OCEAN for Community Housing Impact and Preservation (CHIP)

Application Preparer User Guide

March 9, 2015

2015 Version

Ohio | Department of Development

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Document Overview

OCEAN for Community Housing Impact and Preservation (CHIP)

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 CHIP program. This guide will instruct you on how to perform the following functions in OCEAN:

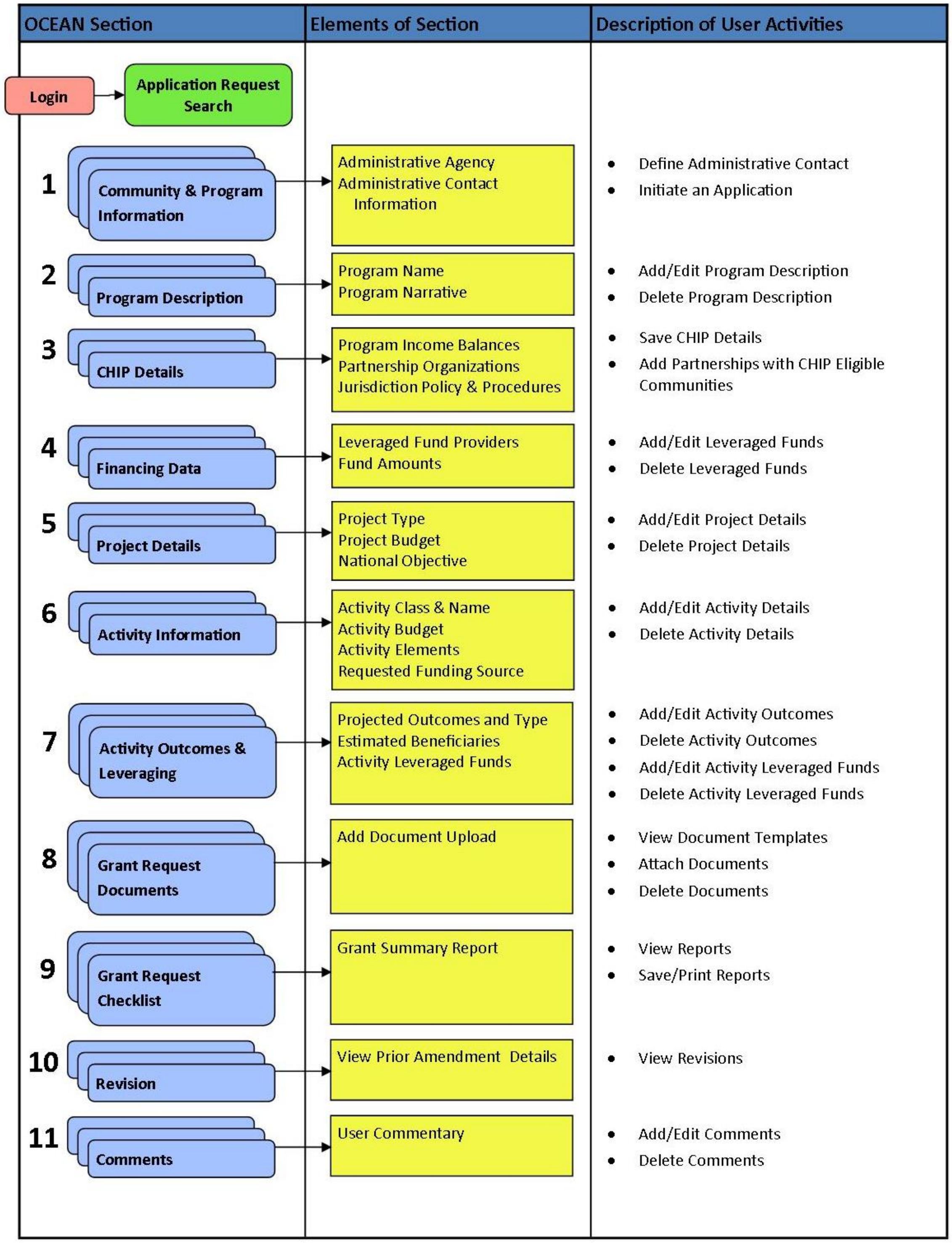
- Logging in to OCEAN
- Changing your password and/or organization
- Completing an application for CHIP
- Logging out of OCEAN

