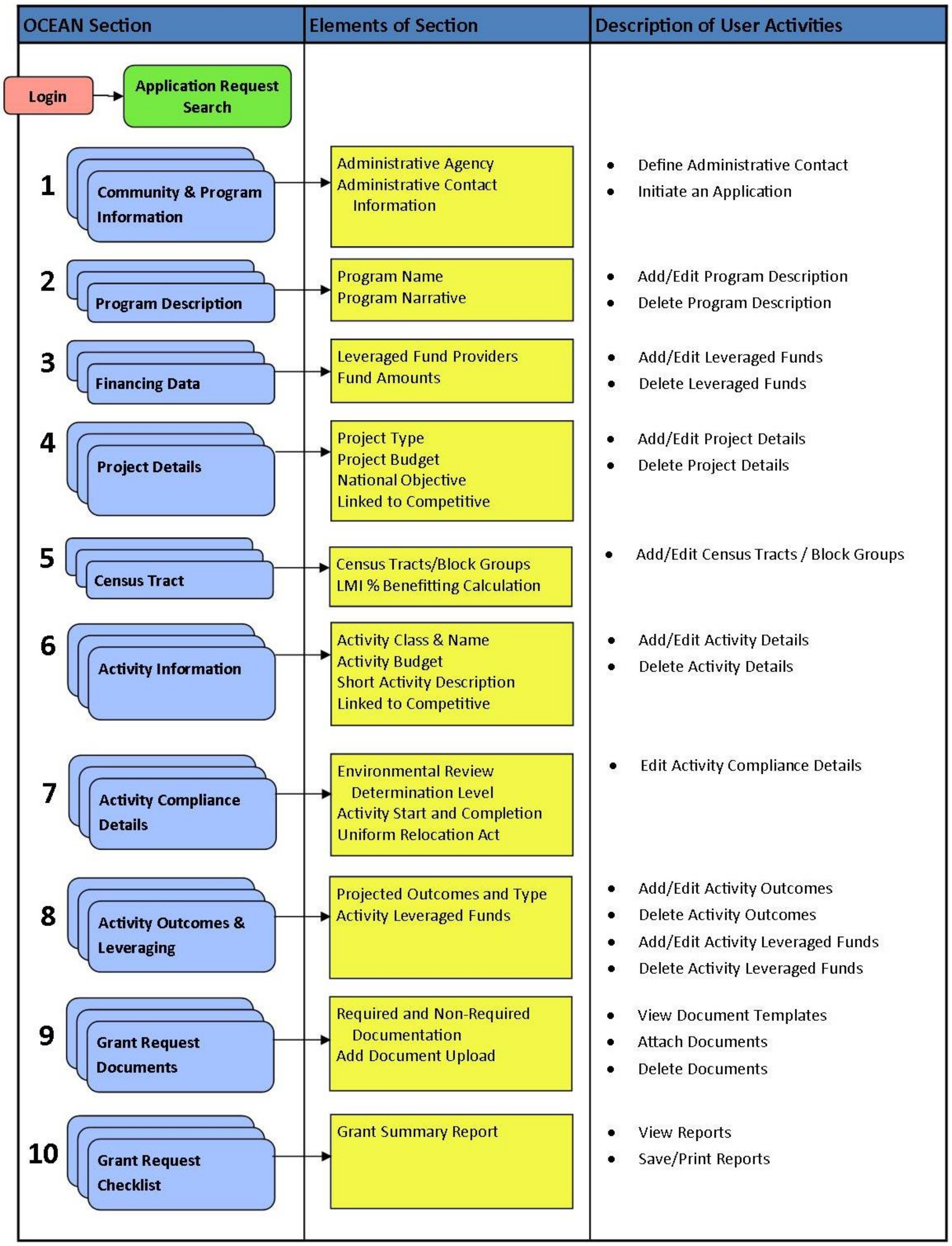


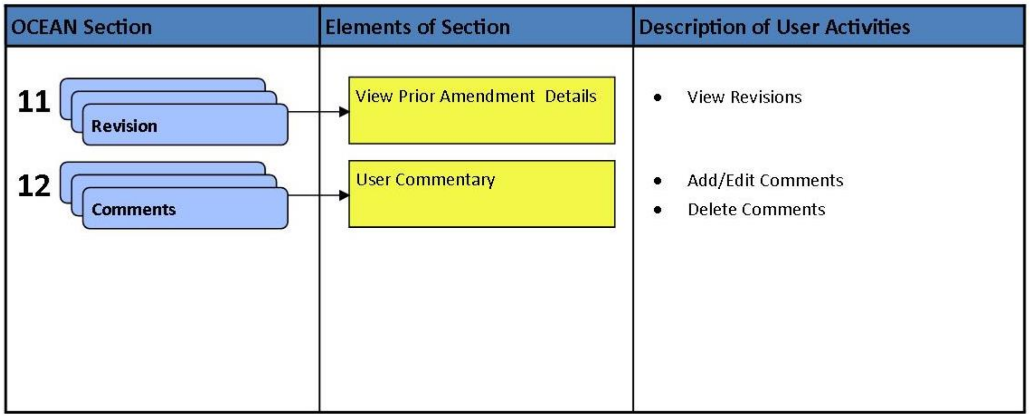
OCEAN Section	Elements of Section	Description of User Activities
11 Grant Request Checklist	Grant Summary Report	• View Reports • Save/Print Reports
12 Revision	View Prior Amendment Details	• View Revisions
13 Comments	User Commentary	• Add/Edit Comments • Delete Comments

Competitive Programs

This diagram shows the process for adding CD competitive program applications, including:

- Neighborhood Revitalization
- Downtown Revitalization
- Critical Infrastructure




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

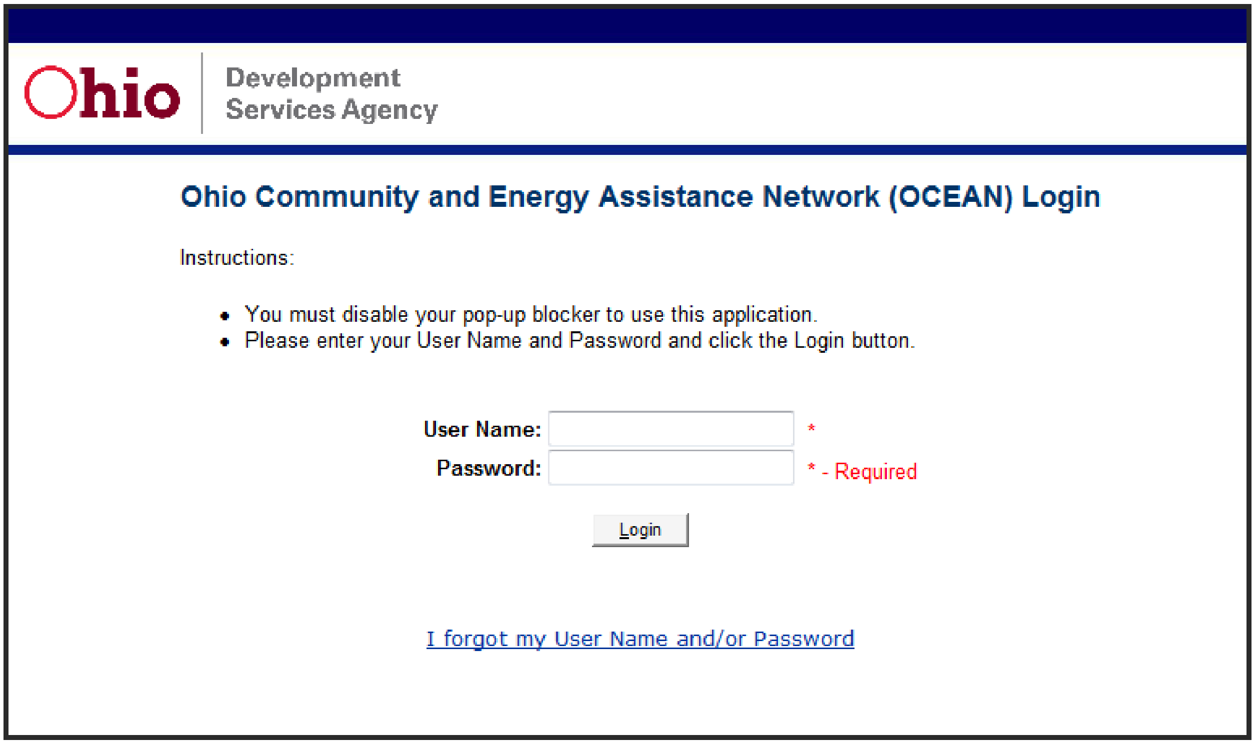
Accessing and Logging into OCEAN

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

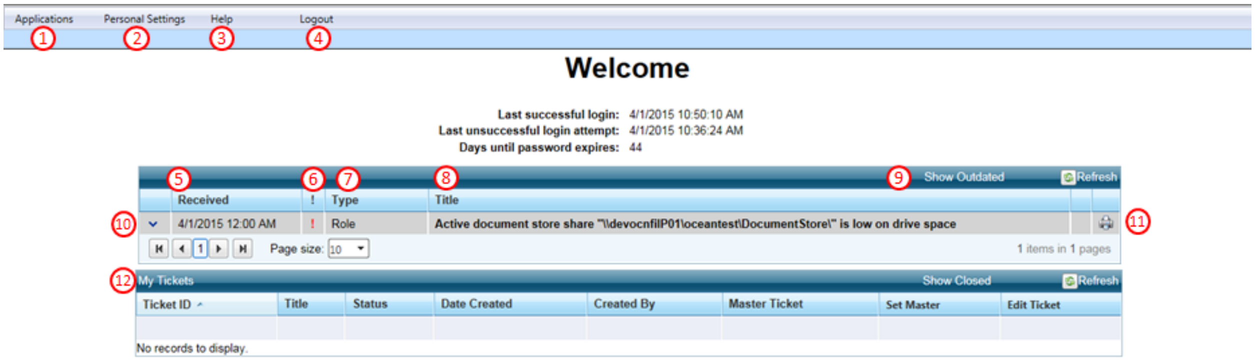
The screen below is the login screen for OCEAN.



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

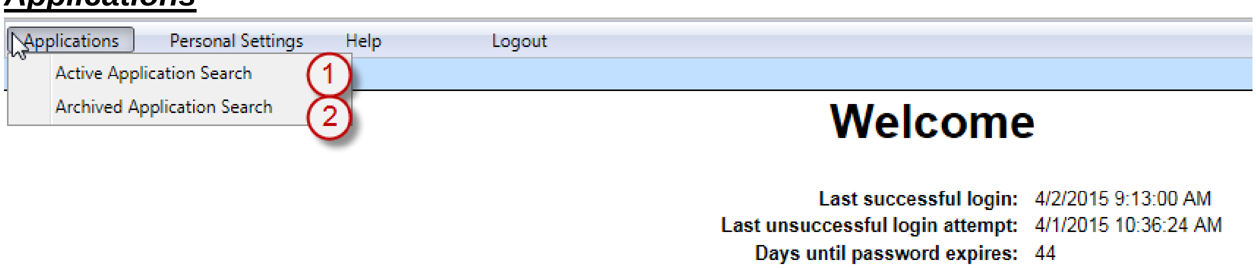
Welcome Screen and Notification Center



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.

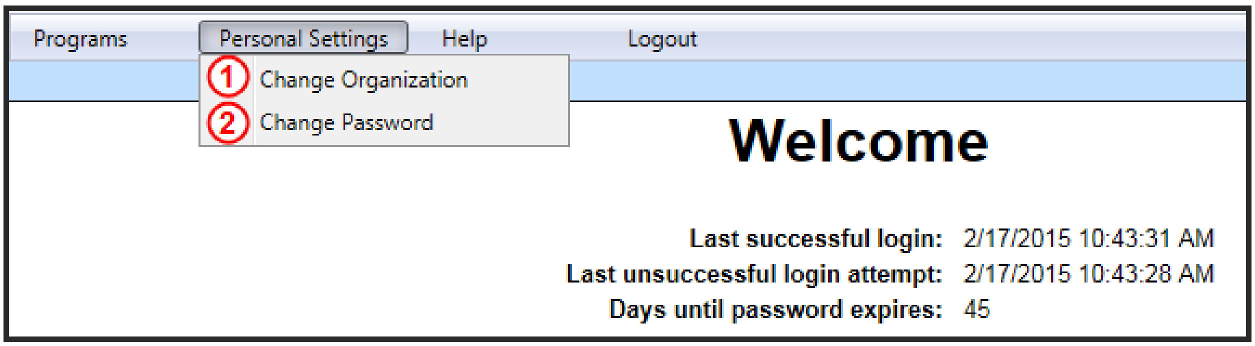
Menu/Field	Purpose
1. Applications	Used to access the OCD grant applications.
2. Personal Settings	Used to change your password and/or organization.
3. Help	Used to access grant document templates and user guide manuals.
4. Logout	Used to sign out and exit the OCEAN application.
5. Date/Time Received	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



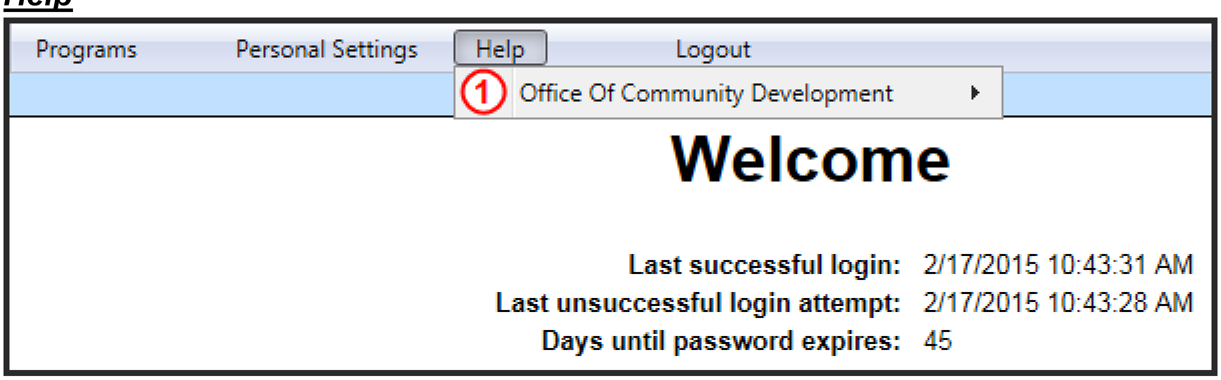
Menu	Purpose
1. Active Application Search	Choose this option to search for active applications, or to add a new application.
2. Archived Application Search	Choose this option to search for archived applications.

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.

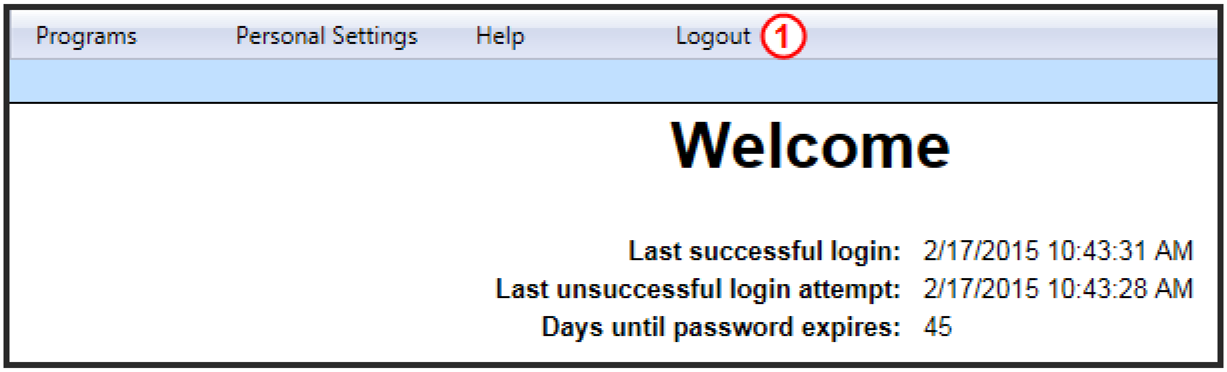
Help



Menu	Purpose

1. Office of Community Development	Choose this option to view grant document templates and user guides for each grant type you have access to.

Logout



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

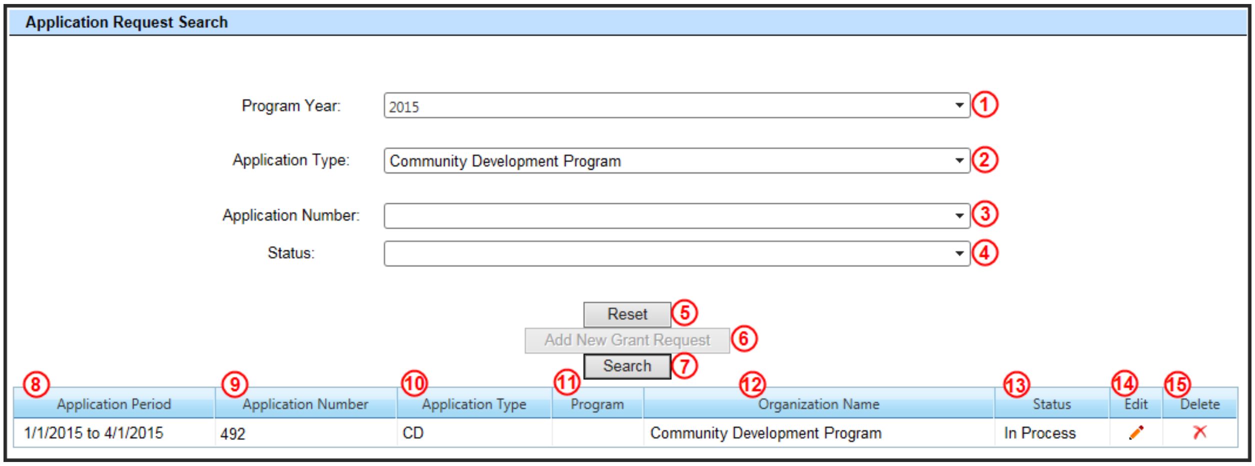
Completing an Application for CD

The following section describes the process for creating an application for the Community Development Programs (CD) in OCEAN.

To begin or view an existing application, you must first navigate to the Application Request Search page. Choose the following menus to display the the Application Request Search pages:

Applications → Active Application Search ***or*** Applications → Archived Application Search

Active 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: Active 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. Archived application cannot be deleted.

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

Search for an Application in OCEAN:

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:

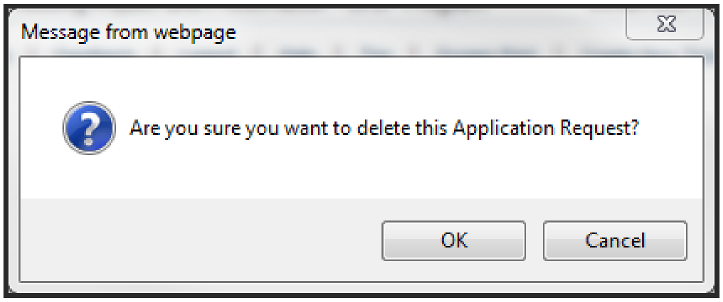
1. Select a **Program Year** and an **Application Type**.
2. Click the **Add New Grant Request** button.
3. You will navigate to the **Grant Request** page for adding a new application.

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.

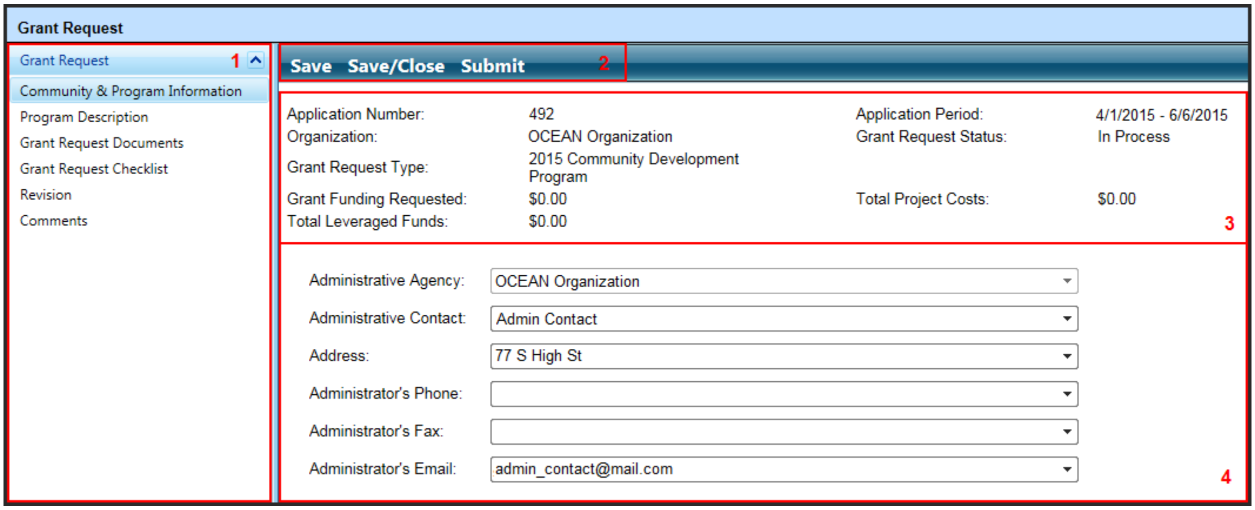
Delete an Existing Application:

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 CHIP 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 correction 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.

Community Development details must be filled in to save / submit the Grant Request.	This message only displays for the C.D. Allocation Program. Click the Community Development Details link in the left navigation, enter data in all fields, and click ‘Save’ in the top button bar.
Activity Compliance Details on Project <<project type and activity>> is not complete.	Activity Compliance Details must be completed for all activities listed on the Activity Compliance Details page. Click the Activity Compliance Details link in the left navigation and enter details for each record in the grid.
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 outcome grid to each activity that tracks outcomes.

Table 1

- **Save/Close –** Saves the application in an “In Process” status and returns you to the Application Request Search page.
- **Submit –** Submits the application to the Office of Community Development for review. Any validations would be displayed and must be corrected prior to submitting the application. Once submitted, the application is saved in a “Submitted” status and you can no longer edit the details of the application.

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
    - **Grant Request Period –** application period for submitting applications
    - **Grant Request Status –** current status of the application
    - **Program Name** – displays the name of the program you entered on the Program Description page
    - **Total Project Costs –** all project costs equal to grant funding requested plus total leveraged funds
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.

Community Development Programs

There are four types of Community Development programs that you can create an application for:

- C.D. Allocation
- Neighborhood Revitalization
- Downtown Revitalization
- Critical Infrastructure

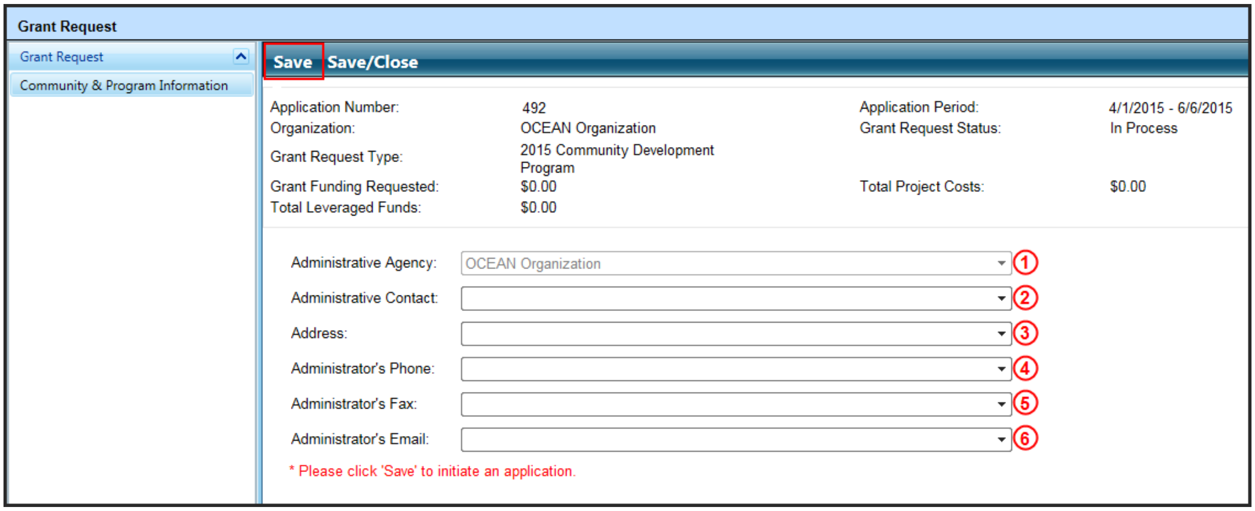
Each program will be added as a separate application. You will be able to create a single C.D. Allocation application and any combination of the other programs for a total of up to three additional applications. Prior to creating your competitive application, you will be required to create the C.D. Allocation application.

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

C.D. Allocation Program

Start from the Application Request Search page and click to **Add New Grant Request**.

