



OCEAN for Housing Opportunities for Persons with AIDS Program (HOPWA)

Application Approver User Guide

October 16, 2014

Version 1.0



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Document Overview

OCEAN for Housing Opportunities for Persons with AIDS Program (HOPWA)

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 Approvers for the HOPWA 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 HOPWA
- Submitting an application for HOPWA
- 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 HOPWA Process Diagram

OCEAN Section	Elements of Section	Description of User Activities
<p>Login → Application Request Search</p>		
1	<p>Community & Program Information</p> <p>Administrative Agency Administrative Contact Information</p>	<ul style="list-style-type: none"> Define Administrative Contact Initiate an Application
2	<p>Program Description</p> <p>Program Name Program Narrative</p>	<ul style="list-style-type: none"> Add/Edit Program Description Delete Program Description
3	<p>HOPWA Details</p> <p>Statistical Information Ryan White Monitoring Findings/Concerns</p>	<ul style="list-style-type: none"> Edit Statistical Information Save HOPWA Details
4	<p>Financing Data</p> <p>Leveraged Fund Providers Fund Amounts</p>	<ul style="list-style-type: none"> Add/Edit Leveraged Funds Delete Leveraged Funds
5	<p>Project Details</p> <p>Project Type Project Budget National Objective</p>	<ul style="list-style-type: none"> Add/Edit Project Details Delete Project Details
6	<p>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
7	<p>Activity Outcomes & Leveraging</p> <p>Projected Outcomes and Type Activity Leveraged Funds</p>	<ul style="list-style-type: none"> Add/Edit Activity Outcomes Delete Activity Outcomes Add/Edit Activity Leveraged Funds Delete Activity Leveraged Funds
8	<p>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
9	<p>Grant Request Checklist</p> <p>Print All Application Pages Available Application Reports</p>	<ul style="list-style-type: none"> View Reports Save/Print Reports
10	<p>Revision</p> <p>View Prior Amendment Details</p>	<ul style="list-style-type: none"> View Revisions
11	<p>Comments</p> <p>User Commentary</p>	<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.

Ohio | Development Services Agency

Ohio Community and Energy Assistance Network (OCEAN) Login

Instructions:

- You must disable your pop-up blocker to use this application.
- Please enter your User Name and Password and click the Login button.

User Name: *

Password: * - Required

[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.

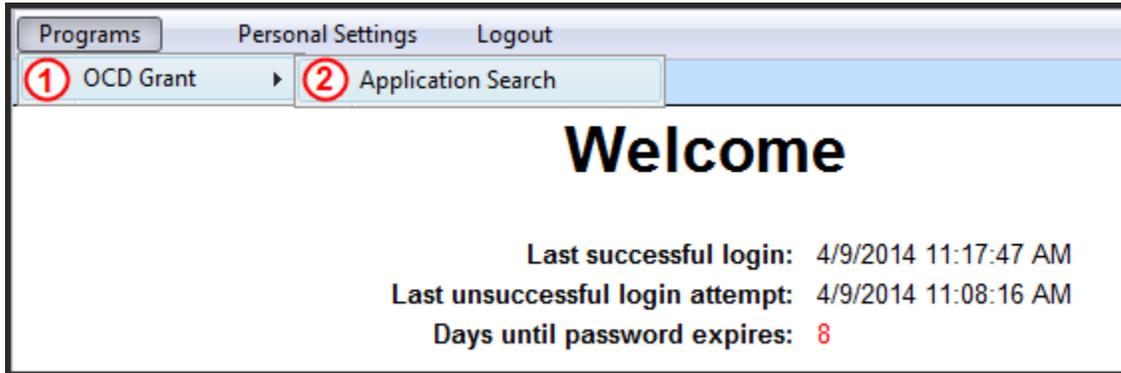
OCEAN Navigation and Menu

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.

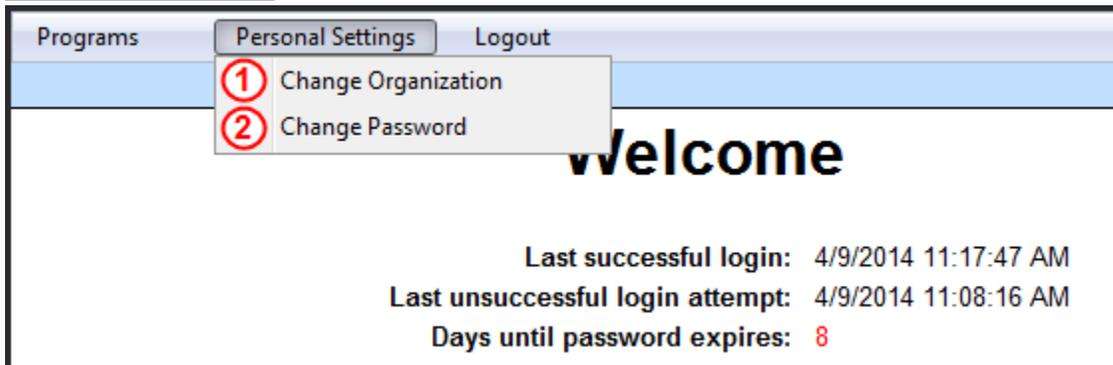
Menu/Field	Purpose
1. Programs	Used to access the OCD grant menu options.
2. Personal Settings	Used to change your password and/or organization.
3. Logout	Used to sign out and exit the OCEAN application.
4. Date/Time Received	Sortable column of notification messages date and time.
5. Urgency Icon	Sortable 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



