



OCEAN for Housing Development Assistance Program (HDAP)

Application Preparer User Guide

October 15, 2014

Version 1.0



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Document Overview

OCEAN for Housing Development Assistance Program (HDAP)

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 HDAP 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 HDAP
- 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 HDAP Process Diagrams

Home

OCEAN Section	Elements of Section	Description of User Activities
<p>Login → Application Request Search</p>		
<p>1 Community & Program Information</p>	<p>Administrative Agency Administrative Contact Information</p>	<ul style="list-style-type: none"> Define Administrative Contact Initiate an Application
<p>2 Program Description</p>	<p>Program Description Program Narrative</p>	<ul style="list-style-type: none"> Add/Edit Program Description Delete Program Description
<p>3 HDAP Details</p>	<p>HDAP Project Funds Requested Projected Outcomes</p>	<ul style="list-style-type: none"> Save HDAP Details
<p>4 Project Details</p>	<p>Project Type Project Budget Target Populations</p>	<ul style="list-style-type: none"> Add/Edit Project Details Delete Project Details
<p>5 Activity Information</p>	<p>Activity Class & Name Activity Budget Short Activity Description</p>	<ul style="list-style-type: none"> Add/Edit Activity Details Delete Activity Details
<p>6 Grant Request Documents</p>	<p>Required and Non-Required Documentation Add Document Upload</p>	<ul style="list-style-type: none"> View Document Templates Attach Documents Delete Documents
<p>7 Grant Request Checklist</p>	<p>Print All Application Pages Available Application Reports</p>	<ul style="list-style-type: none"> View Reports Save/Print Reports
<p>8 Revision</p>	<p>View Prior Amendment Details</p>	<ul style="list-style-type: none"> View Revisions
<p>9 Comments</p>	<p>User Commentary</p>	<ul style="list-style-type: none"> Add/Edit Comments Delete Comments

OHTF

OCEAN Section	Elements of Section	Description of User Activities
1 Community & Program Information	Administrative Agency Administrative Contact Information	<ul style="list-style-type: none"> Define Administrative Contact Initiate an Application
2 Program Description	Program Description Program Narrative	<ul style="list-style-type: none"> Add/Edit Program Description Delete Program Description
3 HDAP Details	HDAP Project Funds Requested Projected Outcomes	<ul style="list-style-type: none"> Save HDAP Details
4 Project Details	Project Type Project Budget Target Populations	<ul style="list-style-type: none"> Add/Edit Project Details Delete Project Details
5 Activity Information	Activity Class & Name Activity Budget Short Activity Description	<ul style="list-style-type: none"> Add/Edit Activity Details Delete Activity Details
6 Grant Request Documents	Required and Non-Required Documentation Add Document Upload	<ul style="list-style-type: none"> View Document Templates Attach Documents Delete Documents
7 Grant Request Checklist	Print All Application Pages Available Application Reports	<ul style="list-style-type: none"> View Reports Save/Print Reports
8 Revision	View Prior Amendment Details	<ul style="list-style-type: none"> View Revisions
9 Comments	User Commentary	<ul style="list-style-type: none"> 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 Scot.Burbacher@development.ohio.gov
 - Fax: 614-955-1465 attn: Scot Burbacher
 - Mail: Scot Burbacher
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.

The screenshot shows the login interface for the Ohio Community and Energy Assistance Network (OCEAN). At the top left is the Ohio Development Services Agency logo. The main heading is "Ohio Community and Energy Assistance Network (OCEAN) Login". Below this, there are instructions: "Instructions: • You must disable your pop-up blocker to use this application. • Please enter your User Name and Password and click the Login button." The login form consists of two input fields: "User Name:" and "Password:". The "User Name:" field has a red asterisk to its right. The "Password:" field has a red asterisk and the text "* - Required" to its right. Below the input fields is a "Login" button. At the bottom of the form area, there is a blue hyperlink: "[I forgot my User Name and/or Password](#)".

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.

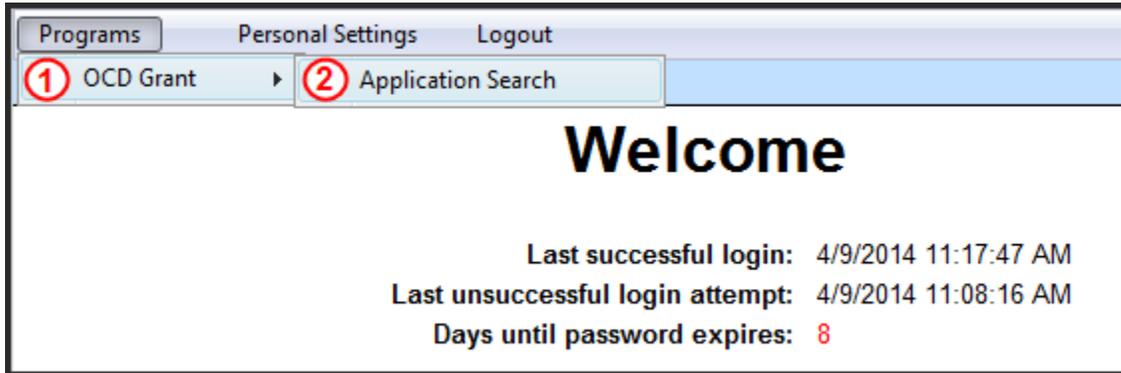
OCEAN Navigation and Menu

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.