Community & Program Information

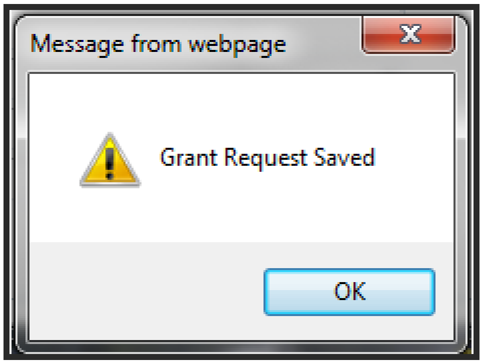


Field	Description
1. Administrative Agency	Displays your current organization as the administrative agency.
2. Administrative Contact	Use this dropdown to select the administrative contact from your organization for the CD application.
3. Address	This dropdown will populate with the current address on 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

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.

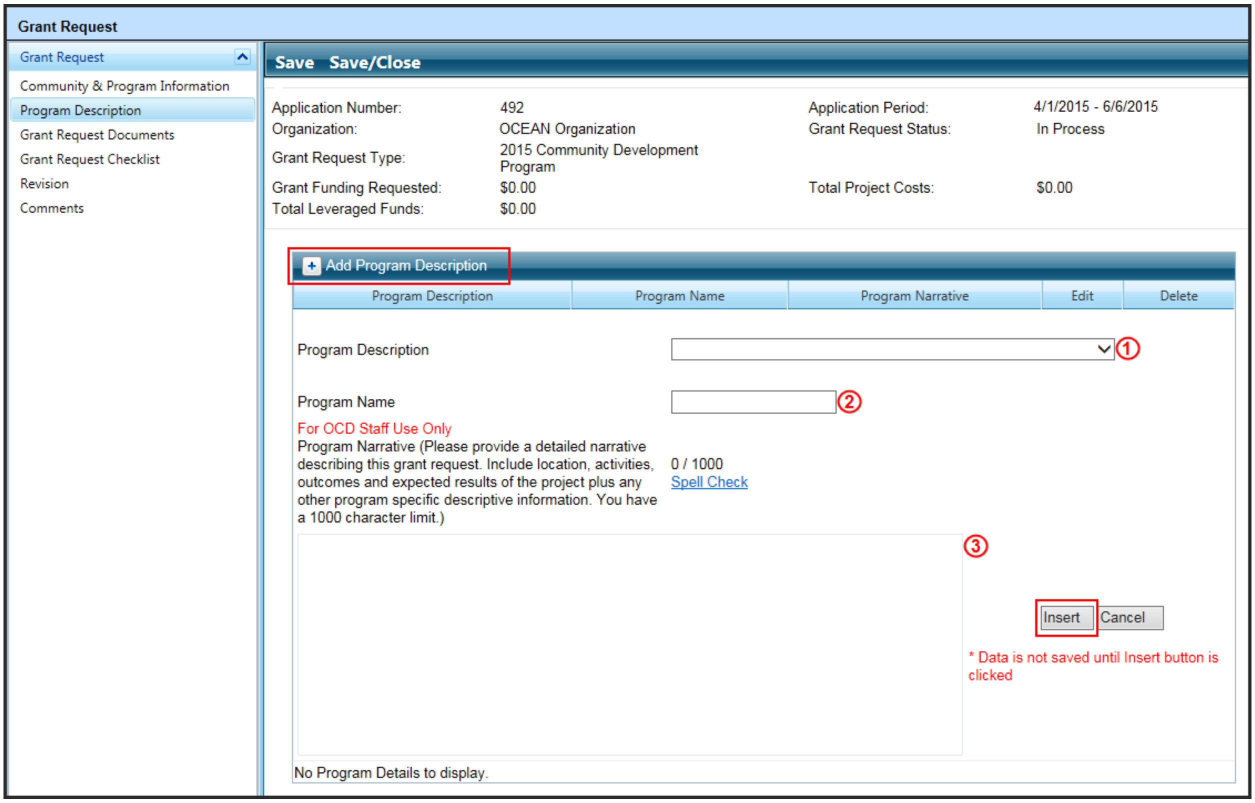


5. Click **OK** in the message box to continue.
6. The remaining pages of the grant application will be displayed in the left navigation panel.

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 Description	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 CD, there are four available programs: • C.D. Allocation • Neighborhood Revitalization • Downtown Revitalization • Critical Infrastructure
2. Program Name	Enter the name for the program that is used by your organization to identify the application.
3. Program Narrative	This field will be used by the OCD Staff only. The OCD Staff will provide a detailed narrative describing the grant request after submission.

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 ‘C.D. Allocation’ 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 Name**. The **Program Description** field cannot be edited.
4. Click the **Update** button.
5. Program description details are updated.

Cancel Adding/Editing Program Description

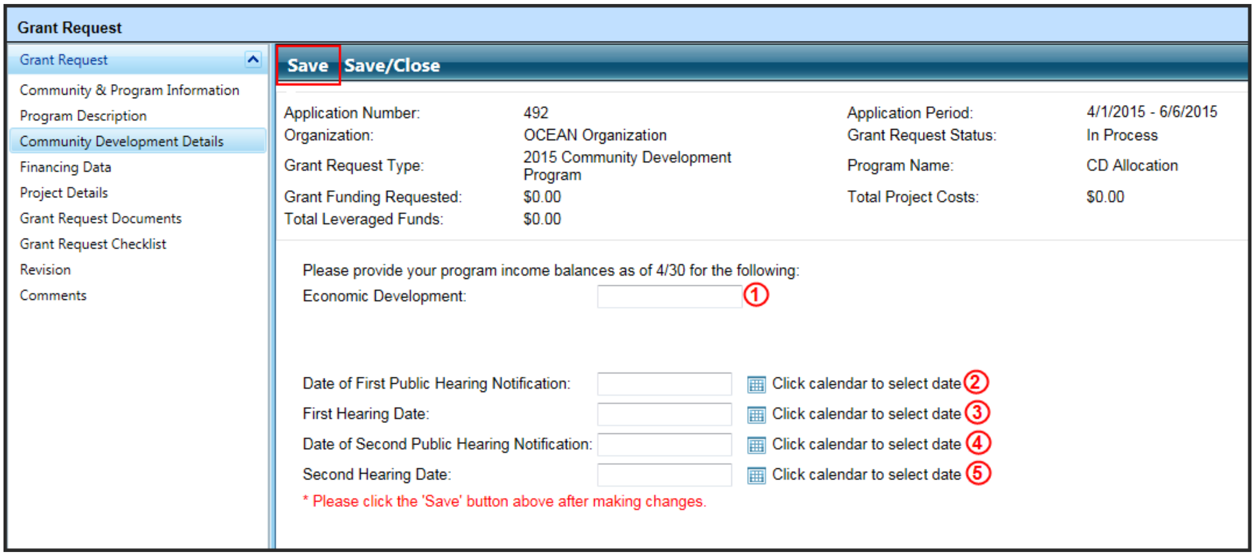
1. Click to either **Add Program Description** or **Edit** an existing program description in the grid.
2. The grid expands for adding/editing a program description.
3. Click the **Cancel** button.
4. Changes are not saved.

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, Activity Information, Activity Compliance Details, and Activity Outcomes and Leveraging will be deleted as well.

Community Development Details

The Community Development Details page only displays after a program has been added on the Program Description page for 'C.D. Allocation.'



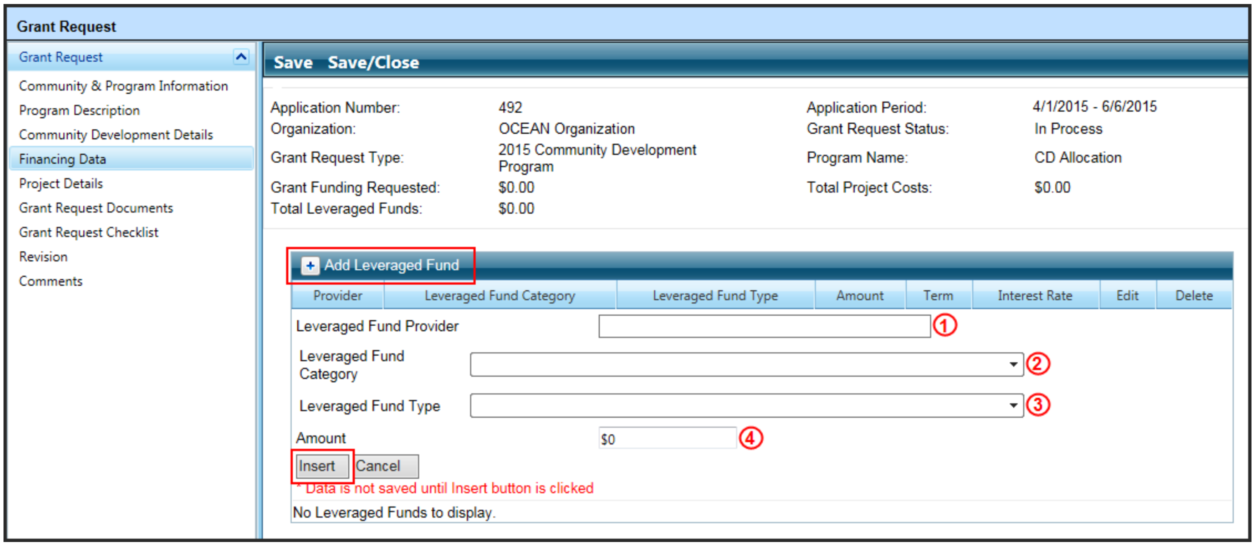
Field	Description
1. Economic Development	Enter your program income balance as of 4/30 for Economic Development.
2. Date of First Public Hearing Notification	Click the calendar icon and select the date of your first public hearing notification.
3. First Hearing Date	Click the calendar icon and select the date of your first hearing.
4. Date of Second Public Hearing Notification	Click the calendar icon and select the date of your second public hearing notification.
5. Second Hearing Date	Click the calendar icon and select the date of your second hearing.

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

Save Community Development Details

1. Enter **Economic Development** program income balance and select dates for each public hearing field.
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: • 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.
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.

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.

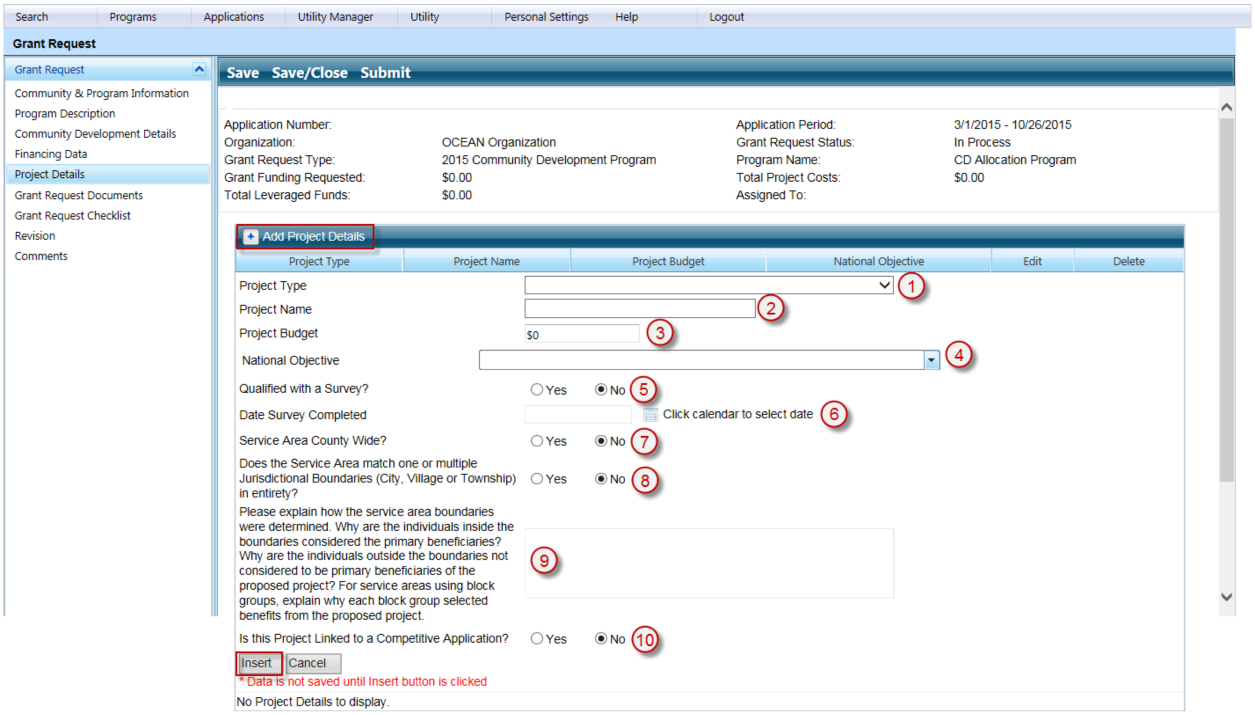
Cancel Adding/Editing Leveraged Fund

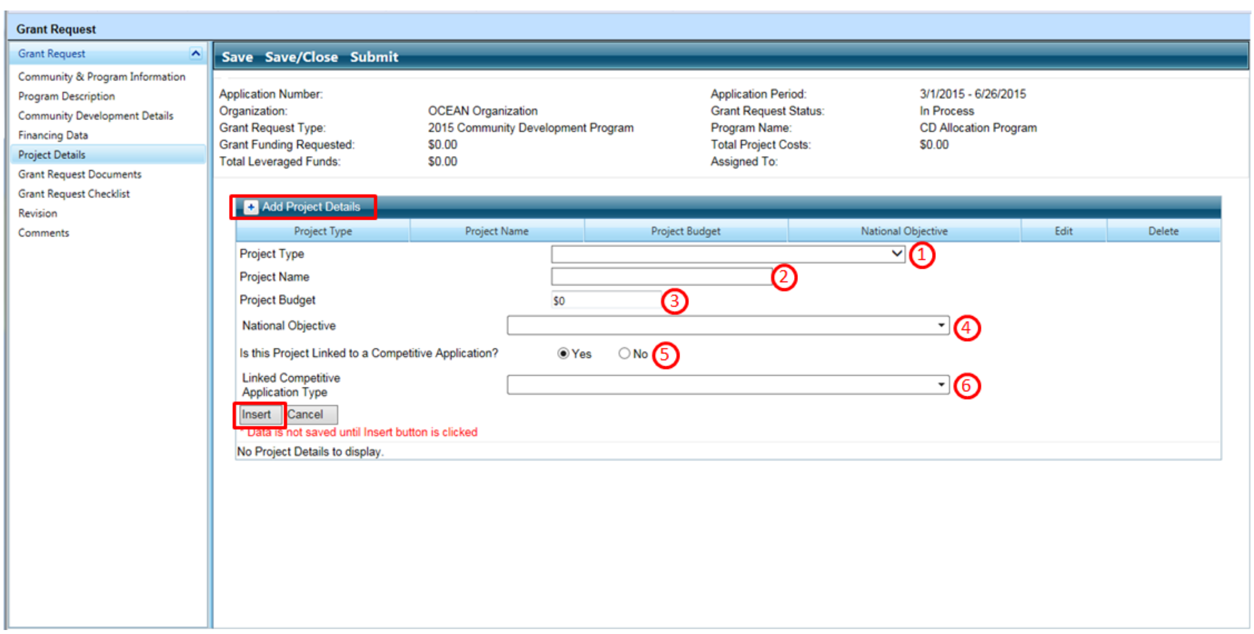
1. Click to either **Add Leveraged Fund** or **Edit** an existing leveraged fund in the grid.
2. The grid expands for adding/editing a leveraged fund record.
3. Click the **Cancel** button.
4. Changes are not saved.

Delete Leveraged Fund

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 Community Development – C.D. Allocation program, the available project types include: • Admin / Fair Housing / Planning • Project Only one 'Admin / Fair Housing / Planning' project can be added to each application, but a maximum of 9 'Project' projects can be added.
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. Project Linked	Select 'Yes' if this project will be linked to a competitive application.
6. Linked Competitive Application Type	This field only displays if 'Project' is selected as the Project Type and 'Yes' is selected for 'Is this Project Linked to a Competitive Application?' Application Types include: • Neighborhood Revitalization • Downtown Revitalization • Critical Infrastructure
Qualified with a Survey (not shown above)	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.
Date Survey Completed (now shown above)	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.
Service Area County Wide (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) 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.

Does the Service Area Match (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) 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.
Service Area Boundary Explanation (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) 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. 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 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.

Census Tract

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:

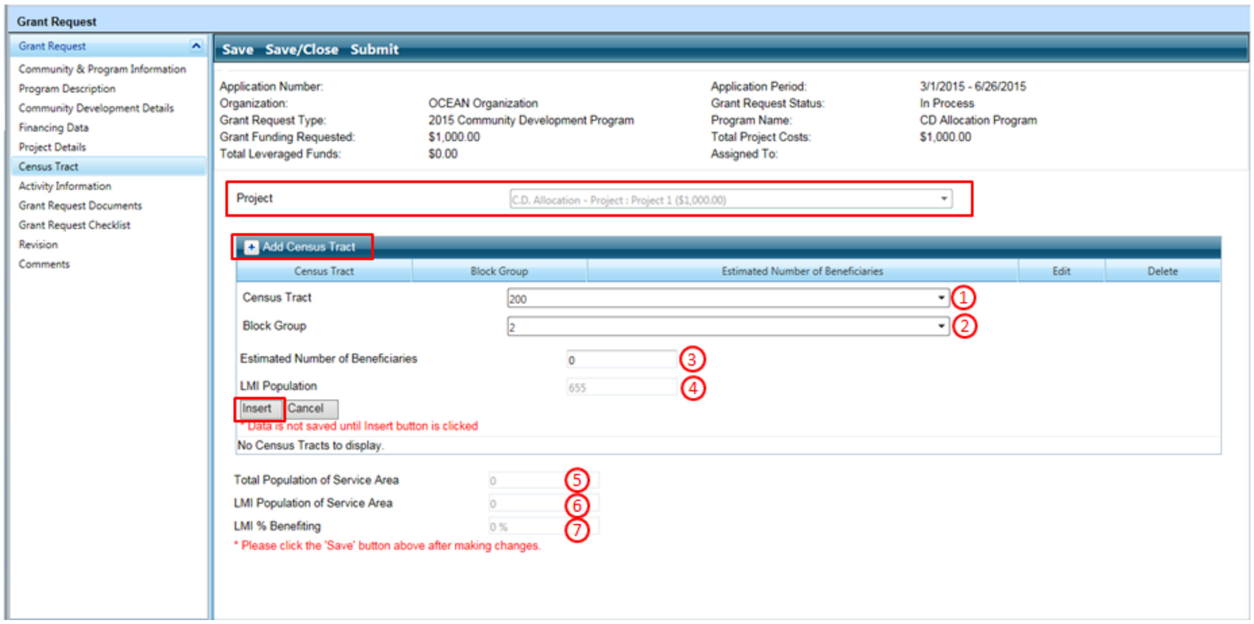
- Area Wide Benefit (LMA)
- Slum & Blight (SBA)
- Limited Clientele (LMC)

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

Census Tract – 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 Population	This populates from census data for the selected Census Tract and Block Group
5. Total Population of Service Area	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. LMI Population of Service Area	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.

The functions available from the Census Tract – Census Tract / Block Group View page are listed below with steps for performing each function:

Add Census Tract

1. Select a project from the **Project** dropdown above the census tract grid.
2. The census tract grid refreshes to show all census tracts and block groups 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. Enter all census tract details. *Note: Only one record for each Census Tract / Block Group combination can be added.
6. Click the **Insert** button.
7. Census tract details are saved.
8. Repeat Steps 3 – 7 for each census tract and block group you need to add for the project type selected.

Edit Census Tract

1. Click on the **Edit** icon next to an existing census tract and block group record in the grid.
2. The grid expands for editing the census tract and block group record.
3. Edit the census tract and block group details.
4. Click the **Update** button.
5. Census tract and block group details are updated.

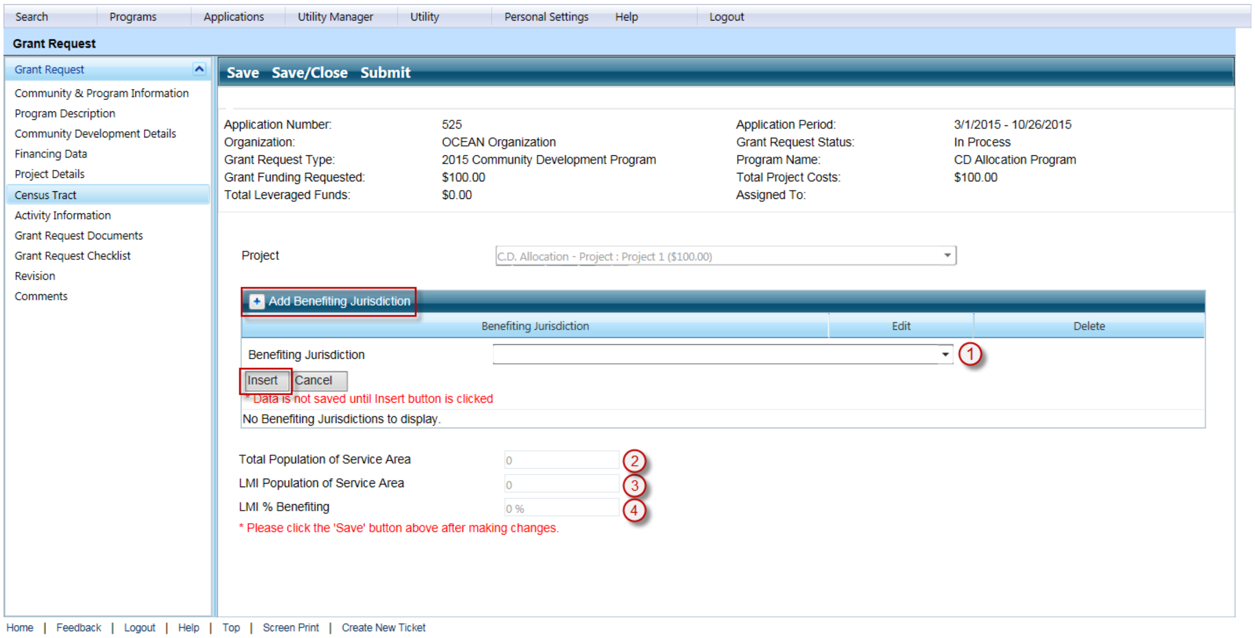
Cancel Adding/Editing Census Tract

1. Click to either **Add Census Tract** or **Edit** an existing census tract and block group record in the grid.
2. The grid expands for adding/editing a census tract and block group 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 and block group record in the grid. *Note: Census tract and block group records cannot be deleted if the service area is county-wide.
2. Census tract and block group record is deleted from the grid.

Census Tract – 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 Population of Service Area	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. LMI Population of Service Area	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.

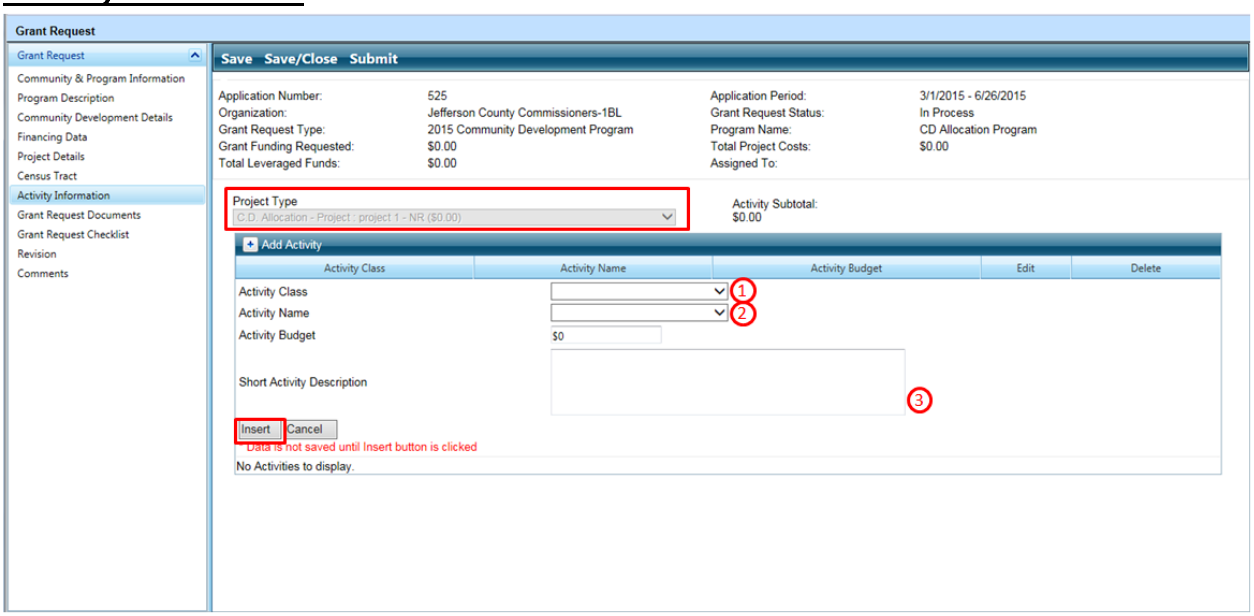
Cancel Adding/Editing Benefiting Jurisdiction

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



<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>1. Activity Class</td><td>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</td></tr>
<tr><td>2. Activity Name</td><td>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.</td></tr>
<tr><td>3. Activity Budget</td><td>Enter the budget for the activity. All activity budgets for the activities on the project must total up to the project budget.</td></tr>
<tr><td>Public Service Type
(not shown above)</td><td>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</td></tr>
<tr><td>4. Short Activity Description</td><td>This field only displays when the project type is ‘Project.’ Enter your short activity description narrative here.</td></tr>
</table>

Presumed Class (not shown above)	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	
Fair Housing	• Fair Housing Program	
Administration	• General Admin	• Planning
Public Services	• Homelessness Prevention	• Public Services
Housing	• Acquisition • Code Enforcement • Conversion / Rehab / Renovation • Demolition / Clearance • Home / Building Repair • Homeless Facilities • Hsng. Dev / Info / Counseling • New Construction	• Parking Facilities • Private Rehabilitation • Public Rehabilitation • Relocation Pymt. & Asst. • Rental / Housing Assistance • Sewer Fac. Improvements • Sidewalk Improvements • Water & Sewer Facilities • Water Fac. Improvements • Weatherization
Economic Dev.	• Private Rehabilitation	

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

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.

