OCEAN for Residential Public Infrastructure Programs (RPI)

Application Approver User Guide

July 7, 2014

Version 1.0

Ohio Department of Development

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Document Overview

OCEAN for Residential Public Infrastructure Programs (RPI)

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 RPI 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 RPI
- 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 RPI Process Diagram

OCEAN Section	Elements of Section	Description of User Activities
Login → Application Request Search		
1 Community & Program Information	Administrative Agency Administrative Contact Information	• Define Administrative Contact • Initiate an Application
2 Program Description	Program Name Program Narrative	• Add/Edit Program Description • Delete Program Description
3 RPI Details	Project Purpose Water/Sewer Rates Number of Connections	• Save RPI Details
4 Financing Data	Leveraged Fund Providers Fund Amounts	• Add/Edit Leveraged Funds • Delete Leveraged Funds
5 Project Details	Project Type Project Budget National Objective	• Add/Edit Project Details • Delete Project Details
6 Census Tract	Census Tracts/Block Groups LMI % Benefitting Calculation	• Add/Edit Census Tracts / Block Groups • Delete Census Tracts / Block Groups
7 Activity Information	Activity Class & Name Activity Budget Short Activity Description	• Add/Edit Activity Details • Delete Activity Details
8 Activity Outcomes & Leveraging	Projected Outcomes and Type Activity Leveraged Funds	• Add/Edit Activity Outcomes • Delete Activity Outcomes • Add/Edit Activity Leveraged Funds • Delete Activity Leveraged Funds
9 Grant Request Documents	Required and Non-Required Documentation Add Document Upload	• View Document Templates • Attach Documents • Delete Documents
10 Grant Request Checklist	Print All Application Pages Available Application Reports	• View Reports • Save/Print Reports
11 Revision	View Prior Amendment Details	• View Revisions
12 Comments	User Commentary	• Add/Edit Comments • Delete Comments

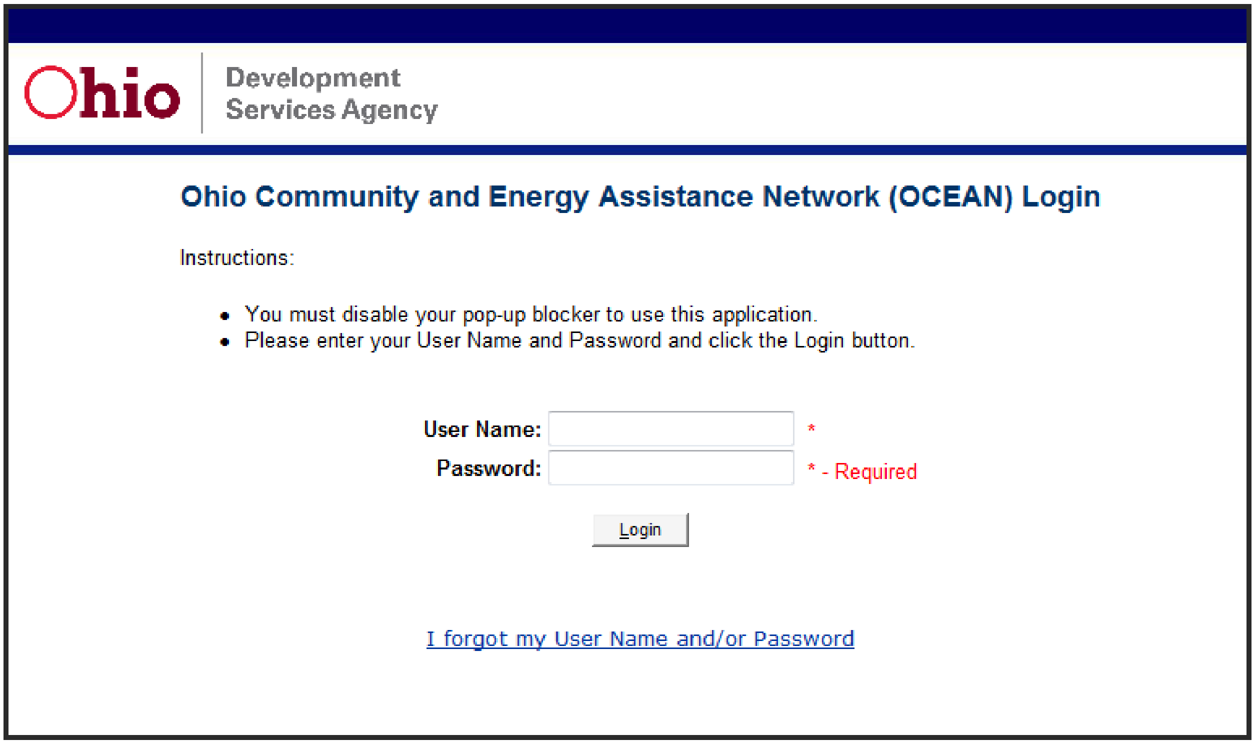
Accessing and Logging into OCEAN

Requirements for access to the OCEAN application:

- Complete the "Going Online with ODSA – OCD Intake Forms" file
  - This document must be signed by your Organization's CEO and a Notary Public
  - Submit your completed form through one of the following three options:
    - Email: scan and email completed and signed forms to 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

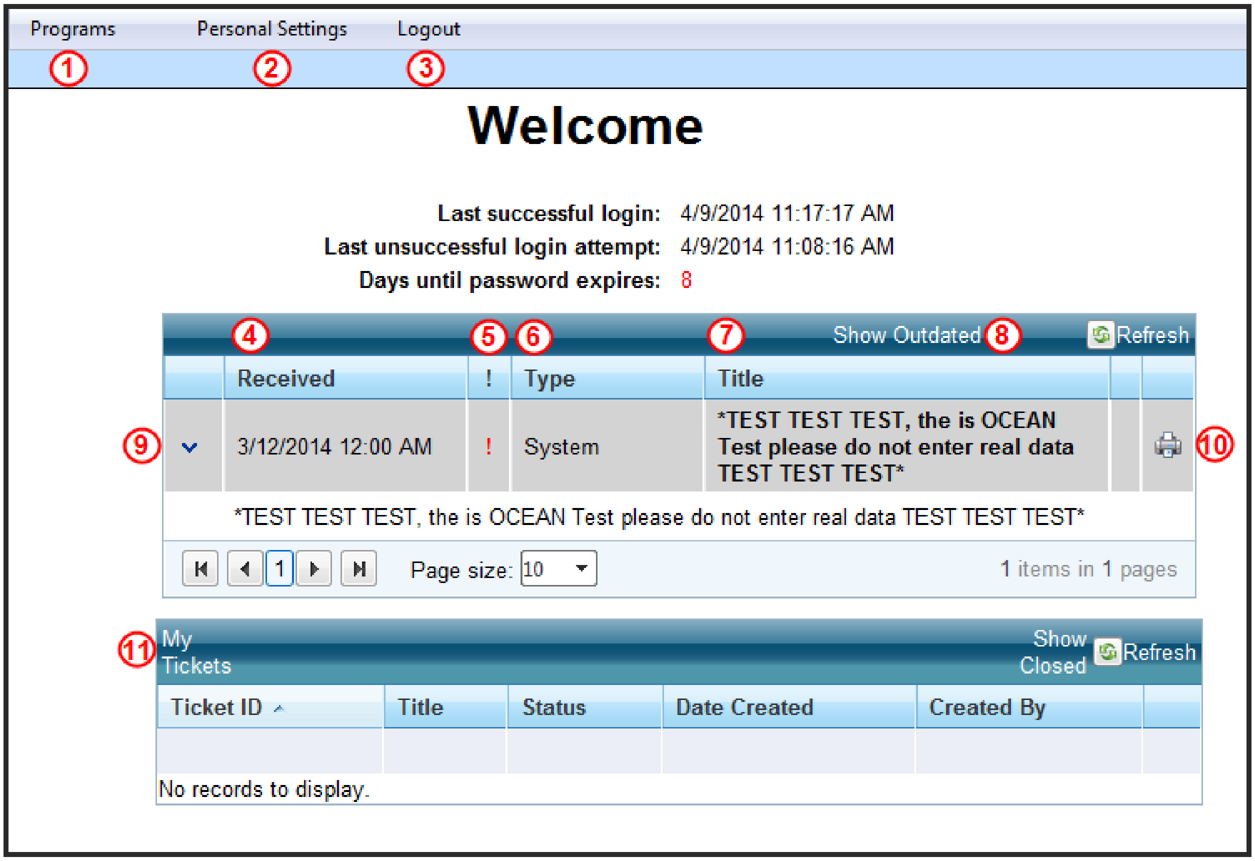
The screen below is the login screen for OCEAN.



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

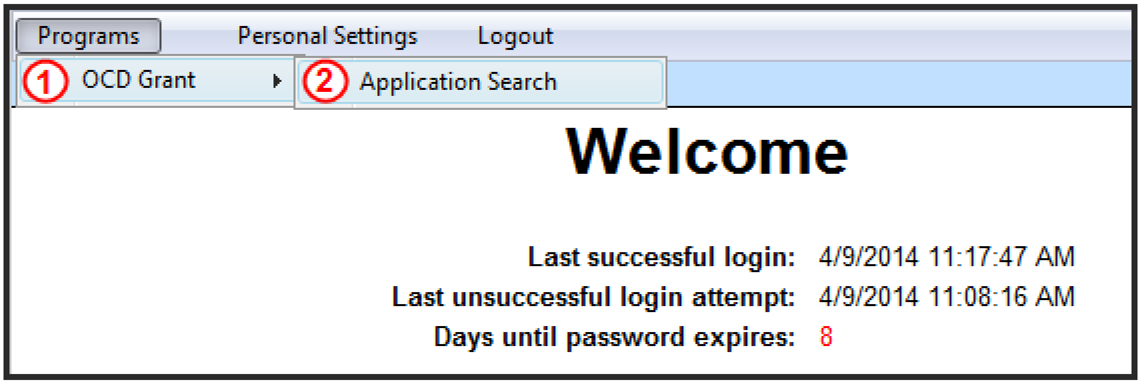
Welcome Screen and Notification Center



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.