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 CHIP Process Diagram



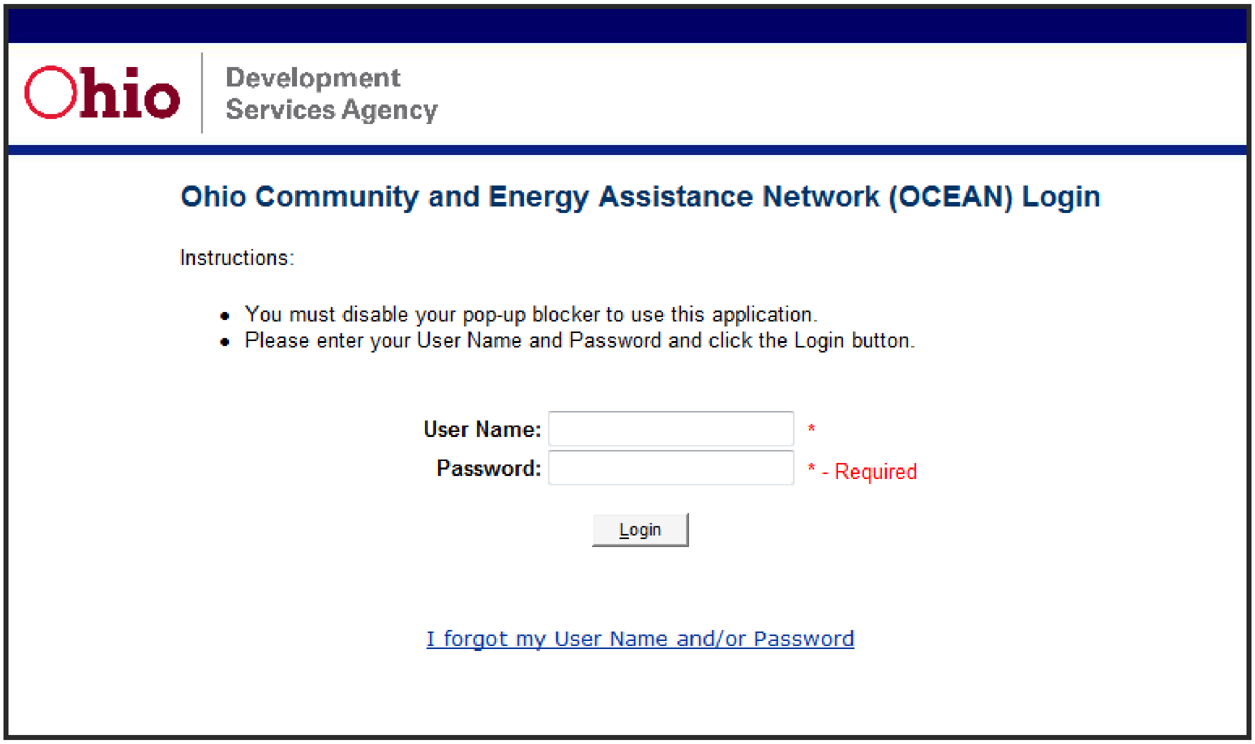
Accessing and Logging into OCEAN

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

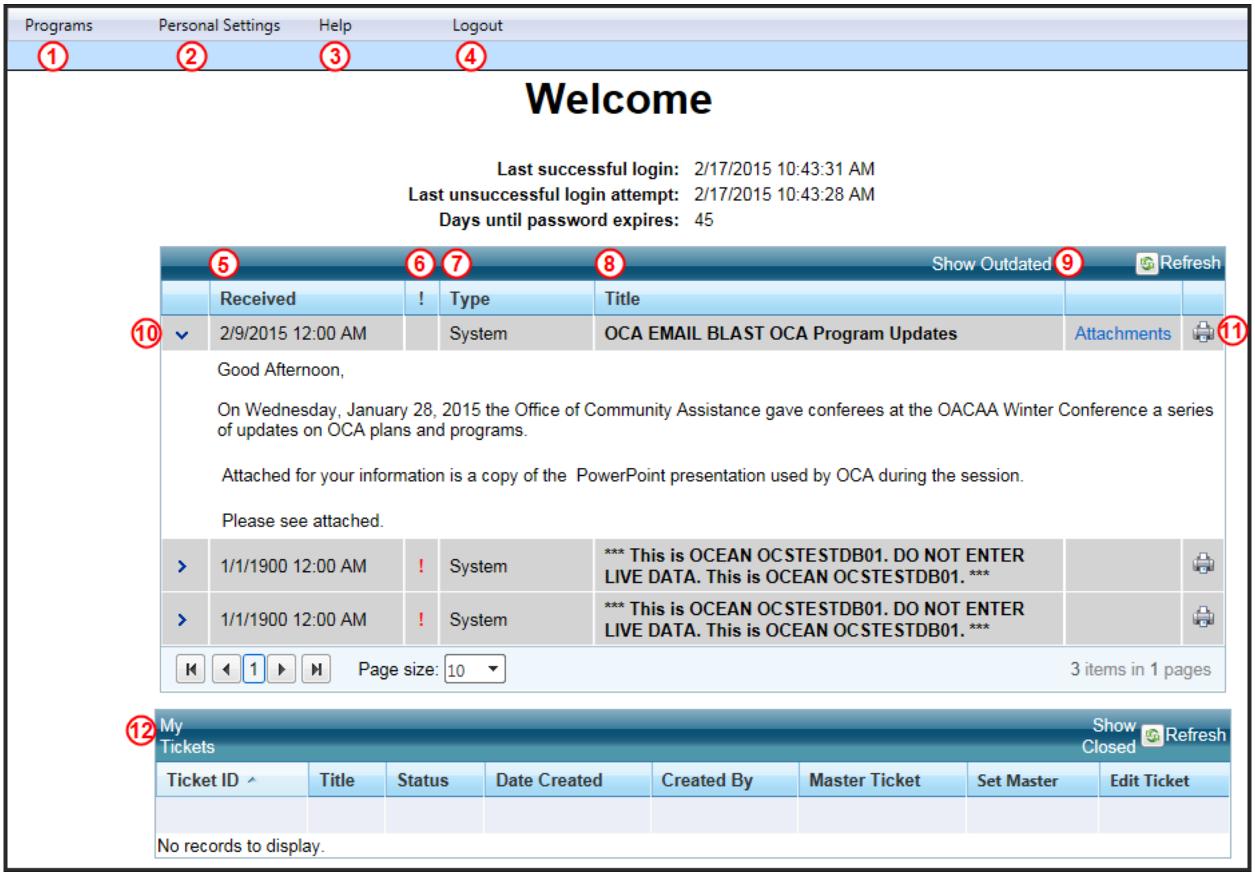
The screen below is the login screen for OCEAN.



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

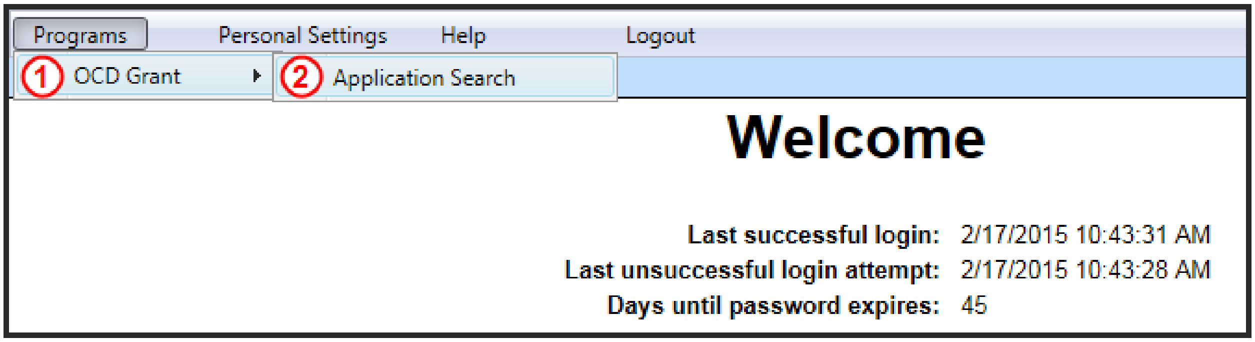


This is the OCEAN Welcome Screen. The Welcome Screen has the menu navigation across the top of the page. The Notification Center and My Tickets grids are also displayed.

Menu/Field	Purpose
1. Programs	Used to access the OCD grant menu options.
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.

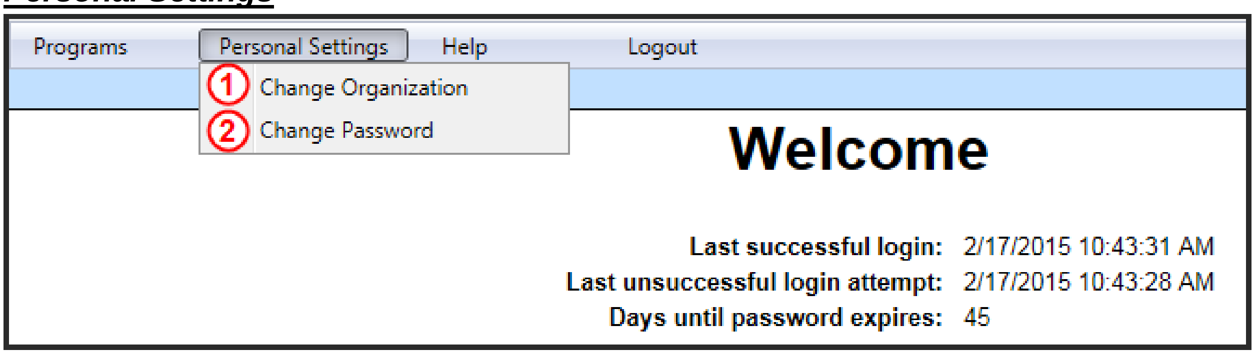
10. Message Line	Click on arrow to expand and view communications in regards to OCEAN.
11. Print Icon	Click to print the message to your local printer.
12. Tickets	Shows tickets entered to the OCEAN Help Desk.

Programs



Menu	Purpose
1. OCD Grant	Choose this option to see a list of OCD Grant pages in OCEAN.
2. Application Search	Choose this option to navigate to the Application Search page for viewing/editing existing applications and adding new applications.