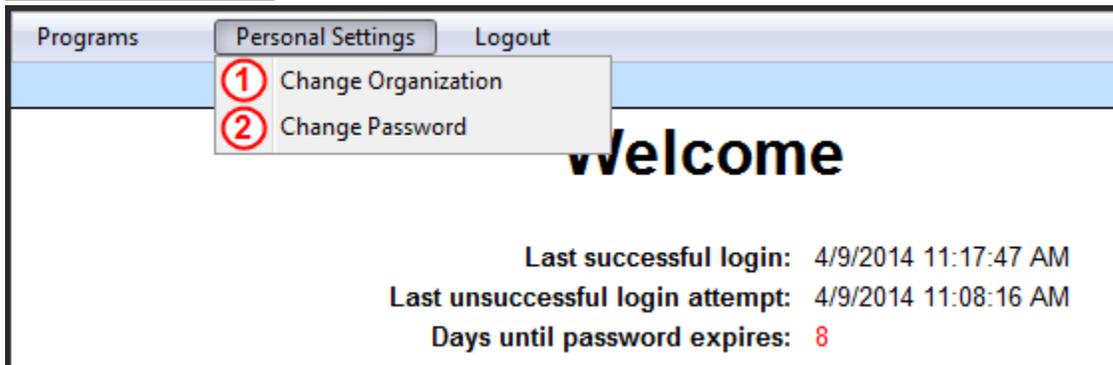
Menu/Field	Purpose
1. Programs	Used to access the OCD grant menu options.
2. Personal Settings	Used to change your password and/or organization.
3. Logout	Used to sign out and exit the OCEAN application.
4. Date/Time Received	Sortable column of notification messages date and time.
5. Urgency Icon	Sortable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

Programs



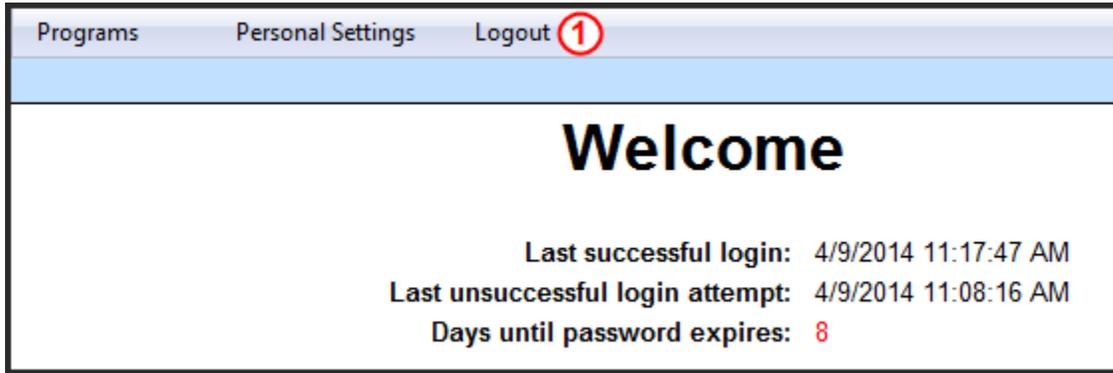
Menu	Purpose
1. OCD Grant	Choose this option to see a list of OCD Grant pages in OCEAN.
2. Application Search	Choose this option to navigate to the Application Search page for viewing/editing existing applications and adding new applications.

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.

Logout



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

Completing an Application for HDAP

The following section describes the process for creating an application for the Housing Development Assistance Program (HDAP) 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

The screenshot shows the 'Application Request Search' interface. It includes several dropdown menus and buttons. The fields are: Program Year (2014), Application Type (Housing Development Assistance Program), Application Number, and Status. Below these are buttons for 'Reset', 'Add New Grant Request', and 'Search'. At the bottom, there is a table with columns: Application Period, Application Number, Application Type, Program, Organization Name, Status, Edit, and Delete. The table contains one row with the following data: 9/1/2014 - 12/31/2014, 493, HDAP, OCEAN Organization, In Process, and icons for Edit and Delete. A navigation bar at the very bottom contains links for Home, Feedback, Logout, Help, Top, Screen Print, and Create New Ticket.

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 'Rejected to User' 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:

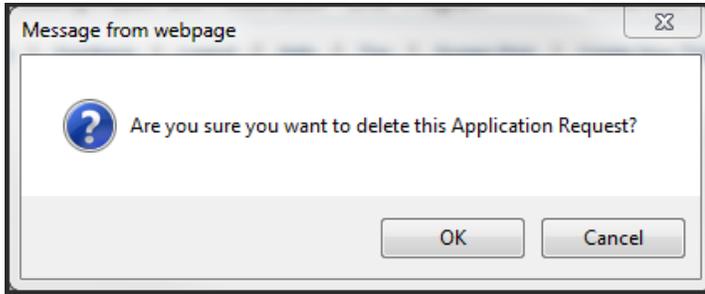
1. Select a **Program Year** and an **Application Type**.
2. Click the **Add New Grant Request** button.
3. You will navigate to the **Grant Request** page for adding a new application.

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 HDAP 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.

HDAP Details must be filled in to save / submit the Grant Request.	Click the HDAP Details link in the left navigation, enter data in all fields, and click 'Save' in the top button bar.
The budget totaled across all project details must be less than or equal to \$\$\$\$ (currently \$\$\$\$).	The Grant Funding Requested (total project budgets across all projects) must be less than or equal to the HDAP Project Funds Requested on the HDAP Details page. Update the project budgets and/or the HDAP Project Funds Requested.