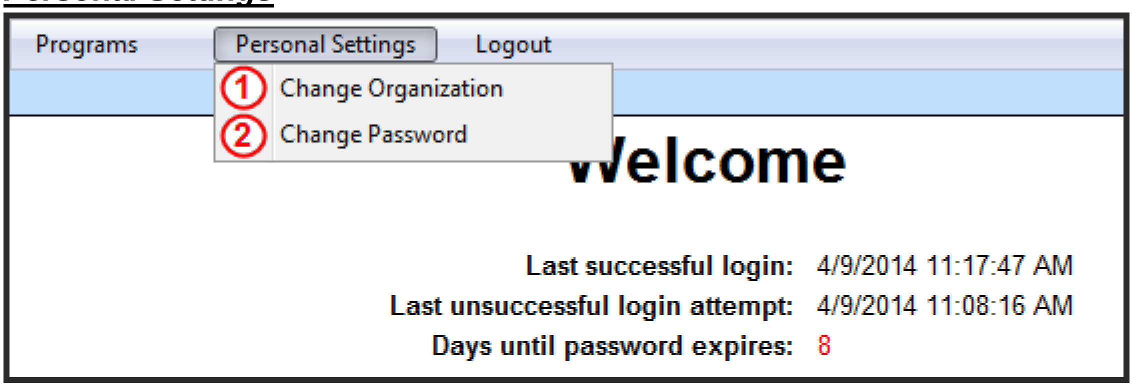
Menu/Field	Purpose
1. Programs	Used to access the OCD grant menu options.
2. Personal Settings	Used to change your password and/or organization.
3. Logout	Used to sign out and exit the OCEAN application.
4. Date/Time Received	Sortable column of notification messages date and time.
5. Urgency Icon	Sortable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



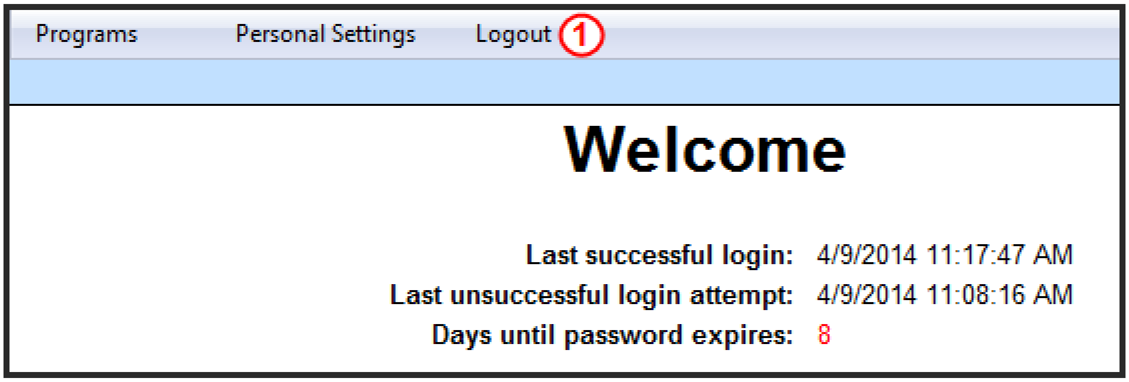
Menu	Purpose
1. OCD Grant	Choose this option to see a list of OCD Grant pages in OCEAN.
2. Application Search	Choose this option to navigate to the Application Search page for viewing/editing existing applications and adding new applications.

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.

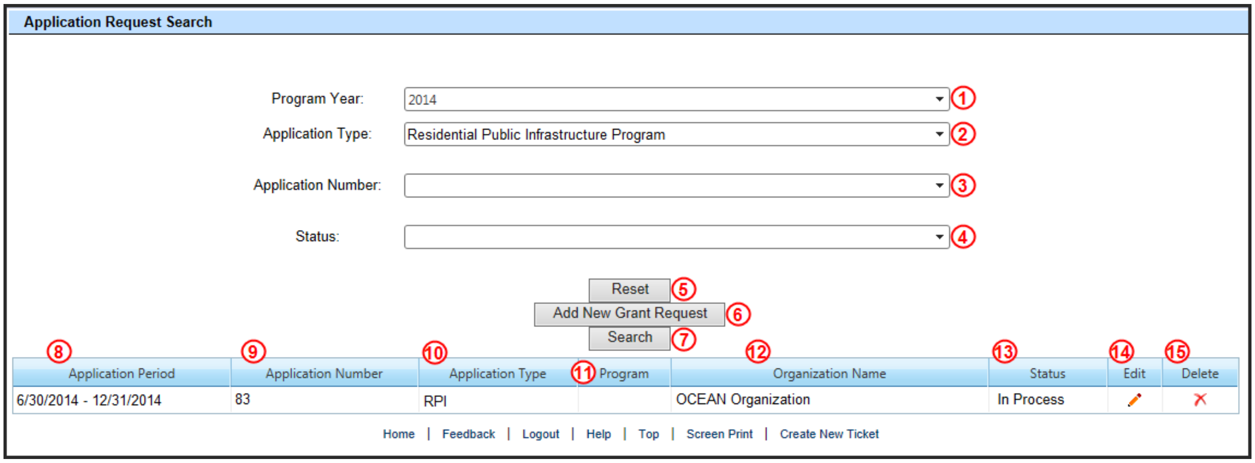
Completing an Application for RPI

The following section describes the process for creating an application for the Residential Public Infrastructure Program (RPI) program in OCEAN.

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

Programs → OCD Grant → Application Search

Application Request Search



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

12. Organization Name	Displays the name of the organization that created the application request.
13. Status	Displays the current status of the application.
14. Edit	Click the pencil icon to edit the application. *Note: Applications can only be edited when they are in an 'In Process' or '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:

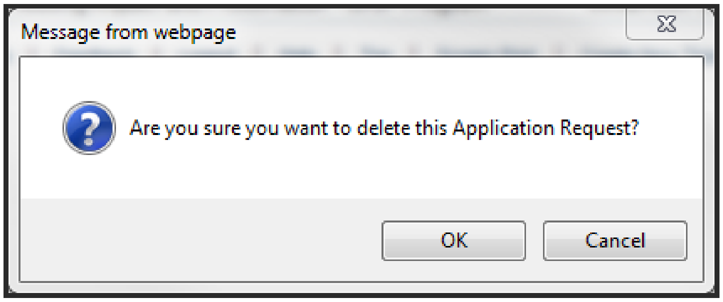
1. Select a **Program Year** and an **Application Type**.
2. Click the **Add New Grant Request** button.
3. You will navigate to the **Grant Request** page for adding a new application.

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.

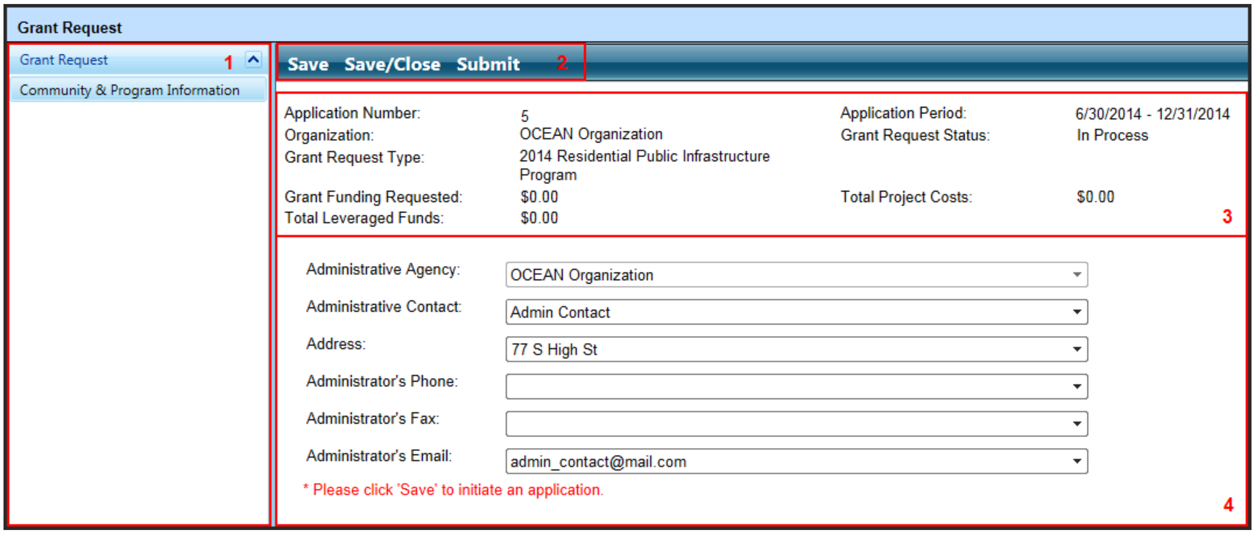
Delete an Existing Application:

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 section:

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

This program requires a minimum 1 to 1 leverage ratio. Before it can be submitted, please review and verify other sources of financing have been provided.	The total amount of leveraged fund must be greater than or equal to the grant funding being requested. Add additional leveraged funds or refine your project budgets to request fewer grant funds.
RPI details must be filled in to save / submit the Grant Request.	Click the RPI Details link in the left navigation, enter data in all fields, and click 'Save' in the top button bar.