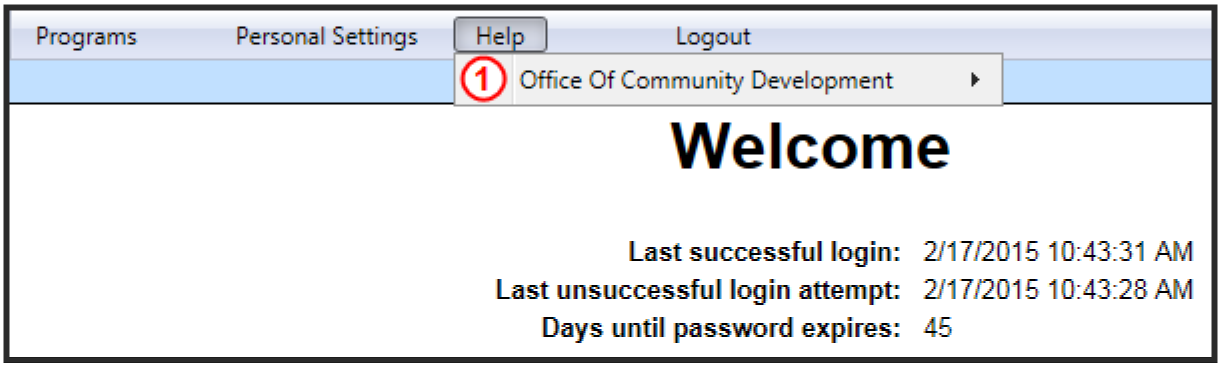
Personal Settings



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.

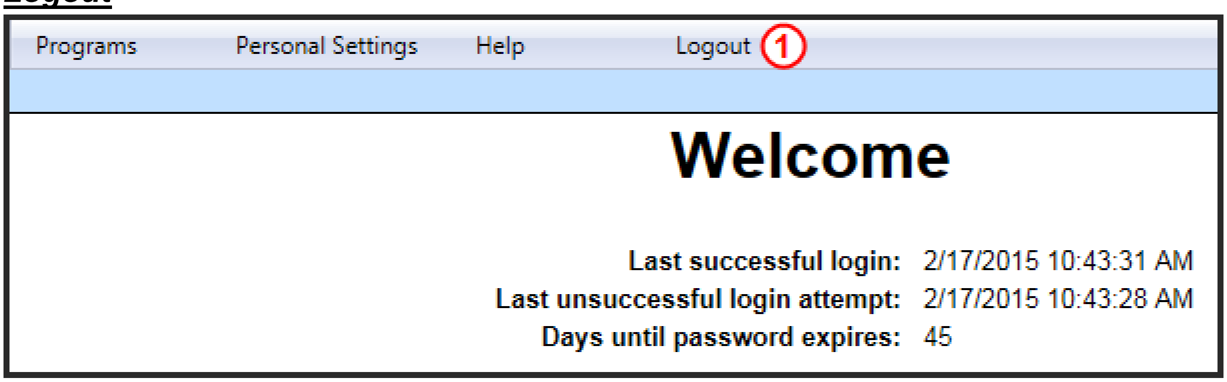
2. Change Password	Choose this option to change your OCEAN password.

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.

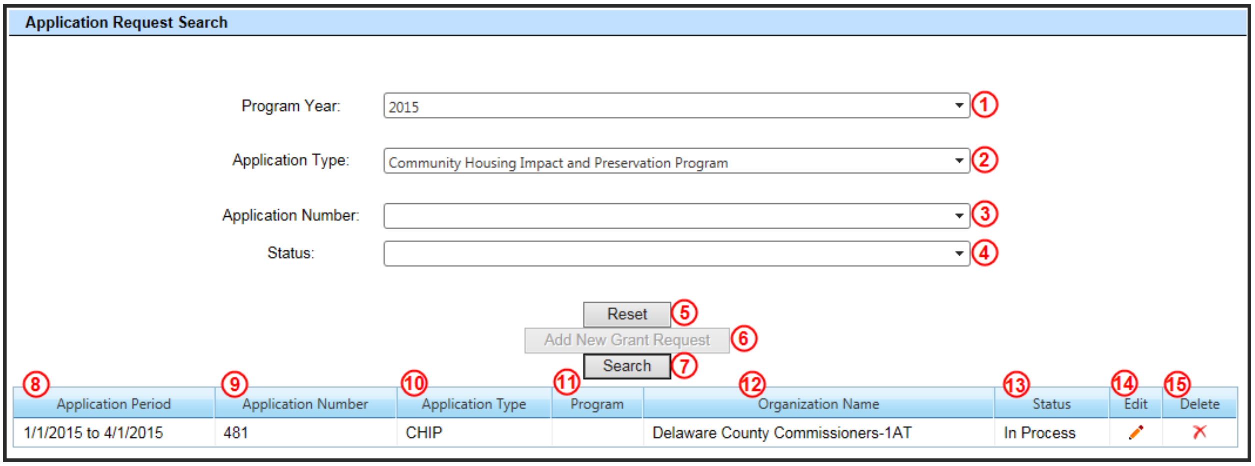
Completing an Application for CHIP

The following section describes the process for creating an application for the Community Housing Impact and Preservation (CHIP) program in OCEAN.

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

Programs → OCD Grant → Application Search

Application Request Search



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

12. Organization Name	Displays the name of the organization that created the application request.
13. Status	Displays the current status of the application.
14. Edit	Click the pencil icon to edit the application. *Note: Applications can only be edited when they are in an 'In Process' or 'Returned for Revision' status. If they have been 'Submitted' to OCD or have been 'Approved,' then the application would open and be read only.
15. Delete	Click the red "x" icon to delete the application. *Note: Applications can only be deleted when they are in an 'In Process' status. Once they have been 'Submitted' to OCD, the applications can no longer be deleted.

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

Search for an Application 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:

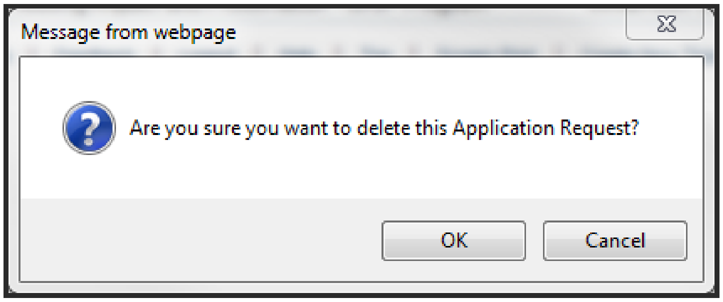
1. Select a **Program Year** and an **Application Type**.
2. Click the **Add New Grant Request** button.
3. You will navigate to the **Grant Request** page for adding a new application.

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.

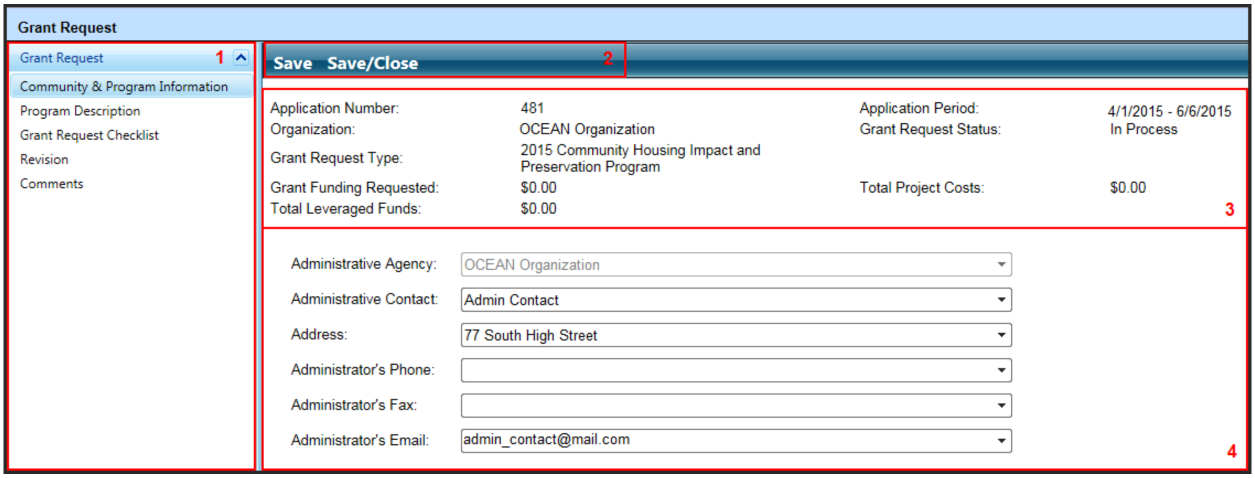
Delete an Existing Application:

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 CHIP. 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 ($$$) must equal $$$$ for the <<provider name>> leveraged fund.	All activity leveraged funds must total to the amounts you defined on the Financing Data page. Reallocate leveraged funds for this provider across the appropriate activities to clear this validation.
Project <<project name>>’s activity budget totals to $$ but should be $$$.	All activity budgets must total to the overall project budget. Reallocate activity budget dollars under this project to clear this validation.

