



# **OCEAN for Residential Public Infrastructure Programs (RPI)**

## **Application Preparer User Guide**

July 7, 2014

Version 1.0



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## Document Overview

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### 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	
1		<ul style="list-style-type: none"> <li>Administrative Agency</li> <li>Administrative Contact Information</li> </ul>	<ul style="list-style-type: none"> <li>Define Administrative Contact</li> <li>Initiate an Application</li> </ul>
2		<ul style="list-style-type: none"> <li>Program Name</li> <li>Program Narrative</li> </ul>	<ul style="list-style-type: none"> <li>Add/Edit Program Description</li> <li>Delete Program Description</li> </ul>
3		<ul style="list-style-type: none"> <li>Project Purpose</li> <li>Water/Sewer Rates</li> <li>Number of Connections</li> </ul>	<ul style="list-style-type: none"> <li>Save RPI Details</li> </ul>
4		<ul style="list-style-type: none"> <li>Leveraged Fund Providers</li> <li>Fund Amounts</li> </ul>	<ul style="list-style-type: none"> <li>Add/Edit Leveraged Funds</li> <li>Delete Leveraged Funds</li> </ul>
5		<ul style="list-style-type: none"> <li>Project Type</li> <li>Project Budget</li> <li>National Objective</li> </ul>	<ul style="list-style-type: none"> <li>Add/Edit Project Details</li> <li>Delete Project Details</li> </ul>
6		<ul style="list-style-type: none"> <li>Census Tracts/Block Groups</li> <li>LMI % Benefiting Calculation</li> </ul>	<ul style="list-style-type: none"> <li>Add/Edit Census Tracts / Block Groups</li> <li>Delete Census Tracts / Block Groups</li> </ul>
7		<ul style="list-style-type: none"> <li>Activity Class &amp; Name</li> <li>Activity Budget</li> <li>Short Activity Description</li> </ul>	<ul style="list-style-type: none"> <li>Add/Edit Activity Details</li> <li>Delete Activity Details</li> </ul>
8		<ul style="list-style-type: none"> <li>Projected Outcomes and Type</li> <li>Activity Leveraged Funds</li> </ul>	<ul style="list-style-type: none"> <li>Add/Edit Activity Outcomes</li> <li>Delete Activity Outcomes</li> <li>Add/Edit Activity Leveraged Funds</li> <li>Delete Activity Leveraged Funds</li> </ul>
9		<ul style="list-style-type: none"> <li>Required and Non-Required Documentation</li> <li>Add Document Upload</li> </ul>	<ul style="list-style-type: none"> <li>View Document Templates</li> <li>Attach Documents</li> <li>Delete Documents</li> </ul>
10		<ul style="list-style-type: none"> <li>Print All Application Pages</li> <li>Available Application Reports</li> </ul>	<ul style="list-style-type: none"> <li>View Reports</li> <li>Save/Print Reports</li> </ul>
11		<ul style="list-style-type: none"> <li>View Prior Amendment Details</li> </ul>	<ul style="list-style-type: none"> <li>View Revisions</li> </ul>
12		<ul style="list-style-type: none"> <li>User Commentary</li> </ul>	<ul style="list-style-type: none"> <li>Add/Edit Comments</li> <li>Delete Comments</li> </ul>

## Accessing and Logging into OCEAN

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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](mailto:Scot.Burbacher@development.ohio.gov)
    - Fax: 614-955-1465 attn: Scot Burbacher
    - Mail: Scot Burbacher  
77 South High Street  
P.O. Box 1001  
Columbus, OH 43216-1001
  - Once your forms have been received by OCD, they will be forwarded to the OCEAN Help Desk for processing. For any new User accounts created, the User will receive an email once the account has been created. The email will include a link to the OCEAN website as well as login information.
- User ID and Password

## Login Screen

The screen below is the login screen for OCEAN.

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

Username and Password are required. If you forget your username or password, click on the "[I forgot my User Name and/or Password](#)" link to reset it.