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 CDBG funds requested across all projects on this application
 - **Total Leveraged Funds** – total leveraged funds defined on the financing data page
 - **Application Period** – application period for submitting applications
 - **Grant Request Status** – current status of the application
 - **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.

Housing Development Assistance Program

There are two types of Housing Development Assistance Programs that you can create an application for:

- Home
- OHTF

Each program will be added as a separate application.

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

Home

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

Community & Program Information

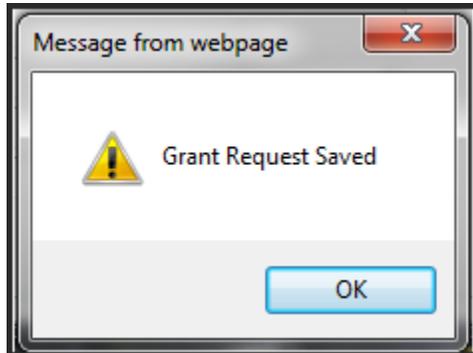
Grant Request			
Grant Request		Save Save/Close	
Community & Program Information			
Application Number:	492	Application Period:	9/1/2014 - 12/31/2014
Organization:	OCEAN Organization	Grant Request Status:	In Process
Grant Request Type:	2014 Housing Development Assistance Program		
Grant Funding Requested:	\$0.00	Total Project Costs:	\$0.00
Total Leveraged Funds:	\$0.00		
Administrative Agency:	<input type="text"/>		①
Administrative Contact:	<input type="text"/>		②
Address:	<input type="text"/>		③
Administrator's Phone:	<input type="text"/>		④
Administrator's Fax:	<input type="text"/>		⑤
Administrator's Email:	<input type="text"/>		⑥
* Please click 'Save' to initiate an application.			

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 HDAP 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 HDAP, there are two available programs: <ul style="list-style-type: none"> • Home • OHTF
2. Program Narrative	Provide a detailed narrative describing this grant request. You must include the location, activities, outcomes and expected results of the project plus any other program specific descriptive information. This field has a 3000 character limit, with a character counter displayed that will update as you type.

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 'Home' 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 Narrative**. 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, and Activity Information will be deleted as well.

HDAP Details

Grant Request	
<ul style="list-style-type: none"> Grant Request Community & Program Information Program Description HDAP Details Project Details Activity Information Grant Request Documents Grant Request Checklist Revision Comments 	<div style="border: 1px solid black; padding: 5px;"> Save Save/Close </div> <p> Application Number: 492 Application Period: 9/1/2014 - 12/31/2014 Organization: OCEAN Organization Grant Request Status: In Process Grant Request Type: 2014 Housing Development Assistance Program Grant Funding Requested: \$0.00 Total Project Costs: \$0.00 Total Leveraged Funds: \$0.00 </p> <p> HDAP Project Funds Requested <input type="text"/> ① Projected Outcomes: Estimated Leveraged Funds <input type="text"/> ② Number of Rental Projects <input type="text"/> ③ Units Rehabbed - Rental <input type="text"/> ④ Units Constructed - Rental <input type="text"/> ⑤ </p> <p style="color: red; font-size: small;">* Please click the 'Save' button above after making changes.</p>

Field	Description
1. HDAP Project Funds Requested	Enter the total amount of project funds that you will be requesting. This includes admin, operating expenses, and all future projects to be defined for this application.
2. Estimated Leveraged Funds	Enter the total estimated amount of leveraged funds, including leveraged funds on future projects to be defined for this application.
3. Number of Rental Projects	Enter the number of Rental Projects projected to be completed.
4. Units Rehabbed – Rental	Enter the number of rental units projected to be rehabbed.
5. Units Constructed – Rental	Enter the number of rental units projected to be constructed.

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

Save HDAP Details

1. Enter **HDAP Project Funds Requested** and **Projected Outcomes** details.
2. Click the **Save** button in the top button bar.

Project Details

Grant Request																									
<ul style="list-style-type: none"> Grant Request Community & Program Information Program Description HDAP Details Project Details Activity Information Grant Request Documents Grant Request Checklist Revision Comments 	<p>Save Save/Close</p> <p>Application Number: 492 Application Period: 9/1/2014 - 12/31/2014 Organization: OCEAN Organization Grant Request Status: In Process</p> <p>Grant Request Type: 2014 Housing Development Assistance Program Program Name: HDAP Program</p> <p>Grant Funding Requested: \$0.00 Total Project Costs: \$0.00 Total Leveraged Funds: \$0.00</p> <p>+ Add Project Details</p> <table border="1"> <thead> <tr> <th>Project Type</th> <th>Project Name</th> <th>Project Budget</th> <th>National Objective</th> <th>Edit</th> <th>Delete</th> </tr> </thead> <tbody> <tr> <td>Project Type</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="button" value="Edit"/></td> <td><input type="button" value="Delete"/></td> </tr> <tr> <td>Project Name</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="button" value="Edit"/></td> <td><input type="button" value="Delete"/></td> </tr> <tr> <td>Project Budget</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="button" value="Edit"/></td> <td><input type="button" value="Delete"/></td> </tr> </tbody> </table> <p><input type="button" value="Insert"/> <input type="button" value="Cancel"/></p> <p><small>*Data is not saved until Insert button is clicked</small></p> <p>No Project Details to display.</p>	Project Type	Project Name	Project Budget	National Objective	Edit	Delete	Project Type	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	Project Name	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	Project Budget	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Project Type	Project Name	Project Budget	National Objective	Edit	Delete																				
Project Type	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>																				
Project Name	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>																				
Project Budget	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>																				