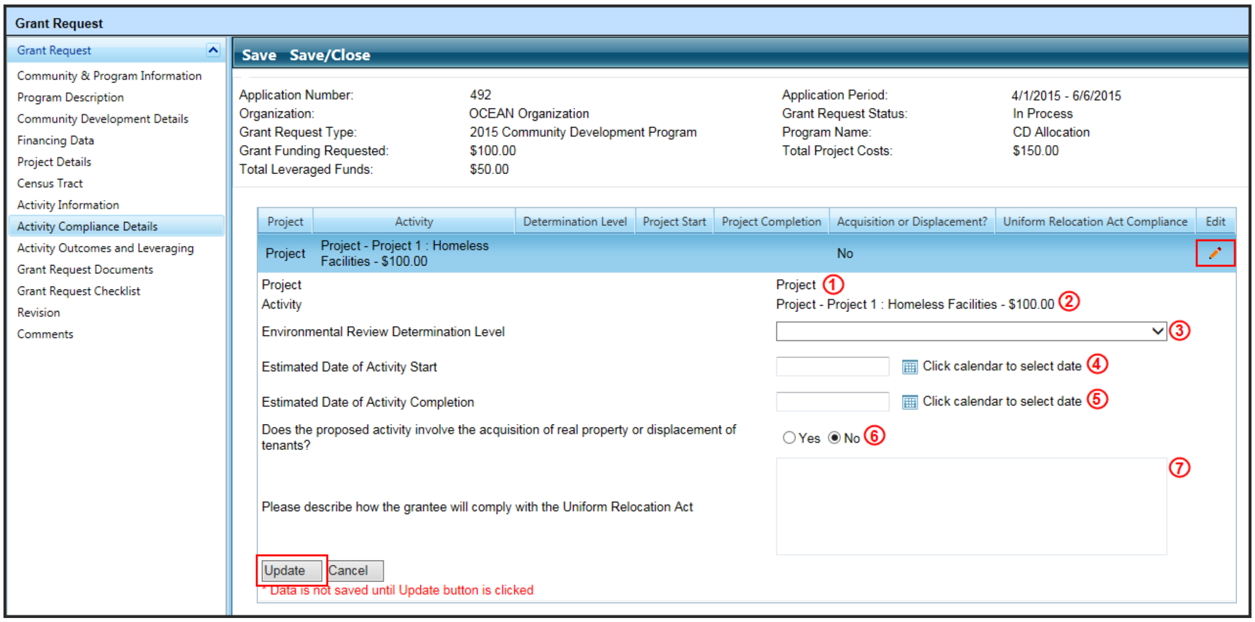
4. Changes are not saved.

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 Compliance Details

This page displays all activities for all project types (except Admin / Fair Housing / Planning).



Field	Description
1. Project	Displays the project type of the activity listed.
2. Activity	Displays the project name and activity for the activity record.
3. Environmental Review Determination Level	Select the environmental review determination level from the following options: • Categorically Excluded Not Subject to 58.5 • Categorically Excluded Subject to 58.5 • Continuing Relevance • Environmental Assessment • Exempt
4. Estimated Date of Activity Start	Click the calendar icon and select the estimated date the activity is to start.
5. Estimated Date of Activity Completion	Click the calendar icon and select the estimated date the activity is to be completed.

6. Does the proposed activity involve the acquisition of real property or displacement of tenants?	Click yes or no if the proposed activity involves the acquisition of real property or displacement of tenants.
7. Please describe how the grantee will comply with the Uniform Relocation Act	This field is only editable when 'Yes' has been selected for 'Does the proposed activity involve the acquisition of real property or displacement of tenants.' Enter details to describe how you will comply with the Uniform Relocation Act.

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

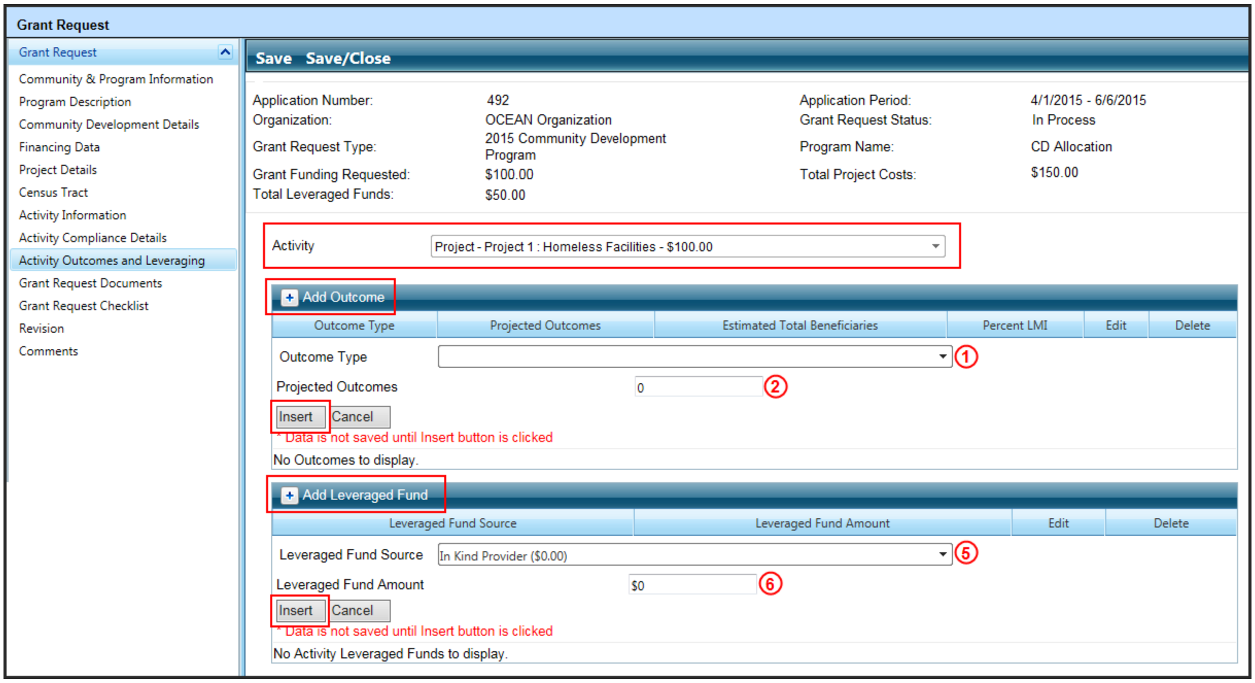
Edit Activity Compliance Details

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

Cancel Adding/Editing Activity Compliance Details

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

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.
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
Demolition / Clearance	• Structures Demolished	
Disposition	• Acres of Land • Square Feet of Structure	• Structures

Activity	Outcomes	
Fair Housing Program	• FH Training Program • FH Counseling • FH Complaint System • FH Education Outreach • FH Legislation Adopted • FH Affirmation Action Plan	• FH Analysis • FH Coordinator • FH CHIP Program Outcomes • Standard Fair Housing Program
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
Homelessness Prevention	• Households Assisted	• Hslds Asst. with Counseling/Education
Hsng. Dev. / Info / Counseling	• Households Assisted	• Hslds Asst. with Counseling/Education
Interim / Emergency Rental Asst.	• Households Assisted	
Neighb. Fac / Community Ctr	• Buildings Rehabbed/Constructed	
New Construction	• Square Feet of Construction • Units Constructed – Owner	• Units Constructed – Rental • Units Acquired, Constructed and Sold
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	
Relocation Pymt. & Asst.	• Household Assisted • Businesses/Organizations Assisted	• Households Assisted – Opt. Relocation

Activity	Outcomes	
Rental / Housing Assistance	• Households Assisted • Units Assisted or Inspected	• Hslds Asst. with Counseling/Education
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
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
Weatherization	• Units Repaired – Owner	• Units Repaired – Rental

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.
1\. The grid expands for editing the leveraged fund record.
2\. Edit the leveraged fund details.
3\. Click the **Update** button.
4\. 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

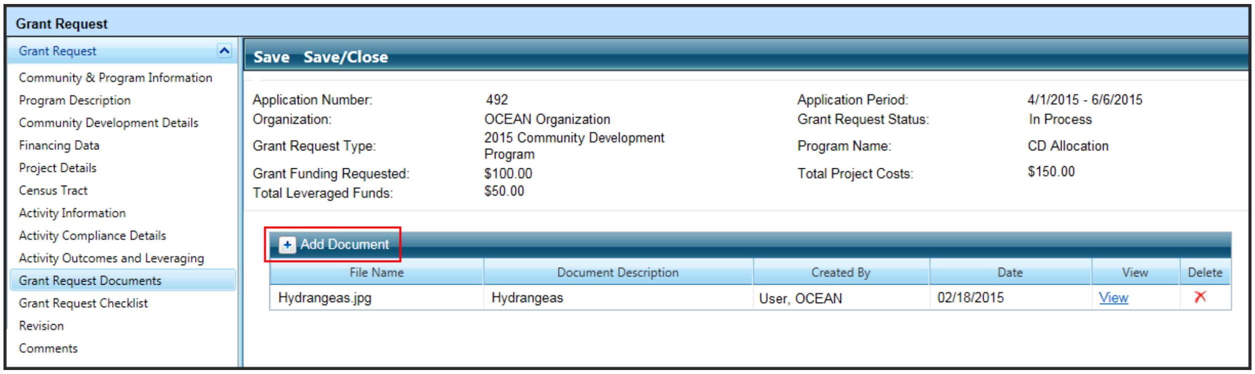
grid.

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. 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.

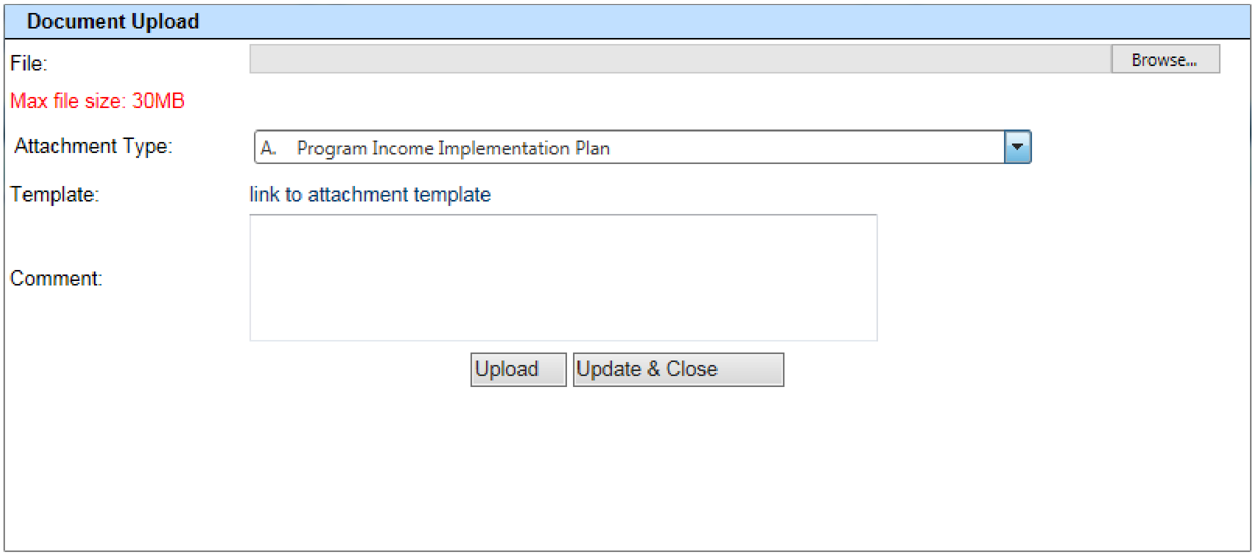
The functions available from the Grant Request Documents page are listed below with steps for performing each function:

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.



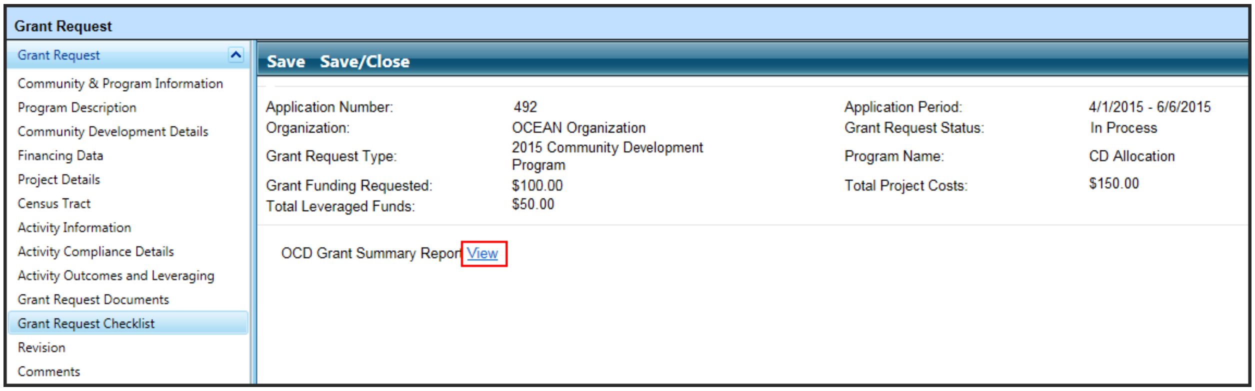
*Note: If the attachment type selected is for a project or activity, then you will be required to select the project and/or activity to attach the document to. These will be shown by additional dropdowns on the document upload popup above.

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

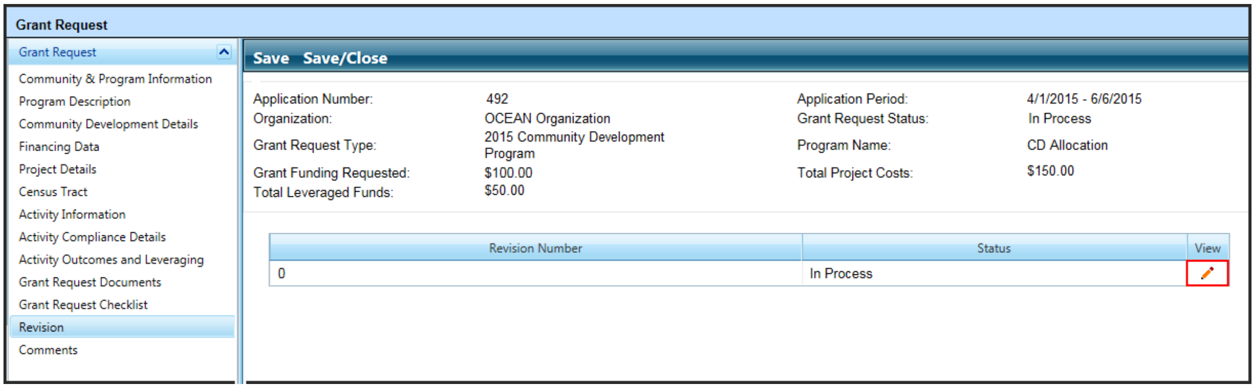


The functions available from the Grant Request Checklist page are listed below with steps for performing each function:

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

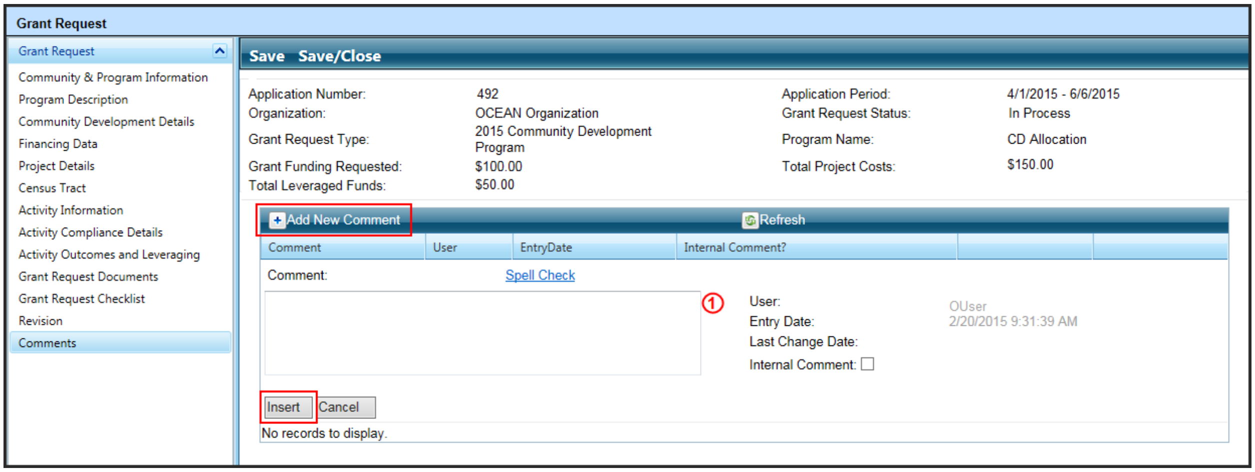


The functions available from the Revision page are listed below with steps for performing each function:

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.

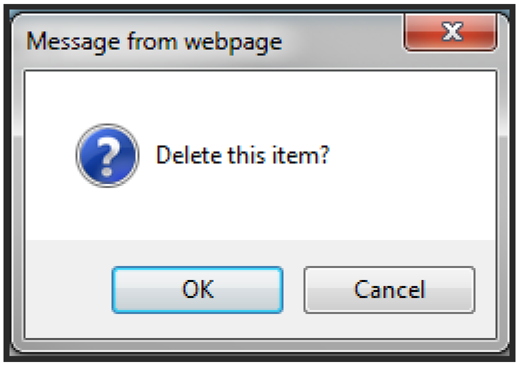
Cancel Adding/Editing Comment

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.

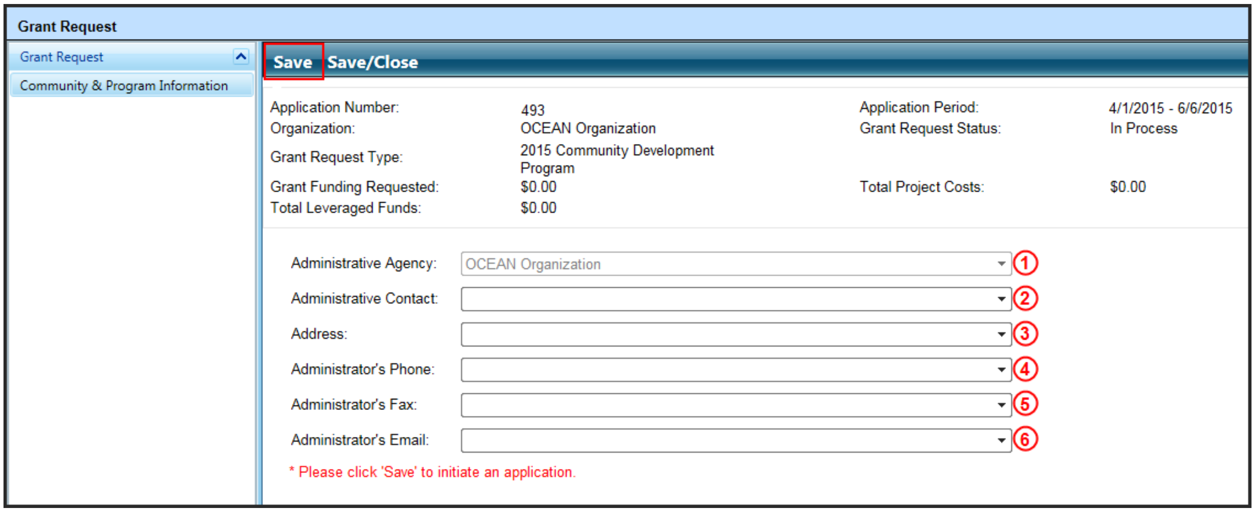


1. Click **OK**.
2. Comment record is deleted from the grid.

Neighborhood Revitalization Program

Start from the Application Request Search page and click to **Add New Grant Request**. Prior to creating a Grant Request for the Neighborhood Revitalization Program, the organization must already have a Grant Request created for the C.D. Allocation Program.

Community & Program Information

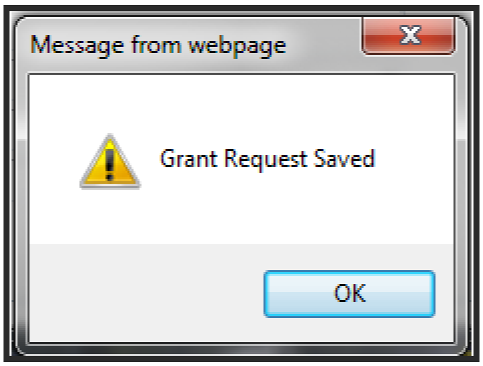


Field	Description
1. Administrative Agency	Displays your current organization as the administrative agency.
2. Administrative Contact	Use this dropdown to select the administrative contact from your organization for the CD application.
3. Address	This dropdown will populate with the current address on 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

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.

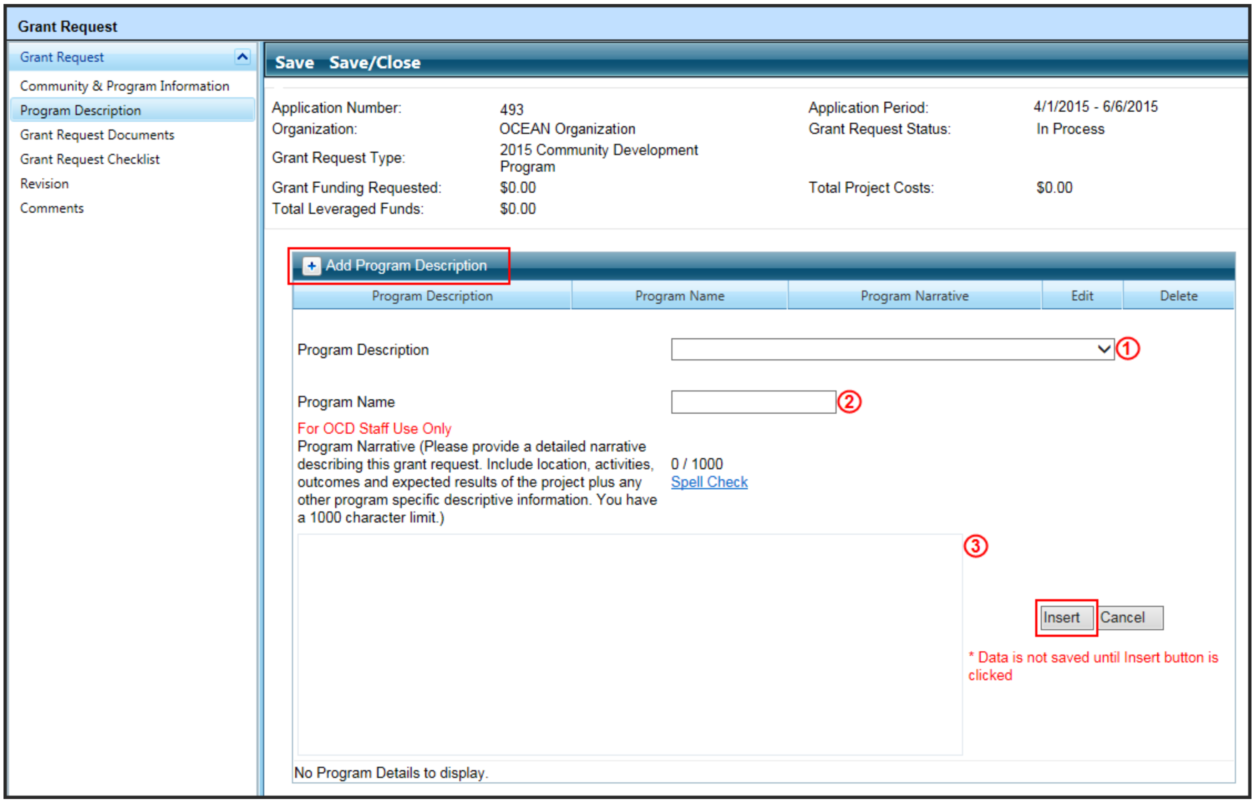


5. Click **OK** in the message box to continue.
6. The remaining pages of the grant application will be displayed in the left navigation panel.