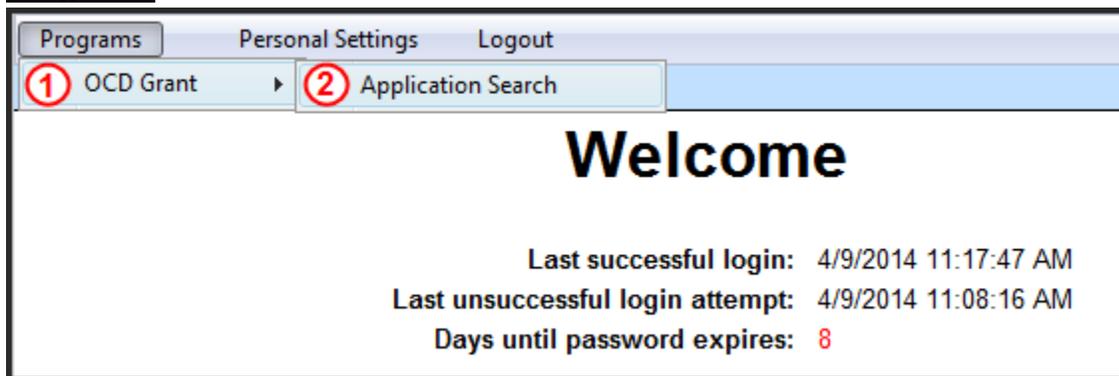
## OCEAN Navigation and Menu

### Welcome Screen and Notification Center

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

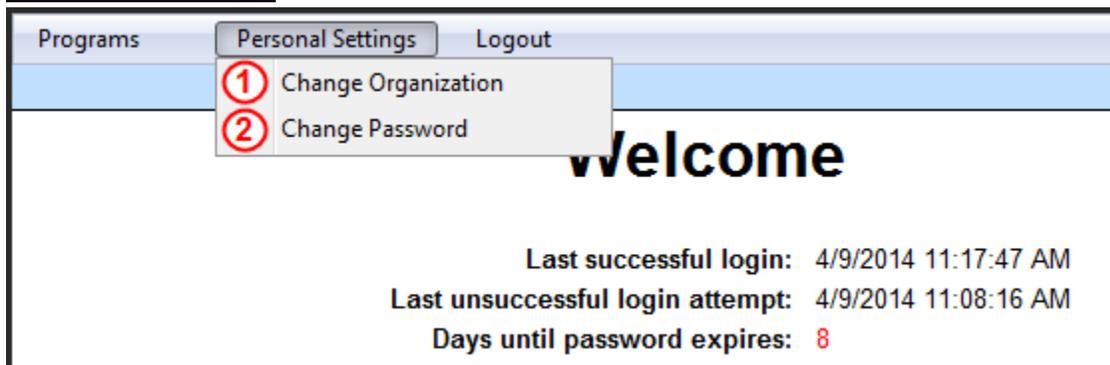
Menu/Field	Purpose
1. <b>Programs</b>	Used to access the OCD grant menu options.
2. <b>Personal Settings</b>	Used to change your password and/or organization.
3. <b>Logout</b>	Used to sign out and exit the OCEAN application.
4. <b>Date/Time Received</b>	Sortable column of notification messages date and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

**Programs**



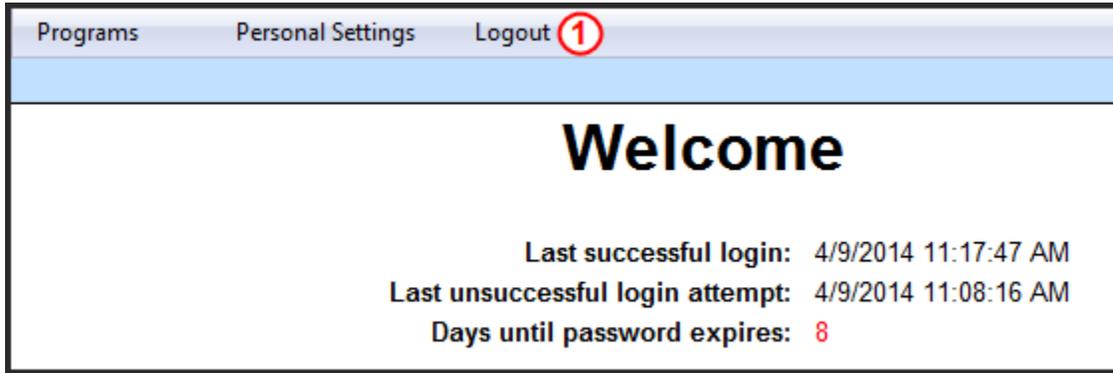
Menu	Purpose
1. <b>OCD Grant</b>	Choose this option to see a list of OCD Grant pages in OCEAN.
2. <b>Application Search</b>	Choose this option to navigate to the Application Search page for viewing/editing existing applications and adding new applications.

**Personal Settings**



Menu	Purpose
1. <b>Change Organization</b>	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. <b>Change Password</b>	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

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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

The screenshot shows the 'Application Request Search' interface. It includes four dropdown menus for filtering: Program Year (set to 2014), Application Type (set to Residential Public Infrastructure Program), Application Number, and Status. Below these are three buttons: Reset, Add New Grant Request, and Search. At the bottom, there is a table with search results. The table has columns for Application Period, Application Number, Application Type, Program, Organization Name, Status, Edit, and Delete. A single result is shown for the period 6/30/2014 - 12/31/2014, with application number 83, type RPI, program OCEAN Organization, and status In Process. A navigation bar at the very bottom contains links for Home, Feedback, Logout, Help, Top, Screen Print, and Create New Ticket.

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

<b>12. Organization Name</b>	Displays the name of the organization that created the application request.
<b>13. Status</b>	Displays the current status of the application.
<b>14. Edit</b>	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.
<b>15. Delete</b>	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:***

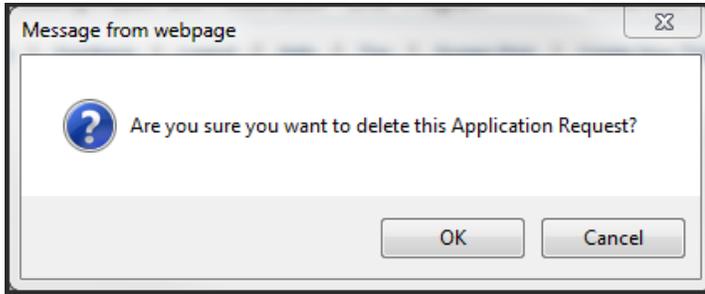
1. Select a **Program Year** and an **Application Type**.
2. Click the **Add New Grant Request** button.
3. You will navigate to the **Grant Request** page for adding a new application.

