



**United States Department of Agriculture  
Rural Development**

## **RD Apply – Application Intake**

# **Telecommunications Customer User Guide**

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# WELCOME TO RD APPLY

## 1.0 WHAT IS RD APPLY?

RD Apply is an application intake system that allows you to apply electronically for loans and grants for Rural Utility Services (RUS) Programs. Instead of asking you to mail in a paper application, a process that can be slow and unwieldy, you can now access the system and begin work on an application in a just a few minutes. Additionally, multiple users now have the ability to work on one to multiple applications from different locations simultaneously.

RD Apply uses checkmarks and X's to display whether or not a section is complete, so you can see the status of your application at a glance. As an added bonus, RUS Program staff will be able to login to the system and review your application, at any stage in the submittal process.

### WHY IS RD APPLY IMPORTANT?

**Convenience** - The Internet allows customers access to information 24 hours a day and 7 days a week. For example, customers can fill out and submit their application any time of the day or night from their homes or offices.

**Identity Security** - Information submitted to the Federal Government remains safe and secure because every customer has a unique User ID and password; only authorized USDA employees can access the information.

**Reduced Paper Consumption** - Over time, RD Apply will save paper, which benefits the environment.

## 2.0 WHAT IS EAUTHENTICATION?

USDA eAuthentication is the system used by USDA agencies to enable customers to obtain accounts that will grant them access to USDA Web applications and services via the Internet. This includes tasks such as submitting forms electronically, completing surveys online, and checking the status of your USDA accounts.

USDA will only accept eAuthentication Accounts from individuals; USDA eAuthentication does not have the mechanism to issue accounts to businesses, corporations or other entities. To apply, visit [Create an Account](#).

## 3.0 WHO CAN CREATE AN APPLICATION?

Any eligible entity can create an application if they have a Level 2 eAuthentication ID. Once you have obtained a Level 2 eAuthentication ID you will be able to access RD Apply.

## 4.0 PROGRAMS THAT USE RD APPLY

Currently, the only programs that are using RD Apply are Electric, Telecommunications, and Water & Environmental. Eventually, more programs will be added into the system, allowing a wider range of customers to submit applications via RD Apply.

## 5.0 RD APPLY WEBSITES

To log into RD Apply, click [here](#), or paste the following link into your web browser:

<https://rdapply.sc.egov.usda.gov>

# GETTING STARTED

## 6.0 IDENTITY, CREDENTIAL AND ACCESS MANAGEMENT (ICAM)

A Level 2 eAuthentication account allows RUS stakeholders to gain access to USDA Web site portals and applications such as RD Apply. Historically, this process could only be completed by physically meeting with a Local Registration Authority (LRA) to have your User ID and profile verified. However, we are now offering a new service called Identity, Credential and Access Management (ICAM) that allows you to apply for a Level 2 account online through a secure web interaction.

To register for a Level 2 account using ICAM, you will click [here](#) and select “Register for Level 2 Account.” You will enter in your personal information, making sure to complete all the required fields. Once finished, click “Continue.” A verification email will be sent to the email address provided.

Once the email is received, click the link to activate your account. Another email will populate prompting you to verify your identity. You will verify the information you inputted into the system when registering as well as entering your Social Security Number (SSN).

*Note: The Social Security Number is not saved in this process. It is solely used so the system can present you with a series of four identifying questions.*

After answering all the questions, the system will automatically verify the information and either approve or deny you for a Level 2 account. If you cannot verify your identity, you will need to visit a LRA in order to continue.

If you do not have sufficient data for a level 2 request, you will need to finish filling out your information before you can continue.

*Note: You will need to see an LRA if you live outside of the fifty states. If you live inside the United States, a LRA is not necessarily needed in order to successfully register for, and receive, your level 2 eAuth account.*

Electing to verify online will navigate you to a web page where the system will generate a series of four questions that you will need to answer successfully before your account is allowed access to RD Apply.

## 7.0 LINKING YOUR EAUTH ID TO A TAX IDENTIFICATION NUMBER

Some programs require you to be an Authorized Representative before you can create an application with them.