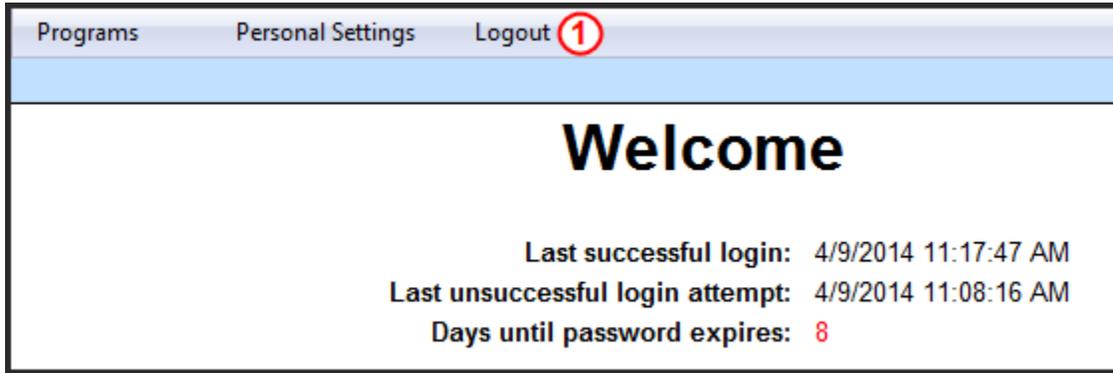
Menu	Purpose
1. OCD Grant	Choose this option to see a list of OCD Grant pages in OCEAN.
2. Application Search	Choose this option to navigate to the Application Search page for viewing/editing existing applications and adding new applications.

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 HOPWA

The following section describes the process for creating an application for the Housing Opportunities for Persons with AIDS Program (HOPWA) 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

Application Request Search

Program Year: ①

Application Type: ②

Application Number: ③

Status: ④

⑤
 ⑥
 ⑦

⑧ Application Period	⑨ Application Number	⑩ Application Type	⑪ Program	⑫ Organization Name	⑬ Status	⑭ Edit	⑮ Delete
9/1/2014 to 12/31/2014	510	HOPWA		OCEAN Organization	In Process		

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:

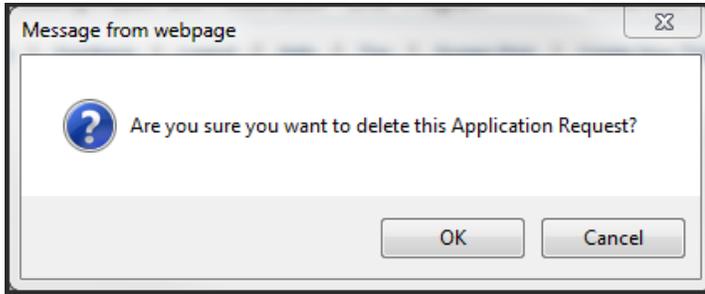
1. Select a **Program Year** and an **Application Type**.
2. Click the **Add New Grant Request** button.
3. You will navigate to the **Grant Request** page for adding a new application.

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 HOPWA 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 HOPWA. 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.
HOPWA Details must be filled in to submit the grant request.	Click the HOPWA Details link in the left navigation, enter data in all fields, and click the ‘Save’ button.

Activity <<project and activity name>> needs at least one outcome measurement.	All activities need an outcome measurement (if applicable). Click the Activity Outcomes and Leveraging link in the left navigation and associate at least one outcome in the outcomes grid to each activity that tracks outcomes.
--	---

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 project funds requested across all projects on this application
 - **Total Leveraged Funds** – total leveraged funds defined on the financing data page
 - **Grant Request Period** – grant start and end date
 - **Application Period** – application start and end dates for submitting applications
 - **Grant Request Status** – current status of the application
 - **Program Name** – displays the name of the program you entered on the Program Description page
 - **Total Project Costs** – all project costs equal to grant funding requested plus total leveraged funds
4. **Page Details** – This section shows the specific details to be entered for the page selected in the left navigation panel. The following pages detail each of these pages and the functions available for entering your application data.