***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.

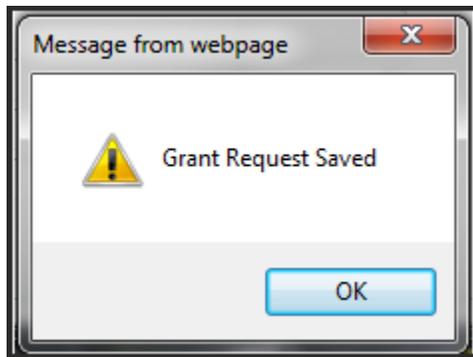
Validation Message	Definition
All of the documents that are required have not been attached.	A document is listed on the Grant Request Documents page that has the checkbox checked for “Required,” but no response document has been uploaded. Upload your response document to clear this validation.
Total 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.

<p>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.</p>	<p>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.</p>
<p>RPI details must be filled in to save / submit the Grant Request.</p>	<p>Click the RPI Details link in the left navigation, enter data in all fields, and click 'Save' in the top button bar.</p>

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.





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: <ul style="list-style-type: none"> <li>Residential Public Infrastructure Program</li> </ul>
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**

Grant Request																					
<ul style="list-style-type: none"> <li>Grant Request</li> <li>Community &amp; Program Information</li> <li>Program Description</li> <li><b>RPI Details</b></li> <li>Financing Data</li> <li>Project Details</li> <li>Activity Information</li> <li>Activity Outcomes and Leveraging</li> <li>Grant Request Documents</li> <li>Grant Request Checklist</li> <li>Revision</li> <li>Comments</li> </ul>	<div style="border: 1px solid black; padding: 5px;"> <span style="border: 1px solid red; padding: 2px;">Save</span> Save/Close                 </div> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;">Application Number:</td> <td style="width: 33%;">5</td> <td style="width: 33%;">Application Period:</td> <td style="width: 33%;">6/30/2014 - 12/31/2014</td> </tr> <tr> <td>Organization:</td> <td>OCEAN Organization</td> <td>Grant Request Status:</td> <td>In Process</td> </tr> <tr> <td>Grant Request Type:</td> <td>2014 Residential Public Infrastructure Program</td> <td>Program Name:</td> <td>RPI Program</td> </tr> <tr> <td>Grant Funding Requested:</td> <td>\$0.00</td> <td>Total Project Costs:</td> <td>\$0.00</td> </tr> <tr> <td>Total Leveraged Funds:</td> <td>\$0.00</td> <td></td> <td></td> </tr> </table> <div style="border: 1px solid black; padding: 5px;">                     Project Purpose: <input type="text"/> <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">1</span> </div> <div style="border: 1px solid black; padding: 5px;">                     Median Household Income (MHI) of the Project Area: <input type="text"/> <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">2</span> </div> <div style="border: 1px solid black; padding: 5px;">                     Applicable Sewer Rate? <input type="radio"/> Yes <input checked="" type="radio"/> No <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">3</span> </div> <div style="border: 1px solid black; padding: 5px;">                     Sewer Rate: <input type="text"/> <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">4</span> </div> <div style="border: 1px solid black; padding: 5px;">                     Applicable Water Rate? <input type="radio"/> Yes <input checked="" type="radio"/> No <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">5</span> </div> <div style="border: 1px solid black; padding: 5px;">                     Water Rate: <input type="text"/> <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">6</span> </div> <div style="border: 1px solid black; padding: 5px;">                     Residential Connections: <input type="text"/> <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">7</span> </div> <div style="border: 1px solid black; padding: 5px;">                     Commercial Connections: <input type="text"/> <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">8</span> </div> <div style="border: 1px solid black; padding: 5px;">                     Industrial Connections: <input type="text"/> <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">9</span> </div> <p style="color: red; font-size: small;">* Please click the 'Save' button above after making changes.</p>	Application Number:	5	Application Period:	6/30/2014 - 12/31/2014	Organization:	OCEAN Organization	Grant Request Status:	In Process	Grant Request Type:	2014 Residential Public Infrastructure Program	Program Name:	RPI Program	Grant Funding Requested:	\$0.00	Total Project Costs:	\$0.00	Total Leveraged Funds:	\$0.00		
Application Number:	5	Application Period:	6/30/2014 - 12/31/2014																		
Organization:	OCEAN Organization	Grant Request Status:	In Process																		
Grant Request Type:	2014 Residential Public Infrastructure Program	Program Name:	RPI Program																		
Grant Funding Requested:	\$0.00	Total Project Costs:	\$0.00																		
Total Leveraged Funds:	\$0.00																				