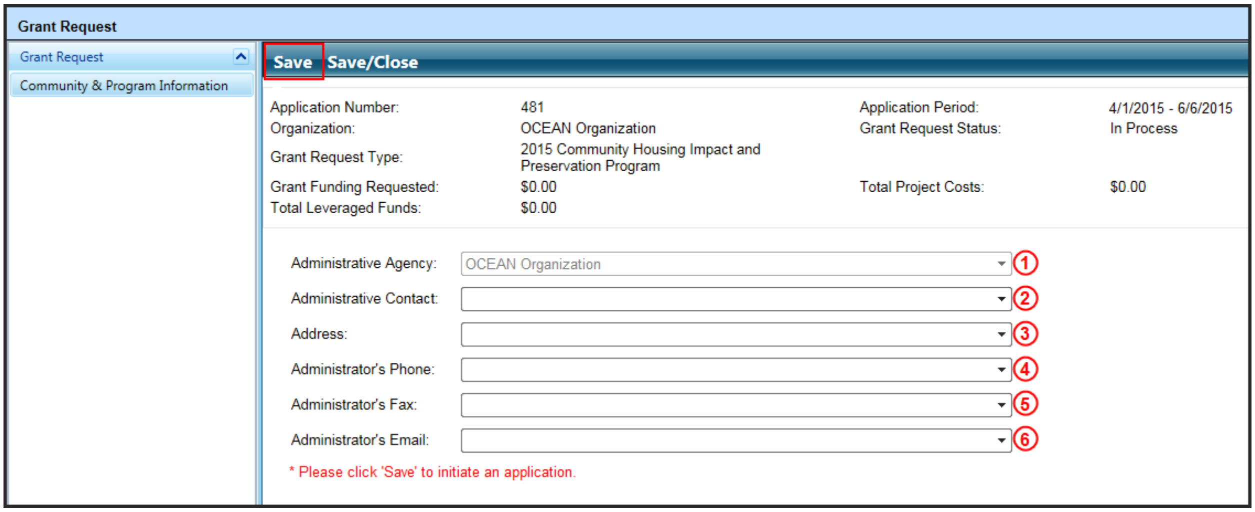
Chip Details must specify which jurisdiction’s policy and procedure manual will be adopted.	When partnering with another CHIP eligible community, you must select which jurisdiction’s policy and procedure manual has been adopted. Click on the CHIP Details link in the left navigation menu and select a jurisdiction from the “Which jurisdiction’s policy and procedure manual has been adopted?” dropdown to clear this validation.

Table 1

- **Save/Close –** Saves the application in an “In Process” status and returns you to the Application Request Search page.

3. **Header Details –** The header details section remains throughout the application. It gives an overview of the application, including:
    - **Application Number –** unique assigned number to the application
    - **Organization** – organization creating the application
    - **Grant Request Type –** program the application is being created for
    - **Grant Funding Requested –** total funds requested from OCD 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
    - **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 & Program Information

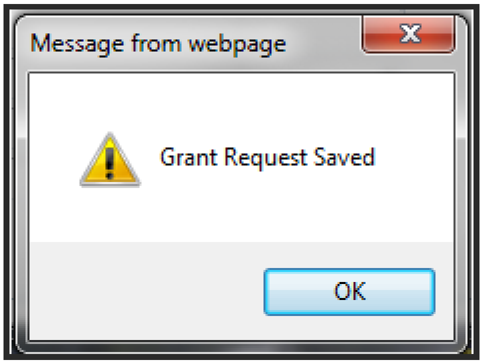


Field	Description
1. Administrative Agency	Displays your current organization as the administrative agency.
2. Administrative Contact	Use this dropdown to select the administrative contact from your organization for the CHIP application.
3. Address	This dropdown will populate with the current address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

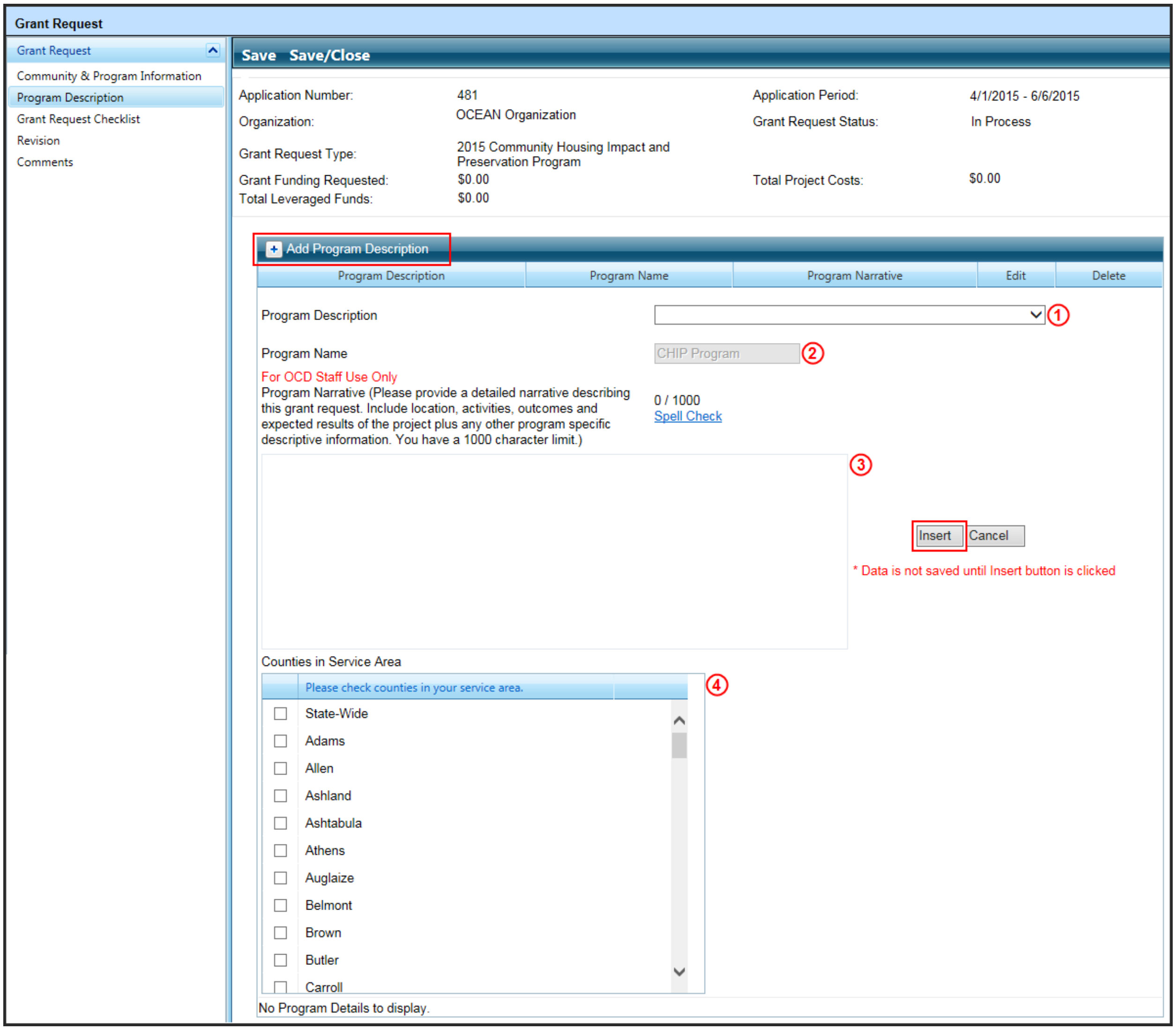


5. Click **OK** in the message box to continue.
6. The remaining pages of the grant application will be displayed in the left navigation panel.