Field	Description
1. Project Type	Select the project type from the dropdown. For the Housing Development Assistance Program – HOME program, the available project types include: <ul style="list-style-type: none"> • Admin • Operating Expenses
2. Project Name	This field defaults depending on the Project Type selected. If the Project Type selected is Admin, then this field defaults to 'OHFA Admin' and is not editable. If the Project Type selected is Operating Expenses, then this field defaults to 'CHDO Operating' and is not editable.
3. Project Budget	Enter the budget for the project. This budget is the amount of funds that are being requested from OCD.

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

Add Project Detail

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

Edit Project Detail

1. Click on the **Edit** icon next to an existing project detail record in the grid.
2. The grid expands for editing the project detail record.
3. Edit the project detail information.

4. Click the **Update** button.
5. Project detail information is updated.

Cancel Adding/Editing Project Detail

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

Delete Project Detail

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

Activity Information

Field	Description
1. Activity Class	Select an activity class for the new activity. The available activity class options depend on the project type selected. If the project type selected is Admin, then the only available activity class is: <ul style="list-style-type: none"> Administration If the project type selected is Operating Expenses, then the only available activity class is: <ul style="list-style-type: none"> Housing
2. Activity Name	Select the activity name from the dropdown. The dropdown choices depend on the activity class that is selected. If the activity class selected is Administration, then the only activity option is: <ul style="list-style-type: none"> General Admin If the activity class selected is Housing, then the only activity option is: <ul style="list-style-type: none"> Operating Expenses / CHDO
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.

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.

Grant Request Documents

Grant Request																																								
Grant Request	Save Save/Close																																							
Community & Program Information	Application Number: 492 Application Period: 9/1/2014 - 12/31/2014																																							
Program Description	Organization: OCEAN Organization Grant Request Status: In Process																																							
HDAP Details	Grant Request Type: 2014 Housing Development Assistance Program Program Name: HDAP Program																																							
Project Details	Grant Funding Requested: \$0.00 Total Project Costs: \$0.00																																							
Activity Information	Total Leveraged Funds: \$0.00																																							
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Field	Description
1. Type	Displays the type of documentation. For Grant Request Documents, this will always display document.
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. Required	If this checkbox is checked, then the document requires a response (attachment) to be uploaded prior to submitting your application request. If this box is not checked, then no document is required. Even if it is not required, there may be special circumstances or conditions within your application details that make it necessary for you to attach a response. Therefore, you should always review each document and determine if they are required for your application or not.
4. View	Use this link to view/download templates and/or instruction forms for application documents.
5. Response Type	Displays the type of response document. For grant request documents, this will always display document.
6. Response Description	Displays the description that you enter when uploading your response document.
7. View	Use this second link to view/download your completed template or instruction form.
8. Uploaded By	Displays the username of the user who uploaded the response document.
9. Uploaded Date	Displays the date the response document was uploaded.
10. Attach	Use this link to upload your completed template and/or form for the application document listed.
11. Updated By	Displays the username of the user who last updated the response document.
12. Last Updated Date	Displays the date the response document was last updated.

13. Status	This field is not currently being used for the CHIP application request.
14. Delete	Click this icon to delete your response document.

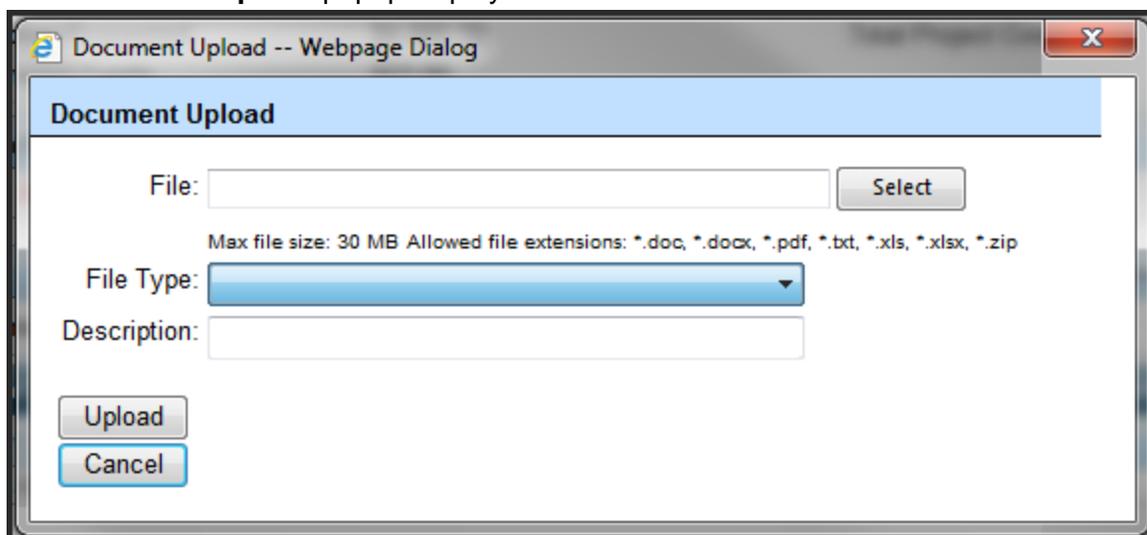
The functions available from the Grant Request Documents page are listed below with steps for performing each function:

View Document in Grant Request Documents

1. Click the **View** link next to the provided template and/or instruction form or next to your response document.
2. A new window displays with the document details displayed.
3. Click the **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 **Attach** link next to a record in the grant request documents grid.
2. The **Document Upload** popup displays.