Field	Description
<b>1. Project Purpose</b>	Select the project purpose from the dropdown. Dropdown choices include: <ul style="list-style-type: none"> <li>Improved Access to Water/Sewer Facilities</li> <li>New Access to Water/Sewer Facilities</li> </ul>
<b>2. Median Household Income (MHI) of the Project Area</b>	Enter the median household income of the project area.
<b>3. Applicable Sewer Rate</b>	Select yes or no if there is an applicable sewer rate.
<b>4. Sewer Rate</b>	This textbox is only enabled if 'yes' is selected for the Applicable Sewer Rate field. Enter the sewer rate.
<b>5. Applicable Water Rate</b>	Select yes or no if there is an applicable water rate.
<b>6. Water Rate</b>	This textbox is only enabled if 'yes' is selected for the Applicable Water Rate field. Enter the water rate.
<b>7. Residential Connections</b>	Enter the number of residential connections that will be affected by the project.
<b>8. Commercial Connections</b>	Enter the number of commercial connections that will be affected by the project.
<b>9. Industrial Connections</b>	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

Grant Request	
Grant Request	Save Save/Close
Community & Program Information	
Program Description	
RPI Details	
<b>Financing Data</b>	
Project Details	
Activity Information	
Activity Outcomes and Leveraging	
Grant Request Documents	
Grant Request Checklist	
Revision	
Comments	

Application Number:	5	Application Period:	6/30/2014 - 12/31/2014
Organization:	OCEAN Organization	Grant Request Status:	In Process
Grant Request Type:	2014 Residential Public Infrastructure Program	Program Name:	RPI 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
Leveraged Fund Provider							
Leveraged Fund Category							
Leveraged Fund Type		Loan					
Amount			\$0				
Term				Months			
Interest Rate							
Insert Cancel							
Data is not saved until Insert button is clicked							
No Leveraged Funds to display.							

Field	Description
<b>1. Leveraged Fund Provider</b>	Enter the name of the leveraged fund provider in the textbox.
<b>2. Leveraged Fund Category</b>	Select the category for the leveraged fund from the dropdown. Dropdown choices include: <ul style="list-style-type: none"> <li>Federal ARC Funds</li> <li>Other Federal</li> <li>Other Funds</li> <li>Private Funds</li> <li>State and Local Funds</li> </ul>
<b>3. Leveraged Fund Type</b>	Select the type of leveraged fund from the dropdown. Dropdown choices include: <ul style="list-style-type: none"> <li>Grant</li> <li>In Kind</li> <li>Loan</li> </ul>
<b>4. Amount</b>	Enter the dollar amount of leveraged funds for the provider entered.
<b>5. Term</b>	This field only displays when 'Loan' is selected for the Leveraged Fund Type. Enter the number of months of the loan.
<b>6. Interest Rate</b>	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																																																									
<ul style="list-style-type: none"> <li>Grant Request</li> <li>Community &amp; Program Information</li> <li>Program Description</li> <li>RPI Details</li> <li>Financing Data</li> <li><b>Project Details</b></li> <li>Activity Information</li> <li>Activity Outcomes and Leveraging</li> <li>Grant Request Documents</li> <li>Grant Request Checklist</li> <li>Revision</li> <li>Comments</li> </ul>	<p>Save Save/Close</p> <p>Application Number: 5      Application Period: 6/30/2014 - 12/31/2014            Organization: OCEAN Organization      Grant Request Status: In Process            Grant Request Type: 2014 Residential Public Infrastructure Program      Program Name: RPI Program            Grant Funding Requested: \$0.00      Total Project Costs: \$0.00            Total Leveraged Funds: \$0.00</p> <p><b>+ Add Project Details</b></p> <table border="1"> <thead> <tr> <th>Project Type</th> <th>Project Name</th> <th>Project Budget</th> <th>Service Area</th> <th>National Objective</th> <th>Edit</th> <th>Delete</th> </tr> </thead> <tbody> <tr> <td>Project Type</td> <td>Project Name</td> <td>Project Budget</td> <td>Service Area</td> <td>National Objective</td> <td></td> <td></td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td>\$0</td> <td><input type="text"/></td> <td>Area Wide Benefit (LMA)</td> <td></td> <td></td> </tr> <tr> <td>Qualified with a Survey?</td> <td colspan="5"> <input type="radio"/> Yes    <input checked="" type="radio"/> No                 </td> <td></td> </tr> <tr> <td>Date Survey Completed</td> <td colspan="5"> <input type="text"/>    Click calendar to select date                 </td> <td></td> </tr> <tr> <td><input type="button" value="Insert"/></td> <td colspan="5"><input type="button" value="Cancel"/></td> <td></td> </tr> <tr> <td colspan="7">                     * Data is not saved until Insert button is clicked                 </td> </tr> <tr> <td colspan="7">No Project Details to display.</td> </tr> </tbody> </table>	Project Type	Project Name	Project Budget	Service Area	National Objective	Edit	Delete	Project Type	Project Name	Project Budget	Service Area	National Objective			<input type="text"/>	<input type="text"/>	\$0	<input type="text"/>	Area Wide Benefit (LMA)			Qualified with a Survey?	<input type="radio"/> Yes <input checked="" type="radio"/> No						Date Survey Completed	<input type="text"/> Click calendar to select date						<input type="button" value="Insert"/>	<input type="button" value="Cancel"/>						* Data is not saved until Insert button is clicked							No Project Details to display.						
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Field	Description
1. Project Type	<p>Select the project type from the dropdown. For RPI, the available project types include:</p> <ul style="list-style-type: none"> <li>• Admin</li> <li>• Water</li> <li>• Sewer</li> </ul> <p>Only one Admin project and one Admin OR Sewer project can be added to the RPI grant request.</p>
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:

The screenshot shows the 'Grant Request' application form. The 'Census Tract' section is highlighted in the left sidebar. The main form area contains the following fields and controls:

- Project Type:** A dropdown menu showing 'Water and Sewer - Water : Water Project (\$50.00)'. A red box highlights this field with a circled '1'.
- Qualified with a Survey?:** A checkbox labeled 'Yes'.
- Is Benefiting Jurisdiction County-wide?:** Radio buttons for 'Yes' and 'No'. The 'No' button is selected and highlighted with a red box and a circled '1'.
- + Add Census Tract:** A button highlighted with a red box.
- Census Tract Grid:** A table with columns: Census Tract Number, Block Group, # Benefiting in Census Tract, Edit, and Delete.
  - Census Tract Number:** A dropdown menu highlighted with a red box and a circled '2'.
  - Block Group:** A dropdown menu highlighted with a red box and a circled '3'.
  - Estimated Number of Beneficiaries:** A text input field with the value '0' highlighted with a red box and a circled '4'.
  - Insert/Cancel:** Buttons below the input field, with 'Insert' highlighted by a red box.
- Summary Fields:**
  - Total Population of Service Area:** Text input field highlighted with a red box and a circled '5'.
  - LMI Population of Service Area:** Text input field highlighted with a red box and a circled '6'.
  - LMI % Benefiting:** Text input field highlighted with a red box and a circled '7'.

Footnote: \* Data is not saved until Insert button is clicked. \* Please click the 'Save' button above after making changes.

Field	Description
<b>1. Is Benefiting Jurisdiction County-wide?</b>	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.
<b>2. Census Tract Number</b>	Contains a list of census tract numbers for the county of the organization. Select a census tract from the dropdown.
<b>3. Block Group</b>	Contains a list of block groups for the census tract number selected. Select the block group.
<b>4. Estimated Number of Beneficiaries</b>	Enter the number of people benefitting for the census tract and block group selected.
<b>5. Total Population of Service Area</b>	Enter the total population of the service area.
<b>6. LMI Population of Service Area</b>	Enter the LMI population of the service area.
<b>7. LMI % Benefiting</b>	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. <b>Is Benefiting Jurisdiction County-wide?</b>	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. <b>Benefiting Jurisdiction</b>	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.

<b>3. All / Partial Benefiting</b>	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.
<b>4. Benefiting Jurisdiction</b>	Contains a list of benefiting jurisdictions from the Benefiting Jurisdiction grid that were marked as 'Partial' benefiting.
<b>5. Census Tract Number</b>	Contains a list of census tract numbers for the benefiting jurisdiction selected. Select a census tract from the dropdown.
<b>6. Block Group</b>	Contains a list of block groups for the census tract number selected. Select the block group.
<b>7. All / Partial Block Group Benefiting</b>	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.
<b>8. Estimated Number of Beneficiaries</b>	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.
<b>9. Total Population of Service Area</b>	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.
<b>10. LMI Population of Service Area</b>	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.
<b>11. LMI % Benefiting</b>	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 in 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