Community & Program Information

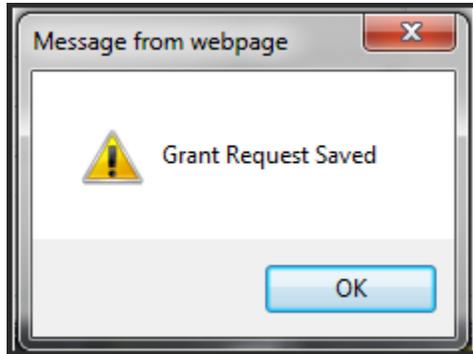
Grant Request			
Grant Request		Save Save/Close	
Community & Program Information			
Application Number:	510	Application Period:	9/1/2014 - 12/31/2014
Organization:	OCEAN Organization	Grant Request Status:	In Process
Grant Request Type:	2014 Housing Opportunities for Persons with AIDS Program		
Grant Funding Requested:	\$0.00	Total Project Costs:	\$0.00
Total Leveraged Funds:	\$0.00		
Administrative Agency:	OCEAN Organization		①
Administrative Contact:			②
Address:			③
Administrator's Phone:			④
Administrator's Fax:			⑤
Administrator's Email:			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 HOPWA 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

Grant Request

Grant Request
Save Save/Close

Community & Program Information

Program Description

Grant Request Documents

Grant Request Checklist

Revision

Comments

Application Number:	510	Application Period:	9/1/2014 - 12/31/2014
Organization:	OCEAN Organization	Grant Request Status:	In Process
Grant Request Type:	2014 Housing Opportunities for Persons with AIDS Program		
Grant Funding Requested:	\$0.00	Total Project Costs:	\$0.00
Total Leveraged Funds:	\$0.00		

+ Add Program Description

Program Description	Program Name	Program Narrative	Total HIV Cases in Service Area	Percentage of HIV Cases	Edit	Delete
Program Description (1)	Program Name (2)	Program Narrative (Please provide a detailed narrative describing this grant request. Include location, activities, outcomes and expected results of the project plus any other program specific descriptive information. You have a 3000 character limit.) (3) <div style="font-size: 0.8em; margin-top: 5px;"> 0/3000 Spell Check </div>			Insert	Cancel

* Data is not saved until Insert button is clicked

Counties in Service Area (4)

Please check counties in your service area.
<input type="checkbox"/> State-Wide
<input type="checkbox"/> Adams
<input type="checkbox"/> Allen
<input type="checkbox"/> Ashland
<input type="checkbox"/> Ashtabula
<input type="checkbox"/> Athens
<input type="checkbox"/> Auglaize
<input type="checkbox"/> Belmont
<input type="checkbox"/> Brown
<input type="checkbox"/> Butler
<input type="checkbox"/> Carroll

No Program Details to display.

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 HOPWA, the only available program is: <ul style="list-style-type: none"> Housing Opportunities for Persons with AIDS
2. Program Name	Enter the name for the program this is used by your organization to identify the application.
3. 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.

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.
2. The grid expands for adding a new program description record.
3. Select the 'Housing Opportunities for Persons with AIDS' Program Description and enter details for all other remaining fields.
4. Click the **Insert** button.
5. Program description details are saved.

Edit Program Description

1. Click on the **Edit** icon next to an existing program description record in the grid.
2. The grid expands for editing the program description record.
3. Edit the **Program Name** and/or **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 Outcomes and Leveraging will be deleted as well.

HOPWA Details

Grant Request

Grant Request
Save Save/Close

Community & Program Information
 Program Description
HOPWA Details
 Financing Data
 Project Details
 Grant Request Documents
 Grant Request Checklist
 Revision
 Comments

Application Number:	510	Application Period:	9/1/2014 - 12/31/2014
Organization:	OCEAN Organization	Grant Request Status:	In Process
Grant Request Type:	2014 Housing Opportunities for Persons with AIDS Program	Program Name:	HOPWA Program
Grant Funding Requested:	\$0.00	Total Project Costs:	\$0.00
Total Leveraged Funds:	\$0.00		

Complete the following information based upon your currently funded HOPWA Program. Projected figures should equal those included in the agency's FY 2013 HOPWA Program grant agreement. Actual figures should reflect the period January 1, 2014 to September 30, 2014.

Statistical Information	Projected	Actual	% of Projected	If the actual outcome is less than 75% of the projected outcome, then please explain	Edit
Number of households receiving housing assistance (short-term rental, mortgage and utility assistance) ✎					
Statistical Information	Number of households receiving housing assistance (short-term rental, mortgage and utility assistance) ①				
Projected	0 ②				
Actual	0 ③				
Percent of Projected	④				
Comment	⑤				

Update
Cancel

*Data is not saved until Update button is clicked

Number of households receiving housing assistance (operating costs)	0	0			✎
Number of households receiving tenant-based rental assistance	0	0			✎
Number of households receiving supportive services without housing assistance	0	0			✎
Number of persons receiving housing information services	0	0			✎

Date of most recent Ryan White Monitoring 📅 ⑥

Findings / Concerns (If Applicable) ⑦

Date of response 📅 ⑧

How were findings / concerns resolved ⑨

* Please click the 'Save' button above after making changes.

Field	Description
1. Statistical Information	Displays the statistic description for collecting data.
2. Projected	Enter the projected figure based on the agency's prior fiscal year HOPWA Program grant agreement.
3. Actual	Enter the actual figure based on the agency's current year data.
4. % of Projected	This is a calculated and non-editable field. It is the percent of the actual to projected.
5. If the actual outcome is less than 75% of the projected outcome, then please explain	If the % of Actual is less than 75%, then provide an explanation in the space provided.