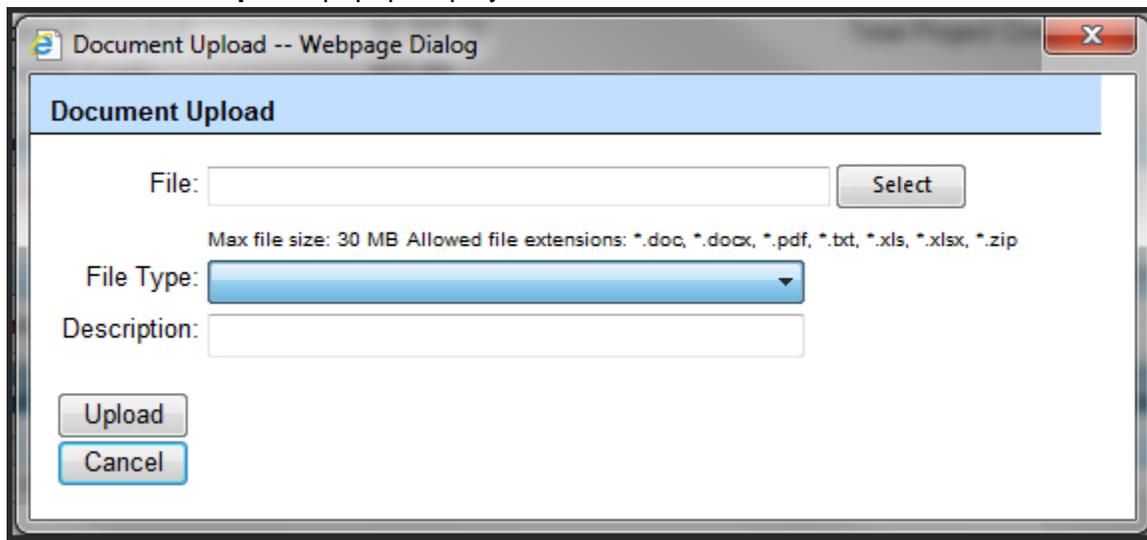
3. Click the **Select** button.
4. The **Windows File Explorer** popup displays.
5. Navigate to the file you would like to attach on your local machine and click the **Open** button.
6. The name of the file will be displayed in the **File** field on the document upload popup.
7. Select the **File Type** from the dropdown list (only option available will be 'document').
8. Enter a **Description** for your document.
9. Click the **Upload** button to attach your document to the record in the grant requests documents grid.

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.

Add Document

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



3. Click the **Select** 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 **File Type** from the dropdown list (only option available will be 'document').
8. Enter a **Description** for your document.
9. Click the **Upload** button to upload your document to the documents grid.

View Document

1. Click the **View** link next to the uploaded document in the documents grid.
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.

Delete Document

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

Grant Request Checklist

Grant Request																					
<ul style="list-style-type: none"> Grant Request Community & Program Information Program Description HDAP Details Project Details Activity Information Grant Request Documents Grant Request Checklist Revision Comments 	<p style="text-align: right;">Save Save/Close</p> <table border="0"> <tr> <td>Application Number:</td> <td>492</td> <td>Application Period:</td> <td>9/1/2014 - 12/31/2014</td> </tr> <tr> <td>Organization:</td> <td>OCEAN Organization</td> <td>Grant Request Status:</td> <td>In Process</td> </tr> <tr> <td>Grant Request Type:</td> <td>2014 Housing Development Assistance Program</td> <td>Program Name:</td> <td>HDAP Program</td> </tr> <tr> <td>Grant Funding Requested:</td> <td>\$0.00</td> <td>Total Project Costs:</td> <td>\$0.00</td> </tr> <tr> <td>Total Leveraged Funds:</td> <td>\$0.00</td> <td></td> <td></td> </tr> </table> <p>OCD Grant Summary Report View</p>	Application Number:	492	Application Period:	9/1/2014 - 12/31/2014	Organization:	OCEAN Organization	Grant Request Status:	In Process	Grant Request Type:	2014 Housing Development Assistance Program	Program Name:	HDAP Program	Grant Funding Requested:	\$0.00	Total Project Costs:	\$0.00	Total Leveraged Funds:	\$0.00		
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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

Grant Request											
<ul style="list-style-type: none"> Grant Request Community & Program Information Program Description HDAP Details Project Details Activity Information Grant Request Documents Grant Request Checklist Revision Comments 	<p>Save Save/Close</p> <p>Application Number: 492 Application Period: 9/1/2014 - 12/31/2014</p> <p>Organization: OCEAN Organization Grant Request Status: In Process</p> <p>Grant Request Type: 2014 Housing Development Assistance Program Program Name: HDAP Program</p> <p>Grant Funding Requested: \$0.00 Total Project Costs: \$0.00</p> <p>Total Leveraged Funds: \$0.00</p> <table border="1"> <thead> <tr> <th>Revision Number</th> <th>Status</th> <th></th> <th>View</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>In Process</td> <td></td> <td></td> </tr> </tbody> </table>			Revision Number	Status		View	0	In Process		
Revision Number	Status		View								
0	In Process										