Grant Request																										
<ul style="list-style-type: none"> <li>Grant Request</li> <li>Community &amp; Program Information</li> <li>Program Description</li> <li>RPI Details</li> <li>Financing Data</li> <li>Project Details</li> <li>Census Tract</li> <li><b>Activity Information</b></li> <li>Activity Outcomes and Leveraging</li> <li>Grant Request Documents</li> <li>Grant Request Checklist</li> <li>Revision</li> <li>Comments</li> </ul>	<div style="text-align: right;"> <a href="#">Save</a> <a href="#">Save/Close</a> </div> <p>                     Application Number: 5      Application Period: 6/30/2014 - 12/31/2014                      Organization: OCEAN Organization      Grant Request Status: In Process                      Grant Request Type: 2014 Residential Public Infrastructure Program      Program Name: RPI Program                      Grant Funding Requested: \$0.00      Total Project Costs: \$0.00                      Total Leveraged Funds: \$0.00                 </p> <p>                     Project Type: Water and Sewer - Water : Water Project (\$50.00)      Activity Subtotal: \$0.00                 </p> <p> <input type="button" value="+ 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></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Activity Name</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Activity Budget</td> <td>0</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Short Activity Description</td> <td colspan="3"></td> <td></td> </tr> </tbody> </table> <p> <input type="button" value="Insert"/> <input type="button" value="Cancel"/> </p> <p style="color: red; font-size: small;">                     * Data is not saved until Insert button is clicked                 </p> <p style="font-size: small;">No Activities to display.</p>	Activity Class	Activity Name	Activity Budget	Edit	Delete	Activity Class					Activity Name					Activity Budget	0				Short Activity Description				
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Field	Description
<b>1. Activity Class</b>	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: <ul style="list-style-type: none"> <li>• Administration</li> </ul> If the activity is being entered for any project type other than the Admin project type, then the only available activity class options is: <ul style="list-style-type: none"> <li>• Housing</li> <li>• Public Facilities</li> </ul>
<b>2. Activity Name</b>	Select the activity name from the dropdown. The dropdown choices depend on the activity class that is selected. See <a href="#">Table 2</a> below for potential activity names per activity class.
<b>3. Activity Budget</b>	Enter the budget for the activity. All activity budgets for the activities on the project must total up to the project budget.
<b>4. Short Activity Description</b>	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	<ul style="list-style-type: none"> <li>• Acquisition</li> <li>• Demolition / Clearance</li> <li>• Flood &amp; Drainage Facilities</li> <li>• Other Costs</li> <li>• Professional Fees</li> </ul>	<ul style="list-style-type: none"> <li>• Sewer Fac. Improvements</li> <li>• Solid Waste Disposal Fac.</li> <li>• Water Fac. Improvements</li> </ul>
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**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

**Grant Request**

Grant Request

Community & Program Information

Program Description

RPI Details

Financing Data

Project Details

Census Tract

Activity Information

Activity Outcomes and Leveraging

Grant Request Documents

Grant Request Checklist

Revision

Comments

Save Save/Close

Application Number: 5      Application Period: 6/30/2014 - 12/31/2014

Organization: OCEAN Organization      Grant Request Status: In Process

Grant Request Type: 2014 Residential Public Infrastructure Program      Program Name: RPI Program

Grant Funding Requested: \$0.00      Total Project Costs: \$0.00

Total Leveraged Funds: \$0.00

Activity  
 Water - Water Project: Water Fac. Improvements - \$50.00

+ Add Outcome

Outcome Type	Projected Outcomes	Edit	Delete
Outcome Type <input style="width: 90%;" type="text" value=""/>	Projected Outcomes <input style="width: 80%;" type="text" value="0"/>		
<div style="display: flex; justify-content: space-between;"> <span>Insert</span> <span>Cancel</span> </div> <p style="font-size: 0.8em; color: red; margin-top: 2px;">*Data is not saved until Insert button is clicked</p>			
No Outcomes to display.			

+ Add Leveraged Fund

Leveraged Fund Source	Leveraged Fund Amount	Edit	Delete
Leveraged Fund Source <input style="width: 90%;" type="text" value=""/>	Leveraged Fund Amount <input style="width: 80%;" type="text" value="\$0"/>		
<div style="display: flex; justify-content: space-between;"> <span>Insert</span> <span>Cancel</span> </div> <p style="font-size: 0.8em; color: red; margin-top: 2px;">*Data is not saved until Insert button is clicked</p>			
No Activity Leveraged Funds to display.			

Field	Description
<b>1. Outcome Type</b>	Select the outcome type from the dropdown. The dropdown choices depend on the activity that the outcome is being added for. See <a href="#">Table 3</a> below for potential outcome types per activity.
<b>2. Projected Outcomes</b>	Enter the projected number of outcomes for the activity.
<b>3. Leveraged Fund Source</b>	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.
<b>4. Leveraged Fund Amount</b>	Enter the amount of leveraged funds from this provider that will be funding the activity selected.

Activity	Outcomes
Acquisition	<ul style="list-style-type: none"> <li>Acres of Land</li> <li>Square Feet of Structure</li> <li>Structures</li> <li>Parcels</li> </ul> <ul style="list-style-type: none"> <li>Households Assisted</li> <li>Business Buyouts</li> <li>Permanent Easements / Right-of-Way</li> </ul>
Demolition / Clearance	<ul style="list-style-type: none"> <li>Structures Demolished</li> </ul>

Flood & Drainage Facilities	<ul style="list-style-type: none"> <li>• Linear Feet</li> <li>• Culverts / Catch Basins Installed</li> </ul>	<ul style="list-style-type: none"> <li>• Manholes Installed</li> <li>• Permanent Easements / Right-of-Way</li> </ul>
Sewer Fac. Improvements	<ul style="list-style-type: none"> <li>• Facility Constructed / Rehabbed</li> <li>• Items of Equip. Installed / Repaired</li> <li>• Linear Feet</li> <li>• Tap-Ins Installed</li> </ul>	<ul style="list-style-type: none"> <li>• Water / Septic Tanks / Sludge Pits Inst.</li> <li>• Manholes Installed</li> <li>• Permanent Easements / Right-of-Way</li> </ul>
Solid Waste Disposal Fac.	<ul style="list-style-type: none"> <li>• Items of Equip. Installed / Repaired</li> </ul>	<ul style="list-style-type: none"> <li>• Facility Constructed / Rehabbed</li> </ul>
Water Fac. Improvements	<ul style="list-style-type: none"> <li>• Facility Constructed / Rehabbed</li> <li>• Items of Equip. Installed / Repaired</li> <li>• Linear Feet</li> <li>• Tap-Ins Installed</li> </ul>	<ul style="list-style-type: none"> <li>• Water / Septic Tanks / Sludge Pits Inst.</li> <li>• Manholes Installed</li> <li>• Permanent Easements / Right-of-Way</li> </ul>