6. Date of most recent Ryan White Monitoring	Click the calendar icon and select the date of the most recent Ryan White Monitoring.
7. Findings/Concerns (if applicable)	If findings/concerns were raised regarding the most recent Ryan White Monitoring, then please detail them in the space provided.
8. Date of response	If findings/concerns were raised, then click the calendar icon and select the date of response.
9. How were findings/concerns resolved	If findings/concerns were raised, then details how they were resolved in the space provided.

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

Edit Statistical Information

1. Click on the **Edit** icon next to an existing statistical information record in the grid.
2. The grid expands for editing the statistical information record.
3. Edit the statistical information details.
4. Click the **Update** button.
5. Statistical information details are updated.
6. Repeat Steps 1 – 5 for each statistical information record.

Cancel Editing Statistical Information

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

Save HOPWA Details

1. Complete the statistical information grid and then add details to the fields below the grid.
2. Click the **Save** button in the top button bar.

Financing Data

Grant Request

Grant Request

Community & Program Information

Program Description

HOPWA Details

Financing Data

Project Details

Grant Request Documents

Grant Request Checklist

Revision

Comments

Save Save/Close

Application Number:	510	Application Period:	9/1/2014 - 12/31/2014
Organization:	OCEAN Organization	Grant Request Status:	In Process
Grant Request Type:	2014 Housing Opportunities for Persons with AIDS Program	Program Name:	HOPWA Program
Grant Funding Requested:	\$0.00	Total Project Costs:	\$0.00
Total Leveraged Funds:	\$0.00		

+ Add Leveraged Fund

Provider	Leveraged Fund Category	Leveraged Fund Type	Amount	Term	Interest Rate	Edit	Delete
<div style="display: flex; justify-content: space-between;"> <div style="width: 60%;"> <p>Leveraged Fund Provider <input style="width: 90%;" type="text" value=""/></p> <p>Leveraged Fund Category <input style="width: 90%;" type="text" value=""/></p> <p>Leveraged Fund Type <input style="width: 90%;" type="text" value=""/></p> <p>Amount <input style="width: 80%;" type="text" value="\$0"/></p> </div> <div style="width: 10%; text-align: center;"> <p>①</p> <p>②</p> <p>③</p> <p>④</p> </div> </div> <div style="margin-top: 5px;"> <input type="button" value="Insert"/> <input type="button" value="Cancel"/> </div> <p style="font-size: small; color: red;">Data is not saved until Insert button is clicked</p> <p style="font-size: small;">No Leveraged Funds to display.</p>							

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: <ul style="list-style-type: none"> State and Local Funds Private Funds Federal ARC Funds Other Federal Other Funds
3. Leveraged Fund Type	Select the type of leveraged fund from the dropdown. Dropdown choices include: <ul style="list-style-type: none"> Grant Loan In Kind Cash
4. Amount	Enter the dollar amount of leveraged funds for the provider entered.
5. Term (not shown above)	This field only displays when 'Loan' is selected for the Leveraged Fund Type. Enter the number of months of the loan.
6. Interest Rate (not shown above)	This field only displays when 'Loan' is selected for the Leveraged Fund Type. Enter the percentage interest rate of the loan.

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

Add Leveraged Fund

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

Edit Leveraged Fund

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

Cancel Adding/Editing Leveraged Fund

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

Delete Leveraged Fund

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

Project Details

Grant Request

Save Save/Close

Application Number: 510 Application Period: 9/1/2014 - 12/31/2014
 Organization: OCEAN Organization Grant Request Status: In Process
 Grant Request Type: 2014 Housing Opportunities for Persons with AIDS Program Program Name: HOPWA Program
 Grant Funding Requested: \$0.00 Total Project Costs: \$0.00
 Total Leveraged Funds: \$0.00

+ Add Project Details

Project Type	Project Name	Project Budget	National Objective	Edit	Delete
Project Type		\$0			

Insert Cancel
 *Data is not saved until Insert button is clicked
 No Project Details to display.

Field	Description
1. Project Type	Select the project type from the dropdown. For the HOPWA program, the available project types include: <ul style="list-style-type: none"> • Admin • Facility-Based Housing Development • Facility-Based Operations • Tenant-Based Rental Assistance • Short-Term Rent / Mortgage Utility • Supportive Services • Housing Information Only one of each project type can be added to the application.
2. Project Name	Enter a name for the project that uniquely identifies this project from all other HOPWA 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 Outcomes and Leveraging records will be deleted as well.