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

The screenshot displays the 'Grant Request' form with the following details:

- Application Number:** 492
- Organization:** OCEAN Organization
- Grant Request Type:** 2014 Housing Development Assistance Program
- Grant Funding Requested:** \$0.00
- Total Leveraged Funds:** \$0.00
- Application Period:** 9/1/2014 - 12/31/2014
- Grant Request Status:** In Process
- Program Name:** HDAP Program
- Total Project Costs:** \$0.00

The 'Comments' section includes an 'Add New Comment' button, a text input field (marked with a red circle and '1'), and an 'Insert' button. Other elements include a 'Refresh' button, a 'Spell Check' link, and user information: User: OUser, Entry Date: 4/24/2014 3:48:51 PM, Last Change Date, and Internal Comment checkbox. The status at the bottom indicates 'No records to display.'

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.

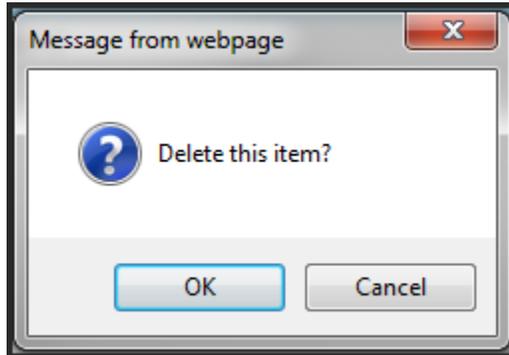
Cancel Adding/Editing Comment

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.

OHTF

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

Community & Program Information

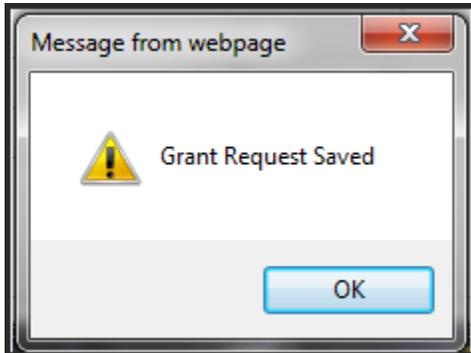
Grant Request			
Grant Request		Save Save/Close	
Community & Program Information			
Application Number:	492	Application Period:	9/1/2014 - 12/31/2014
Organization:	OCEAN Organization	Grant Request Status:	In Process
Grant Request Type:	2014 Housing Development Assistance Program		
Grant Funding Requested:	\$0.00	Total Project Costs:	\$0.00
Total Leveraged Funds:	\$0.00		
Administrative Agency:	<input type="text"/>		①
Administrative Contact:	<input type="text"/>		②
Address:	<input type="text"/>		③
Administrator's Phone:	<input type="text"/>		④
Administrator's Fax:	<input type="text"/>		⑤
Administrator's Email:	<input type="text"/>		⑥
* Please click 'Save' to initiate an application.			

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 HDAP 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 HDAP, there are two available programs: <ul style="list-style-type: none"> • Home • OHTF
2. Program Narrative	Provide a detailed narrative describing this grant request. You must include the location, activities, outcomes and expected results of the project plus any other program specific descriptive information. This field has a 3000 character limit, with a character counter displayed that will update as you type.

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 'OHTF' 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 Narrative**. 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, and Activity Leveraging will be deleted as well.

HDAP Details

Grant Request	
<ul style="list-style-type: none"> Grant Request Community & Program Information Program Description HDAP Details Project Details Activity Information Grant Request Documents Grant Request Checklist Revision Comments 	<div style="border: 1px solid black; padding: 5px;"> Save Save/Close </div> <p> Application Number: 492 Application Period: 9/1/2014 - 12/31/2014 Organization: OCEAN Organization Grant Request Status: In Process Grant Request Type: 2014 Housing Development Assistance Program Grant Funding Requested: \$0.00 Total Project Costs: \$0.00 Total Leveraged Funds: \$0.00 </p> <p> HDAP Project Funds Requested <input type="text"/> ① Projected Outcomes: Estimated Leveraged Funds <input type="text"/> ② Number of Rental Projects <input type="text"/> ③ Number of Homeownership Projects <input type="text"/> ④ Units Rehabbed - Rental <input type="text"/> ⑤ Units Constructed - Rental <input type="text"/> ⑥ Units Repaired - Rental <input type="text"/> ⑦ Units Rehabbed - Owner <input type="text"/> ⑧ Units Constructed - Owner <input type="text"/> ⑨ </p> <p style="color: red; font-size: small;">* Please click the 'Save' button above after making changes.</p>

Field	Description
1. HDAP Project Funds Requested	Enter the total amount of project funds that you will be requesting. This includes admin, operating expenses, and all future projects to be defined for this application.
2. Estimated Leveraged Funds	Enter the total estimated amount of leveraged funds, including leveraged funds on future projects to be defined for this application.
3. Number of Rental Projects	Enter the number of Rental Projects projected to be completed.
4. Number of Homeownership Projects	Enter the number of Homeownership Projects projected to be completed.
5. Units Rehabbed – Rental	Enter the number of rental units projected to be rehabbed.
6. Units Constructed – Rental	Enter the number of rental units projected to be constructed.
7. Units Repaired – Rental	Enter the number of rental units projected to be repaired.
8. Units Rehabbed – Owner	Enter the number of owner units projected to be rehabbed.
9. Units Constructed – Owner	Enter the number of owner units projected to be constructed.