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

Grant Request													
Save Save/Close													
Application Number:		5		Application Period:		6/30/2014 - 12/31/2014							
Organization:		OCEAN Organization		Grant Request Status:		In Process							
Grant Request Type:		2014 Residential Public Infrastructure Program		Program Name:		RPI Program							
Grant Funding Requested:		\$0.00		Total Project Costs:		\$0.00							
Total Leveraged Funds:		\$0.00											
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"/>	<a href="#">View</a>	Document	ER Forms	<a href="#">View</a>	SFitch2	4/24/2014		SFitch2	4/24/2014 3:38:30 PM		<span style="color: red;">✗</span>
Document	Public Service Certification	<input type="checkbox"/>	<a href="#">View</a>						<a href="#">Attach</a>				
<a href="#">+ Add Document</a> <span style="float: right;"><a href="#">Refresh</a> <a href="#">Include Deleted</a></span>													
Date	File Name	Document Description	Document Type	Created By									
No files to display.													

Field	Description
<b>1. Type</b>	Displays the type of documentation. For grant request Documents, this will always display document.
<b>2. Description</b>	Displays the name of the template and/or instruction form document uploaded by OCD for your use in completing the application attachments.
<b>3. Required</b>	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.
<b>4. View</b>	Use this link to view/download templates and/or instruction forms for application documents.
<b>5. Response Type</b>	Displays the type of response document. For grant request documents, this will always display document.
<b>6. Response Description</b>	Displays the description that you enter when uploading your response document.
<b>7. View</b>	Use this second link to view/download your completed template or instruction form.
<b>8. Uploaded By</b>	Displays the username of the user who uploaded the response document.
<b>9. Uploaded Date</b>	Displays the date the response document was uploaded.
<b>10. Attach</b>	Use this link to upload your completed template and/or form for the application document listed.
<b>11. Updated By</b>	Displays the username of the user who last updated the response document.
<b>12. Last Updated Date</b>	Displays the date the response document was last updated.

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

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

#### *View Document in Grant Request Documents*

1. Click the **View** link next to the provided template and/or instruction form or next to your response document.
2. A new window displays with the document details displayed.
3. Click the **File → Save As** menu option to save a copy of the document to your computer or close the window to return to the grant request documents page.

#### *Attach Document in Grant Request Documents*

1. Click the **Attach** link next to a record in the grant request documents grid.
2. The **Document Upload** popup displays.

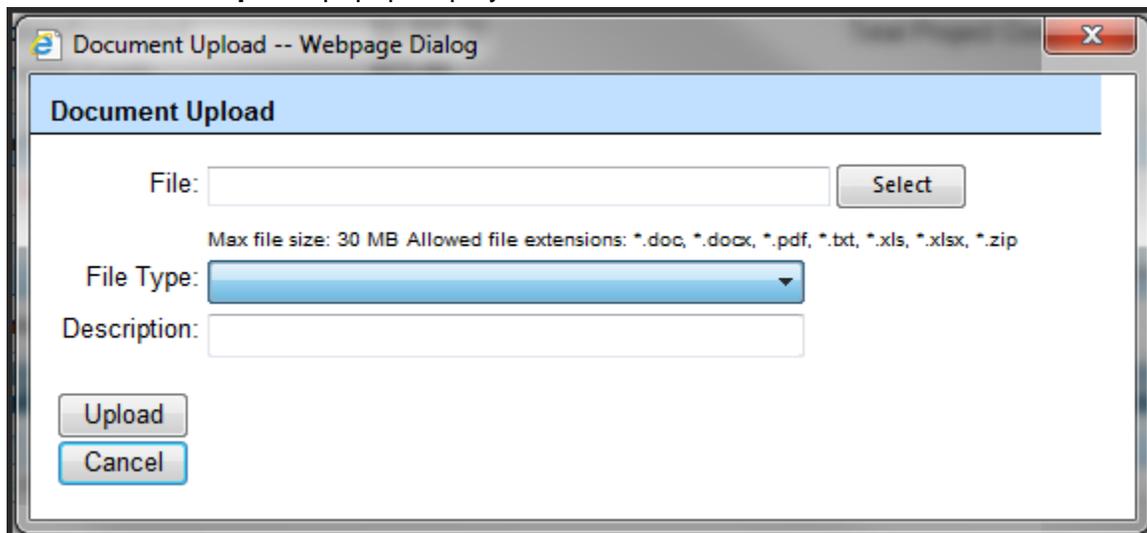
3. Click the **Select** button.
4. The **Windows File Explorer** popup displays.
5. Navigate to the file you would like to attach on your local machine and click the **Open** button.
6. The name of the file will be displayed in the **File** field on the document upload popup.
7. Select the **File Type**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

### *Delete Document from Grant Request Documents*

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

### *Add Document*

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



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

### *View Document*

1. Click the **View** link next to the uploaded document in the documents grid.
2. A new window displays with the document details displayed.
3. Click the **File → Save As** menu option to save a copy of the document to your computer or close the window to return to the grant request documents page.