Activity Information

Grant Request																															
<ul style="list-style-type: none"> Grant Request Community & Program Information Program Description HOPWA Details Financing Data Project Details Activity Information Grant Request Documents Grant Request Checklist Revision Comments 	<p>Save Save/Close</p> <p>Application Number: 510 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 Opportunities for Persons with AIDS Program Program Name: HOPWA Program</p> <p>Grant Funding Requested: \$0.00 Total Project Costs: \$0.00</p> <p>Total Leveraged Funds: \$0.00</p> <p>Project Type: Housing Opportunities for Persons with AIDS - Facility-Based Housing Development : Pro Activity Subtotal: \$0.00</p> <p>+ Add Activity</p> <table border="1"> <thead> <tr> <th>Activity Class</th> <th>Activity Name</th> <th>Activity Budget</th> <th>Edit</th> <th>Delete</th> </tr> </thead> <tbody> <tr> <td>Activity Class</td> <td><input type="text"/></td> <td><input type="text"/></td> <td></td> <td></td> </tr> <tr> <td>Activity Name</td> <td><input type="text"/></td> <td><input type="text"/></td> <td></td> <td></td> </tr> <tr> <td>Activity Budget</td> <td>\$0</td> <td><input type="text"/></td> <td></td> <td></td> </tr> <tr> <td>Direct Assistance Hard Cost</td> <td><input type="text"/></td> <td><input type="text"/></td> <td></td> <td></td> </tr> <tr> <td>Direct Assistance Soft Cost</td> <td><input type="text"/></td> <td><input type="text"/></td> <td></td> <td></td> </tr> </tbody> </table> <p>Insert Cancel</p> <p style="color: red; font-size: small;">Data is not saved until Insert button is clicked</p> <p>No Activities to display.</p>	Activity Class	Activity Name	Activity Budget	Edit	Delete	Activity Class	<input type="text"/>	<input type="text"/>			Activity Name	<input type="text"/>	<input type="text"/>			Activity Budget	\$0	<input type="text"/>			Direct Assistance Hard Cost	<input type="text"/>	<input type="text"/>			Direct Assistance Soft Cost	<input type="text"/>	<input type="text"/>		
Activity Class	Activity Name	Activity Budget	Edit	Delete																											
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Direct Assistance Soft Cost	<input type="text"/>	<input type="text"/>																													

Field	Description
1. Activity Class	Select an activity class for the new activity. If the activity is being entered for an Admin project type, then the only available activity class option is: <ul style="list-style-type: none"> Administration If the activity is being entered any other project type, then the only available activity class option is: <ul style="list-style-type: none"> Housing
2. Activity Name	Select the activity name from the dropdown. The dropdown choices depend on the project type that is selected. 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.
4. Direct Assistance Hard Cost	This field only displays for 'Facility-Based Housing Development' and 'Facility-Based Operations' project types. Enter the direct assistance hard cost.
5. Direct Assistance Soft Cost	This field only displays for 'Facility-Based Housing Development' and 'Facility-Based Operations' project types. Enter the direct assistance soft cost.

Project Type	Activities
Admin	<ul style="list-style-type: none"> General Admin
Facility-Based Housing Development	<ul style="list-style-type: none"> Housing Development
Facility-Based Operations	<ul style="list-style-type: none"> Operating Expenses / CHDO

Tenant-Based Rental Assistance	<ul style="list-style-type: none"> Rental / Housing Assistance
Short-Term Rent/Mortgage Utility	<ul style="list-style-type: none"> Interim / Emergency Rental Asst.
Supportive Services	<ul style="list-style-type: none"> Supportive Services w/ Housing Supportive Services w/o Housing
Housing Information	<ul style="list-style-type: none"> Hsng. Dev. / Info / Counseling

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

Edit Activity

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

Cancel Adding/Editing Activity

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

Delete Activity

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

Activity Outcomes and Leveraging

Field	Description
1. Outcome Type	Select the outcome type from the dropdown. The dropdown choices are the same for all activities (except admin). These choices include: <ul style="list-style-type: none"> Total Number of Households Assisted Number of Persons with HIV/AIDS Number of Other Persons in Families
2. Projected Outcomes	Enter the projected number of outcomes for the activity.
3. Leveraged Fund Source	Select a source of leveraged funds for the activity. The dropdown choices for the leveraged fund source include a list of the leveraged fund providers defined on the financing data page.
4. Leveraged Fund Amount	Enter the amount of leveraged funds from this provider that will be funding the activity selected.

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

Add Outcome

1. Select an activity from the **Activity** dropdown above the outcomes and/or leveraged fund grid.
2. The outcomes and/or leveraged funds grids refresh to show all current records currently associated with the selected activity.

3. Click on the **Add Outcome** button in the outcomes grid.
4. The grid expands for adding an outcome record.
5. Enter all outcome details.
6. Click the **Insert** button.
7. Outcome details are saved.
8. Repeat Steps 3 – 7 for each outcome you need to add for the activity selected.
9. Repeat Steps 1 – 8 for each activity in the activity dropdown until outcomes have been added for all applicable activities.

Edit Outcome

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

Cancel Adding/Editing Outcome

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

Delete Outcome

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

Add Leveraged Fund

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

Edit Leveraged Fund

1. Click on the **Edit** icon next to an existing leveraged fund record in the grid.
2. The grid expands for editing the leveraged fund record.
3. Edit the leveraged fund details.