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

Save HDAP Details

1. Enter **HDAP Project Funds Requested** and **Projected Outcomes** details.
2. Click the **Save** button in the top button bar.

Project Details

Field	Description
1. Project Type	Select the project type from the dropdown. For the Housing Development Assistance Program – OHTF program, the only available project types is: <ul style="list-style-type: none"> • Admin
2. Project Name	Enter a name for the project that uniquely identifies this project from all other Housing Development Assistance Program projects.
3. Project Budget	Enter the budget for the project. This budget is the amount of funds that are being requested from OCD.

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

Add Project Detail

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

Edit Project Detail

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

Cancel Adding/Editing Project Detail

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

Delete Project Detail

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

Activity Information

Field	Description
1. Activity Class	Select an activity class for the new activity. The available activity class options depend on the project type selected. If the project type selected is Admin, then the only available activity class is: <ul style="list-style-type: none"> Administration
2. Activity Name	Select the activity name from the dropdown. The dropdown choices depend on the activity class that is selected. If the activity class selected is Administration, then the only activity option is: <ul style="list-style-type: none"> General Admin
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.

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.

Grant Request Documents

Grant Request																																								
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Field	Description
1. Type	Displays the type of documentation. For Grant Request Documents, this will always display document.
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. Required	If this checkbox is checked, then the document requires a response (attachment) to be uploaded prior to submitting your application request. If this box is not checked, then no document is required. Even if it is not required, there may be special circumstances or conditions within your application details that make it necessary for you to attach a response. Therefore, you should always review each document and determine if they are required for your application or not.
4. View	Use this link to view/download templates and/or instruction forms for application documents.
5. Response Type	Displays the type of response document. For grant request documents, this will always display document.
6. Response Description	Displays the description that you enter when uploading your response document.
7. View	Use this second link to view/download your completed template or instruction form.
8. Uploaded By	Displays the username of the user who uploaded the response document.
9. Uploaded Date	Displays the date the response document was uploaded.
10. Attach	Use this link to upload your completed template and/or form for the application document listed.
11. Updated By	Displays the username of the user who last updated the response document.
12. Last Updated Date	Displays the date the response document was last updated.

13. Status	This field is not currently being used for the CHIP application request.
14. Delete	Click this icon to delete your response document.

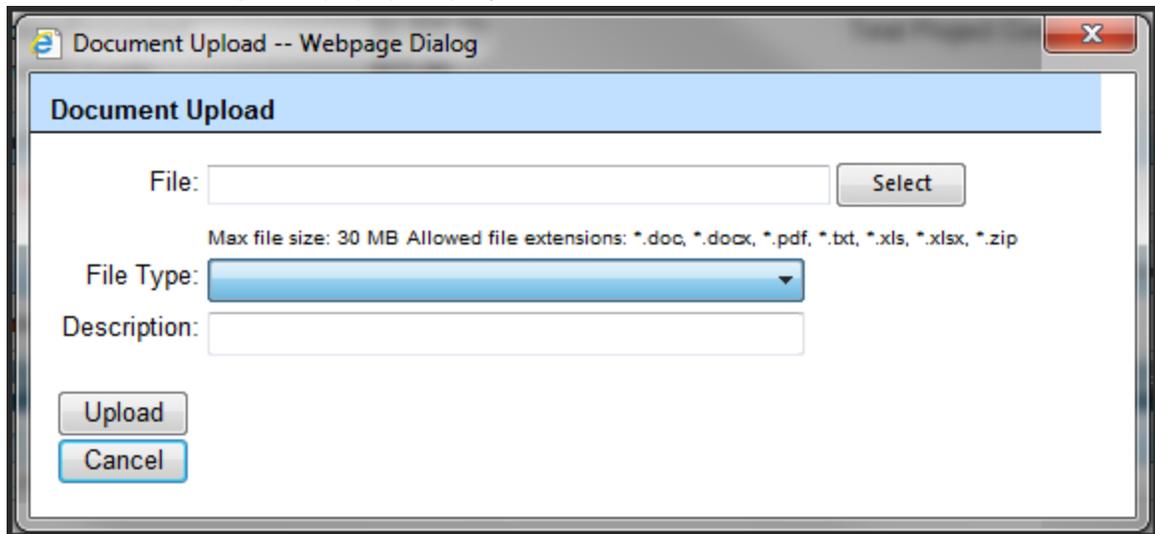
The functions available from the Grant Request Documents page are listed below with steps for performing each function:

View Document in Grant Request Documents

1. Click the **View** link next to the provided template and/or instruction form or next to your response document.
2. A new window displays with the document details displayed.
3. Click the **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 **Attach** link next to a record in the grant request documents grid.
2. The **Document Upload** popup displays.