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 CHIP, there is only one available program: • Community Housing Impact and Revitalization
2. Program Name	For CHIP, this field will default to 'CHIP Program' and not be editable.
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.
4. Counties in Service Area	Check each county in the service area OR check 'State-Wide.'

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 in the grid.
2. The grid expands for adding a new program description record.
3. Select/enter details for all 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** and/or **Counties in Service Area**. The **Program Description** field cannot be edited.
4. Click the **Update** button.
5. Program description details are updated.

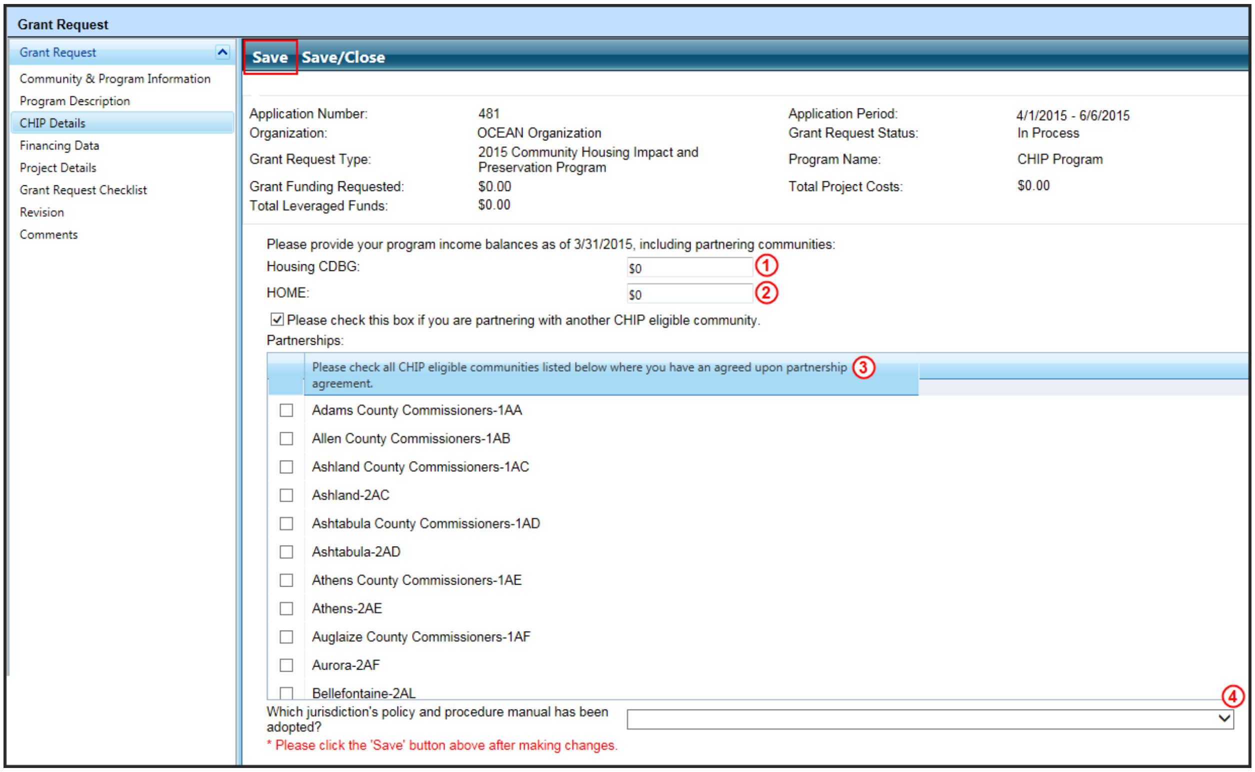
Cancel Adding/Editing Program Description

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 record.
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, and Activity Outcomes and Leveraging will be deleted as well.

CHIP Details



Field	Description
1. Housing CDBG	Enter your program income balance as of 3/31 for Housing CDBG.
2. HOME	Enter your program income balance as of 3/31 for HOME.
3. Please check all CHIP eligible communities listed below where you have an agreed upon partnership agreement.	For organizations that are allowed to partner, a checkbox will be displayed. Check this box if you are partnering with another CHIP eligible community. Once checked, the list of potential partnership organizations will be displayed. Check all the communities in the list that you are partnering with for this CHIP grant request.
4. Which jurisdiction's policy and procedure manual has been adopted?	Select the organization from the dropdown to designate which jurisdiction's policy and procedure manual has been adopted.

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

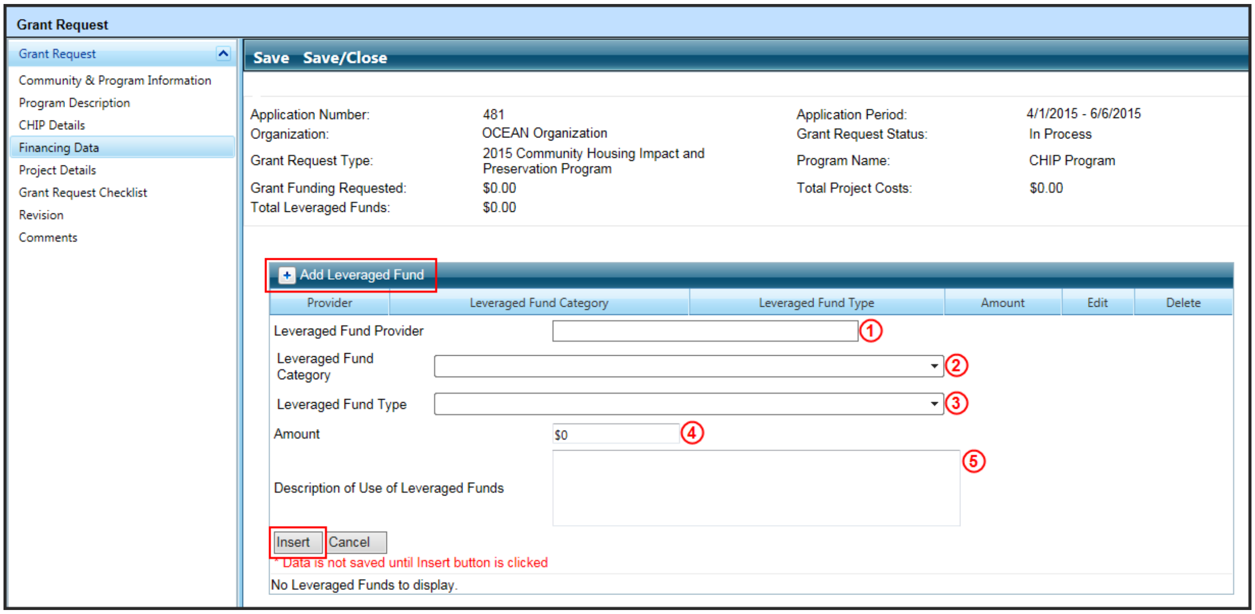
Save Program Income Balances as of 3/31

1. Enter **Housing CDBG** and **HOME** program income balances.
2. Click the **Save** button in the top button bar.

Add Partnerships with CHIP Eligible Communities

1. Check the box for **Please check this box if you are partnering with another CHIP eligible community**.
2. Select at least one community in the grid that displays with CHIP eligible communities.
3. 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 • Homeowner Financing • In Kind • Landlord / Owner Match • Tenant Rent Contribution • Other
4. Amount	Enter the dollar amount of leveraged funds for the provider entered.
5. Description of Use of Leveraged Funds	Enter a description for how the leveraged funds will be used.