### HOW DO I BECOME AN AUTHORIZED REPRESENTATIVE?

When you log into RD Apply, you will be taken to the Landing/Home Page. At the top of the screen will be a button called "Authorized Representative Request." Clicking it will generate a form where you can send a request to Rural Utilities Services Staff, asking for your eAuth ID to be linked to your entity's Tax Identification Number (TIN).

### Completing the Authorized Representative Request

When you open the "Authorized Representative Request," you are required to fill out the legal name, TIN, and DUNS number of the entity that is applying. You will also need to select what the primary program will be, as well as the state you are primarily planning on working in.

After you enter your entity's information, you will need to enter your name, your eAuth ID, and which security role you would like to have. You can also enter up to four more users, to be associated with that same TIN.

*Note: The email field will prepopulate with your eAuthentication email. You will be able to change it to a personal email, if you do not wish to be contacted at your eAuthentication email.*

Once you have finished with the users section, enter your point of contact's information.

You will also need to upload any supporting documentation that grants you the authority to submit the Authorized Representative Request.

Authorized Representative Request

Please enter the following information about the entity applying for a USDA loan:

\*Legal Name:

\*TIN:

\*Primary Program:

Telecommunic

\*DUNS Nbr:

RUS ID:

\*State:

County:

Please enter the following information about additional users working with the applicant:

Disclaimer: The email you enter here is for contact purposes only. Any notifications RD Apply sends you will be sent to your eAuth email account.

\*Your Name:

\*eAuth ID:

\*Security Role:

\*Email:

despina.hartley@oll.usda.gov

User Name 2:

eAuth ID:

Security Role:

Email:

User Name 3:

eAuth ID:

Security Role:

Email:

User Name 4:

eAuth ID:

Security Role:

Email:

User Name 5:

eAuth ID:

Security Role:

Email:

Please provide contact information for the company representative who is authorized to answer additional questions about the Authorized Representative Request and Board Resolution/uploaded document:

\*A/R POC Name:

\*Phone Nbr:

\*Email:

Administrator: Assigns roles to other users.

Representative-Signature-Certify: Signs certifications / board resolutions and submits applications. Does NOT assign roles to other users.

Representative-Update-Data: Allows the user to enter / update an application.

Engineering Consultant: Allows the user to enter / update engineering sections of the application only.

Financial Consultant: Allows the user to enter / update financial sections of the application only.

Legal Consultant: Ability to view the entire application and only upload and delete attachments.

Viewer: Allows the user to view the application with no update access.

Please upload the documentation that authorizes you to become an authorized representative or administrator for your company:

Upload

Send Request



After you send in your Authorized Representative Request, Rural Utilities Services Staff will review it. Once it has been approved, they will link your eAuth ID to your Tax Identification Number and you will be able to login to RD Apply and create an application.

## AUTHORIZED REPRESENTATIVE REQUEST BOARD RESOLUTION SAMPLES

If you need sample templates for the ARR upload document, you can use the following templates:

LLC Member's Authorizations

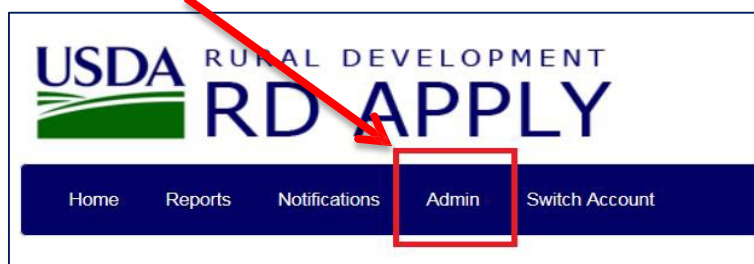
Secretary's Certificate

## 8.0 LINKING OTHER USERS TO YOUR TAX IDENTIFICATION NUMBER

After you have submitted the "Authorized Representative Request" and RUS Staff has accepted it, you will be able to log into the Application Authorization Security Management (AASM) website. Here, you will be able to search other users by their eAuthentication ID and link them to your specific Tax Identification Number.

In order to reach the Application Authorization Security Management (AASM) website, you will have to login to RD Apply. At the top of your screen, there will be a button titled "Admin." Clicking it will open the Application Authorization Security Management website in a new window.