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 Description	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 CD, there are four available programs: • C.D. Allocation • Neighborhood Revitalization • Downtown Revitalization • Critical Infrastructure
2. Program Name	Enter the name for the program that is used by your organization to identify the application.
3. Program Narrative	This field will be used by the OCD Staff only. The OCD Staff will provide a detailed narrative describing the grant request after submission.

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 ‘Neighborhood Revitalization’ 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 Name**. The **Program Description** field cannot be edited.
4. Click the **Update** button.
5. Program description details are updated.

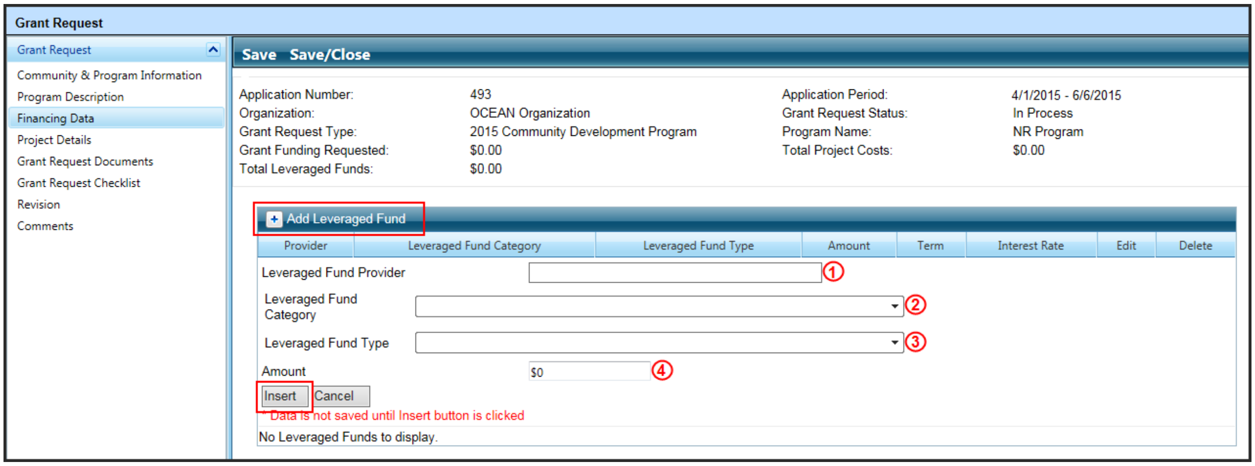
Cancel Adding/Editing Program Description

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, Activity Information, Activity Compliance Details, and Activity Outcomes and Leveraging will be deleted as well.

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 • C.D. Allocation
4. Amount	Enter the dollar amount of leveraged funds 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.

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.

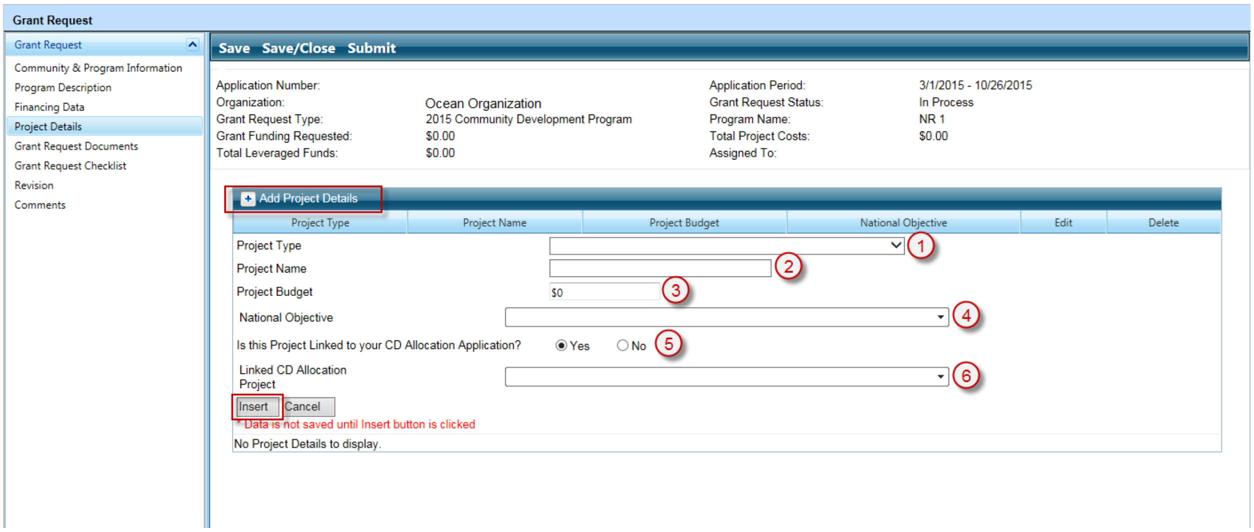
Cancel Adding/Editing Leveraged Fund

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

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 Community Development – C.D. Allocation program, the available project types include: • Admin / Fair Housing / Planning • Project Only one 'Admin / Fair Housing / Planning' project can be added to each application, but a maximum of 9 'Project' projects can be added.
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. Project Linked to CD Allocation	Select 'Yes' if this project will be linked to the CD Allocation application.
6. Linked Competitive Application Type	This field only displays if 'Project' is selected as the Project Type and 'Yes' is selected for 'Is this Project Linked to your CD Allocation Application?'. All CD Allocation projects designated as linked to 'Neighborhood Revitalization' Application Types will be available for selection.

Qualified with a Survey (not shown above)	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.
Date Survey Completed (now shown above)	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.
Service Area County Wide (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) 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.
Does the Service Area Match (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) 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.
Service Area Boundary Explanation (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) 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

7. Click on the **Add Project Details** button in the grid.
8. The grid expands for adding a project detail 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 Project Detail

6. Click on the **Edit** icon next to an existing project detail record in the grid.
7. 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.
8. Edit the **Project Name** or the **Project Budget** information.
9. Click the **Update** button.
10. **Project Name** and **Project Budget** information is updated.

Cancel Adding/Editing Project Detail

5. Click to **Add Project Details** or **Edit** an existing project detail record in the grid.
6. The grid expands for adding/editing a project detail record.
7. Click the **Cancel** button.
8. 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 Activity Information, Activity Compliance Details, and Activity Outcomes and Leveraging records will be deleted as well.

Census Tract

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:

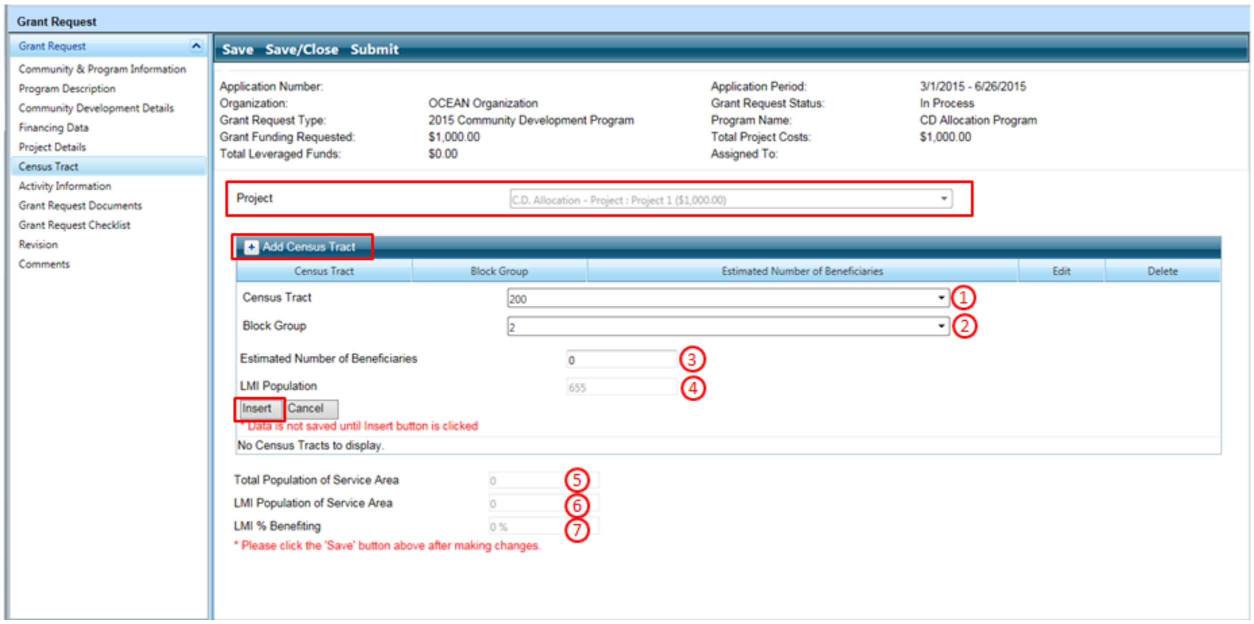
- Area Wide Benefit (LMA)
- Slum & Blight (SBA)
- Limited Clientele (LMC)

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

<u>Census Tract – Census Tract / Block Group View</u>

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 Population	This populates from census data for the selected Census Tract and Block Group
5. Total Population of Service Area	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. LMI Population of Service Area	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.

The functions available from the Census Tract – Census Tract / Block Group View page are listed below with steps for performing each function:

Add Census Tract

9. Select a project from the **Project** dropdown above the census tract grid.
10. The census tract grid refreshes to show all census tracts and block groups currently associated with the selected project.
11. Click on the **Add Census Tract** button in the grid.
12. The grid expands for adding a census tract record.
13. Enter all census tract details. *Note: Only one record for each Census Tract / Block Group combination can be added.
14. Click the **Insert** button.
15. Census tract details are saved.
16. Repeat Steps 3 – 7 for each census tract and block group you need to add for the project type selected.

Edit Census Tract

6. Click on the **Edit** icon next to an existing census tract and block group record in the grid.
7. The grid expands for editing the census tract and block group record.
8. Edit the census tract and block group details.
9. Click the **Update** button.
10. Census tract and block group details are updated.

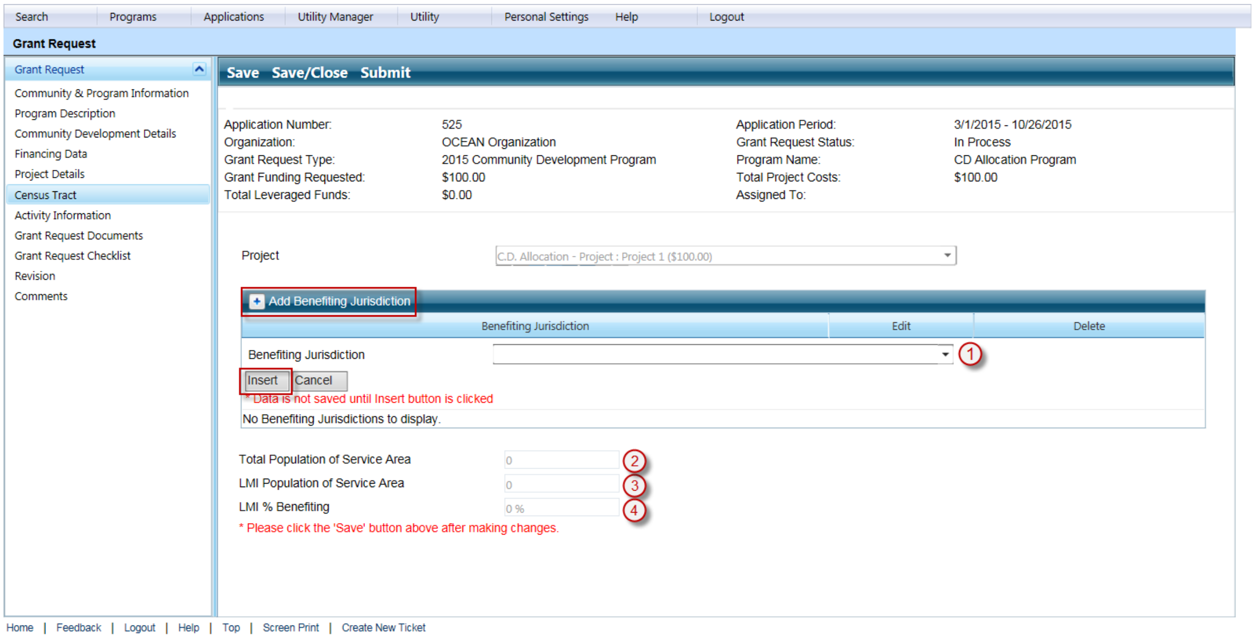
Cancel Adding/Editing Census Tract

5. Click to either **Add Census Tract** or **Edit** an existing census tract and block group record in the grid.
6. The grid expands for adding/editing a census tract and block group record.
7. Click the **Cancel** button.
8. Changes are not saved.

Delete Census Tract

3. Click on the **Delete** icon next to an existing census tract and block group record in the grid. *Note: Census tract and block group records cannot be deleted if the service area is county-wide.
4. Census tract and block group record is deleted from the grid.

Census Tract – 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 Population of Service Area	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. LMI Population of Service Area	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

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

14. Click the **Insert** button.
15. Benefiting jurisdictions are saved.
16. Repeat Steps 3 – 7 for each benefiting jurisdiction you need to add for the project type selected.

Edit Benefiting Jurisdiction

6. Click on the **Edit** icon next to an existing benefiting jurisdiction record in the grid.
7. The grid expands for editing the benefiting jurisdiction record.
8. Edit the benefiting jurisdiction selection.
9. Click the **Update** button.
10. The benefiting jurisdiction is updated.

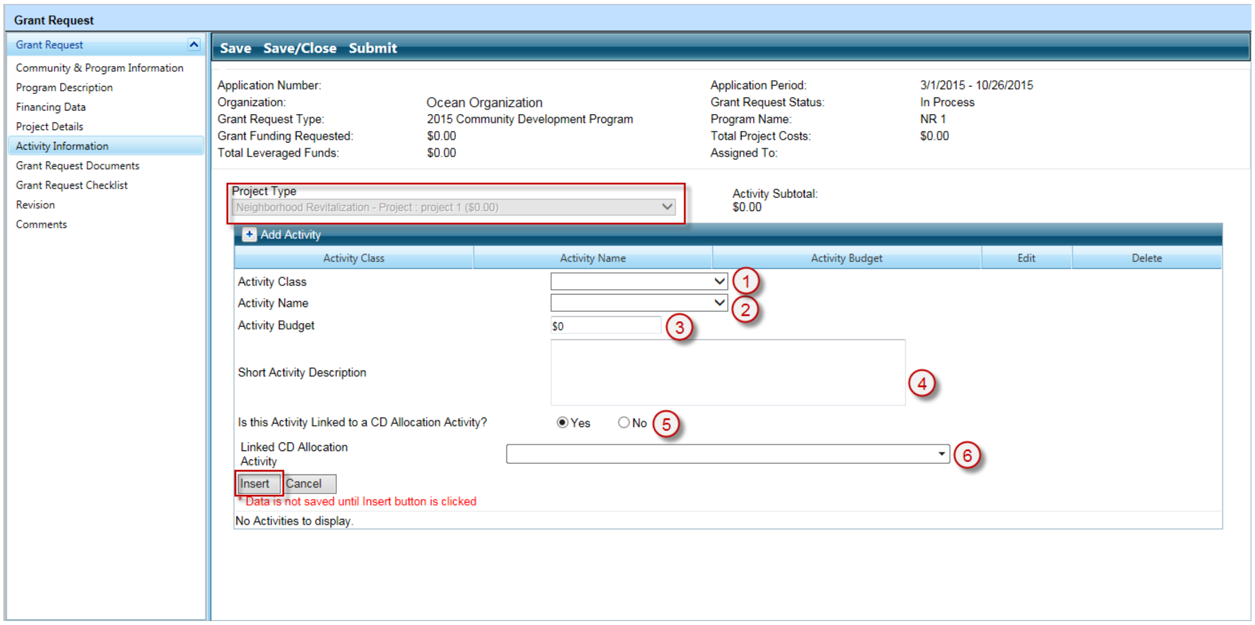
Cancel Adding/Editing Benefiting Jurisdiction

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

Delete Benefiting Jurisdiction

3. Click on the **Delete** icon next to an existing benefiting jurisdiction record in the grid.
4. 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 only available activity class option is: • Administration If the activity is being entered a Project project type, then the only available activity class option is: • 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. Short Activity Description	This field only displays when the project type is 'Project.' Enter your short activity description narrative here.

Presumed Class (not shown above)	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
5. Activity Linked to CD Allocation	This field only displays when the project type is 'Project' and the project is linked to a CD Allocation application project.
5. Linked CD Allocation Activity	This field only displays when '**Is this Activity Linked to a CD Allocation Activity?**' is 'Yes". The list will show activities on the linked CD Allocation project that match the Activity Class and Activity Name selected for this activity.

Activity Class	Activities
Administration	• General Admin
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.
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

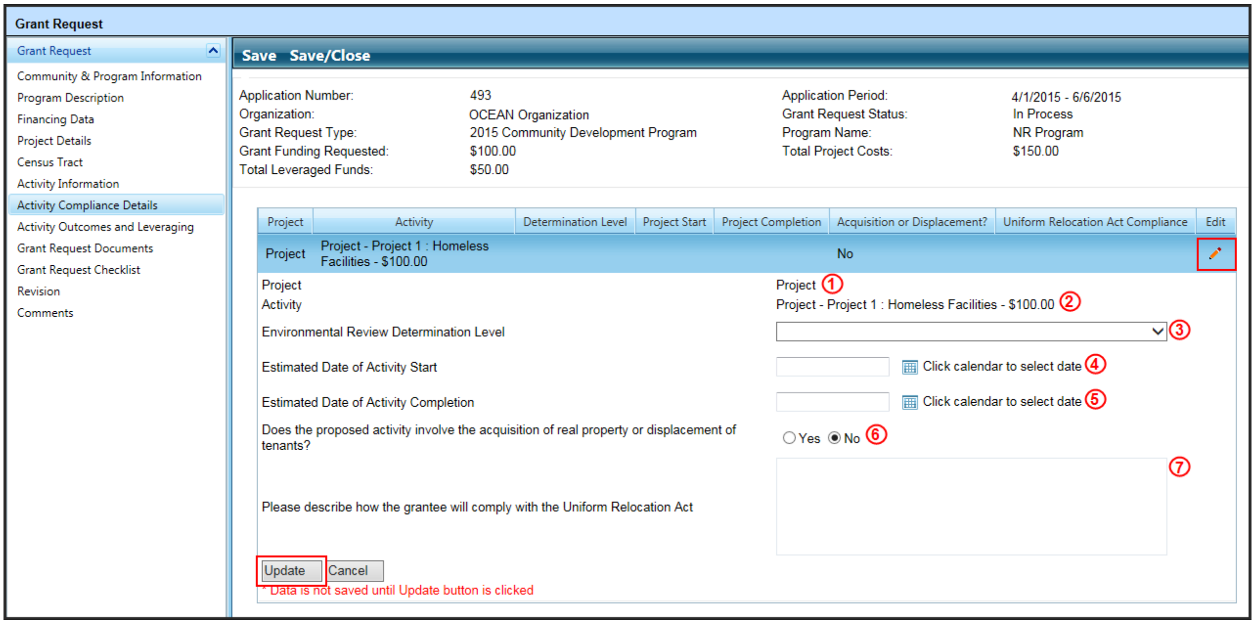
1. Click to either **Add Activity** or **Edit** an existing activity record in the grid.
2. The grid expands for adding/editing an activity record.
3. Click the **Cancel** button.
4. Changes are not saved.

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 Needs, Activity Compliance Details, and Activity Outcomes and Leveraging will be deleted as well.

Activity Compliance Details

This page displays all activities for all project types (except Admin / Fair Housing / Planning).



Field	Description
1. Project	Displays the project type of the activity listed.
2. Activity	Displays the project name and activity for the activity record.
3. Environmental Review Determination Level	Select the environmental review determination level from the following options: • Categorically Excluded Not Subject to 58.5 • Categorically Excluded Subject to 58.5 • Continuing Relevance • Environmental Assessment • Exempt
4. Estimated Date of Activity Start	Click the calendar icon and select the estimated date the activity is to start.
5. Estimated Date of Activity Completion	Click the calendar icon and select the estimated date the activity is to be completed.
6. Does the proposed activity involve the acquisition of real property or displacement of tenants?	Click yes or no if the proposed activity involves the acquisition of real property or displacement of tenants.
7. Please describe how the grantee will comply with the Uniform Relocation Act	This field is only editable when ‘Yes’ has been selected for ‘Does the proposed activity involve the acquisition of real property or displacement of tenants.’ Enter details to describe how you will comply with the Uniform Relocation Act.

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

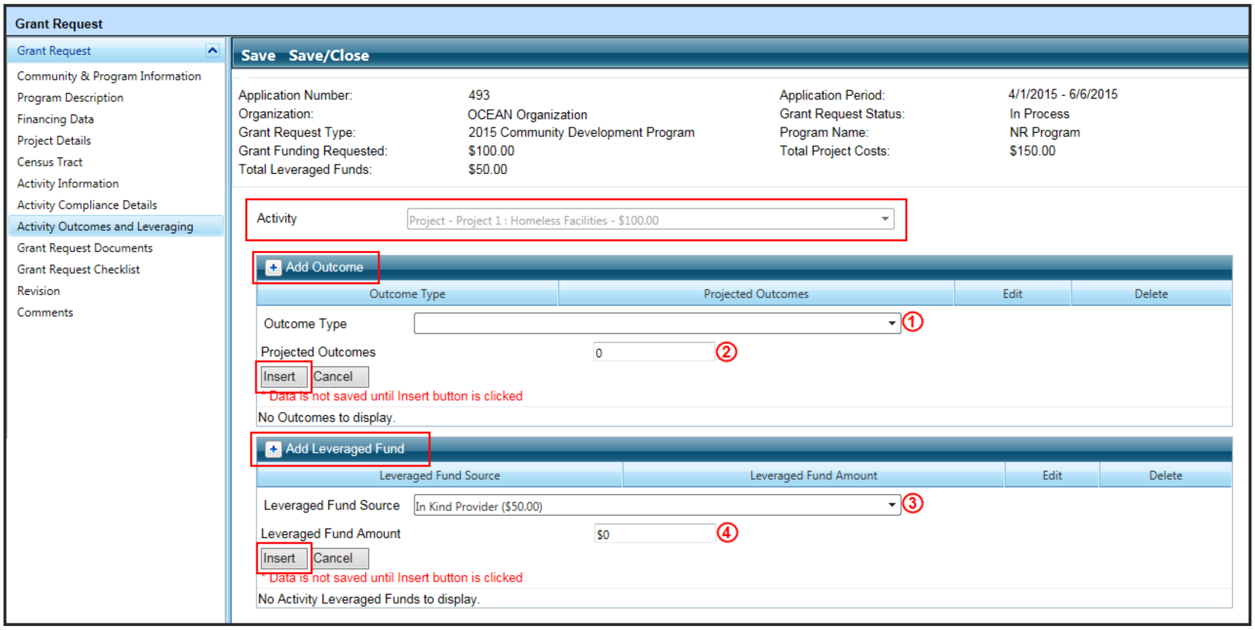
Edit Activity Compliance Details

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

Cancel Adding/Editing Activity Compliance Details

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

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.
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	
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 Rehabilitation	• 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
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

Activity	Outcomes	
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.

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.
1. The grid expands for editing the leveraged fund record.
2. Edit the leveraged fund details.
3. Click the **Update** button.
4. Leveraged fund details are updated.

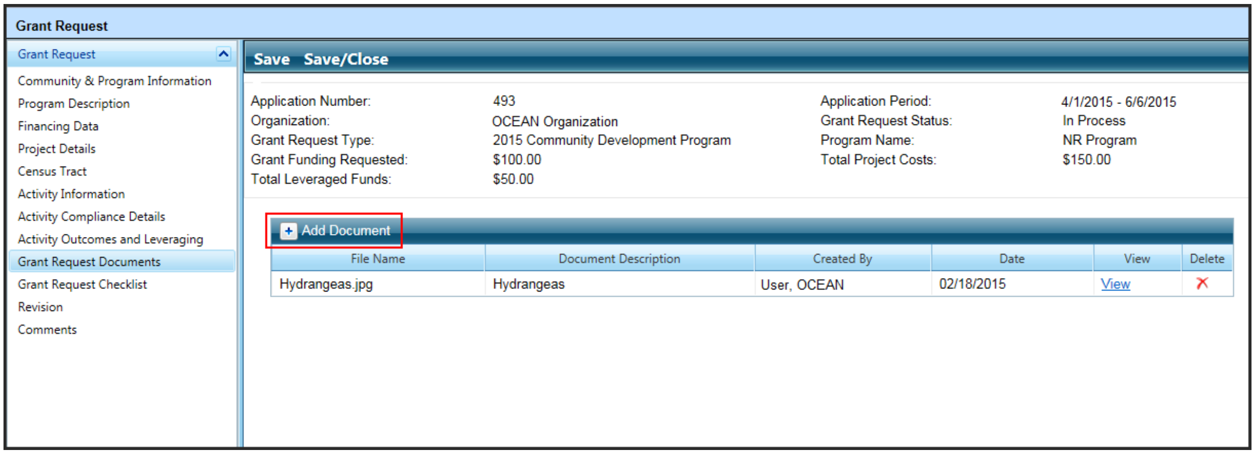
Cancel Adding/Editing Leveraged Fund

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
2. 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.