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
    - **Grant Request Period –** application period for submitting applications
    - **Grant Request Status –** current status of the application
    - **Total Project Costs** – all project costs equal to grant funding requested plus total leveraged funds
4. **Page Details** – This section shows the specific details to be entered for the page selected in the left navigation panel. The following pages detail each of these pages and the functions available for entering your application data.

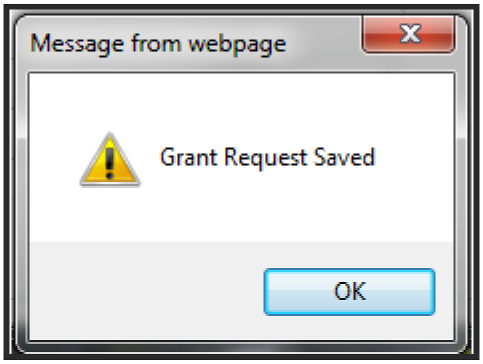
Community & Program Information

Field	Description
1. Administrative Agency	Displays your current organization as the administrative agency.
2. Administrative Contact	Use this dropdown to select the administrative contact from your organization for the RPI 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.

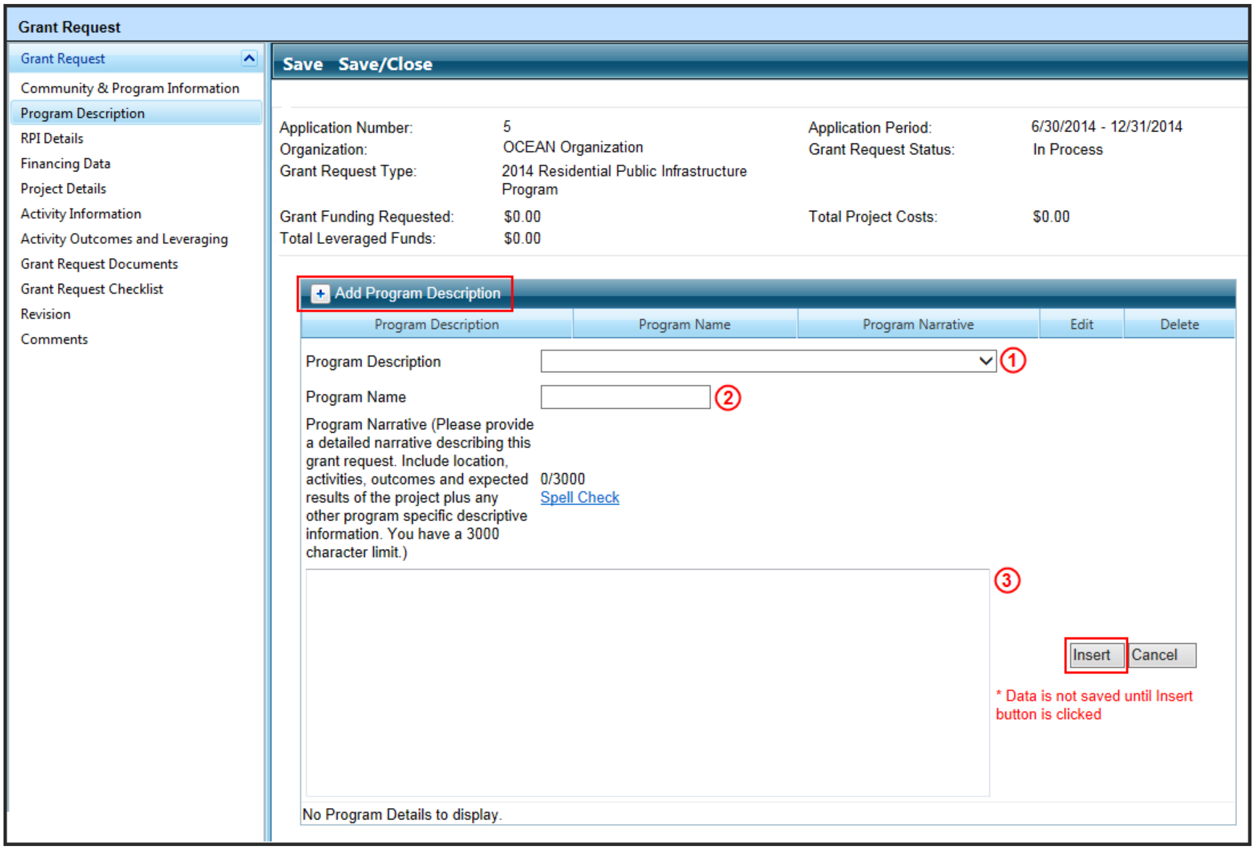


5. Click **OK** in the message box to continue.
6. The remaining pages of the grant application will be displayed in the left navigation panel.

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 RPI, there is only one available program: • Residential Public Infrastructure Program
2. Program Name	Enter the name of your program here.
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.

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

Add Program Description

1. Click on the **Add Program Description** button in the grid.
2. The grid expands for adding a new program description record.

3. Select/enter details for all fields.
4. Click the **Insert** button.
5. Program description details are saved.

Edit Program Description

1. Click on the **Edit** icon next to an existing program description record in the grid.
2. The grid expands for editing the program description record.
3. Edit the **Program Name** and/or **Program Narrative**. The **Program Description** field cannot be edited.
4. Click the **Update** button.
5. Program description details are updated.

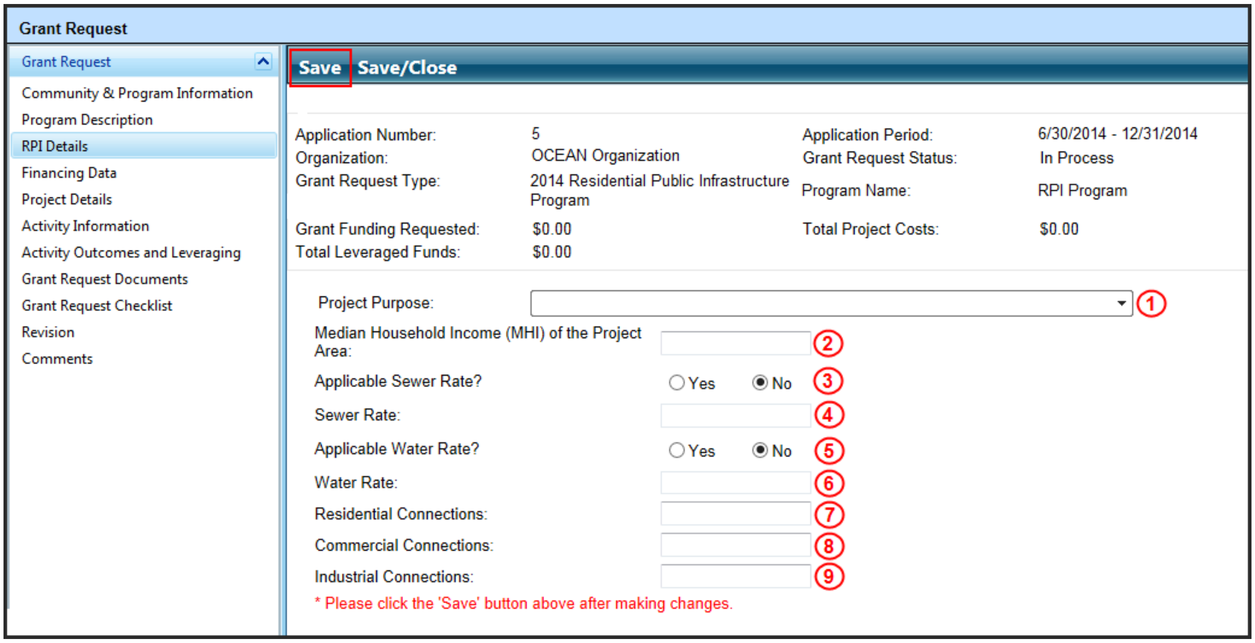
Cancel Adding/Editing Program Description