In order to access AASM, you must be assigned the **Administrator** or **Representative-Signature-Certify** role. Once you have logged in, click on the "Admin" button in the blue header bar.



Once you have clicked on the "Admin" button, AASM will open in a new window.

## 8.1 UPDATING AN EXISTING USER

To search for a user, you must first select a Tax ID (TIN) from the dropdown box.

**User List**

Tax Id    
 System Id    
 eAuth User ID  Use \* at end of eAuth User ID for wildcard search   
 Last Name  Use \* at end of Last Name for wildcard search   
 First Name  Use \* at end of First Name for wildcard search

After you have selected a TIN, you can enter a user's eAuth User ID, to see if they are associated to that TIN. If they are associated, you will see what role they have been assigned.

**User List**

Tax Id    
 System Id    
 eAuth User ID  Use \* at end of eAuth User ID for wildcard search   
 Last Name  Use \* at end of Last Name for wildcard search   
 First Name  Use \* at end of First Name for wildcard search

Action:

eAuth User ID	Name	Status	System	Role	Tax Id	Program
<a href="#">RDVIEWONLY</a>	Schneider, Ryan	Active	RDDNLD	<a href="#">VIEWER</a>	120619770	

If the user has not been added in AASM, click on the "Add User" button. You will be navigated to the following screen.

**USDA Application Authorization Security Management**

**User Maintenance**

eAuth User ID \*    
 Name    
 Phone/Extn \*     
 Fax    
 Email Address    
 Assurance Level

After you have successfully searched for a user, you have three options. You can either “Maintain Role,” “Maintain User,” or “Add Role.”

- **Maintain Role** - Allows you to maintain the role(s) assigned to a user
- **Maintain User** – Allows you to maintain the user’s contact information
- **Add Role** – Allows you to add a new security role to a customer. This is also how you add a user to a TIN

**User List**

Tax Id: 120619770  
 System Id: All Systems  
 eAuth User ID: RDAViewOnly  
 Last Name:   
 First Name:   
 Submit

Action: Maintain Role  
 Maintain Role  
 Maintain User  
 Add Role

eAuth	Name	Status
<a href="#">RDAVIEWONLY</a>	Schneider, Ryan	Active

## 8.2 MAINTAINING A ROLE

If you select “Maintain Role,” you must click on the hyperlinked role to maintain the role.

**User List**

Tax Id: 120619770  
 System Id: All Systems  
 eAuth User ID: RDAViewOnly Use \* at end of eAuth User ID for wildcard search  
 Last Name: Use \* at end of Last Name for wildcard search  
 First Name: Use \* at end of First Name for wildcard search  
 Submit Reset Add User

Action: Maintain Role  
 Maintain Role  
 Maintain User  
 Add Role

eAuth	Name	Status	System	Role	Tax Id	Program
<a href="#">RDAVIEWONLY</a>	Schneider, Ryan	Active	RDDNLD	<a href="#">VIEWER</a>	120619770	

When you click the role, you will be navigated to the following screen:

User Role Maintenance

eAuth User ID

RDVIEWONLY

Last Name

Schneider

First Name

Ryan

Phone/Extn

(555)555-5555 Extn: 00000

Fax

Email Address

ryan.schneider@stl.usda.gov

Assurance Level

2

Status

Active

Authorized System \*

RDApply Authorized

Security Role \*

VIEWER

Tax Id \*

Save

Save ID

Remove ID

Remove Role

Reset

Back

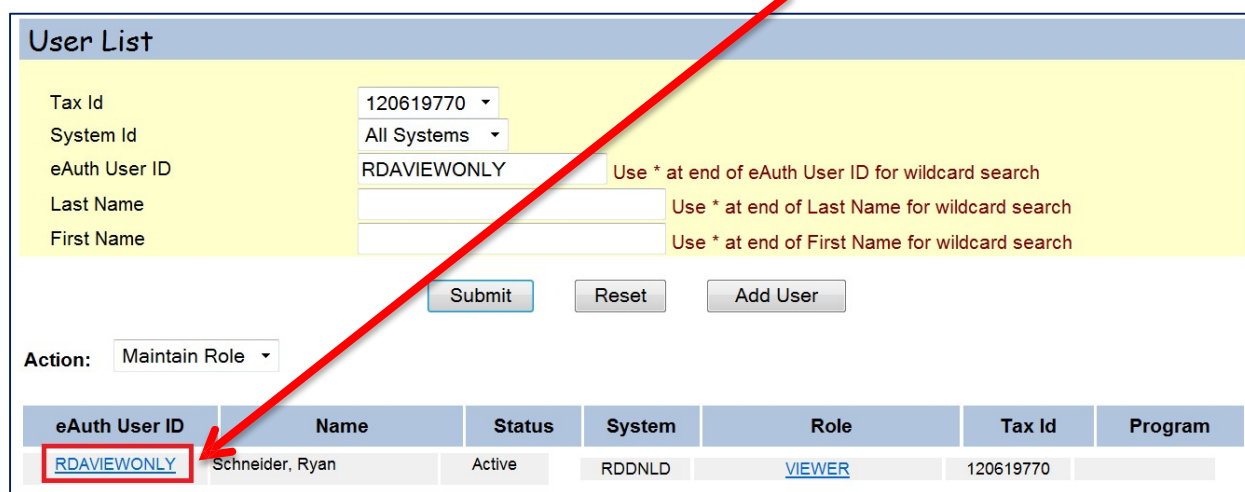
Select	Tax Id	Program Areas
<input type="radio"/>	120619770	
<input type="radio"/>	123121234	
<input type="radio"/>	996791339	BP

On this screen, you will see all of the TINs that the user has been assigned. In this case, these are all the TINs the user was assigned to as a “viewer.”

- **Save** – Enabled once you select a TINs. This lets you save any changes you make to the Authorized System, Security Role, or Tax ID.
- **Save ID** – Enabled when **no** TIN is selected, and disabled when you select a TIN. This lets you save any changes you make to the Authorized System, Security Role, or Tax ID.
- **Remove ID** – Enabled when you select a TIN. This lets you remove the user’s role for a specific TIN.
- **Remove Role** - Enabled when **no** TIN is selected, and disabled when you select a TIN. This lets you completely remove the role of viewer for all TINs.
- **Reset** – Clears all your fields
- **Back** – This lets you go back to the previous screen, where you can see all the user’s roles.

### 8.3 MAINTAINING A USER

If you select “Maintain User,” you must click on the hyperlinked eAuth User ID to maintain the user.



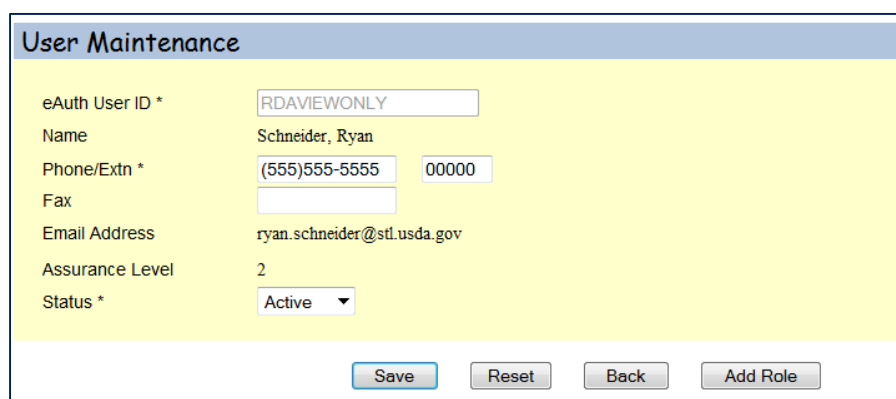
**User List**

Tax Id: 120619770  
 System Id: All Systems  
 eAuth User ID: RDAVIEWONLY Use \* at end of eAuth User ID for wildcard search  
 Last Name:  Use \* at end of Last Name for wildcard search  
 First Name:  Use \* at end of First Name for wildcard search

Action:

eAuth User ID	Name	Status	System	Role	Tax Id	Program
<a href="#">RDAVIEWONLY</a>	Schneider, Ryan	Active	RDDNLD	<a href="#">VIEWER</a>	120619770	

When you click the User ID, you will be navigated to the following screen:



**User Maintenance**

eAuth User ID \*: RDAVIEWONLY  
 Name: Schneider, Ryan  
 Phone/Extn \*: (555)555-5555 00000  
 Fax:   
 Email Address: ryan.schneider@stl.usda.gov  
 Assurance Level: 2  
 Status \*: Active

You can update the user’s phone number, fax number, and status. If the email address is incorrect, the user **must** login into their eAuthentication account and update their email there.