### *Delete Document*

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

### ***Grant Request Checklist***

Grant Request																							
<ul style="list-style-type: none"> <li>Grant Request</li> <li>Community &amp; Program Information</li> <li>Program Description</li> <li>RPI Details</li> <li>Financing Data</li> <li>Project Details</li> <li>Census Tract</li> <li>Activity Information</li> <li>Activity Outcomes and Leveraging</li> <li>Grant Request Documents</li> <li><b>Grant Request Checklist</b></li> <li>Revision</li> <li>Comments</li> </ul>	<p><b>Save Save/Close</b></p> <table> <tr> <td>Application Number:</td> <td>5</td> <td>Application Period:</td> <td>6/30/2014 - 12/31/2014</td> </tr> <tr> <td>Organization:</td> <td>OCEAN Organization</td> <td>Grant Request Status:</td> <td>In Process</td> </tr> <tr> <td>Grant Request Type:</td> <td>2014 Residential Public Infrastructure Program</td> <td>Program Name:</td> <td>RPI Program</td> </tr> <tr> <td>Grant Funding Requested:</td> <td>\$0.00</td> <td>Total Project Costs:</td> <td>\$0.00</td> </tr> <tr> <td>Total Leveraged Funds:</td> <td>\$0.00</td> <td></td> <td></td> </tr> </table> <p>OCD Grant Summary Report <a href="#">View</a></p> <p>OCD Application Profile <a href="#">View</a></p>			Application Number:	5	Application Period:	6/30/2014 - 12/31/2014	Organization:	OCEAN Organization	Grant Request Status:	In Process	Grant Request Type:	2014 Residential Public Infrastructure Program	Program Name:	RPI Program	Grant Funding Requested:	\$0.00	Total Project Costs:	\$0.00	Total Leveraged Funds:	\$0.00		
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Total Leveraged Funds:	\$0.00																						

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"> <li>Grant Request</li> <li>Community &amp; Program Information</li> <li>Program Description</li> <li>RPI Details</li> <li>Financing Data</li> <li>Project Details</li> <li>Census Tract</li> <li>Activity Information</li> <li>Activity Outcomes and Leveraging</li> <li>Grant Request Documents</li> <li>Grant Request Checklist</li> <li style="background-color: #e1ecf4;">Revision</li> <li>Comments</li> </ul>	<div style="border: 1px solid #ccc; padding: 5px;"> <div style="background-color: #0056b3; color: white; padding: 2px; display: flex; justify-content: space-between;"> <span>Save</span> <span>Save/Close</span> </div> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;">Application Number:</td> <td style="width: 33%;">5</td> <td style="width: 33%;">Application Period:</td> <td style="width: 33%;">6/30/2014 - 12/31/2014</td> </tr> <tr> <td>Organization:</td> <td>OCEAN Organization</td> <td>Grant Request Status:</td> <td>In Process</td> </tr> <tr> <td>Grant Request Type:</td> <td>2014 Residential Public Infrastructure Program</td> <td>Program Name:</td> <td>RPI Program</td> </tr> <tr> <td>Grant Funding Requested:</td> <td>\$0.00</td> <td>Total Project Costs:</td> <td>\$0.00</td> </tr> <tr> <td>Total Leveraged Funds:</td> <td>\$0.00</td> <td></td> <td></td> </tr> </table> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr style="background-color: #e1ecf4;"> <th style="width: 30%;">Revision Number</th> <th style="width: 40%;">Status</th> <th style="width: 30%;">View</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">0</td> <td style="text-align: center;">In Process</td> <td style="text-align: center;"></td> </tr> </tbody> </table> </div>	Application Number:	5	Application Period:	6/30/2014 - 12/31/2014	Organization:	OCEAN Organization	Grant Request Status:	In Process	Grant Request Type:	2014 Residential Public Infrastructure Program	Program Name:	RPI Program	Grant Funding Requested:	\$0.00	Total Project Costs:	\$0.00	Total Leveraged Funds:	\$0.00			Revision Number	Status	View	0	In Process	
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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. <b>Comment</b>	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.

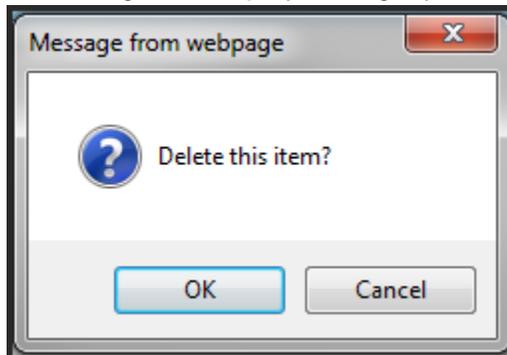
### Cancel Adding/Editing Comment

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.