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

Delete Program Description

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

RPI Details



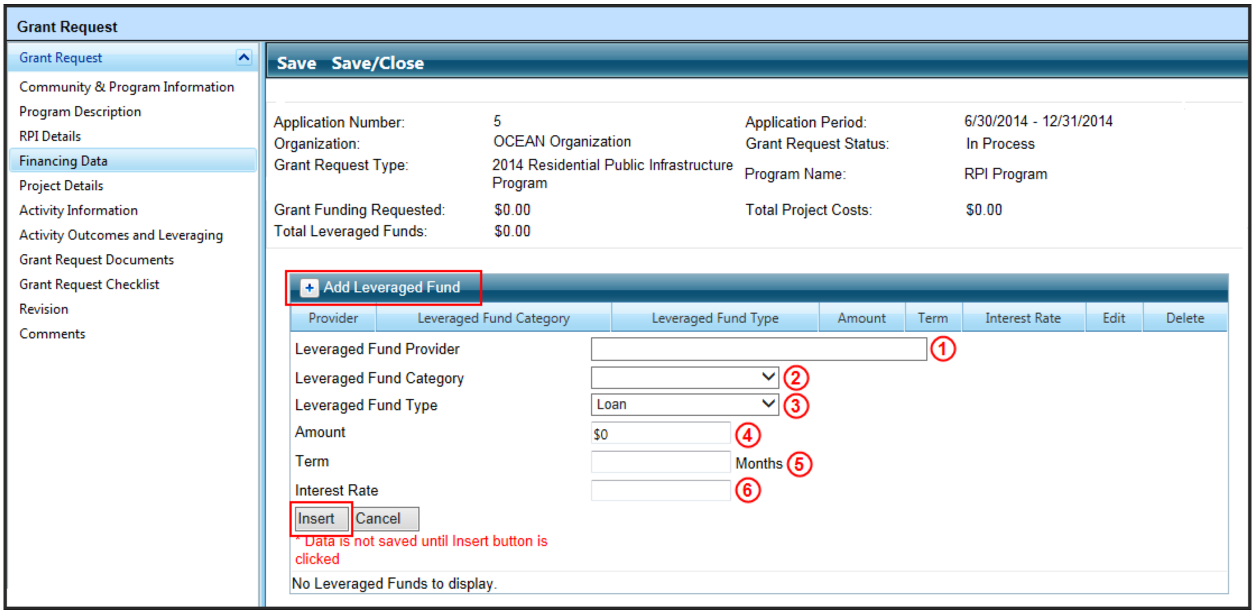
Field	Description
1. Project Purpose	Select the project purpose from the dropdown. Dropdown choices include: • Improved Access to Water/Sewer Facilities • New Access to Water/Sewer Facilities
2. Median Household Income (MHI) of the Project Area	Enter the median household income of the project area.
3. Applicable Sewer Rate	Select yes or no if there is an applicable sewer rate.
4. Sewer Rate	This textbox is only enabled if 'yes' is selected for the Applicable Sewer Rate field. Enter the sewer rate.
5. Applicable Water Rate	Select yes or no if there is an applicable water rate.
6. Water Rate	This textbox is only enabled if 'yes' is selected for the Applicable Water Rate field. Enter the water rate.
7. Residential Connections	Enter the number of residential connections that will be affected by the project.
8. Commercial Connections	Enter the number of commercial connections that will be affected by the project.
9. Industrial Connections	Enter the number of industrial connections that will be affected by the project.

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

Save RPI Details

1. Enter all **RPI Details** fields.
2. Click the **Save** button in the top button bar.

Financing Data



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

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

Add Leveraged Fund

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

Edit Leveraged Fund

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

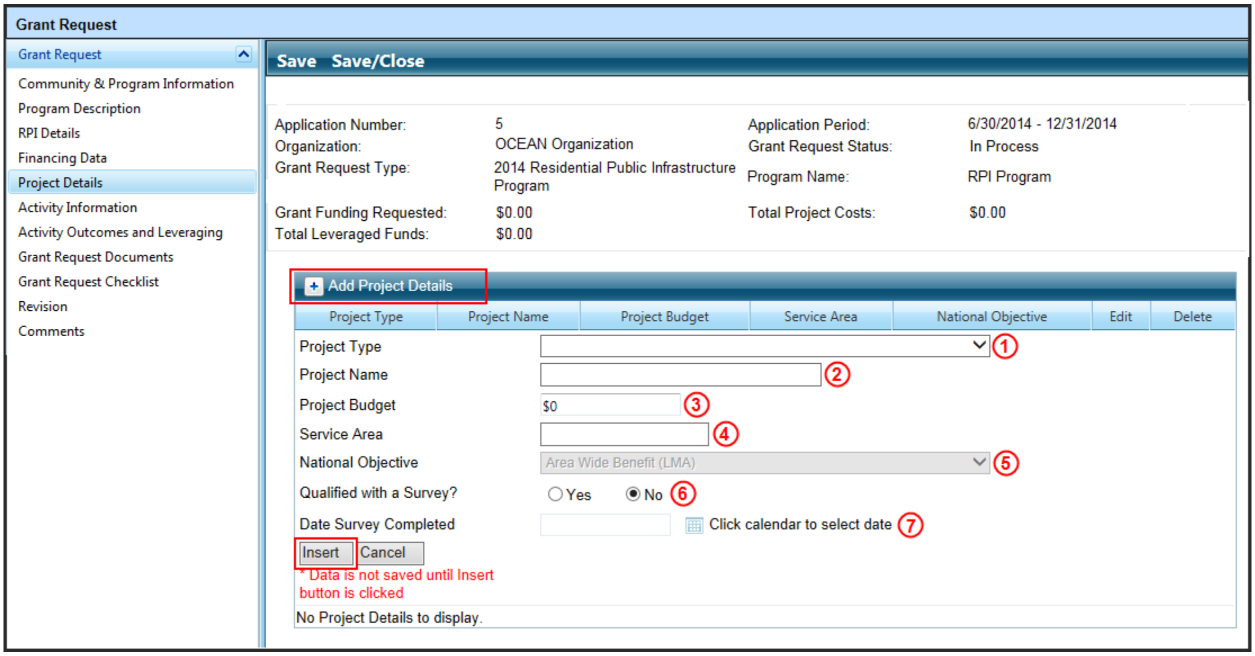
Cancel Adding/Editing Leveraged Fund

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

Delete Leveraged Fund

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

Project Details



Field	Description
1. Project Type	Select the project type from the dropdown. For RPI, the available project types include: • Admin • Water • Sewer Only one Admin project and one Admin OR Sewer project can be added to the RPI grant request.
2. Project Name	Enter a name for the project that uniquely identifies this project from all other RPI projects.
3. Project Budget	Enter the budget for the project. This budget is the amount of funds that are being requested from OCD.
4. Service Area	Define the project service area.
5. National Objective	When adding an Administration / Fair Housing project, the National Objective field will default to 'F/H and Administration.' For all other project types, the National Objective field will default to 'Area Wide Benefit (LMA).' This field is not editable.
6. Qualified with a Survey?	This field only displays for projects that have an 'Area Wide Benefit (LMA)' National Objective. Select yes or no if the project is being qualified with a survey.
7. Date Survey Completed	This field is only displays for project that have an 'Area Wide Benefit (LMA)' National Objective and is enabled if you have selected 'Yes' for Qualified with a Survey

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

Add Project Detail

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

Edit Project Detail

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

Cancel Adding/Editing Project Detail

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

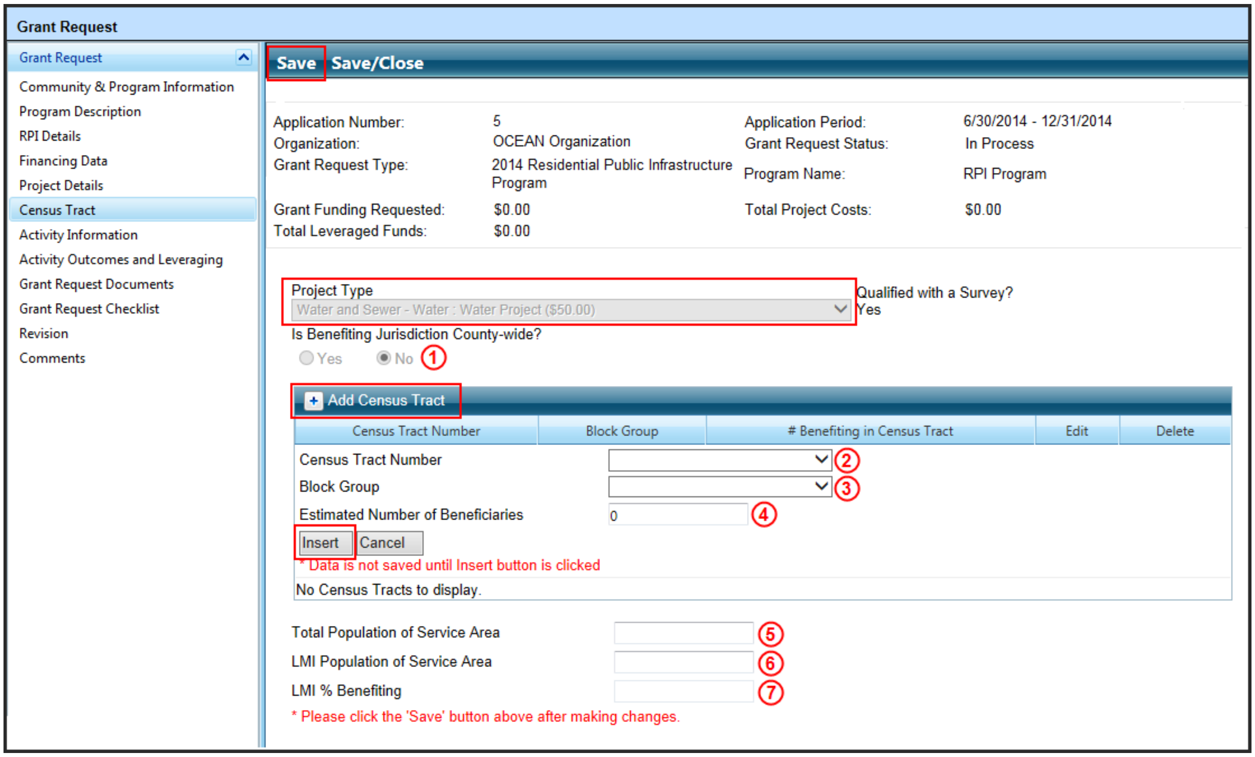
Delete Project Detail

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

Census Tract

The Census Tract page only displays after a project has been added on the Project Details page with a National Objective of 'Area Wide Benefit (LMA).'