- Save – This lets you save your changes and return to the screen with all of the user’s roles
- Reset – Clears all your fields
- Back – This lets you go back to the previous screen, where you can see all the user’s roles.
- Add Role – This allows you to add a role and TIN to the user, the same way you would when maintain a role

## 8.4 ADDING A ROLE

If you select “Add Role,” you must click on the hyperlinked eAuth User ID to maintain the user.

**User List**

Tax Id: 120619770  
 System Id: All Systems  
 eAuth User ID: RDAVIEWONLY Use \* at end of eAuth User ID for wildcard search  
 Last Name: Use \* at end of Last Name for wildcard search  
 First Name: Use \* at end of First Name for wildcard search

Action:

eAuth User ID	Name	Status	System	Role	Tax Id	Program
<a href="#">RDAVIEWONLY</a>	Schneider, Ryan	Active	RDDNLD	<a href="#">VIEWER</a>	120619770	

When you click the User ID, you will be navigated to the following screen:

**User Role Maintenance**

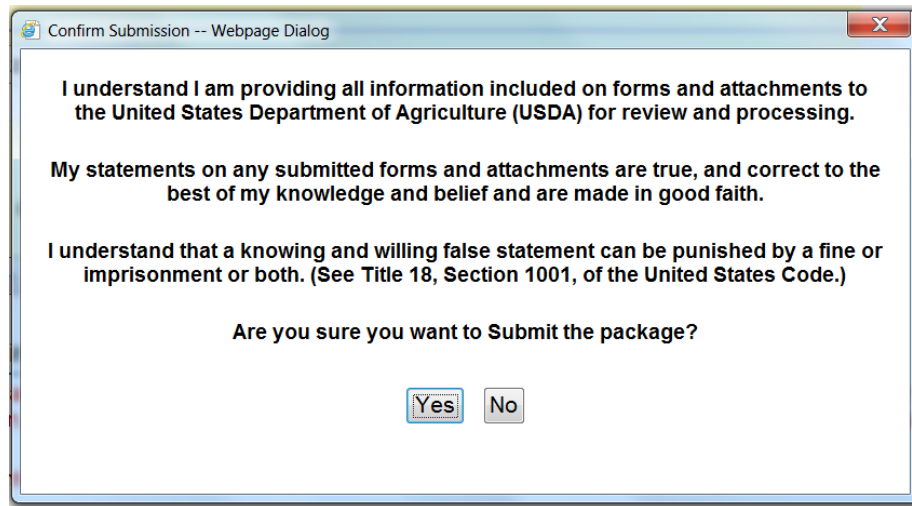
eAuth User ID: RDAVIEWONLY  
 Last Name: Schneider  
 First Name: Ryan  
 Phone/Extn: (555)555-5555 Extn: 00000  
 Fax: (333)333-3333  
 Email Address: ryan.schneider@stl.usda.gov  
 Assurance Level: 2  
 Status: Active

Authorized System \*: RDApply Authorized  
 Security Role \*: VIEWER  
 Tax Id \*: Select

Loan Program \* ( ☐ BP ) ( ☐ CF ) ( ☐ MH ) ( ☐ FSA ) ( ☐ RH ) ( ☐ WW )

You will be able to select an Authorized System, a Security Role, and a TIN for this user. The Loan Program is not required to save a role for a user.