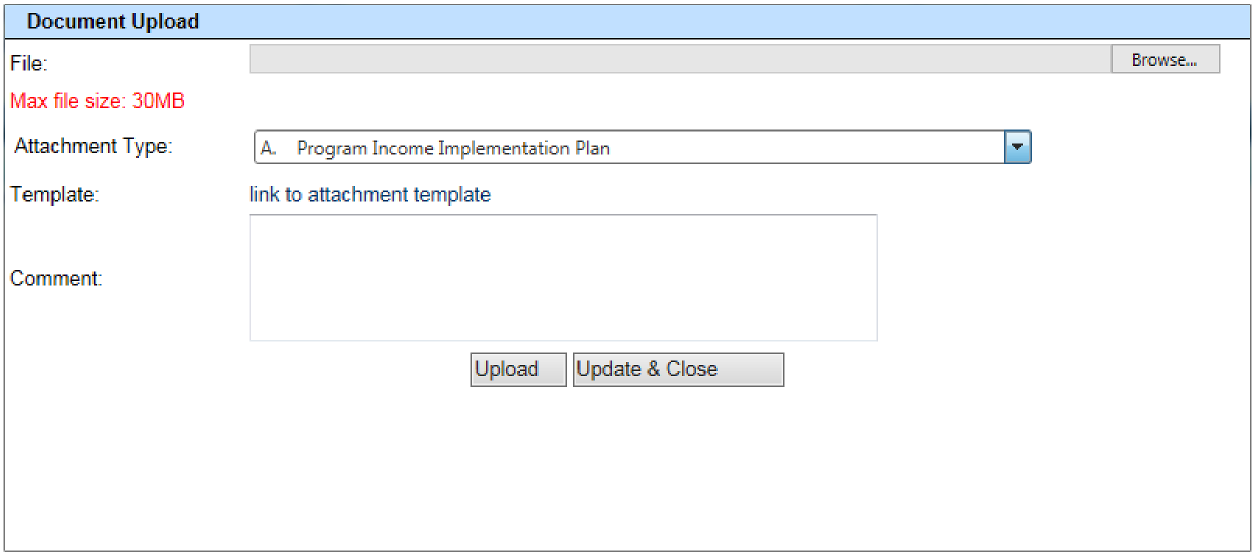
The functions available from the Grant Request Documents page are listed below with steps for performing each function:

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.



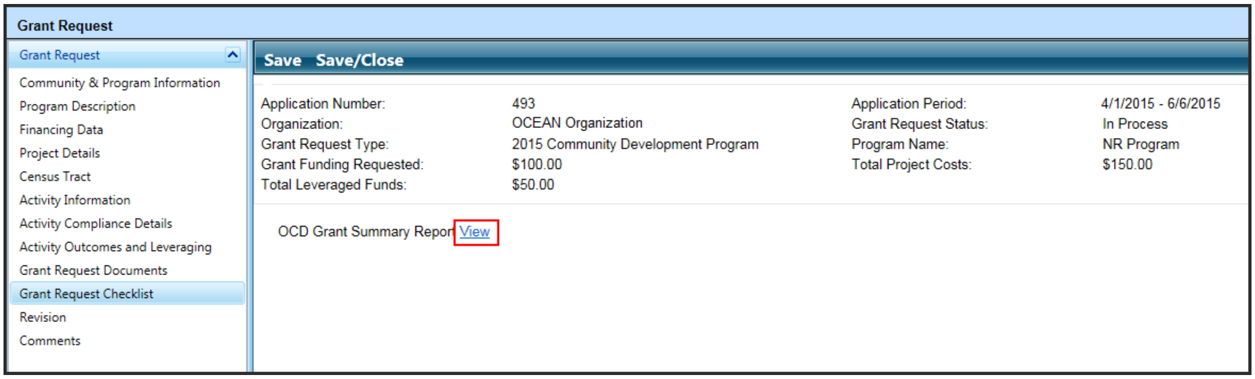
*Note: If the attachment type selected is for a project or activity, then you will be required to select the project and/or activity to attach the document to. These will be shown by additional dropdowns on the document upload popup above.

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

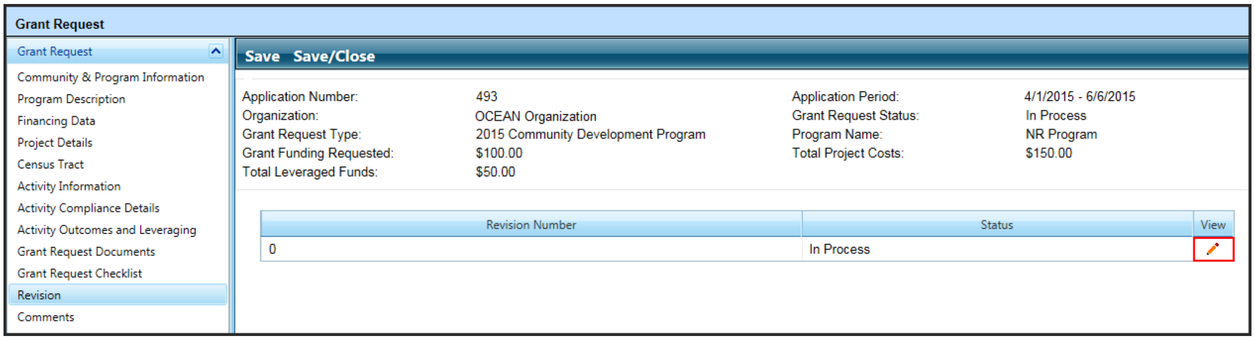


The functions available from the Grant Request Checklist page are listed below with steps for performing each function:

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

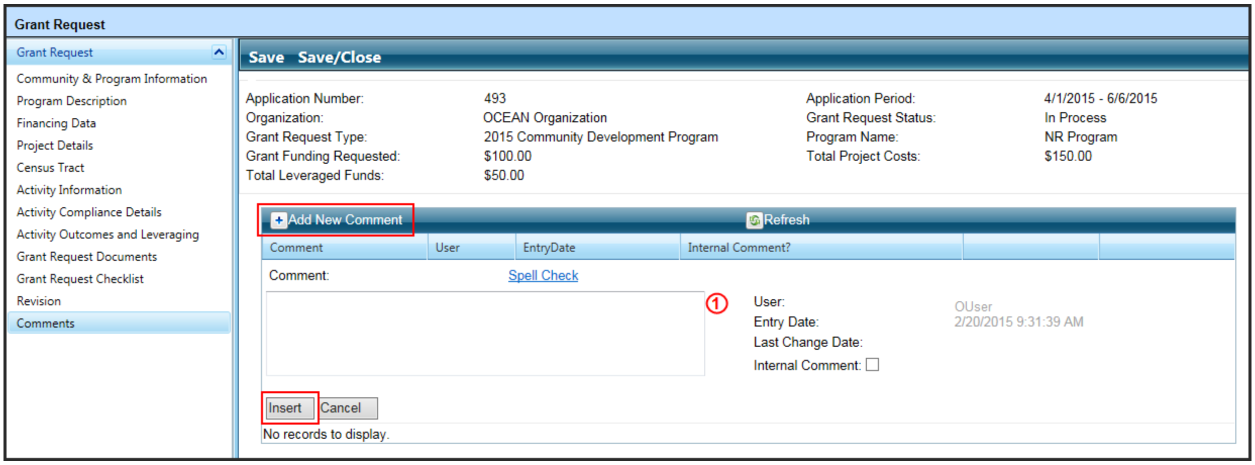


The functions available from the Revision page are listed below with steps for performing each function:

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.

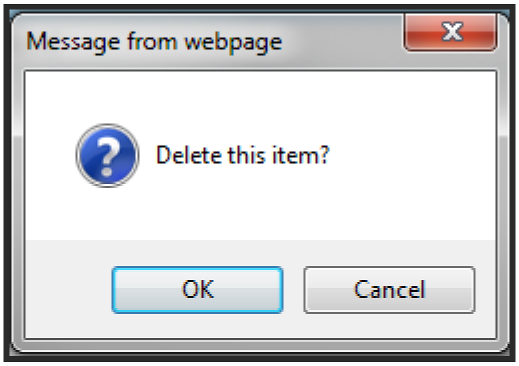
Cancel Adding/Editing Comment

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.

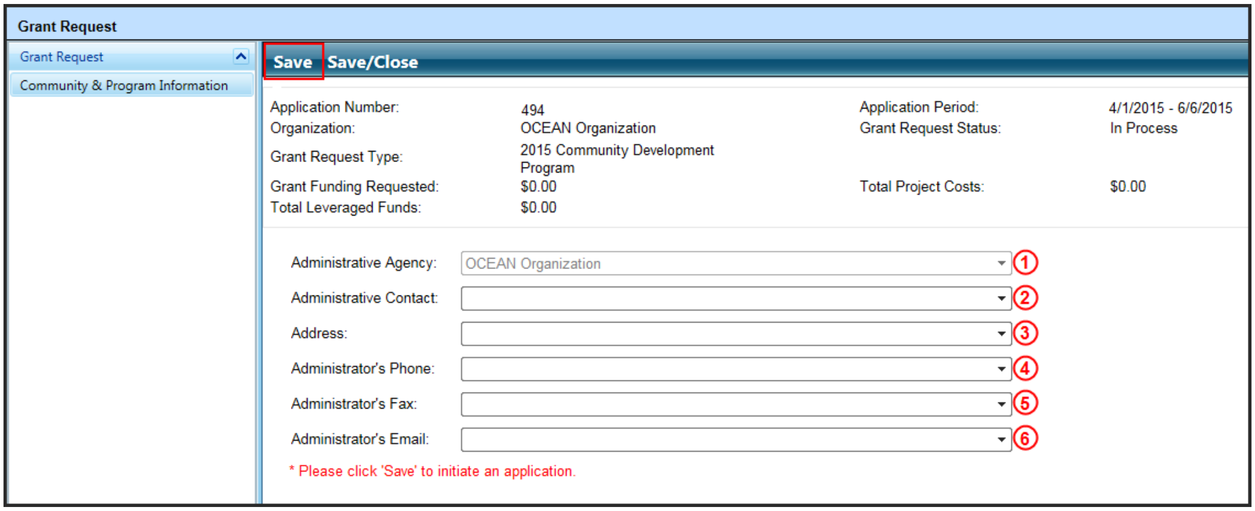


3. Click **OK**.
4. Comment record is deleted from the grid.

Downtown Revitalization Program

Start from the Application Request Search page and click the **Add New Grant Request**.

Community & Program Information

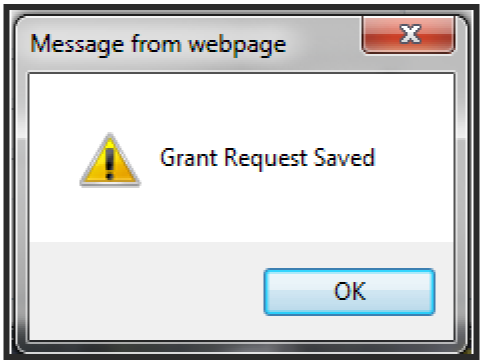


Field	Description
1. Administrative Agency	Displays your current organization as the administrative agency.
2. Administrative Contact	Use this dropdown to select the administrative contact from your organization for the CD application.
3. Address	This dropdown will populate with the current address on 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

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.

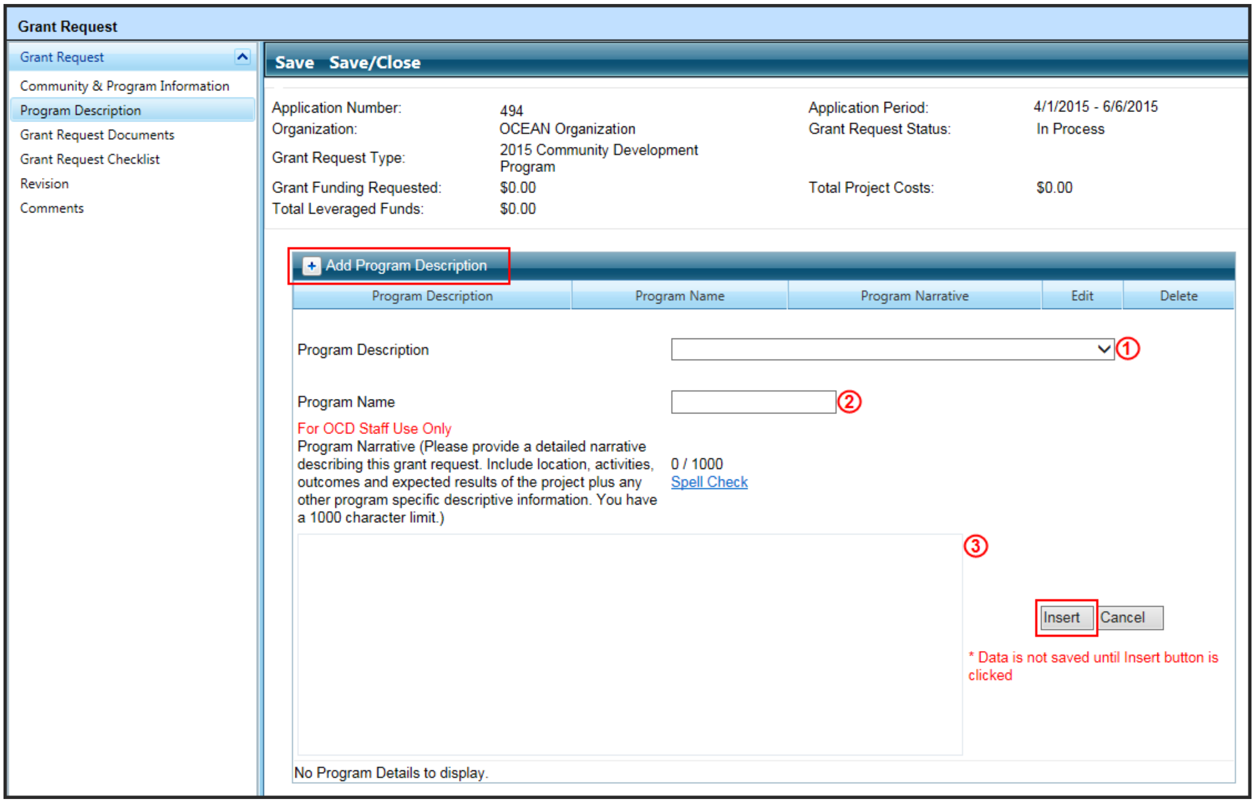


5. Click **OK** in the message box to continue.
6. The remaining pages of the grant application will be displayed in the left navigation panel.

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 Description	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 CD, there are four available programs: • C.D. Allocation • Neighborhood Revitalization • Downtown Revitalization • Critical Infrastructure
2. Program Name	Enter the name for the program that is used by your organization to identify the application.
3. Program Narrative	This field will be used by the OCD Staff only. The OCD Staff will provide a detailed narrative describing the grant request after submission.

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 'Downtown Revitalization' 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 Name**. The **Program Description** field cannot be edited.
4. Click the **Update** button.
5. Program description details are updated.

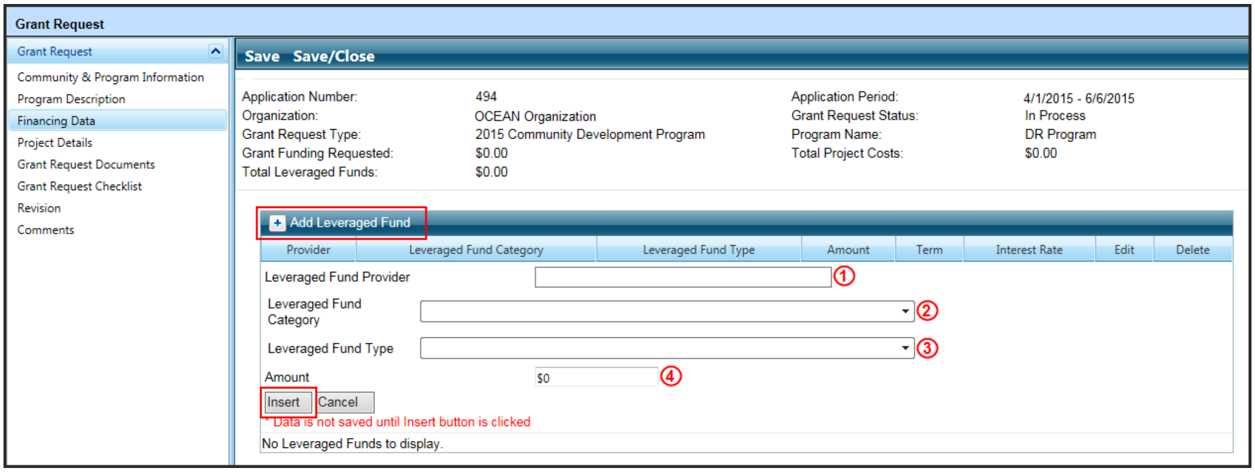
Cancel Adding/Editing Program Description

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, Activity Information, Activity Compliance Details, and Activity Outcomes and Leveraging will be deleted as well.

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 • C.D. Allocation
4. Amount	Enter the dollar amount of leveraged funds 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.

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.

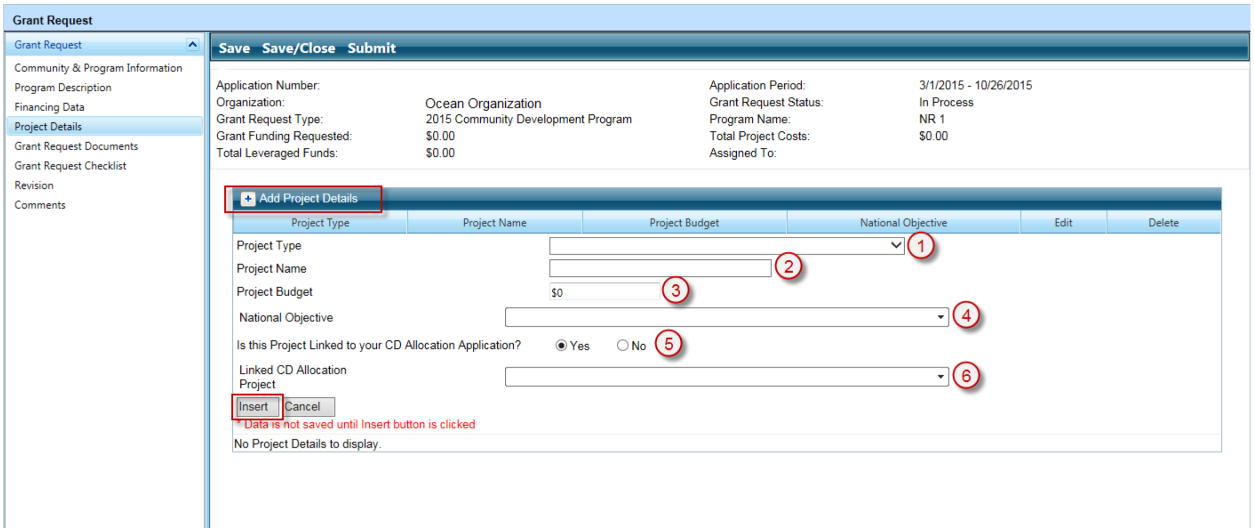
Cancel Adding/Editing Leveraged Fund

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

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 Community Development – C.D. Allocation program, the available project types include: • Admin / Fair Housing / Planning • Project Only one 'Admin / Fair Housing / Planning' project can be added to each application, but a maximum of 9 'Project' projects can be added.
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. Project Linked to CD Allocation	Select 'Yes' if this project will be linked to the CD Allocation application.
6. Linked Competitive Application Type	This field only displays if 'Project' is selected as the Project Type and 'Yes' is selected for 'Is this Project Linked to your CD Allocation Application?'. All CD Allocation projects designated as linked to 'Downtown Revitalization' Application Types will be available for selection.

Qualified with a Survey (not shown above)	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.
Date Survey Completed (now shown above)	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.
Service Area County Wide (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) 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.
Does the Service Area Match (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) 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.
Service Area Boundary Explanation (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) 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

13. Click on the **Add Project Details** button in the grid.
14. The grid expands for adding a project detail record.
15. Enter all project detail information.
16. Click the **Insert** button.
17. Project details information is saved.
18. Repeat Steps 1 – 5 for each project on your application.

Edit Project Detail

11. Click on the **Edit** icon next to an existing project detail record in the grid.
12. 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.
13. Edit the **Project Name** or the **Project Budget** information.
14. Click the **Update** button.
15. **Project Name** and **Project Budget** information is updated.

Cancel Adding/Editing Project Detail

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

Delete Project Detail

5. Click on the **Delete** icon next to an existing project detail record in the grid.
6. 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.

Census Tract

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:

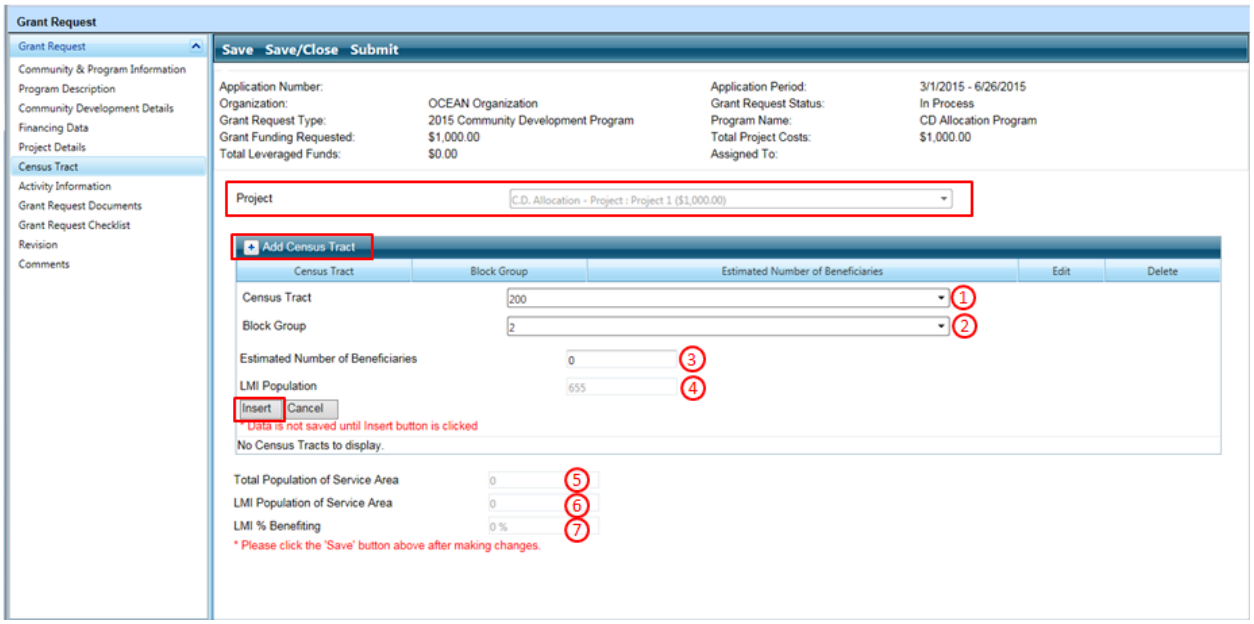
- Area Wide Benefit (LMA)
- Slum & Blight (SBA)
- Limited Clientele (LMC)

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

Census Tract – 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 Population	This populates from census data for the selected Census Tract and Block Group
5. Total Population of Service Area	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. LMI Population of Service Area	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.

The functions available from the Census Tract – Census Tract / Block Group View page are listed below with steps for performing each function:

Add Census Tract

17. Select a project from the **Project** dropdown above the census tract grid.
18. The census tract grid refreshes to show all census tracts and block groups currently associated with the selected project.
19. Click on the **Add Census Tract** button in the grid.
20. The grid expands for adding a census tract record.
21. Enter all census tract details. *Note: Only one record for each Census Tract / Block Group combination can be added.
22. Click the **Insert** button.
23. Census tract details are saved.
24. Repeat Steps 3 – 7 for each census tract and block group you need to add for the project type selected.

Edit Census Tract

11. Click on the **Edit** icon next to an existing census tract and block group record in the grid.
12. The grid expands for editing the census tract and block group record.
13. Edit the census tract and block group details.
14. Click the **Update** button.
15. Census tract and block group details are updated.