If the project was qualified with a survey, then the screen below will be shown:



Field	Description
1. Is Benefiting Jurisdiction County-wide?	This field is only editable if the organization is a county. Select yes or no if the benefiting jurisdiction is county-wide. If 'Yes' is selected, then all the census tracts and block groups will populate in the Census Tract grid for that county along with the total population for each block group.
2. Census Tract Number	Contains a list of census tract numbers for the county of the organization. Select a census tract from the dropdown.
3. Block Group	Contains a list of block groups for the census tract number selected. Select the block group.
4. Estimated Number of Beneficiaries	Enter the number of people benefitting for the census tract and block group selected.
5. Total Population of Service Area	Enter the total population of the service area.
6. LMI Population of Service Area	Enter the LMI population of the service area.
7. LMI % Benefiting	This is a calculated field and is not editable. The LMI % Benefiting equals the LMI Population of the Service Area divided by the Total Population of the Service Area.

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

Mark the Benefiting Jurisdiction as County-Wide

1. Select a project from the **Project Type** dropdown above the census tract grid.
2. If your organization is a county, then click **Yes** for the 'Is Benefiting Jurisdiction County-wide?' field.
3. Census tract and block group data is populated in the census tract grid.

Mark the Benefiting Jurisdiction as NOT County-Wide

1. Select a project from the **Project Type** dropdown above the census tract grid.
2. If your organization is a county, then click **No** for the 'Is Benefiting Jurisdiction County-wide?' field.
3. If census tract and block group data previously existed in the grid, then it will be removed. Otherwise, you must enter records manually for census tracts and block groups as defined below.

Add Census Tract

1. Select a project from the **Project Type** dropdown above the census tract grid.
2. The census tract grid refreshes to show all census tracts and block groups currently associated with the selected project.
3. Click on the **Add Census Tract** button in the grid.
4. The grid expands for adding a census tract record.
5. Enter all census tract details.
6. Click the **Insert** button.
7. Census tract details are saved.
8. Repeat Steps 3 – 7 for each census tract and block group you need to add for the project type selected.
9. Repeat Steps 1 – 8 for each project type (that is Qualified by Survey) in the project dropdown until census tracts and block groups have been added for all projects.

Edit Census Tract

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

Cancel Adding/Editing Census Tract

1. Click to either **Add Census Tract** or **Edit** an existing census tract and block group record in the grid.
2. The grid expands for adding/editing a census tract and block group record.
3. Click the **Cancel** button.

4. Changes are not saved.

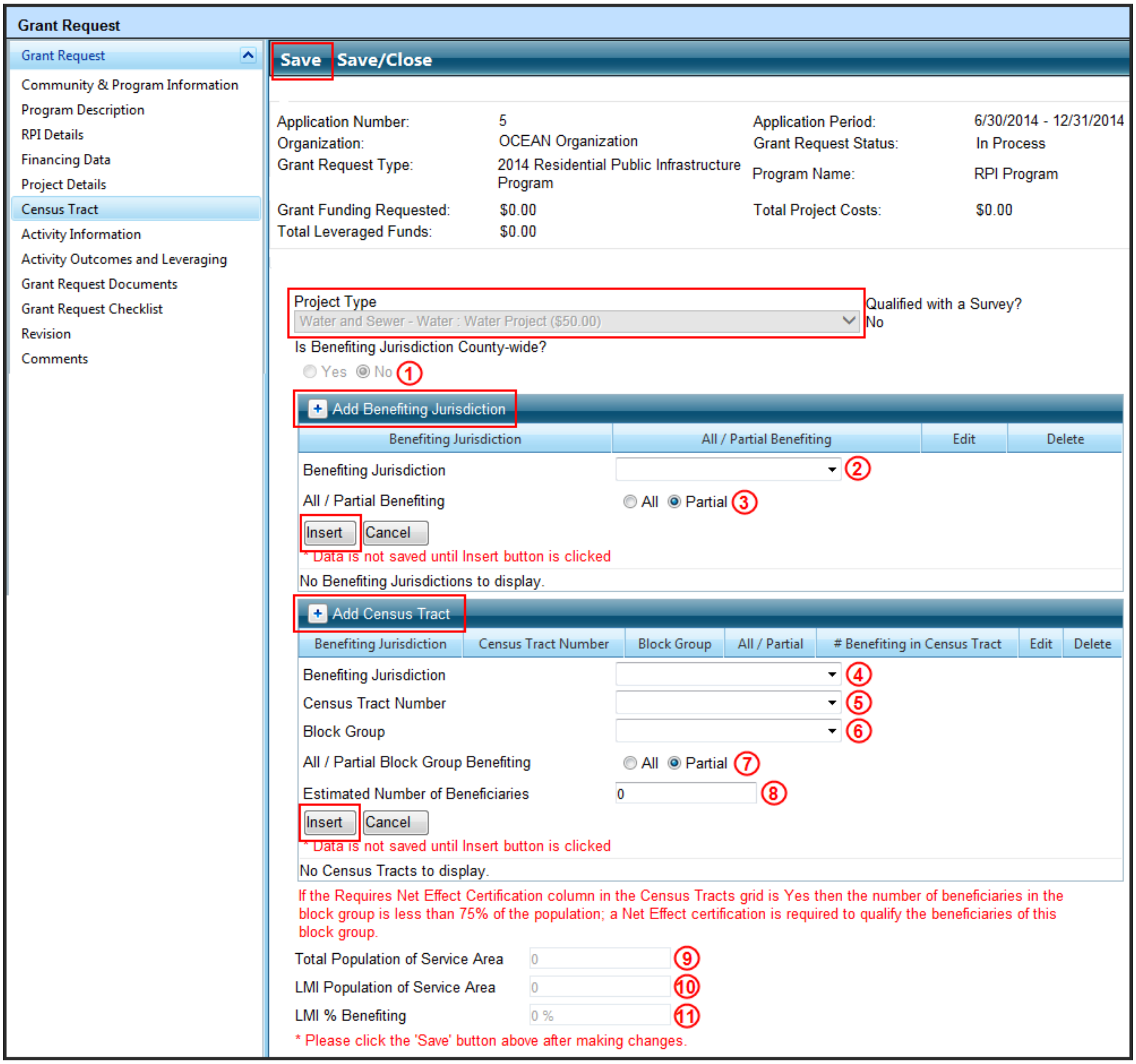
Delete Census Tract

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

Enter Population Data

1. Enter the total population of the service area below the census tract grid.
2. Enter the LMI population of the service area below the census tract grid.
3. The LMI % benefiting will be calculated and displayed.
4. Click the **Save** button in the top button bar.

If the project was not qualified with a survey, then the screen below will be shown:



Field	Description
1. Is Benefiting Jurisdiction County-wide?	This field is only editable if the organization is a county. Select yes or no if the benefiting jurisdiction is county-wide. If 'Yes' is selected, then all the census tracts and block groups will populate in the Census Tract grid for that county along with the total population for each block group.
2. Benefiting Jurisdiction	Contains a list of jurisdictions for the county of the organization. If your organization is a city or village, then this list will only show your city or village.

3. All / Partial Benefiting	Select all or partial benefiting. If 'All' is chosen, then all the census tracts and block groups for the jurisdiction will be populated in the census tract grid.
4. Benefiting Jurisdiction	Contains a list of benefiting jurisdictions from the Benefiting Jurisdiction grid that were marked as 'Partial' benefiting.
5. Census Tract Number	Contains a list of census tract numbers for the benefiting jurisdiction selected. Select a census tract from the dropdown.
6. Block Group	Contains a list of block groups for the census tract number selected. Select the block group.
7. All / Partial Block Group Benefiting	Select all or partial of the block group benefiting. If 'All' is selected, then the Estimated Number of Beneficiaries will be populated with the total population of the block group. If 'Partial' is selected, then you will need to enter the Estimated Number of Beneficiaries for the block group.
8. Estimated Number of Beneficiaries	Enter the number of people benefitting for the census tract and block group selected. *Note: If the Estimated Number of Beneficiaries is less than 75% of the block group population, then you will be required to upload a Net Effect Certification on the Grant Request Documents page.
9. Total Population of Service Area	This is a calculated field and is not editable. The Total Population of Service Area displays the total population of the service area as added for each census tract and block group.
10. LMI Population of Service Area	This is a calculated field and is not editable. The LMI Population of Service Area equals the LMI population for each census tract and block group added.
11. LMI % Benefiting	This is a calculated field and is not editable. The LMI % Benefiting equals the LMI Population of the Service Area divided by the Total Population of the Service Area.

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

Mark the Benefiting Jurisdiction as County-Wide

1. Select a project from the **Project Type** dropdown above the census tract grid.
2. If your organization is a county, then click **Yes** for the 'Is Benefiting Jurisdiction County-wide?' field.
3. All benefiting jurisdictions for the county are added and marked as 'All Benefiting.' All census tract and block group data is also populated in the census tract grid for each census tract and block group is the jurisdictions added.

Mark the Benefiting Jurisdiction as NOT County-Wide

1. Select a project from the **Project Type** dropdown above the census tract grid.
2. If your organization is a county, then click **No** for the 'Is Benefiting Jurisdiction County-wide?' field.
3. If benefiting jurisdictions and census tract and block group data previously existed in the grids, then it will be removed. Otherwise, you must enter records manually for benefiting

jurisdictions and census tracts and block groups as defined below.

Add Benefiting Jurisdiction

1. Select a project from the **Project Type** dropdown above the benefiting jurisdiction grid.
2. The benefiting jurisdiction grid refreshes to show all benefiting jurisdictions currently associated with the selected project.
3. Click on the **Add Benefiting Jurisdiction** button in the grid.
4. The grid expands for adding a benefiting jurisdiction record.
5. Enter benefiting jurisdiction details.
6. Click the **Insert** button.
7. Benefiting jurisdiction details are saved.
8. Repeat Steps 3 – 7 for each benefiting jurisdiction you need to add for the project type selected.
9. Repeat Steps 1 – 8 for each project type (that is NOT Qualified by Survey) in the project dropdown until all benefiting jurisdictions have been added for all projects.