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.

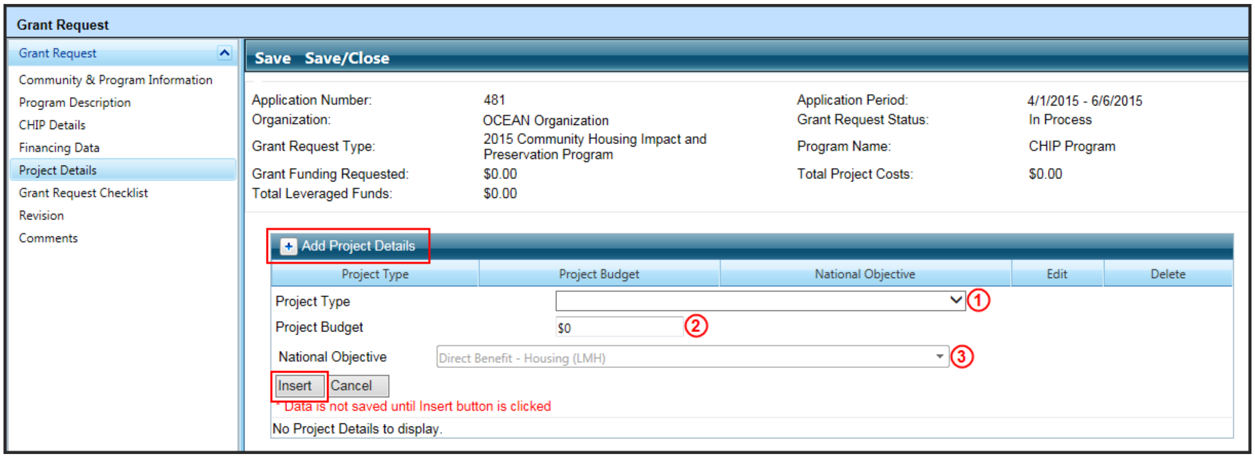
Cancel Adding/Editing Leveraged Fund

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 CHIP, the available project types include: • Rehabilitation Assistance • Repair Assistance • Homeownership Assistance • Tenant-Based Rental Assistance • Administration / Fair Housing Only one project for each project type can be added to the CHIP grant request.
2. Project Budget	Enter the budget for the project. This budget is the amount of funds that are being requested from OCD.
3. National Objective	When adding an Administration / Fair Housing project, the National Objective field will default to 'F/H and Administration.' For all other project types, the National Objective field will default to Direct Benefit – Housing (LMH). This field is not editable.

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 grant request.

Edit Project Detail

1. Click on the **Edit** icon next to an existing project detail record in the grid.

2. The grid expands for editing the project detail record.
3. Edit the project detail information.
4. Click the **Update** button.
5. Project detail information is updated.

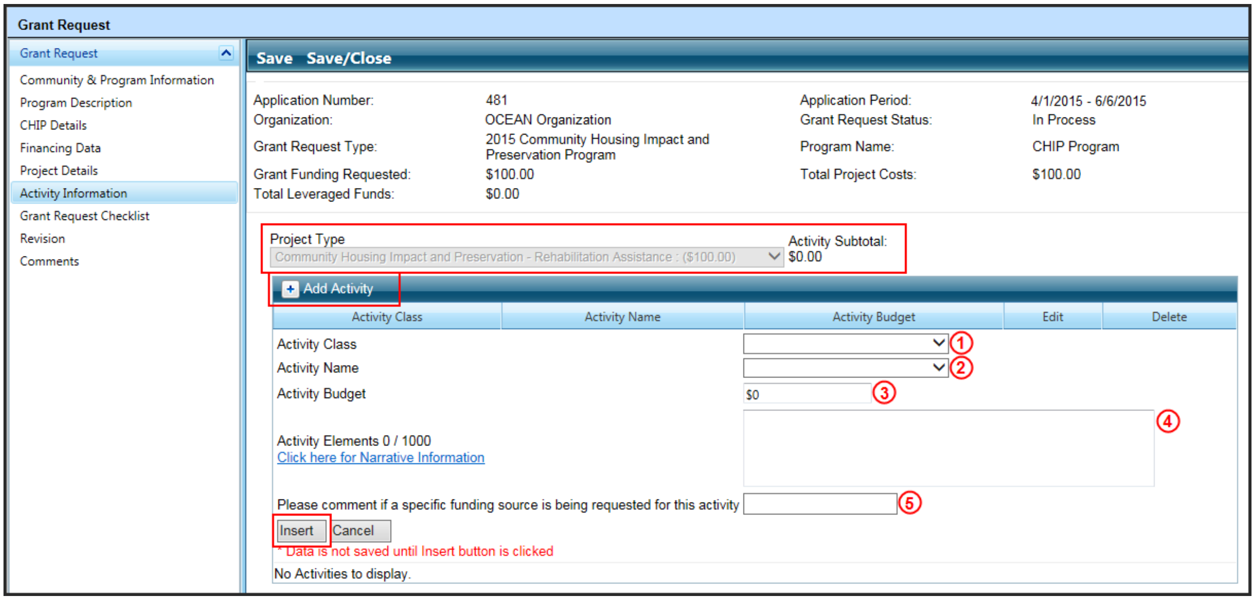
Cancel Adding/Editing Project Detail

1. Click to either **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 and Activity Outcomes and Leveraging records will be deleted as well.

Activity Information



Field	Description
1. Activity Class	Select an activity class for the new activity. If the activity is being entered for an Administration / Fair Housing project type, then the available activity class options include: • Fair Housing • Administration If the activity is being entered for any project type other than the Administration / Fair Housing project type, then the only available activity class options is: • Housing
2. Activity Name	Select the activity name from the dropdown. The dropdown choices depend on the project type that the activity is being added for. See Table 2 below for potential activity names per project type.
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.
Click here for Narrative Information	Click this link to view information necessary for completing the Activity Elements narrative completely and correctly. This link does not display for Administration / Fair Housing project types.
4. Activity Elements	Enter detail for the activity elements narrative based on the information provided in the **Click here for Narrative Information** link. This link does not display for Administration / Fair Housing project types.
5. Please comment if a specific funding source is being requested for this activity	Enter the name of a funding source that is being requested for this activity if you have a preference on where your funding is coming from. This preference may or may not be fulfilled depending on the availability of grant funds.

Project	Activities
Rehabilitation Assistance	Private Rehabilitation, Private Rental Rehabilitation
Repair Assistance	Home/Building Repair, Rental Repair
Homeownership Assistance	Downpayment Assistance, New Construction
Tennant-Based Rental Assistance	Rental/Housing Assistance
Administration/Fair Housing	Fair Housing, Administration

Table 2

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

Add Activity

1. Select a project from the **Project Type** dropdown above the activity grid.
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 2 – 7 for each activity you need to add for the project type selected.
9. Repeat Steps 1 – 8 for each project type in the project dropdown until activities have been added for all projects.