4. Click the **Update** button.
5. Leveraged fund details are updated.

Cancel Adding/Editing Leveraged Fund

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

Delete Leveraged Fund

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

Grant Request Documents

Grant Request																																																																			
<ul style="list-style-type: none"> Grant Request Community & Program Information Program Description HOPWA Details Financing Data Project Details Activity Information Activity Outcomes and Leveraging Grant Request Documents Grant Request Checklist Revision Comments 	<p>Save Save/Close</p> <p>Application Number: 510 Application Period: 9/1/2014 - 12/31/2014 Organization: OCEAN Organization Grant Request Status: In Process Grant Request Type: 2014 Housing Opportunities for Persons with AIDS Program Program Name: HOPWA Program Grant Funding Requested: \$100.00 Total Project Costs: \$100.00 Total Leveraged Funds: \$0.00</p> <table border="1"> <thead> <tr> <th>1</th> <th>2</th> <th>3</th> <th>4</th> <th>5</th> <th>6</th> <th>7</th> <th>8</th> <th>9</th> <th>10</th> <th>11</th> <th>12</th> <th>13</th> <th>14</th> </tr> <tr> <th>Type</th> <th>Description</th> <th>Required?</th> <th></th> <th>Response Type</th> <th>Response Description</th> <th></th> <th>Uploaded By</th> <th>Upload Date</th> <th></th> <th>Updated by</th> <th>Last Updated Date</th> <th>Status</th> <th></th> </tr> </thead> <tbody> <tr> <td>Document</td> <td>Environmental Review Forms</td> <td><input checked="" type="checkbox"/></td> <td>View</td> <td>Document</td> <td>ER Forms</td> <td>View</td> <td>SFitch2</td> <td>4/24/2014</td> <td></td> <td>SFitch2</td> <td>4/24/2014 3:38:30 PM</td> <td></td> <td>✗</td> </tr> <tr> <td>Document</td> <td>Public Service Certification</td> <td><input type="checkbox"/></td> <td>View</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Attach</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>+ Add Document Refresh Include Deleted</p> <table border="1"> <thead> <tr> <th>Date</th> <th>File Name</th> <th>Document Description</th> <th>Document Type</th> <th>Created By</th> </tr> </thead> <tbody> <tr> <td colspan="5">No files to display.</td> </tr> </tbody> </table>	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Type	Description	Required?		Response Type	Response Description		Uploaded By	Upload Date		Updated by	Last Updated Date	Status		Document	Environmental Review Forms	<input checked="" type="checkbox"/>	View	Document	ER Forms	View	SFitch2	4/24/2014		SFitch2	4/24/2014 3:38:30 PM		✗	Document	Public Service Certification	<input type="checkbox"/>	View						Attach					Date	File Name	Document Description	Document Type	Created By	No files to display.				
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No files to display.																																																																			

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 HOPWA application request.
14. Delete	Click this icon to delete your response document.

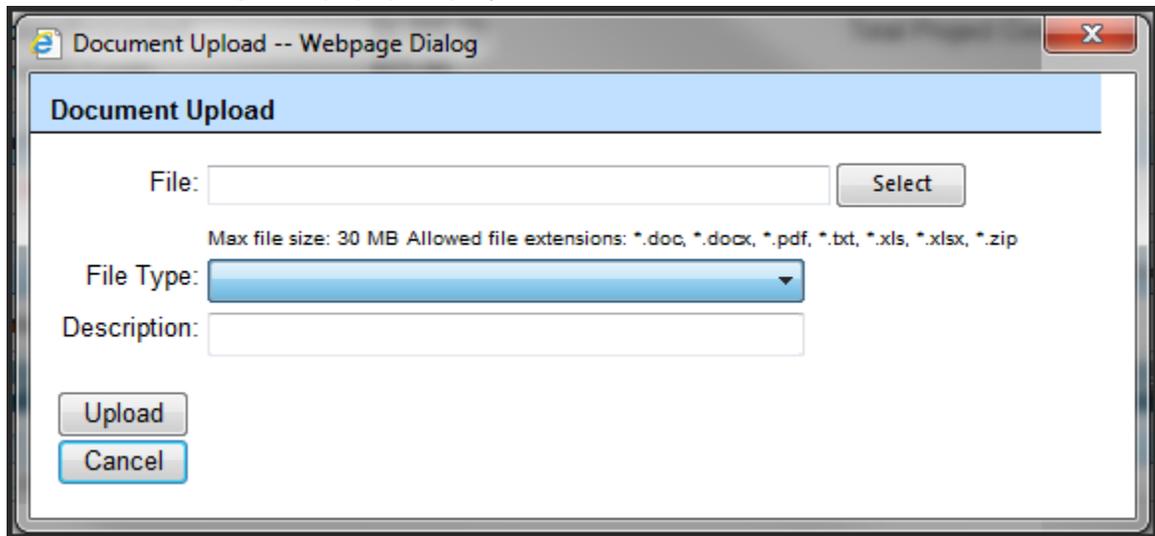
The functions available from the Grant Request Documents page are listed below with steps for performing each function:

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.