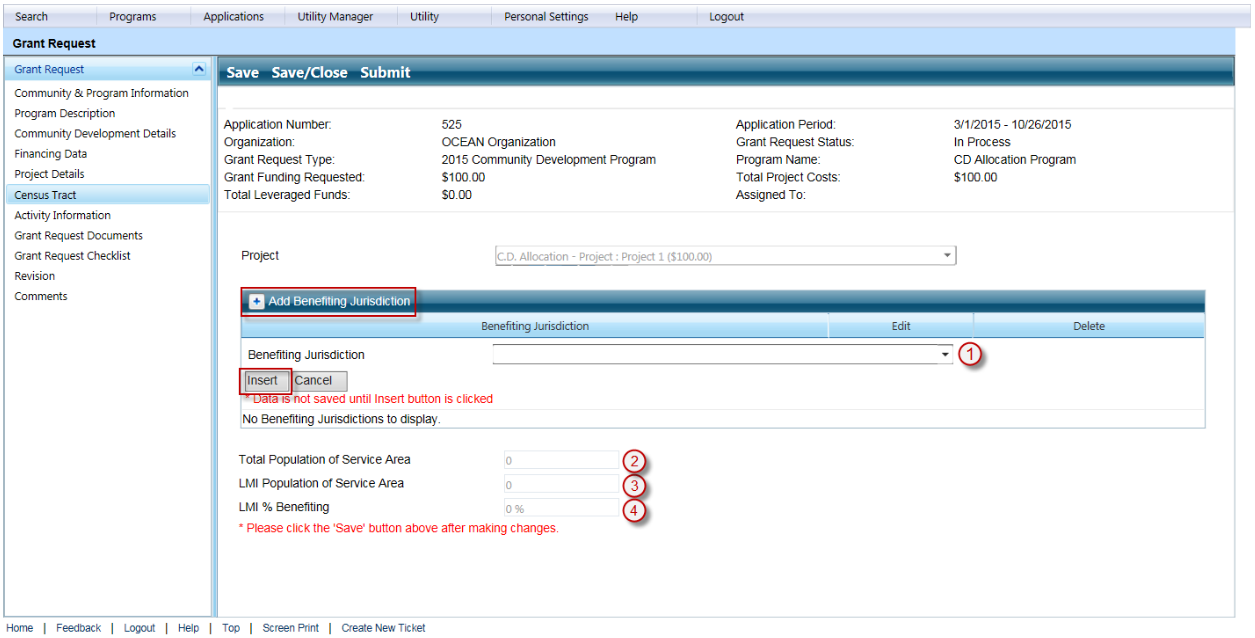
Cancel Adding/Editing Census Tract

9. Click to either **Add Census Tract** or **Edit** an existing census tract and block group record in the grid.
10. The grid expands for adding/editing a census tract and block group record.
11. Click the **Cancel** button.
12. Changes are not saved.

Delete Census Tract

5. Click on the **Delete** icon next to an existing census tract and block group record in the grid. *Note: Census tract and block group records cannot be deleted if the service area is county-wide.
6. Census tract and block group record is deleted from the grid.

Census Tract – 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 Population of Service Area	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. LMI Population of Service Area	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

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

22. Click the **Insert** button.
23. Benefiting jurisdictions are saved.
24. Repeat Steps 3 – 7 for each benefiting jurisdiction you need to add for the project type selected.

Edit Benefiting Jurisdiction

11. Click on the **Edit** icon next to an existing benefiting jurisdiction record in the grid.
12. The grid expands for editing the benefiting jurisdiction record.
13. Edit the benefiting jurisdiction selection.
14. Click the **Update** button.
15. The benefiting jurisdiction is updated.

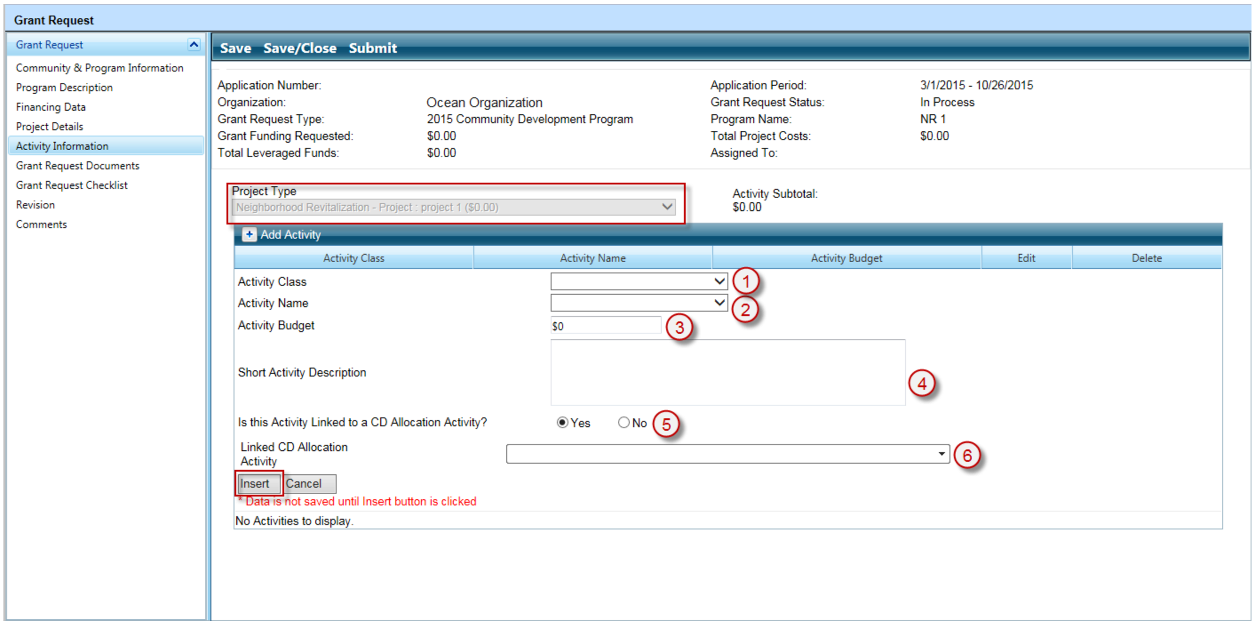
Cancel Adding/Editing Benefiting Jurisdiction

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

Delete Benefiting Jurisdiction

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

Activity Information



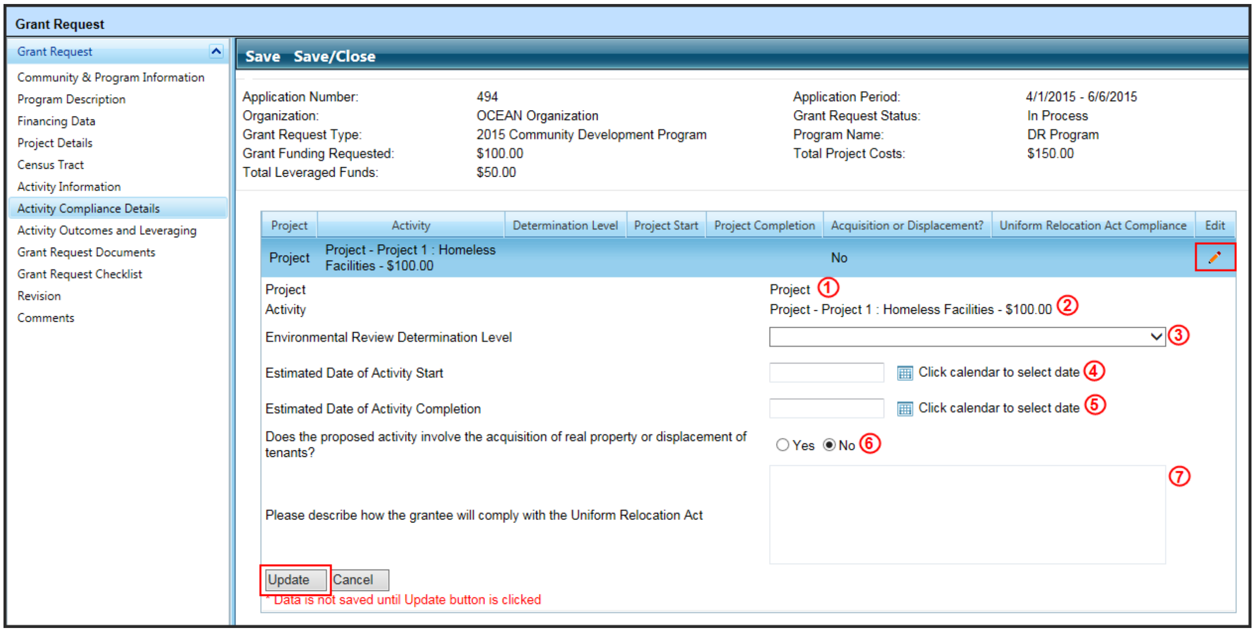
Field	Description
1. Activity Class	Select an activity class for the new activity. If the activity is being entered for an Admin / Fair Housing / Planning project type, then the only available activity class option is: • Administration If the activity is being entered a Project project type, then the available activity class options include: • 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. Short Activity Description	This field only displays when the project type is 'Project.' Enter your short activity description narrative here.

Presumed Class (not shown above)	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
5. Activity Linked to CD Allocation	This field only displays when the project type is 'Project' and the project is linked to a CD Allocation application project.
5. Linked CD Allocation Activity	This field only displays when '**Is this Activity Linked to a CD Allocation Activity?**' is 'Yes". The list will show activities on the linked CD Allocation project that match the Activity Class and Activity Name selected for this activity.

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

Activity Compliance Details

This page displays all activities for all project types (except Admin / Fair Housing / Planning).



Field	Description
1. Project	Displays the project type of the activity listed.
2. Activity	Displays the project name and activity for the activity record.
3. Environmental Review Determination Level	Select the environmental review determination level from the following options: • Categorically Excluded Not Subject to 58.5 • Categorically Excluded Subject to 58.5 • Continuing Relevance • Environmental Assessment • Exempt
4. Estimated Date of Activity Start	Click the calendar icon and select the estimated date the activity is to start.
5. Estimated Date of Activity Completion	Click the calendar icon and select the estimated date the activity is to be completed.
6. Does the proposed activity involve the acquisition of real property or displacement of tenants?	Click yes or no if the proposed activity involves the acquisition of real property or displacement of tenants.
7. Please describe how the grantee will comply with the Uniform Relocation Act	This field is only editable when 'Yes' has been selected for 'Does the proposed activity involve the acquisition of real property or displacement of tenants.' Enter details to describe how you will comply with the Uniform Relocation Act.

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

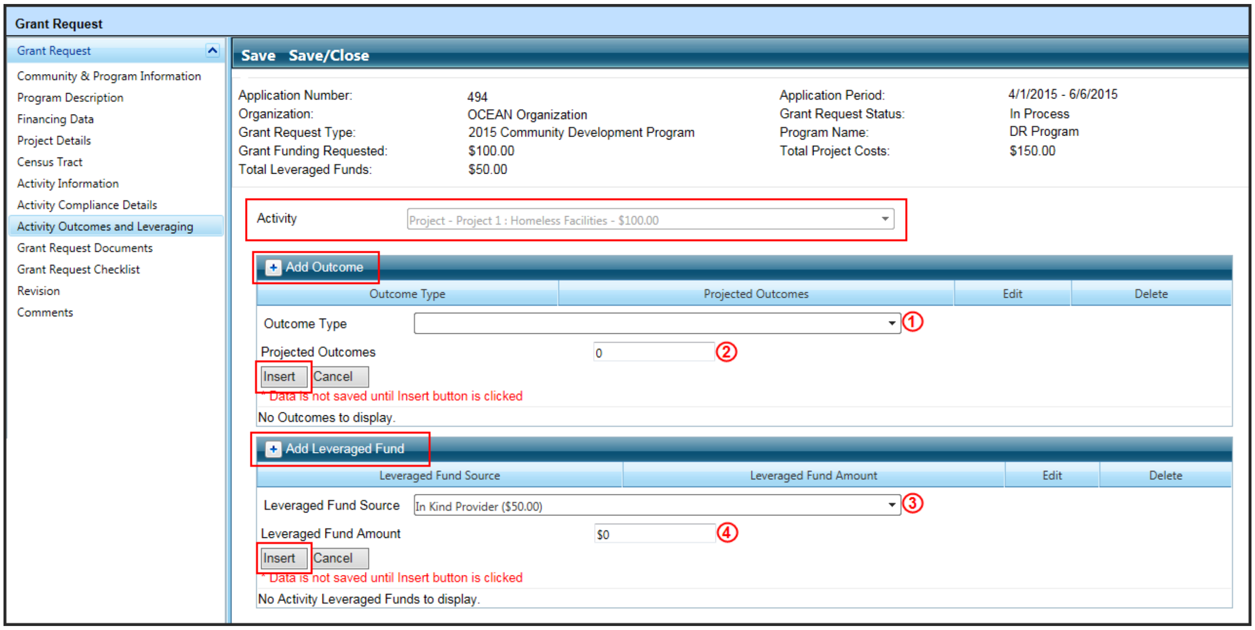
Edit Activity Compliance Details

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

Cancel Adding/Editing Activity Compliance Details

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

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 7 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	
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 Rehabilitation	• 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
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

Activity	Outcomes	
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 2

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.

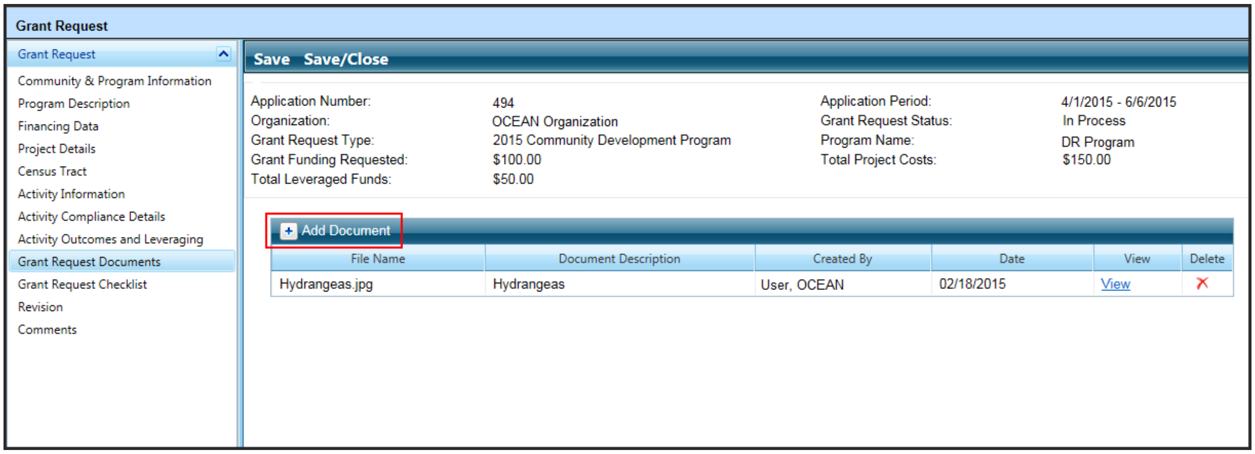
Cancel Adding/Editing Leveraged Fund

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. 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.

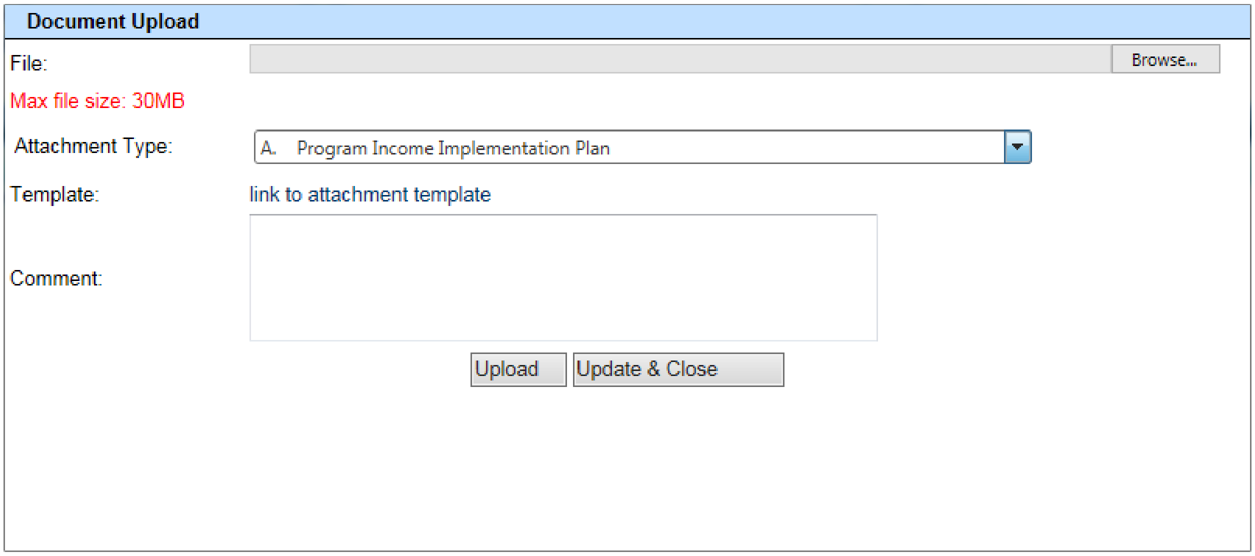
The functions available from the Grant Request Documents page are listed below with steps for performing each function:

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.



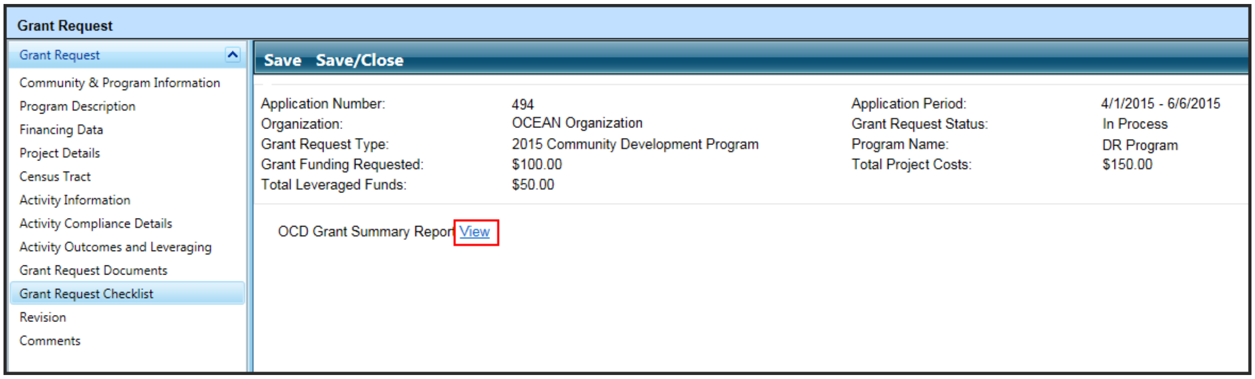
*Note: If the attachment type selected is for a project or activity, then you will be required to select the project and/or activity to attach the document to. These will be shown by additional dropdowns on the document upload popup above.

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

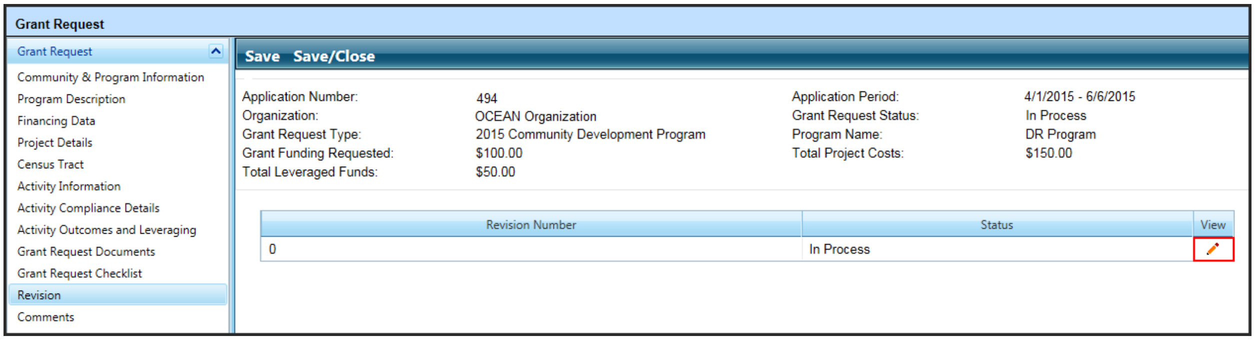


The functions available from the Grant Request Checklist page are listed below with steps for performing each function:

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

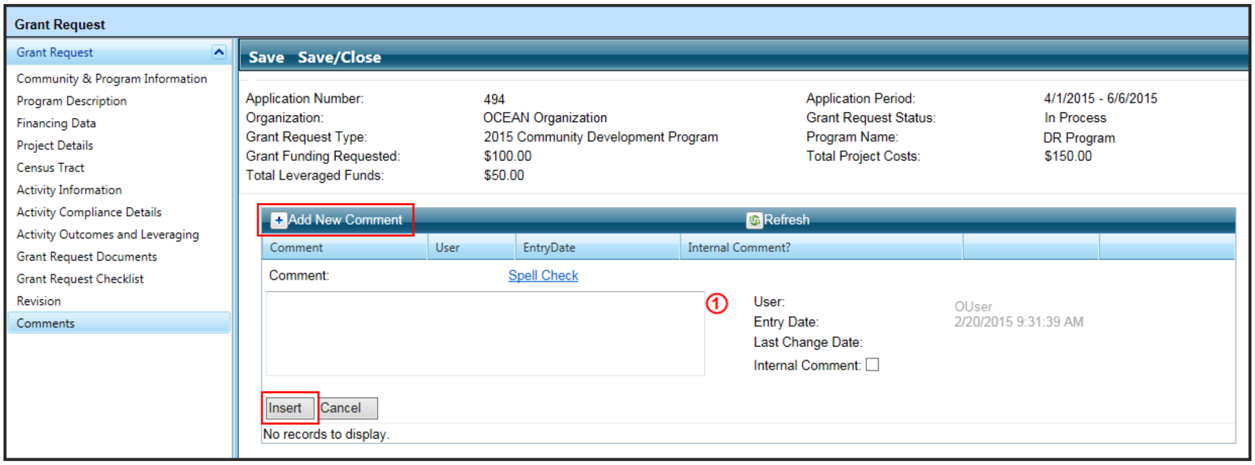


The functions available from the Revision page are listed below with steps for performing each function:

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.

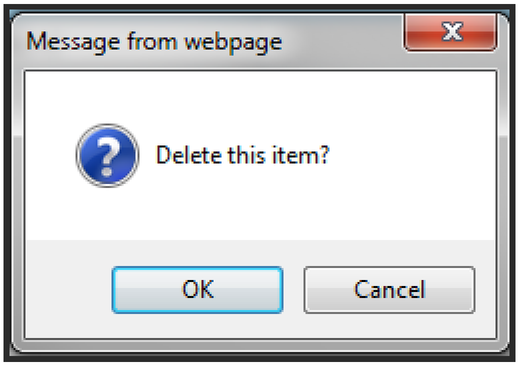
Cancel Adding/Editing Comment

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.

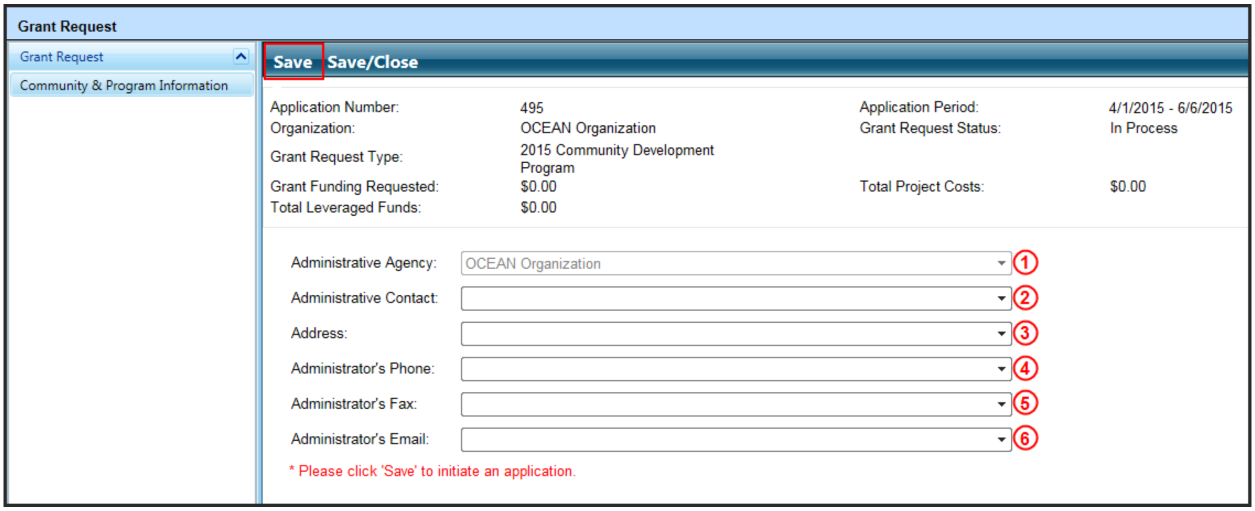


3. Click **OK**.
4. Comment record is deleted from the grid.

Critical Infrastructure Program

Start from the Application Request Search page and click to **Add New Grant Request**.