Edit Activity

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

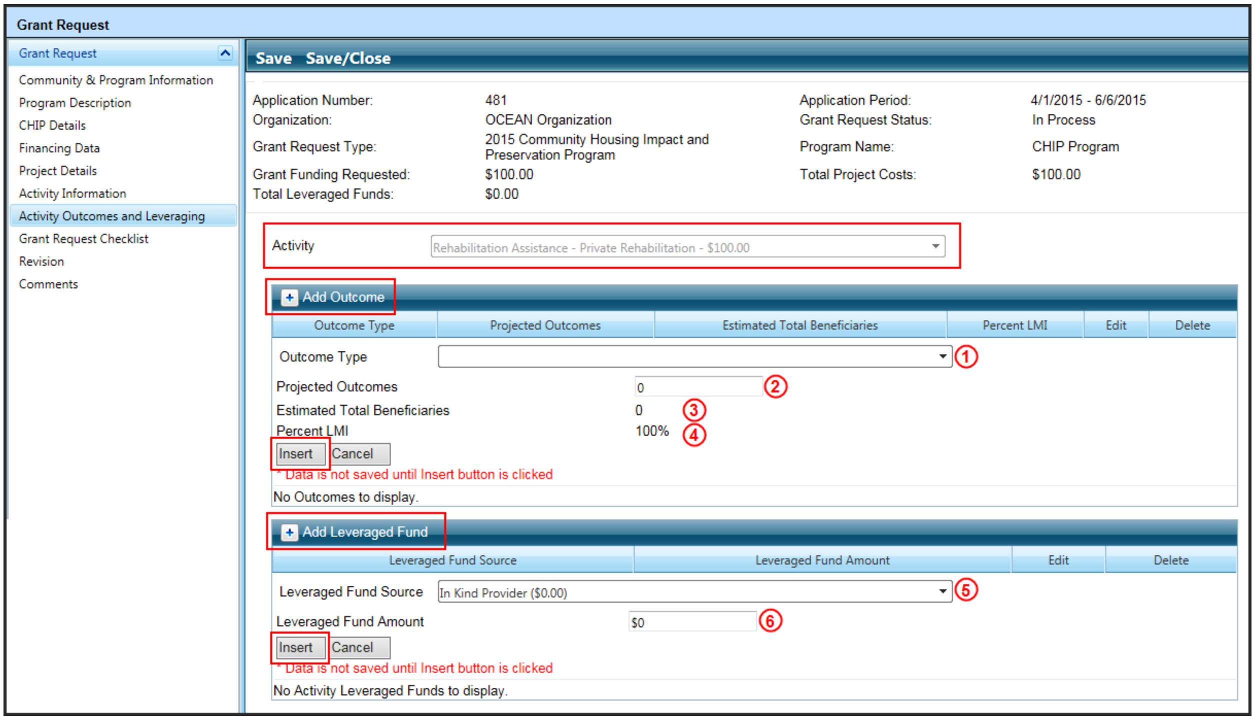
Cancel Adding/Editing Activity

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

Delete Activity

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

Activity Outcomes and Leveraging



Field	Description
1. Outcome Type	Select the outcome type from the dropdown. The dropdown choices depend on the activity that the outcome is being added for. See **Table 3** below for potential outcome types per activity.
2. Projected Outcomes	Enter the projected number of outcomes for the activity.
3. Estimated Total Beneficiaries	This field displays the estimated total beneficiaries. It is a calculated field based on the projected number of outcomes. The field takes the projected outcomes multiplied by 2.7 and then rounds to the nearest whole number. The estimated total beneficiaries field is not editable.
4. Percent LMI	This is always 100% for CHIP and is not editable.
5. 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.
6. Leveraged Fund Amount	Enter the amount of leveraged funds from this provider that will be funding the activity selected.

Activity	Outcomes
Private Rehabilitation	Units Rehabbed – Owner
Private Rental Rehab.	Units Rehabbed – Rental
Home / Building Repair	Units Repaired – Owner, Water/Septic Tanks/Sludge Pits Inst.
Rental Repair	Units Repaired – Rental, Owner, Water/Septic Tanks/Sludge Pits Inst.
Downpayment Asst. / Rehab	Units Assisted with DPA / Rehab
New Construction	Units Constructed – Owner
Rental / Housing Assistance	Households Assisted
Fair Housing	Standard Fair Housing Program
General Admin	N/A (Outcomes grid will not be displayed)

Table 3

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 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 2 – 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 funds 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 2 – 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

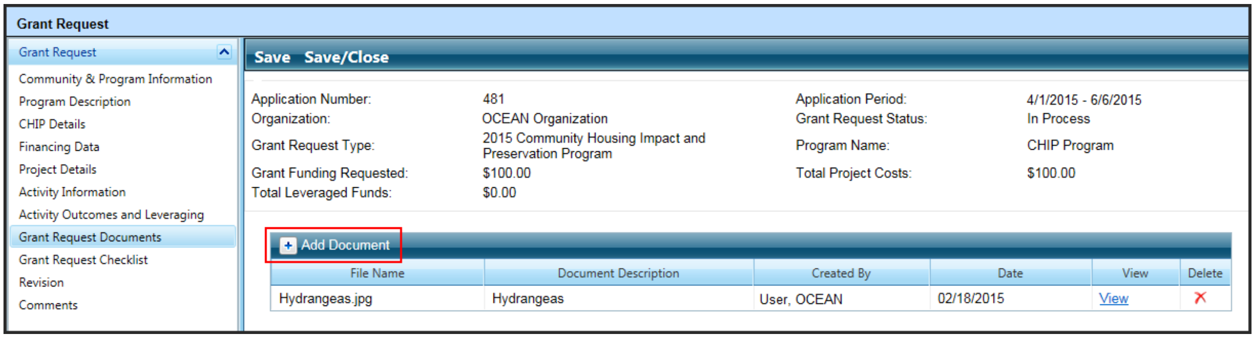
1. Click to either **Add Leveraged Fund** or **Edit** an existing leveraged fund record in the grid.
2. The grid expands for adding/editing a leveraged fund record.
3. Click the **Cancel** button.
4. Changes are not saved.

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

The Grant Request Documents page allows the user to attach documents to the grant, a project, or an activity when adding a document depending on the level specified by the Office of Community Development.



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.