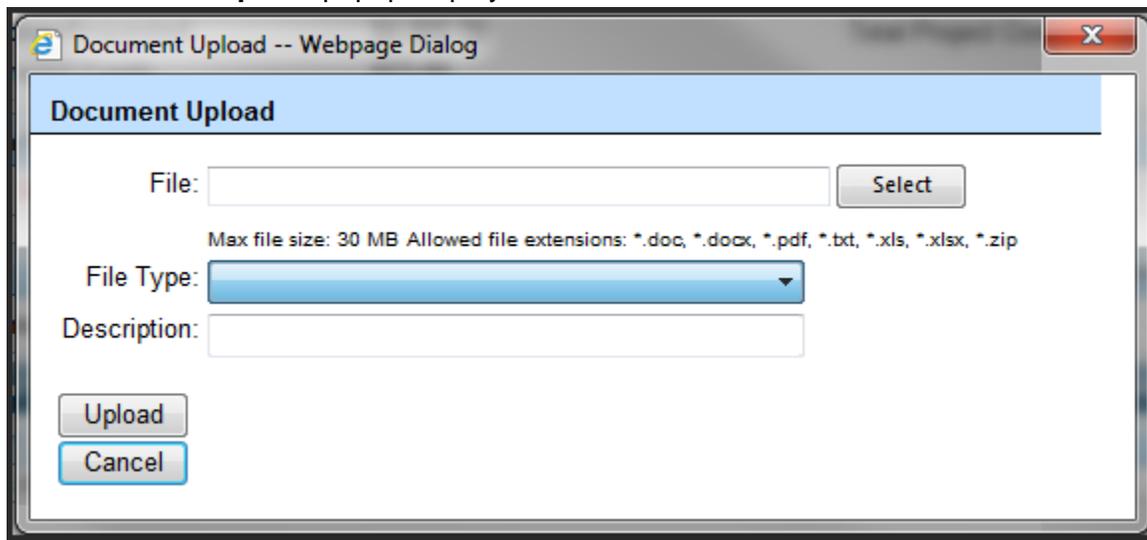
3. Click the **Select** button.
4. The **Windows File Explorer** popup displays.
5. Navigate to the file you would like to attach on your local machine and click the **Open** button.
6. The name of the file will be displayed in the **File** field on the document upload popup.
7. Select the **File Type** 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	
Grant Request	Save Save/Close
Community & Program Information	
Program Description	Application Number: 510
HOPWA Details	Organization: OCEAN Organization
Financing Data	Grant Request Type: 2014 Housing Opportunities for Persons with AIDS Program
Project Details	Grant Funding Requested: \$100.00
Activity Information	Total Leveraged Funds: \$0.00
Activity Outcomes and Leveraging	Application Period: 9/1/2014 - 12/31/2014
Grant Request Documents	Grant Request Status: In Process
Grant Request Checklist	Program Name: HOPWA Program
Revision	Total Project Costs: \$100.00
Comments	
	OCD Grant Summary Report View

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 HOPWA Details Financing Data Project Details Activity Information Activity Outcomes and Leveraging Grant Request Documents Grant Request Checklist Revision Comments 	<p>Save Save/Close</p> <p>Application Number: 510 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 Opportunities for Persons with AIDS Program Program Name: HOPWA Program</p> <p>Grant Funding Requested: \$100.00 Total Project Costs: \$100.00</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.

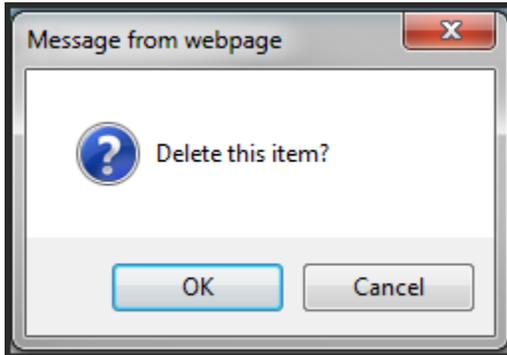
Cancel Adding/Editing Comment

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.

Submitting an Application for HOPWA

The following section describes the process for submitting an application to the Office of Community Development for the Housing Opportunities for Persons with AIDS (HOPWA) program in OCEAN.

To submit 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

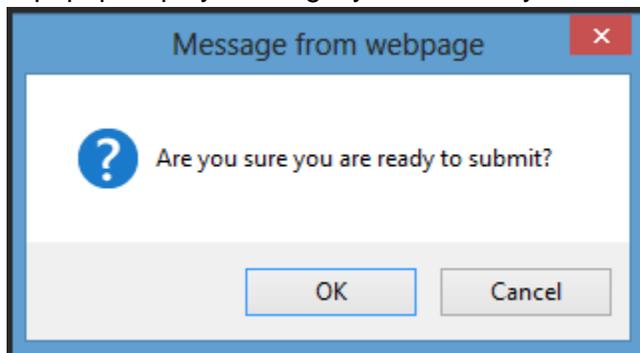
Search for an application that is in an “In Process” status. Review each section of the application as defined in the “Completing an Application for HOPWA” section and verify all validations pass successfully.