Community & Program Information

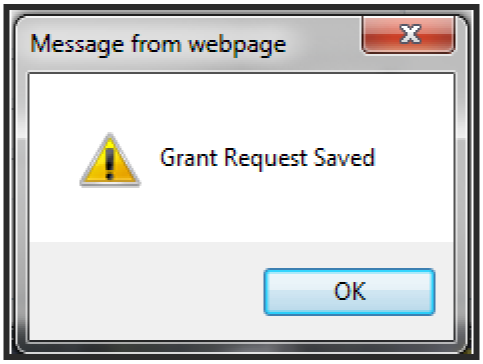


Field	Description
1. Administrative Agency	Displays your current organization as the administrative agency.
2. Administrative Contact	Use this dropdown to select the administrative contact from your organization for the CD application.
3. Address	This dropdown will populate with the current address on 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

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.

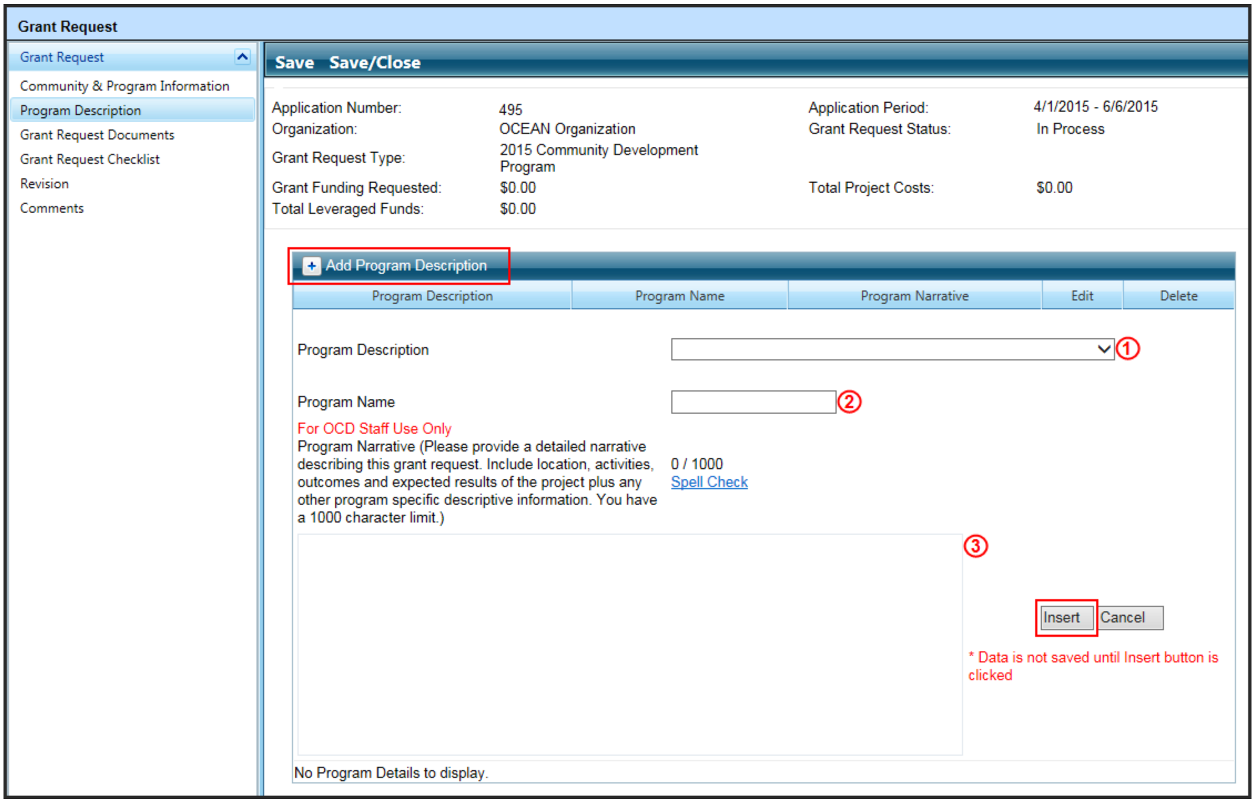


5. Click **OK** in the message box to continue.
6. The remaining pages of the grant application will be displayed in the left navigation panel.

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 Description	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 CD, there are four available programs: • C.D. Allocation • Neighborhood Revitalization • Downtown Revitalization • Critical Infrastructure
2. Program Name	Enter the name for the program that is used by your organization to identify the application.
3. Program Narrative	This field will be used by the OCD Staff only. The OCD Staff will provide a detailed narrative describing the grant request after submission.

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 ‘Critical Infrastructre’ 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 Name**. The **Program Description** field cannot be edited.
4. Click the **Update** button.
5. Program description details are updated.

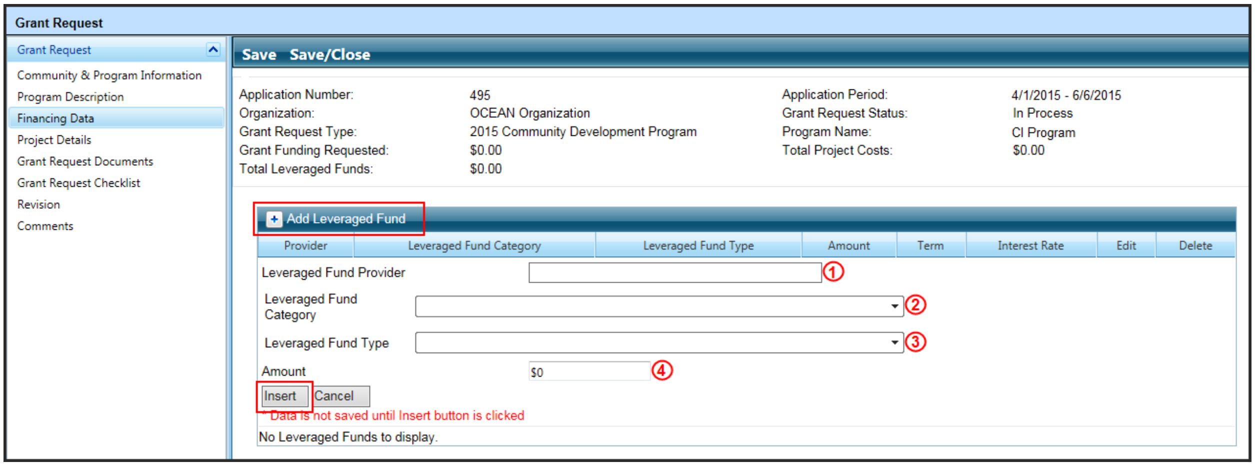
Cancel Adding/Editing Program Description

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, Activity Information, Activity Compliance Details, and Activity Outcomes and Leveraging will be deleted as well.

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 • C.D. Allocation
4. Amount	Enter the dollar amount of leveraged funds 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.

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.

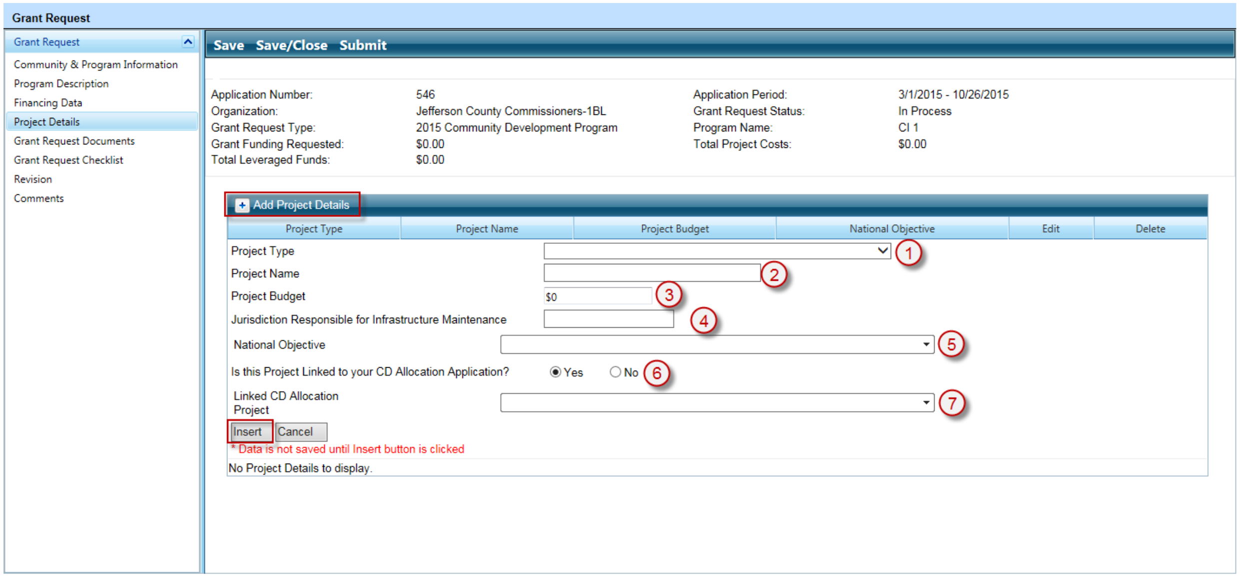
Cancel Adding/Editing Leveraged Fund

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

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 Community Development – C.D. Allocation program, the available project types include: • Admin / Fair Housing / Planning • Project Only one 'Admin / Fair Housing / Planning' project can be added to each application, but a maximum of 9 'Project' projects can be added.
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. Jurisdiction Responsible for Infrastructure Maintenance	Enter the name of the jurisdiction responsible for infrastructure maintenance.
5. 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) • Limited Clientele (LMC) • Slum & Blight (SBA)
6. Project Linked to CD Allocation	Select 'Yes' if this project will be linked to the CD Allocation application.

7. Linked Competitive Application Type	This field only displays if 'Project' is selected as the Project Type and 'Yes' is selected for 'Is this Project Linked to your CD Allocation Application?'. All CD Allocation projects designated as linked to 'Critical Infrastructure' Application Types will be available for selection.
Qualified with a Survey (not shown above)	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.
Date Survey Completed (now shown above)	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.
Service Area County Wide (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) 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.
Does the Service Area Match (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) 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.
Service Area Boundary Explanation (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) Use this area to explain how the service area boundaries were determined. An entry is required.
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

19. Click on the **Add Project Details** button in the grid.
20. The grid expands for adding a project detail record.
21. Enter all project detail information.
22. Click the **Insert** button.
23. Project details information is saved.
24. Repeat Steps 1 – 5 for each project on your application.

Edit Project Detail

16. Click on the **Edit** icon next to an existing project detail record in the grid.
17. 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.
18. Edit the **Project Name** or the **Project Budget** information.
19. Click the **Update** button.
20. **Project Name** and **Project Budget** information is updated.

Cancel Adding/Editing Project Detail

13. Click to **Add Project Details** or **Edit** an existing project detail record in the grid.
14. The grid expands for adding/editing a project detail record.
15. Click the **Cancel** button.
16. Changes are not saved.

Delete Project Detail

7. Click on the **Delete** icon next to an existing project detail record in the grid.
8. 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.

Census Tract

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:

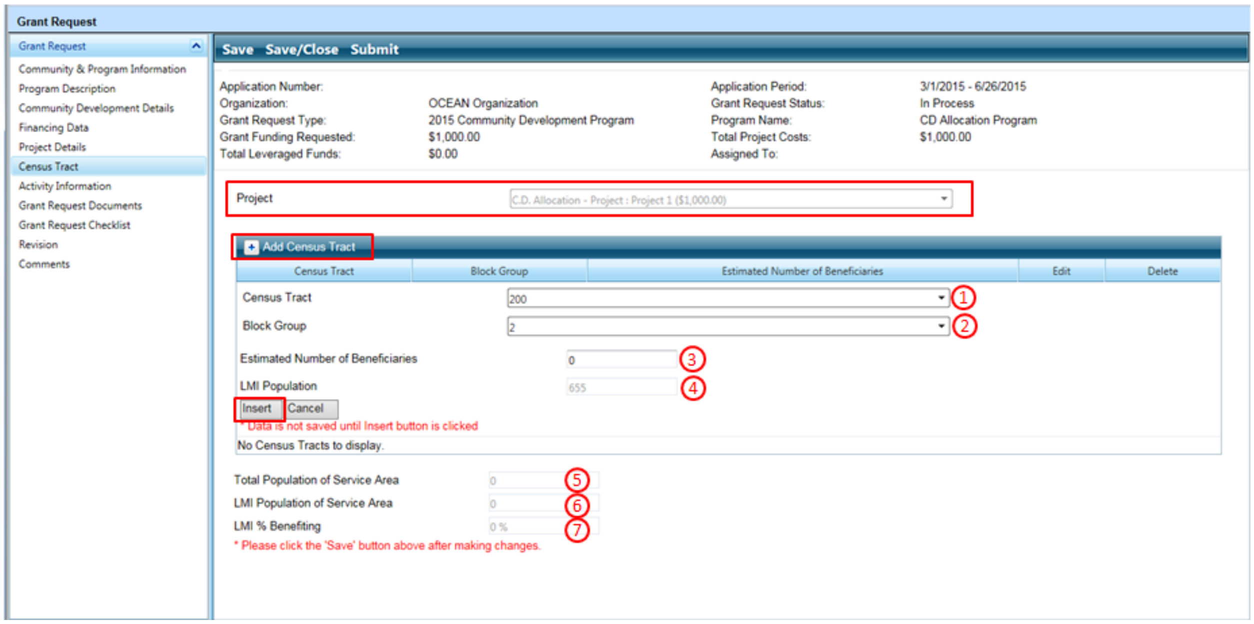
- Area Wide Benefit (LMA)
- Slum & Blight (SBA)
- Limited Clientele (LMC)

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

Census Tract – 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 Population	This populates from census data for the selected Census Tract and Block Group
5. Total Population of Service Area	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. LMI Population of Service Area	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.

The functions available from the Census Tract – Census Tract / Block Group View page are listed below with steps for performing each function:

Add Census Tract

25. Select a project from the **Project** dropdown above the census tract grid.
26. The census tract grid refreshes to show all census tracts and block groups currently associated with the selected project.
27. Click on the **Add Census Tract** button in the grid.
28. The grid expands for adding a census tract record.
29. Enter all census tract details. *Note: Only one record for each Census Tract / Block Group combination can be added.
30. Click the **Insert** button.
31. Census tract details are saved.
32. Repeat Steps 3 – 7 for each census tract and block group you need to add for the project type selected.

Edit Census Tract

16. Click on the **Edit** icon next to an existing census tract and block group record in the grid.
17. The grid expands for editing the census tract and block group record.
18. Edit the census tract and block group details.
19. Click the **Update** button.
20. Census tract and block group details are updated.

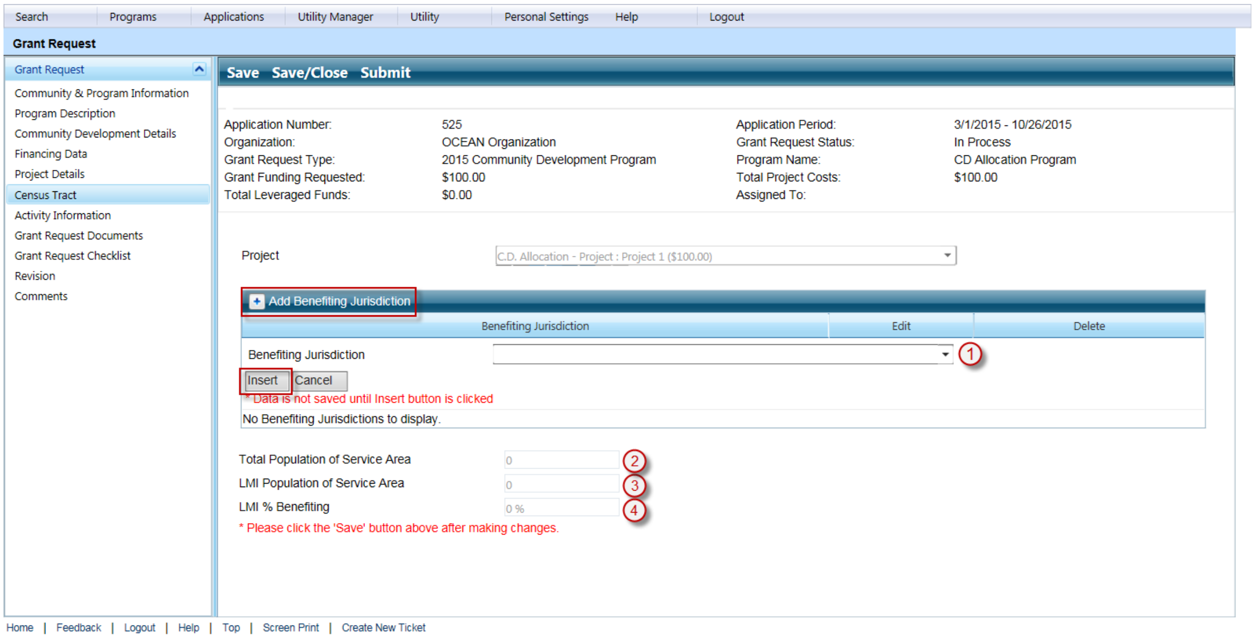
Cancel Adding/Editing Census Tract

13. Click to either **Add Census Tract** or **Edit** an existing census tract and block group record in the grid.
14. The grid expands for adding/editing a census tract and block group record.
15. Click the **Cancel** button.
16. Changes are not saved.

Delete Census Tract

7. Click on the **Delete** icon next to an existing census tract and block group record in the grid. *Note: Census tract and block group records cannot be deleted if the service area is county-wide.
8. Census tract and block group record is deleted from the grid.

Census Tract – 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 Population of Service Area	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. LMI Population of Service Area	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

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

30. Click the **Insert** button.
31. Benefiting jurisdictions are saved.
32. Repeat Steps 3 – 7 for each benefiting jurisdiction you need to add for the project type selected.

Edit Benefiting Jurisdiction

16. Click on the **Edit** icon next to an existing benefiting jurisdiction record in the grid.
17. The grid expands for editing the benefiting jurisdiction record.
18. Edit the benefiting jurisdiction selection.
19. Click the **Update** button.
20. The benefiting jurisdiction is updated.

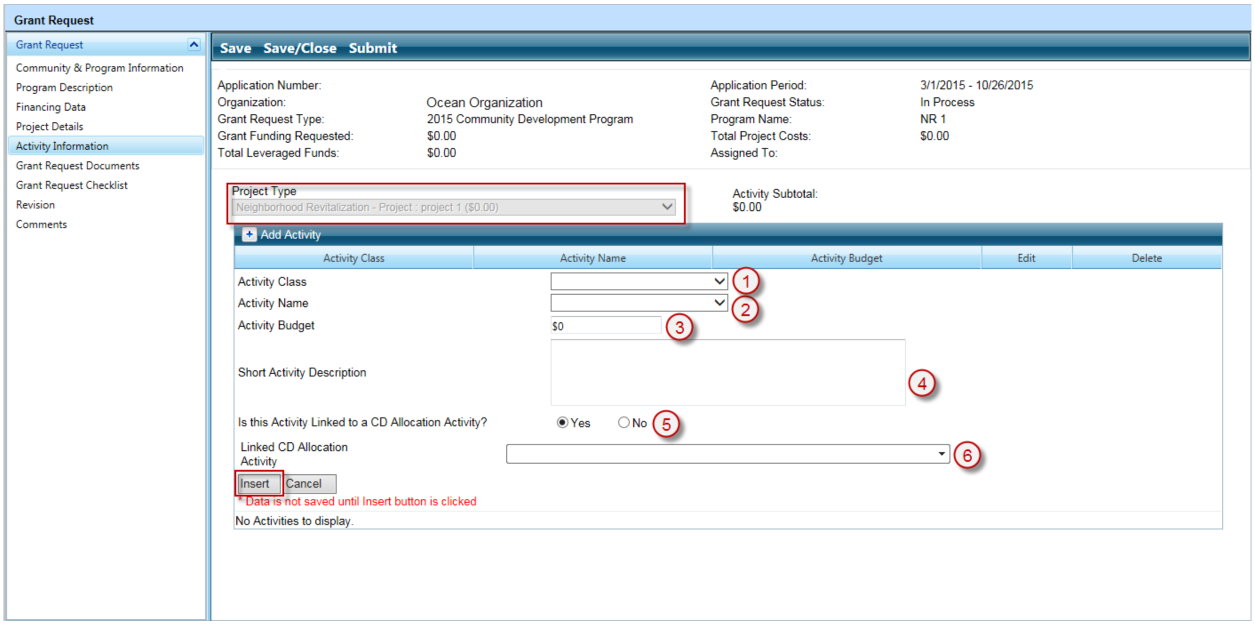
Cancel Adding/Editing Benefiting Jurisdiction

13. Click to either **Add Benefiting Jurisdiction** or **Edit** an existing benefiting jurisdiction record in the grid.
14. The grid expands for adding/editing a benefiting jurisdiction record.
15. Click the **Cancel** button.
16. Changes are not saved.

Delete Benefiting Jurisdiction

7. Click on the **Delete** icon next to an existing benefiting jurisdiction record in the grid.
8. 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 only available activity class option is: • Administration If the activity is being entered a Project project type, then the available activity class options include: • 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 Table 4 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. Short Activity Description	This field only displays when the project type is 'Project.' Enter your short activity description narrative here.

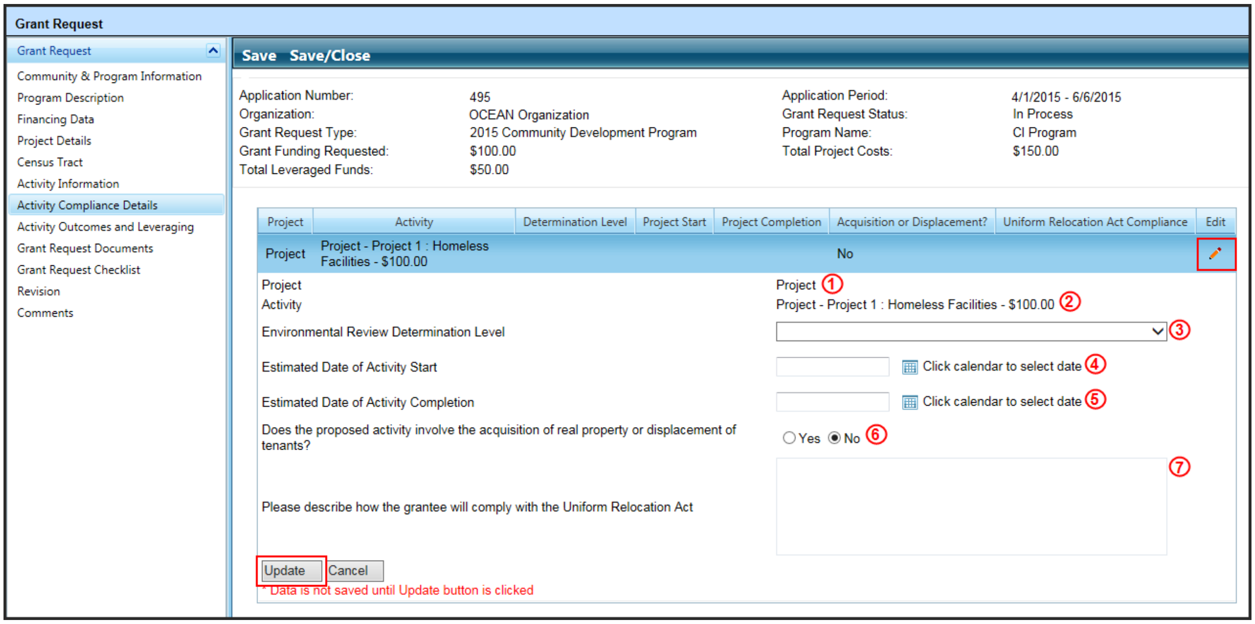
Presumed Class (not shown above)	This field only displays when the project selected for the project type dropdown has a 'Limited Clientele (LMC)' National Objective. Select the presumed class from the following options: • Abused Children • Battered Spouses • Elderly Persons • Severely Disabled Adults • 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
5. Activity Linked to CD Allocation	This field only displays when the project type is 'Project' and the project is linked to a CD Allocation application project.
5. Linked CD Allocation Activity	This field only displays when '**Is this Activity Linked to a CD Allocation Activity?**' is 'Yes". The list will show activities on the linked CD Allocation project that match the Activity Class and Activity Name selected for this activity.