Edit Benefiting Jurisdiction

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

Cancel Adding/Editing Benefiting Jurisdiction

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

Delete Benefiting Jurisdiction

1. Click on the **Delete** icon next to an existing benefiting jurisdiction record in the grid. *Note: Benefiting jurisdictions cannot be deleted if the benefiting jurisdiction is county-wide.
2. Benefiting jurisdiction record is deleted from the grid.

Add Census Tract

1. Select a project from the **Project Type** dropdown above the census tract grid.
2. The census tract grid refreshes to show all census tracts and block groups currently associated with the selected project.
3. Click on the **Add Census Tract** button in the grid.
4. The grid expands for adding a census tract record.
5. Enter all census tract details.
6. Click the **Insert** button.

7. Census tract details are saved.
8. Repeat Steps 3 – 7 for each census tract and block group you need to add for the project type selected.
9. Repeat Steps 1 – 8 for each project type (that is Qualified by Survey) in the project dropdown until census tracts and block groups have been added for all projects.

Edit Census Tract

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

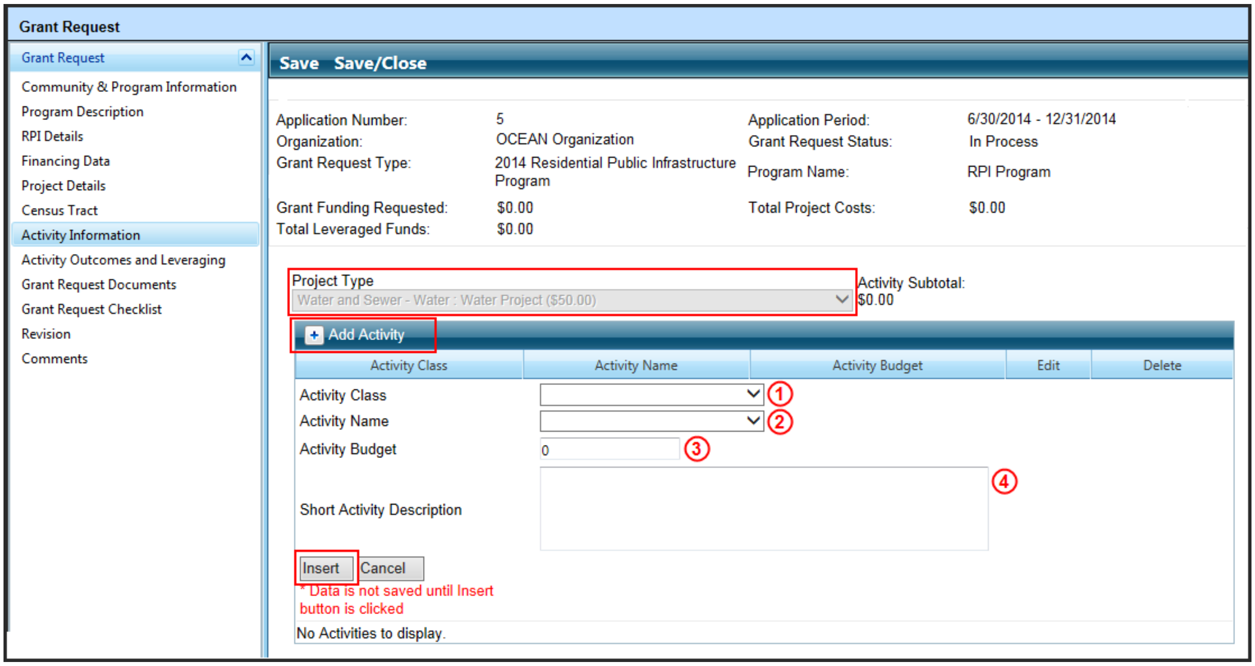
Cancel Adding/Editing Census Tract

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

Delete Census Tract

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

Activity Information



Field	Description
1. Activity Class	Select an activity class for the new activity. If the activity is being entered for an Admin project type, then the only available activity class option includes: • Administration If the activity is being entered for any project type other than the Admin project type, then the only available activity class options is: • Housing • Public Facilities
2. Activity Name	Select the activity name from the dropdown. The dropdown choices depend on the activity class that is selected. See Table 2 below for potential activity names per activity class.
3. Activity Budget	Enter the budget for the activity. All activity budgets for the activities on the project must total up to the project budget.
4. Short Activity Description	This field only displays when the project type is not 'Admin.' Enter your short activity description narrative here.

Activity Class	Activities	
Administration	General Admin	
Housing	Sewer Fac. Improvements	Water Fac. Improvements

Public Facilities	• Acquisition • Demolition / Clearance • Flood & Drainage Facilities • Other Costs • Professional Fees	• Sewer Fac. Improvements • Solid Waste Disposal Fac. • Water Fac. Improvements

Table 2

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

Add Activity

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

Edit Activity

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

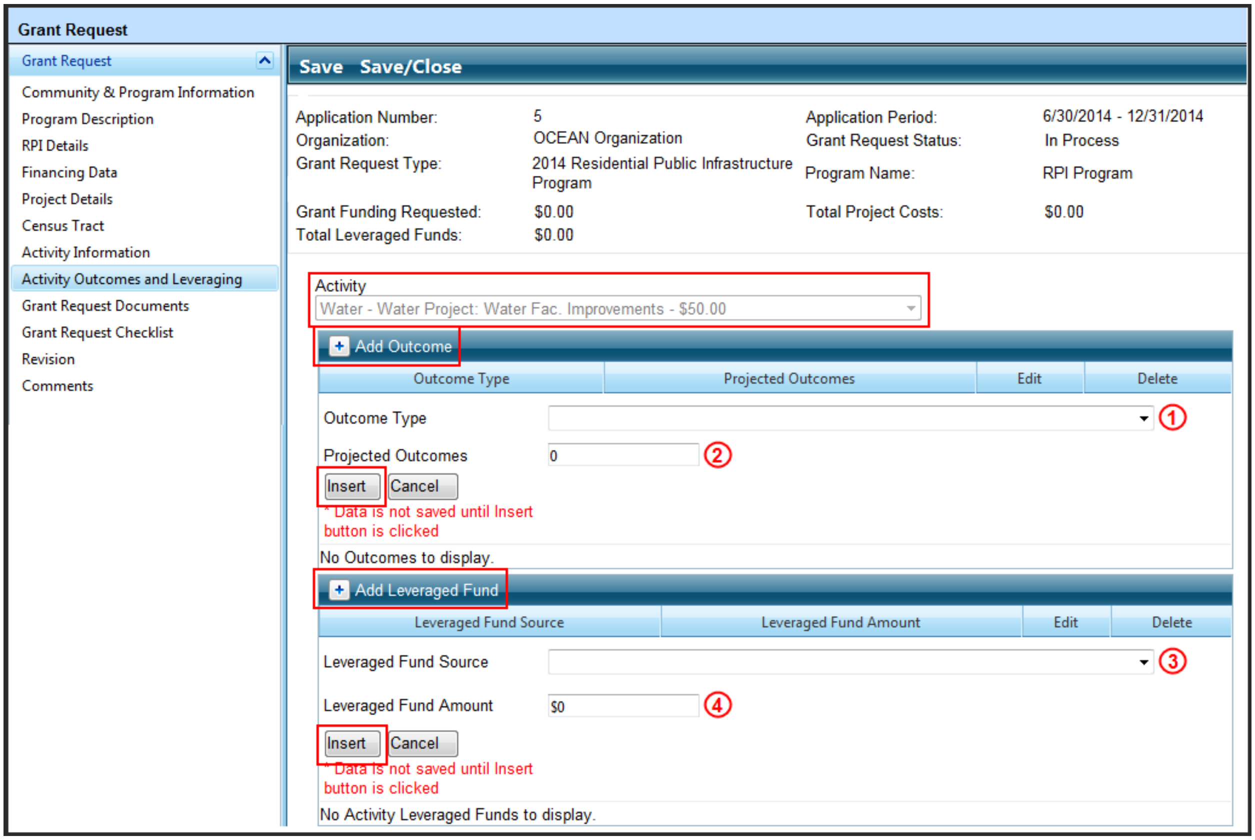
Cancel Adding/Editing Activity

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

Delete Activity

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

Activity Outcomes and Leveraging



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

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

Flood & Drainage Facilities	• Linear Feet • Culverts / Catch Basins Installed	• Manholes Installed • Permanent Easements / Right-of-Way
Sewer Fac. Improvements	• Facility Constructed / Rehabbed • Items of Equip. Installed / Repaired • Linear Feet • Tap-Ins Installed	• Water / Septic Tanks / Sludge Pits Inst. • Manholes Installed • Permanent Easements / Right-of-Way
Solid Waste Disposal Fac.	• Items of Equip. Installed / Repaired	• Facility Constructed / Rehabbed
Water Fac. Improvements	• Facility Constructed / Rehabbed • Items of Equip. Installed / Repaired • Linear Feet • Tap-Ins Installed	• Water / Septic Tanks / Sludge Pits Inst. • Manholes Installed • Permanent Easements / Right-of-Way

Table 3

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

Add Outcome

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

Edit Outcome

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

Cancel Adding/Editing Outcome

1. Click to either **Add Outcome** or **Edit** an existing outcome record in the grid.
2. The grid expands for adding/editing an outcome record.