Application Submission

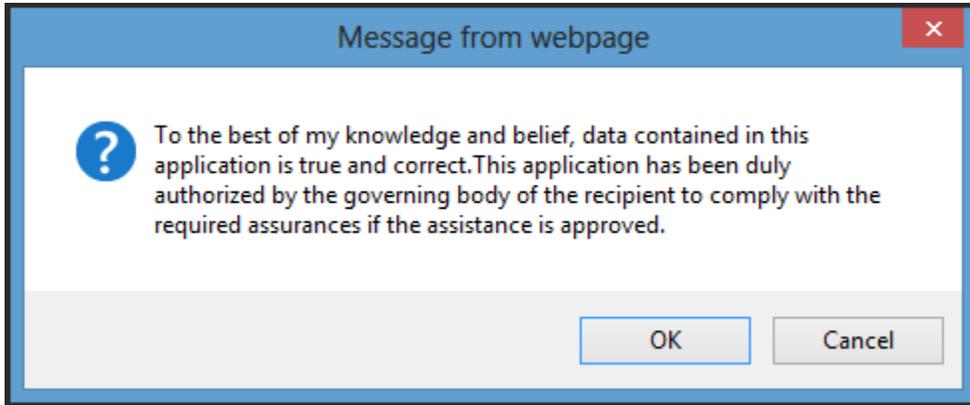
Grant Request			
<ul style="list-style-type: none"> Grant Request Community & Program Information Program Description HOPWA Details Financing Data Project Details Activity Information Activity Outcomes and Leveraging Grant Request Documents Grant Request Checklist Revision Comments 	<div style="border: 1px solid black; padding: 2px;"> Save Save/Close Submit </div>		
Application Number: 510 Organization: OCEAN Organization		Application Period: 9/1/2014 - 12/31/2014 Grant Request Status: In Process	
Grant Request Type: 2014 Housing Opportunities for Persons with AIDS Program		Program Name: HOPWA Program	
Grant Funding Requested: \$100.00 Total Leveraged Funds: \$0.00		Total Project Costs: \$100.00	
Administrative Agency: <input type="text" value="OCEAN Organization"/>			
Administrative Contact: <input type="text" value="Admin Contact"/>			
Address: <input type="text" value="77 S. High St"/>			
Administrator's Phone: <input type="text"/>			
Administrator's Fax: <input type="text"/>			
Administrator's Email: <input type="text" value="admin_contact@mail.com"/>			

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

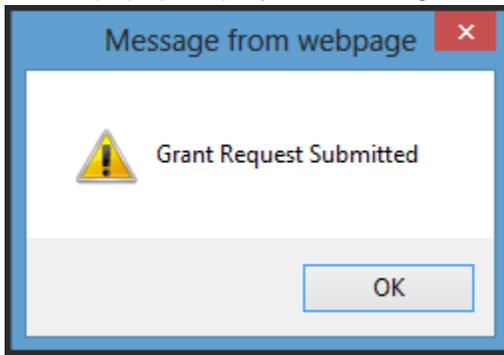
1. Click on the **Submit** button in the button bar.
2. A popup displays asking if you are sure you are ready to submit.



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



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



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

Application Review Process

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

Grant Request Review

Your HOPWA application may be rejected if issues are found that need to be corrected prior to completing the review of the application. These issues are displayed on the Grant Request Review page and your application would be in a 'Rejected to User' status.

Grant Request																	
<ul style="list-style-type: none"> Grant Request Community & Program Information Program Description HOPWA Details Financing Data Project Details Activity Information Activity Outcomes and Leveraging Grant Request Documents Grant Request Checklist Grant Request Review Revision Comments 	<p>Save Save/Close</p> <p>Application Number: 510 Application Period: 9/1/2014 - 12/31/2014 Organization: OCEAN Organization Grant Request Status: In Process</p> <p>Grant Request Type: 2014 Housing Opportunities for Persons with AIDS Program Program Name: HOPWA Program</p> <p>Grant Funding Requested: \$100.00 Total Project Costs: \$100.00 Total Leveraged Funds: \$0.00</p> <p>Review</p> <table border="1"> <thead> <tr> <th>Condition</th> <th>Condition Date</th> <th>Date Met</th> </tr> </thead> <tbody> <tr> <td colspan="3">No Records To Display</td> </tr> </tbody> </table> <p>Request</p> <table border="1"> <thead> <tr> <th>Description of Issue</th> <th>Date Created</th> <th>Date Request Met</th> <th>User</th> </tr> </thead> <tbody> <tr> <td colspan="4">No Records To Display</td> </tr> </tbody> </table>			Condition	Condition Date	Date Met	No Records To Display			Description of Issue	Date Created	Date Request Met	User	No Records To Display			
Condition	Condition Date	Date Met															
No Records To Display																	
Description of Issue	Date Created	Date Request Met	User														
No Records To Display																	

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