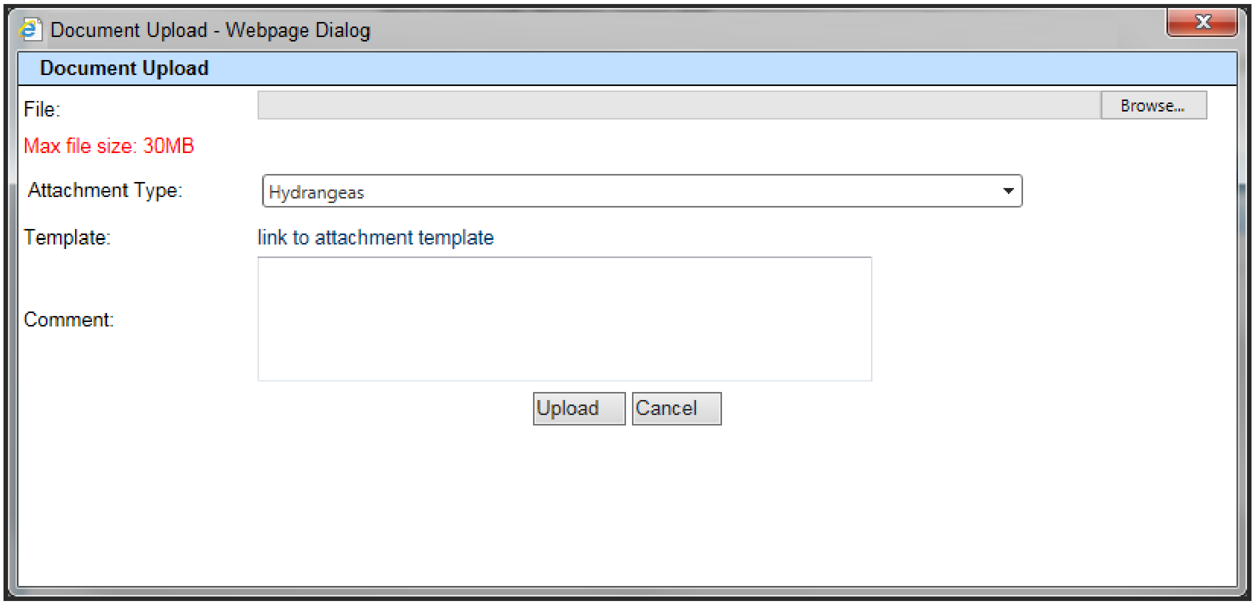
The functions available from the Grant Request Documents page are listed below with steps for performing each function:

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.



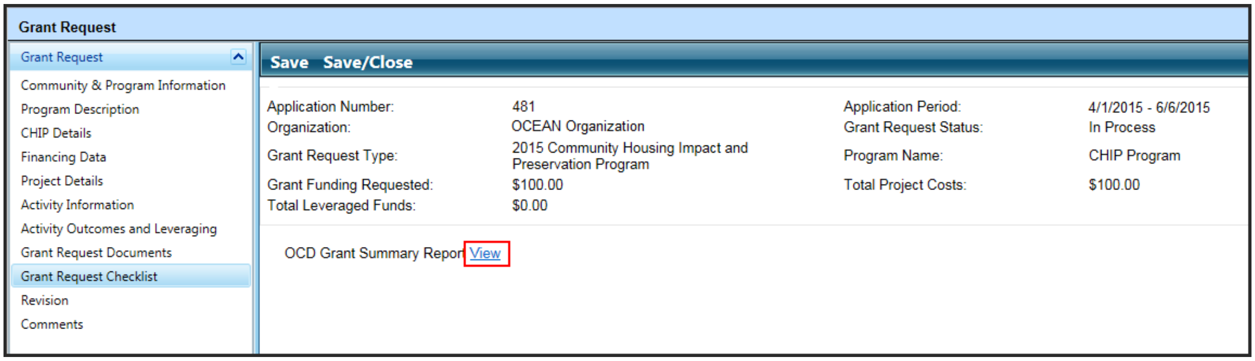
*Note: If the attachment type selected is for a project or activity, then you will be required to select the project and/or activity to attach the document to. These will be shown by additional dropdowns on the document upload popup above.

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.

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

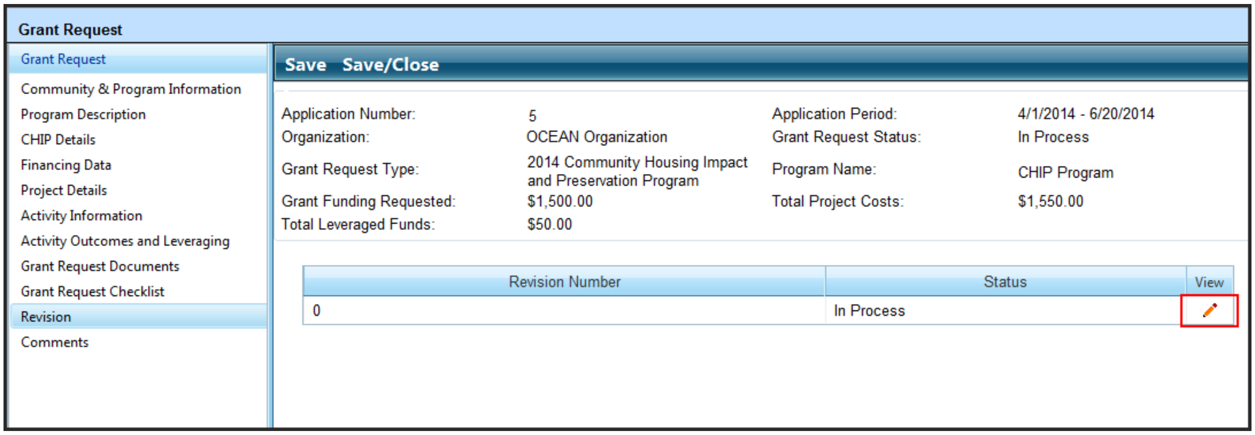


The functions available from the Grant Request Checklist page are listed below with steps for performing each function:

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

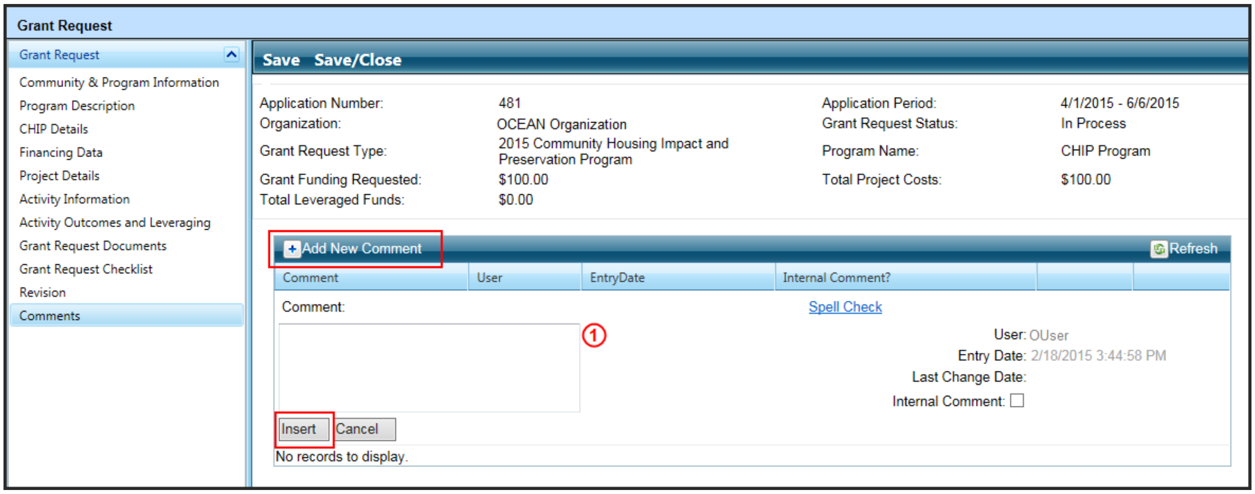


The functions available from the Revision page are listed below with steps for performing each function:

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.

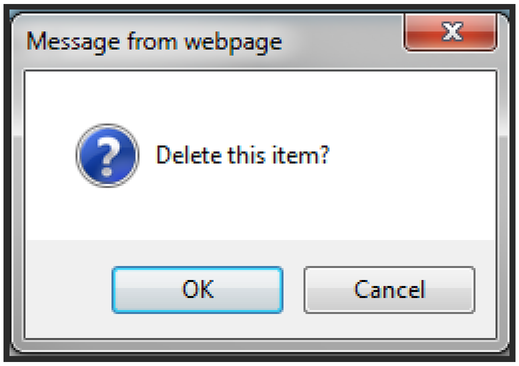
Cancel Adding/Editing Comment

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.