Activity Class	Activities	
Administration	• General Admin	• Planning
Public Services	• Homelessness Prevention	• Public Services
Housing	• Acquisition • Code Enforcement • Conversion / Rehab / Renovation • Demolition / Clearance • Home / Building Repair • Homeless Facilities • Hsng. Dev / Info / Counseling • New Construction	• Parking Facilities • Private Rehabilitation • Public Rehabilitation • Relocation Pymt. & Asst. • Rental / Housing Assistance • Sewer Fac. Improvements • Sidewalk Improvements • Water & Sewer Facilities • Water Fac. Improvements • Weatherization
Economic Dev.	• Private Rehabilitation	

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

Activity Compliance Details

This page displays all activities for all project types (except Admin / Fair Housing / Planning).



Field	Description
1. Project	Displays the project type of the activity listed.
2. Activity	Displays the project name and activity for the activity record.
3. Environmental Review Determination Level	Select the environmental review determination level from the following options: • Categorically Excluded Not Subject to 58.5 • Categorically Excluded Subject to 58.5 • Continuing Relevance • Environmental Assessment • Exempt
4. Estimated Date of Activity Start	Click the calendar icon and select the estimated date the activity is to start.
5. Estimated Date of Activity Completion	Click the calendar icon and select the estimated date the activity is to be completed.
6. Does the proposed activity involve the acquisition of real property or displacement of tenants?	Click yes or no if the proposed activity involves the acquisition of real property or displacement of tenants.
7. Please describe how the grantee will comply with the Uniform Relocation Act	This field is only editable when 'Yes' has been selected for 'Does the proposed activity involve the acquisition of real property or displacement of tenants.' Enter details to describe how you will comply with the Uniform Relocation Act.

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

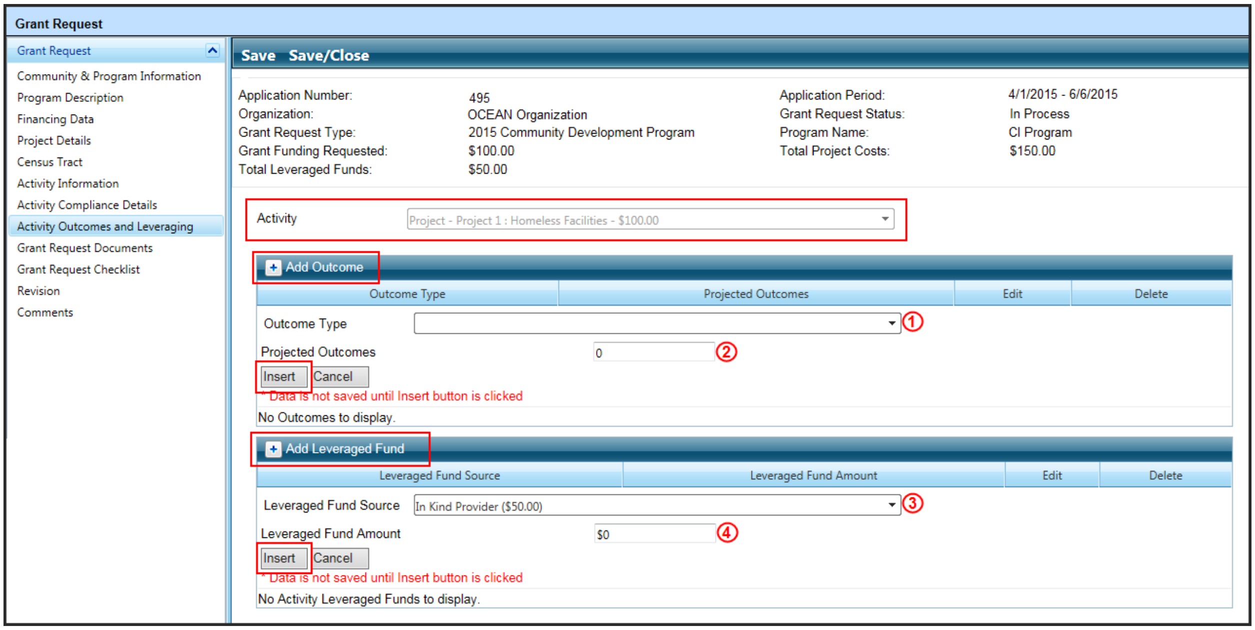
Edit Activity Compliance Details

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

Cancel Adding/Editing Activity Compliance Details

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

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 tab;e 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	
Fair Housing Program	• FH Training Program • FH Counseling • FH Complaint System • FH Education Outreach • FH Legislation Adopted • FH Affirmation Action Plan	• FH Analysis • FH Coordinator • FH CHIP Program Outcomes • Standard Fair Housing Program
Homelessness Prevention	• Households Assisted	• Hslds Asst. with Counseling/Education
Relocation Pymt. & Asst.	• Household Assisted • Businesses/Organizations Assisted	• Households Assisted – Opt. Relocation

Activity	Outcomes	
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
Parking Facilities	• Square Feet of Pavement/Landscaping	• Parking Spaces
Code Enforcement	• Units Assisted or Inspected	•
Hsng. Dev. / Info / Counseling	• Households Assisted	• Hslds Asst. with Counseling/Education
New Construction	• Square Feet of Construction • Units Constructed – Owner	• Units Constructed – Rental • Units Acquired, Constructed and Sold
Rental / Housing Assistance	• Households Assisted • Units Assisted or Inspected	• Hslds Asst. with Counseling/Education
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
Home / Building Repair	• Units Repaired – Owner • Units Repaired – Rental	• Buildings Repaired
Conversion / Rehab / Renovation	• Square Feet of Structure	• Building Rehabbed/Constructed
Demolition / Clearance	• Structures Demolished	
Weatherization	• Units Repaired – Owner	• Units Repaired – Rental
Sidewalk Improvements	• Linear Feet • Curbcuts Installed	• 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
Acquisition	• Acres of Land • Square Feet of Structure • Structures • Parcels	• Households Assisted • Business Buyouts • Permanent Easements/Right-of-Way
Homeless Facilities	• Buildings Rehabbed/Constructed	• Households Assisted
Public Rehabilitation	• Buildings Rehabbed/Constructed • Handicapped Ramps Installed	• Restroom Facilities Installed • Elevators/Doors Installed

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
Senior Centers	• Buildings Rehabbed/Constructed	
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
Historic Preservation	• Buildings Rehabbed/Constructed	• Units Rehabbed – Owner
Flood & Drainage Facilities	• Linear Feet • Culverts/Catch Basins Installed	• Manholes Installed • Permanent Easements/Right-of-Way
Neighb. Fac / Community Ctr	• Buildings Rehabbed/Constructed	
Centers for Handicapped	• Buildings Rehabbed/Constructed	
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
Fire Protect. Fac. & Equip	• Square Feet of Structure • Buildings Rehabbed/Constructed • Vehicles Purchased	• Items of Equipment Purchased • Fire Hydrants Installed
Interim / Emergency Rental Asst.	• Households Assisted	
Public Utilities	• Utility Poles/Lines Relocated	
Disposition	• Acres of Land • Square Feet of Structure	• Structures
Solid Waste Disposal Fac.	• Items of Equip. Installed/Repaired	• Facility Constructed/Rehabbed

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.

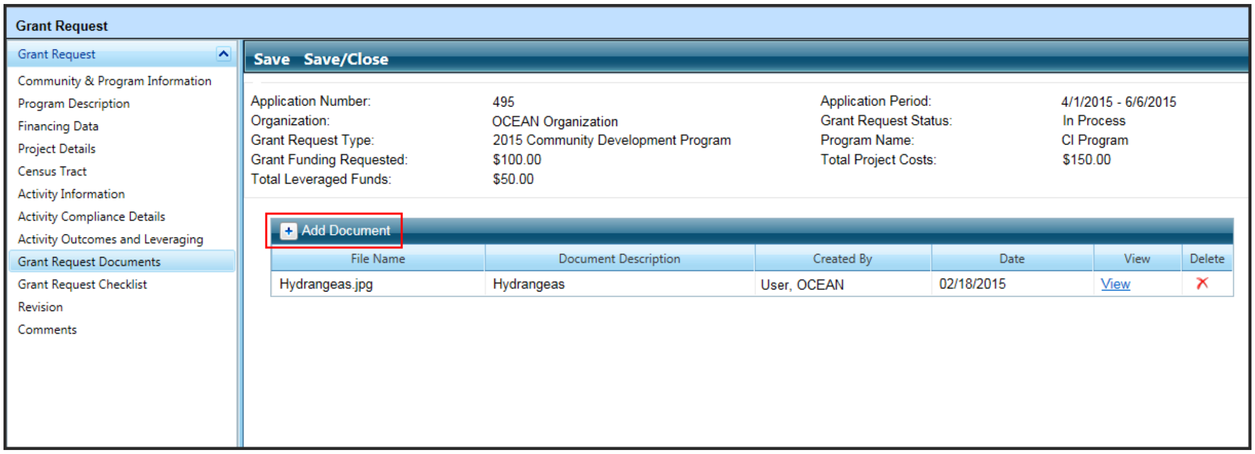
Cancel Adding/Editing Leveraged Fund

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
3. 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.

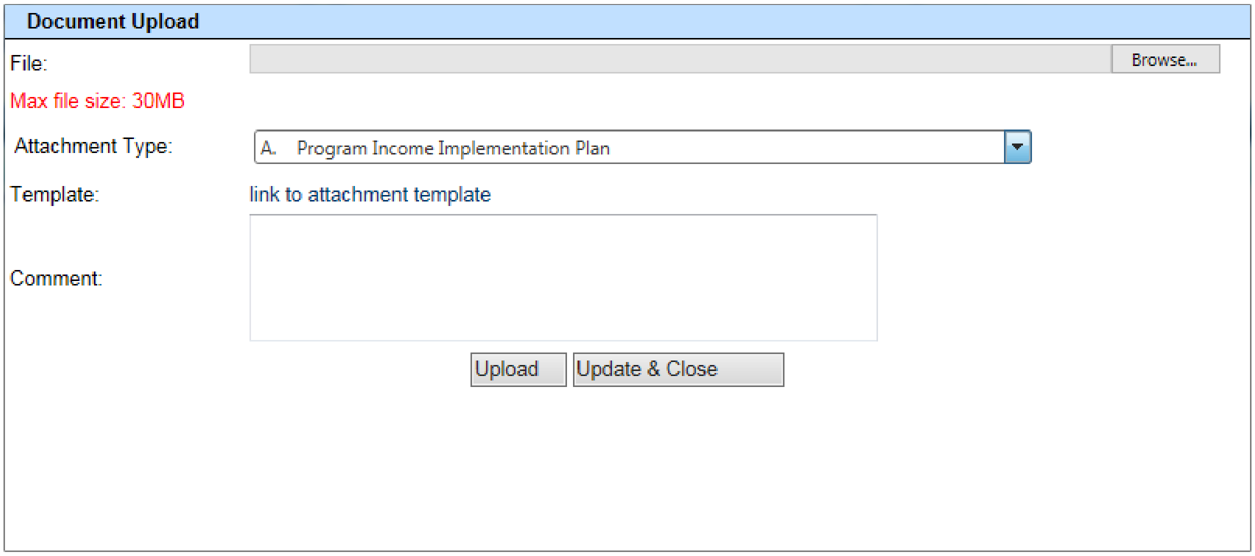
The functions available from the Grant Request Documents page are listed below with steps for performing each function:

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.



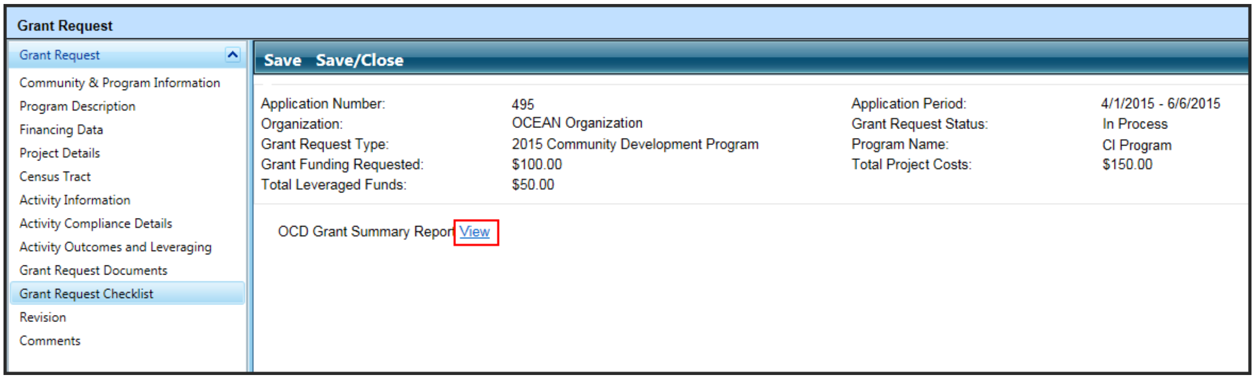
*Note: If the attachment type selected is for a project or activity, then you will be required to select the project and/or activity to attach the document to. These will be shown by additional dropdowns on the document upload popup above.

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

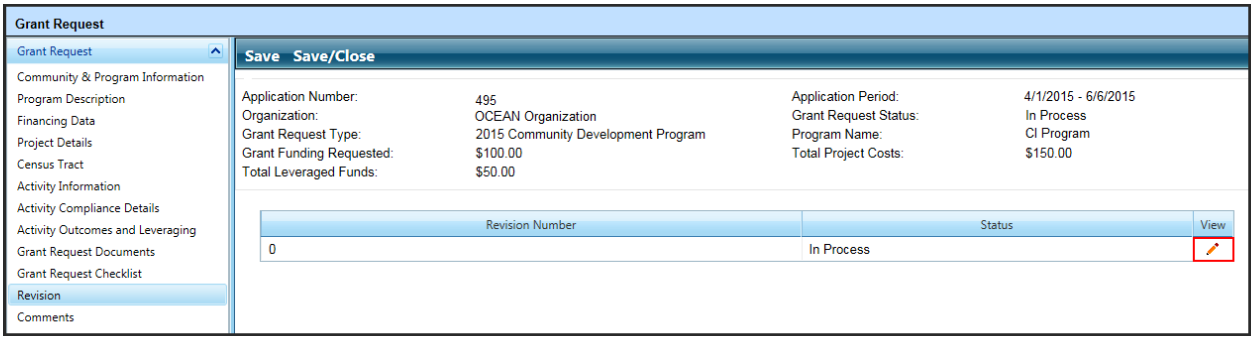


The functions available from the Grant Request Checklist page are listed below with steps for performing each function:

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

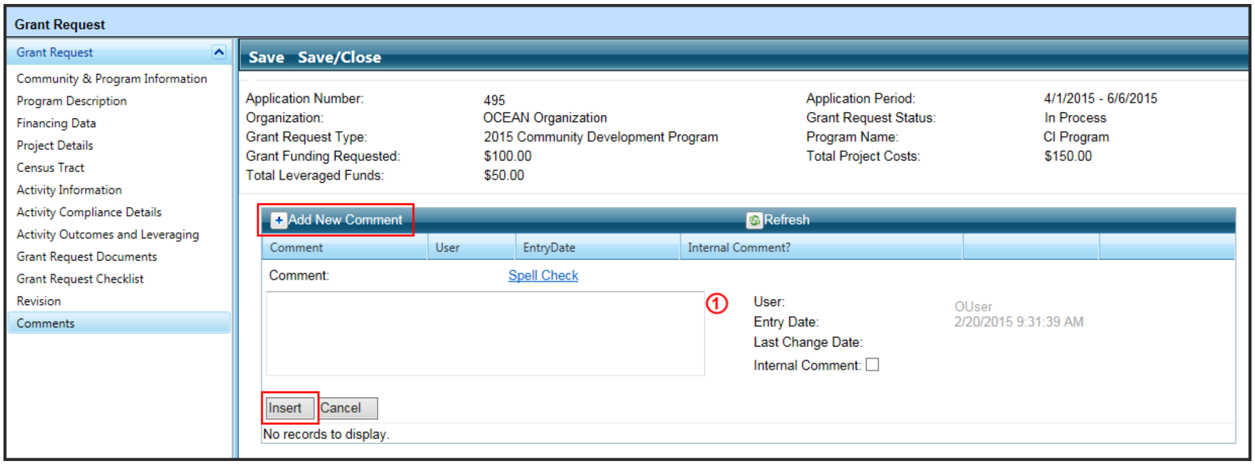


The functions available from the Revision page are listed below with steps for performing each function:

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.

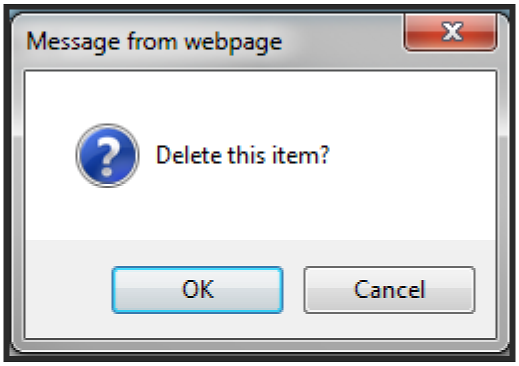
Cancel Adding/Editing Comment

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.

Submitting an Application for CD

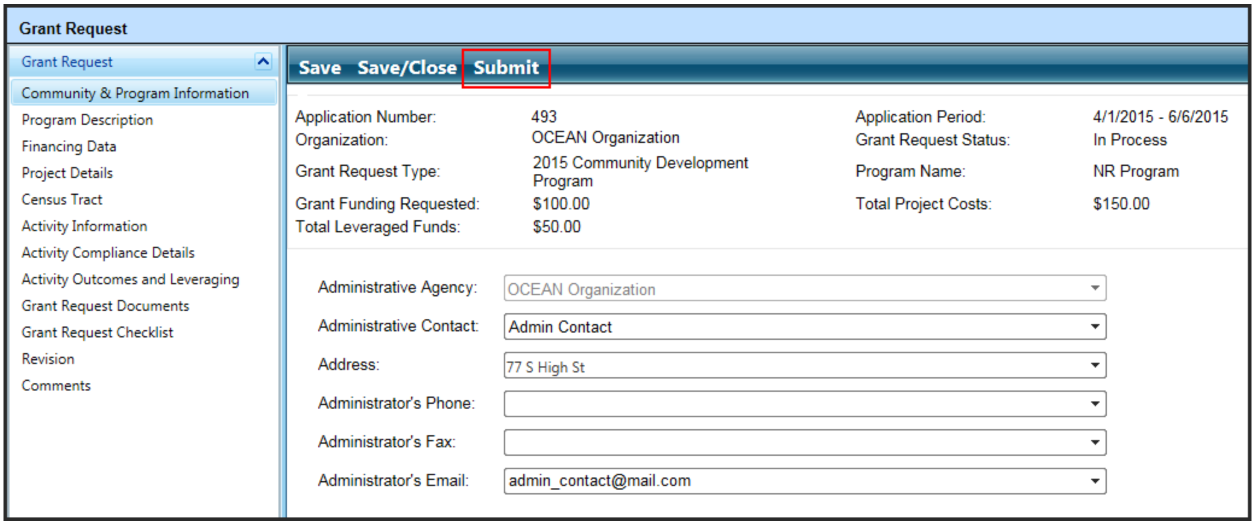
The following section describes the process for submitting an application to the Office of Community Development for the Community Development (CD) program in OCEAN.

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

Applications → Active Application Search ***or*** Applications → Archived Application Search

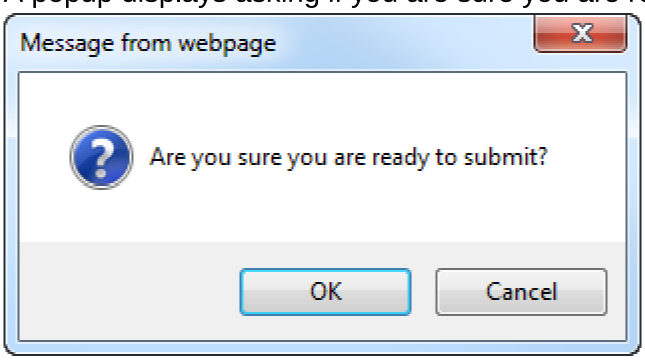
Search for an application that is in an "In Process" status. Review each section of the application as defined in the "Completing an Application for CD" section and verify all validations pass successfully.

Application Submission

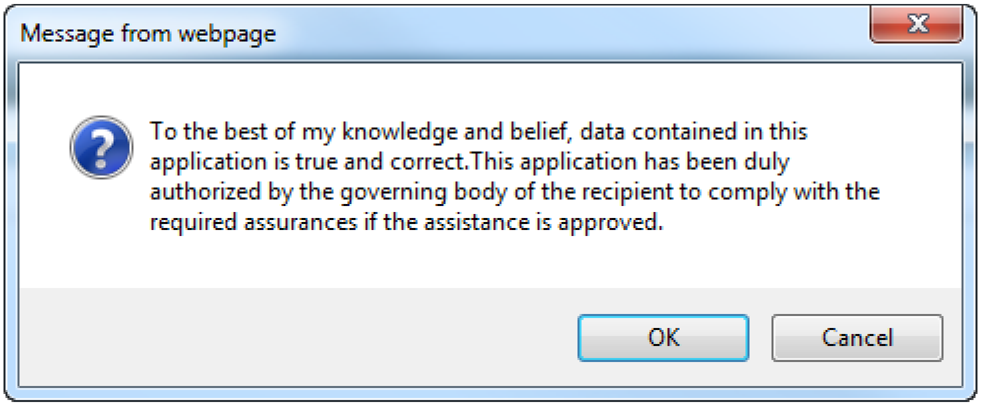


After reviewing the CD application for completeness and verifying all validations pass successfully, complete the following steps for submitting your application to the Office of Community Development:

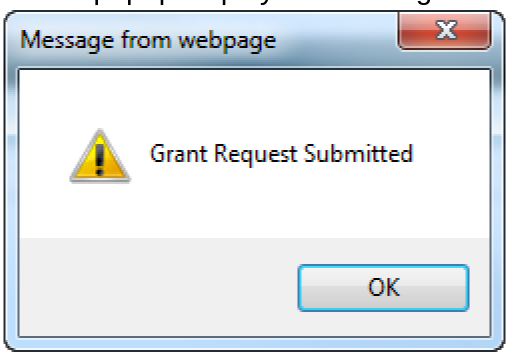
1. Click on the **Submit** button in the button bar.
2. A popup displays asking if you are sure you are ready to submit.



3. Click **OK** in the popup.
4. Another popup displays for you to confirm the statement is true prior to submitting your application.



5. Click **OK** in the popup.
6. A final popup displays confirming the submission of your application.



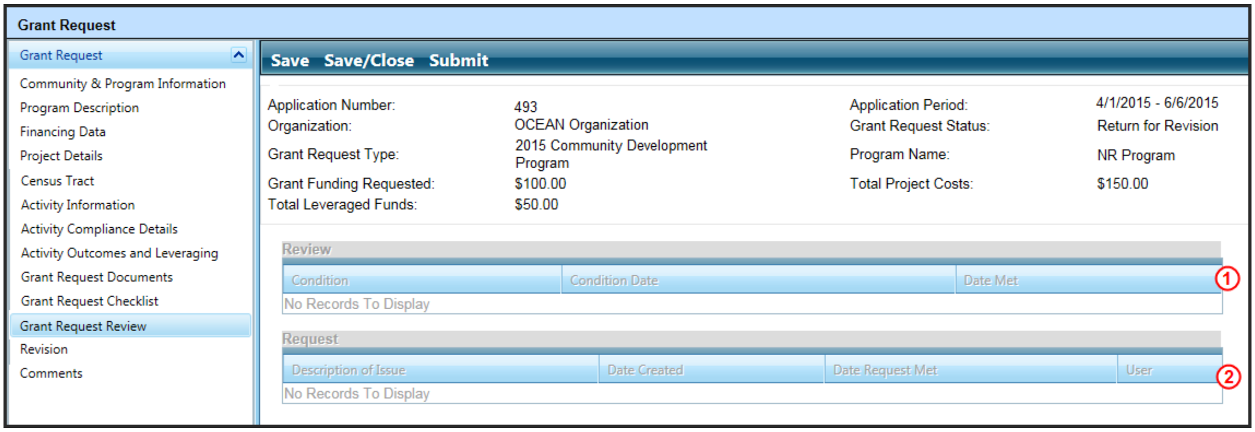
7. Click **OK** in this final popup.
8. Your application has now been submitted. The status of the application is updated to "Submitted" and you can no longer edit the details of the application.

Application Review Process

Applications that have been submitted to the Office of Community Development go through an internal review process. If the Office of Community Development sees an error or needs additional information for your application, then they reserve the right to return your application back to you for additional clarification prior to the application end date (these details are defined below). CD applications that are awarded funds will be updated to a status of “Approved.” CD applications that are not awarded funds will be updated to a status of “Rejected.”

Grant Request Review

Your CD application may be rejected if issues are found that need to be corrected prior to completing the review of the application. These issues are displayed on the Grant Request Review page and your application will be in a “Return for Revision” status.



Field	Description
1. Review Conditions	This grid displays any conditions to the approval of your application (i.e. submitting a document by a certain date so as not to lose funding).
2. Request	This grid displays any issues found in your application. Each issue will need to be correct and re-submitted to the Office of Community Development prior to completing the review of your application.