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

Delete Outcome

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

Add Leveraged Fund

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

Edit Leveraged Fund

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

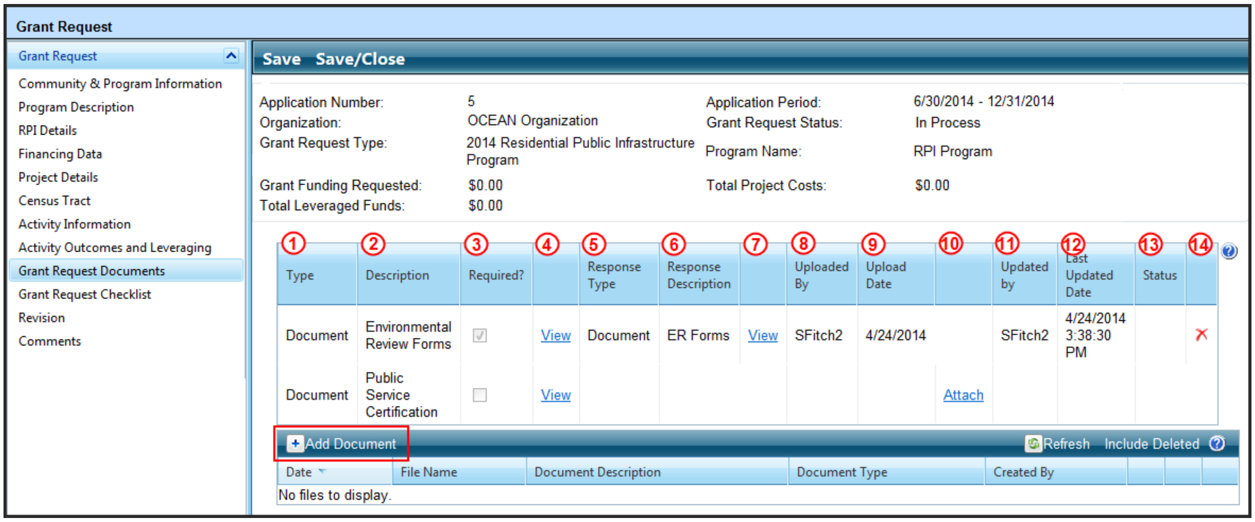
Cancel Adding/Editing Leveraged Fund

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

Delete Leveraged Fund

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

Grant Request Documents



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.

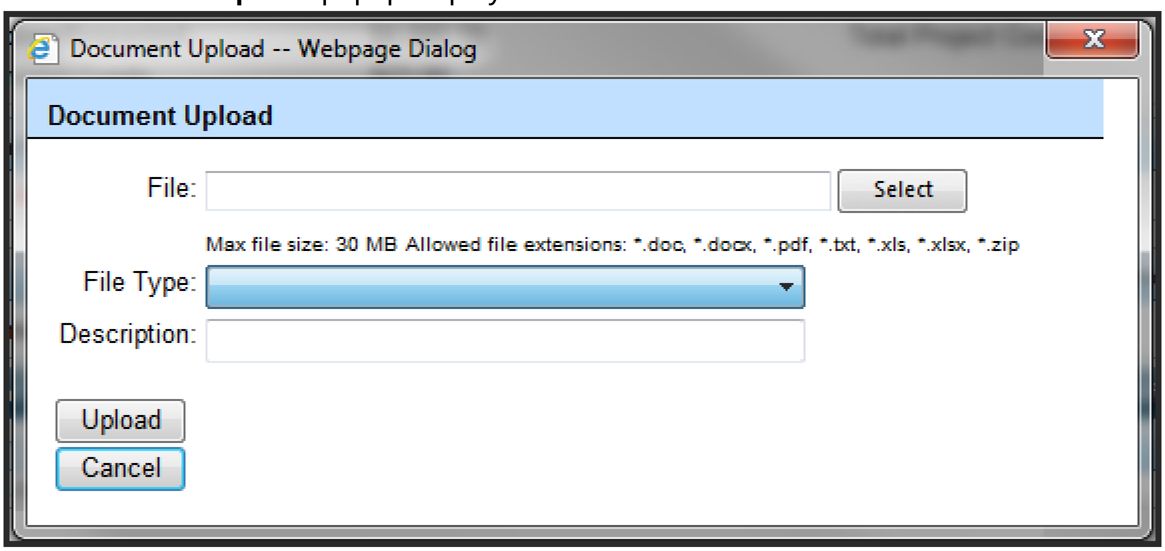
The functions available from the Grant Request Documents page are listed below with steps for performing each function:

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.



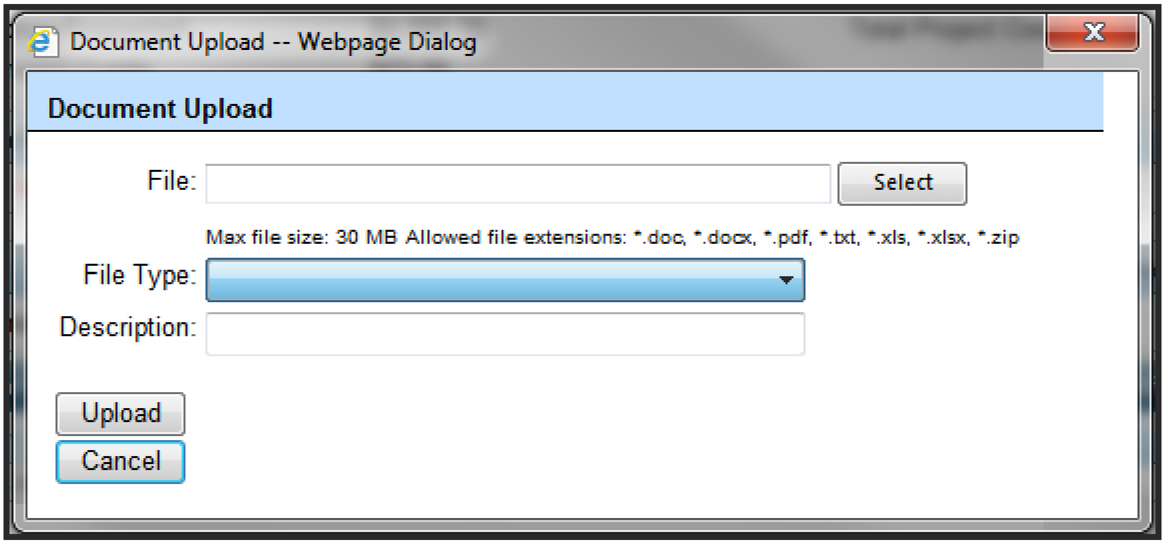
3. Click the **Select** button.
4. The **Windows File Explorer** popup displays.
5. Navigate to the file you would like to attach on your local machine and click the **Open** button.
6. The name of the file will be displayed in the **File** field on the document upload popup.
7. Select the **File Type** 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.

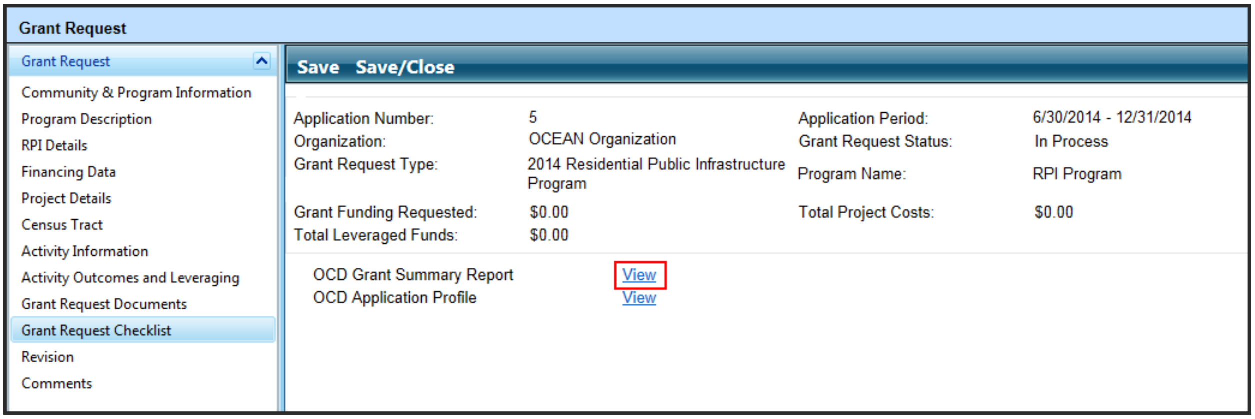
View Document

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

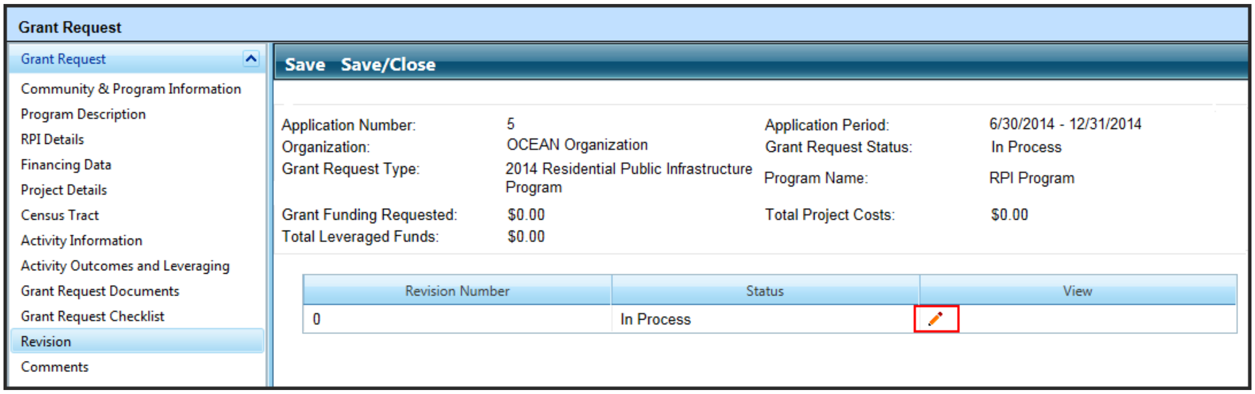


The functions available from the Grant Request Checklist page are listed below with steps for performing each function:

View

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

Revision

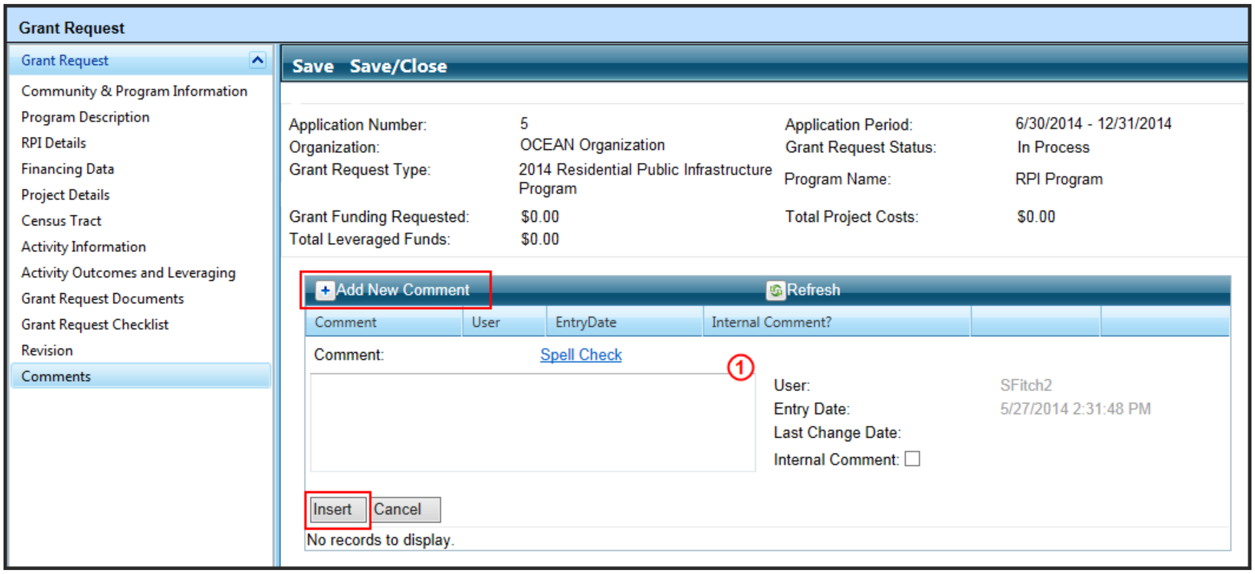


The functions available from the Revision page are listed below with steps for performing each function:

View Revision

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

Comments



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

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

Add Comment

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

Edit Comment

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

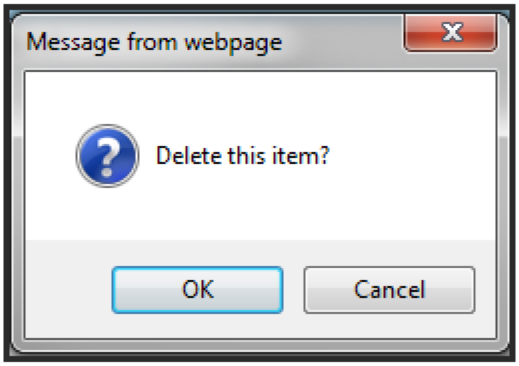
Cancel Adding/Editing Comment

1. Click to either **Add New Comment** or **Edit** an existing comment record in the grid.

2. The grid expands for adding/editing a comment record.
3. Click the **Cancel** button.
4. Changes are not saved.

Delete Comment

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



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

Submitting an Application for RPI

The following section describes the process for submitting an application to the Office of Community Development for the Residential Public Infrastructure Program (RPI) 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:

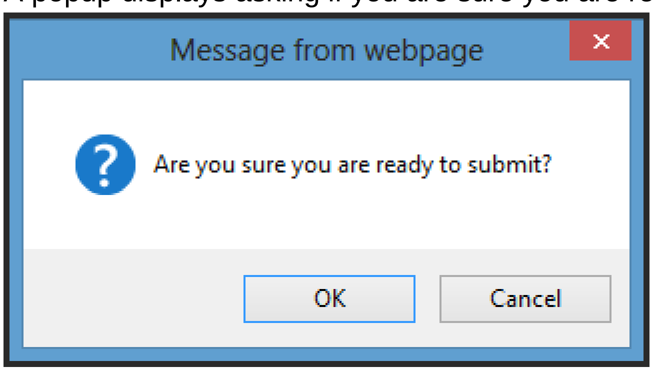
Programs → OCD Grant → Application Search

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 RPI" section and verify all validations pass successfully.

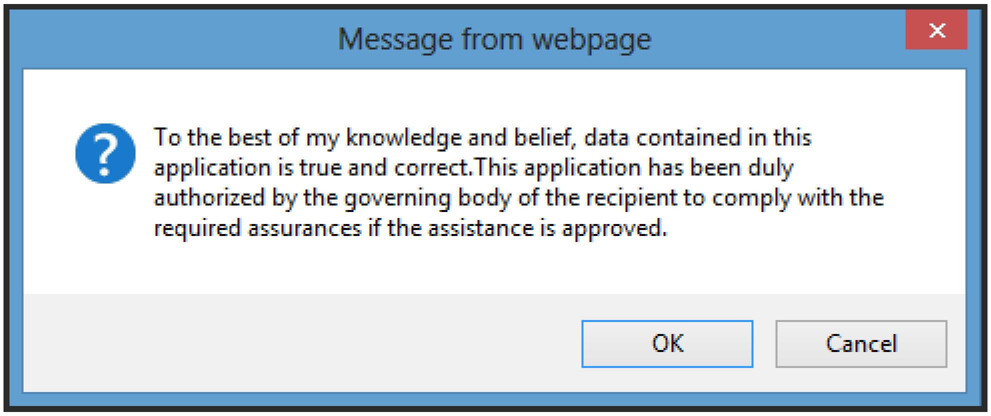
Application Submission

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

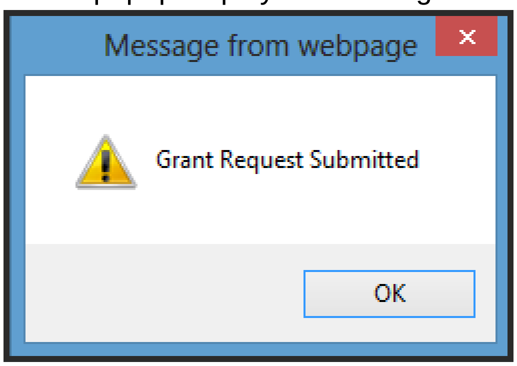
1. Click on the **Submit** button in the button bar.
2. A popup displays asking if you are sure you are ready to submit.



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.



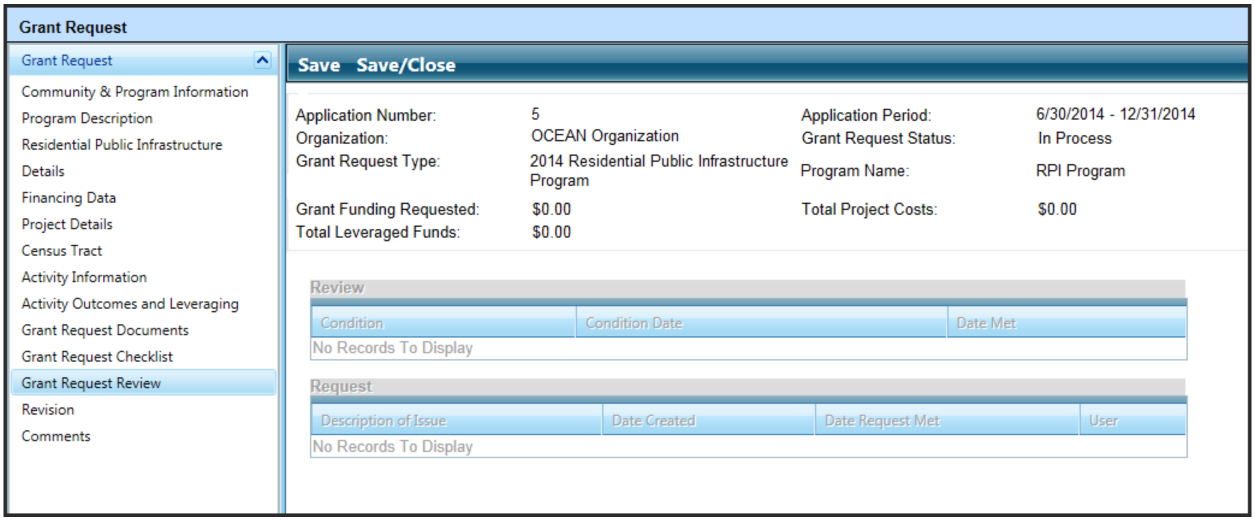
7. Click **OK** in this final popup.
8. Your application has now been submitted. The status of the application is updated to “Submitted” and you can no longer edit the details of the application.

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 RPI 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). RPI applications that are awarded funds will be updated to a status of "Approved." RPI applications that are not awarded funds will be updated to a status of "Rejected."

Grant Request Review

Your RPI 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.



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.