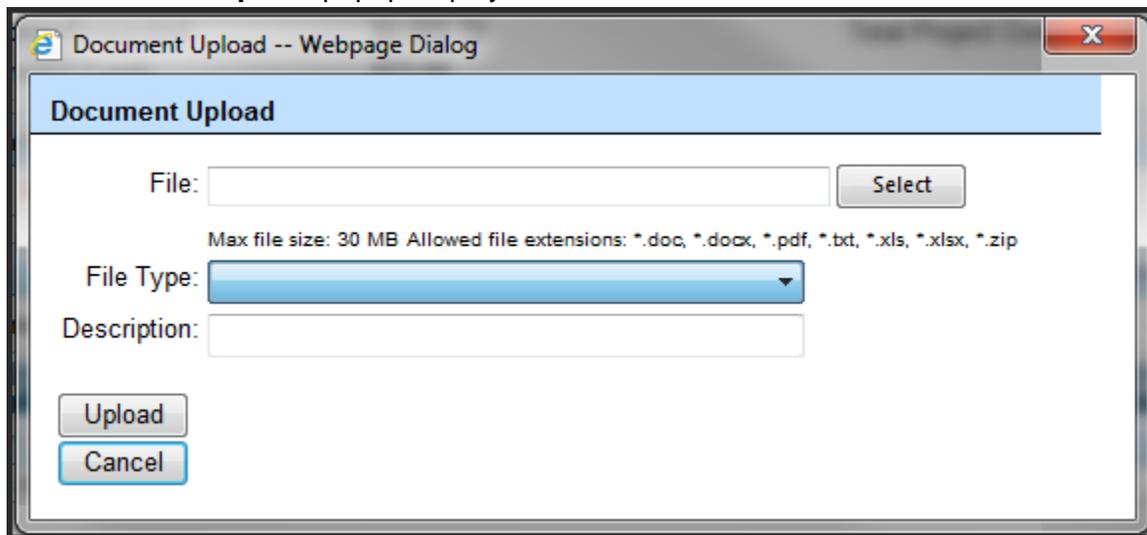
3. Click the **Select** button.
4. The **Windows File Explorer** popup displays.
5. Navigate to the file you would like to attach on your local machine and click the **Open** button.
6. The name of the file will be displayed in the **File** field on the document upload popup.
7. Select the **File Type** from the dropdown list (only option available will be 'document').
8. Enter a **Description** for your document.
9. Click the **Upload** button to attach your document to the record in the grant requests documents grid.

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.

Add Document

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



3. Click the **Select** 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 **File Type** from the dropdown list (only option available will be 'document').
8. Enter a **Description** for your document.
9. Click the **Upload** button to upload your document to the documents grid.

View Document

1. Click the **View** link next to the uploaded document in the documents grid.
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.

Delete Document

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

Grant Request Checklist

Grant Request																					
<ul style="list-style-type: none"> Grant Request Community & Program Information Program Description HDAP Details Project Details Activity Information Grant Request Documents <li style="background-color: #e0f0ff;">Grant Request Checklist Revision Comments 	<div style="text-align: right; border-bottom: 1px solid black; padding-bottom: 5px;"> Save Save/Close </div> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;">Application Number:</td> <td style="width: 33%;">492</td> <td style="width: 33%;">Application Period:</td> <td style="width: 33%;">9/1/2014 - 12/31/2014</td> </tr> <tr> <td>Organization:</td> <td>OCEAN Organization</td> <td>Grant Request Status:</td> <td>In Process</td> </tr> <tr> <td>Grant Request Type:</td> <td>2014 Housing Development Assistance Program</td> <td>Program Name:</td> <td>HDAP Program</td> </tr> <tr> <td>Grant Funding Requested:</td> <td>\$0.00</td> <td>Total Project Costs:</td> <td>\$0.00</td> </tr> <tr> <td>Total Leveraged Funds:</td> <td>\$0.00</td> <td></td> <td></td> </tr> </table> <div style="border-top: 1px solid black; padding-top: 5px;"> <p>OCD Grant Summary Report View</p> </div>	Application Number:	492	Application Period:	9/1/2014 - 12/31/2014	Organization:	OCEAN Organization	Grant Request Status:	In Process	Grant Request Type:	2014 Housing Development Assistance Program	Program Name:	HDAP Program	Grant Funding Requested:	\$0.00	Total Project Costs:	\$0.00	Total Leveraged Funds:	\$0.00		
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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

Grant Request											
<ul style="list-style-type: none"> Grant Request Community & Program Information Program Description HDAP Details Project Details Activity Information Grant Request Documents Grant Request Checklist Revision Comments 	<p>Save Save/Close</p> <p>Application Number: 492 Application Period: 9/1/2014 - 12/31/2014</p> <p>Organization: OCEAN Organization Grant Request Status: In Process</p> <p>Grant Request Type: 2014 Housing Development Assistance Program Program Name: HDAP Program</p> <p>Grant Funding Requested: \$0.00 Total Project Costs: \$0.00</p> <p>Total Leveraged Funds: \$0.00</p> <table border="1"> <thead> <tr> <th>Revision Number</th> <th>Status</th> <th></th> <th>View</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>In Process</td> <td></td> <td></td> </tr> </tbody> </table>			Revision Number	Status		View	0	In Process		
Revision Number	Status		View								
0	In Process										

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.

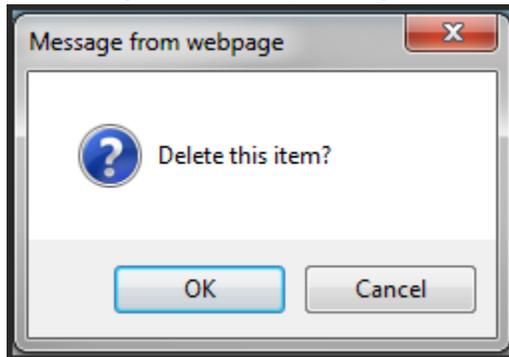
Cancel Adding/Editing Comment

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.