When you select the “Save” button, you will be asked the following statement:



Confirm Submission -- Webpage Dialog

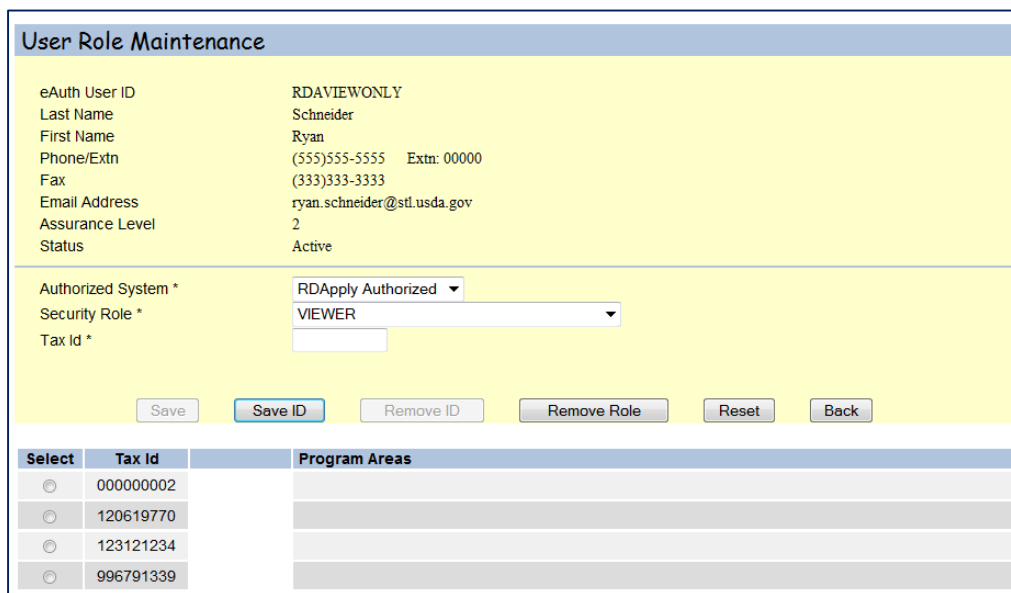
**I understand I am providing all information included on forms and attachments to the United States Department of Agriculture (USDA) for review and processing.**

**My statements on any submitted forms and attachments are true, and correct to the best of my knowledge and belief and are made in good faith.**

**I understand that a knowing and willing false statement can be punished by a fine or imprisonment or both. (See Title 18, Section 1001, of the United States Code.)**

**Are you sure you want to Submit the package?**

Once you click the “Yes” button, and successfully add a role, you will be directed to the following screen:



**User Role Maintenance**

eAuth User ID: RDAVIEWONLY  
 Last Name: Schneider  
 First Name: Ryan  
 Phone/Extn: (555)555-5555 Extn: 00000  
 Fax: (333)333-3333  
 Email Address: ryan.schneider@stl.usda.gov  
 Assurance Level: 2  
 Status: Active

Authorized System \*: RDApply Authorized  
 Security Role \*: VIEWER  
 Tax Id \*:

Select	Tax Id	Program Areas
<input type="radio"/>	000000002	
<input type="radio"/>	120619770	
<input type="radio"/>	123121234	
<input type="radio"/>	996791339	

Here you will be able to maintain the user’s role. If you do not need to update any of the roles, click the “Back” button to return to the main page.

## 8.5 ADDING A NEW USER

To search for a user, you must first select a Tax ID (TIN) from the dropdown box.

**User List**

Tax Id: Select (dropdown menu open showing list of TINs)

System Id: Select (dropdown menu open)

eAuth User ID: RDARepUpdateData (with hint: Use \* at end of eAuth User ID for wildcard search)

Last Name: (with hint: Use \* at end of Last Name for wildcard search)

First Name: (with hint: Use \* at end of First Name for wildcard search)

Buttons: Submit, Reset, Add User

After you have selected a TIN, you can enter a user's eAuth User ID, to see if they are associated to that TIN. If they are not associated to that TIN, you will see this error message:

**Validation Errors**

No records found for the search criteria entered.

**User List**

Tax Id: 123456789 (dropdown)

System Id: All Systems (dropdown)

eAuth User ID: RDARepUpdateData (with hint: Use \* at end of eAuth User ID for wildcard search)

Last Name: (with hint: Use \* at end of Last Name for wildcard search)

First Name: (with hint: Use \* at end of First Name for wildcard search)

Buttons: Submit, Reset, Add User

Since the user is not associated to that TIN, you will need to manually add them. To do that, you will need to click on the "Add User" button. You will be taken to the following screen:

**User Maintenance**

eAuth User ID \*

Name

Phone/Extn \*

Fax

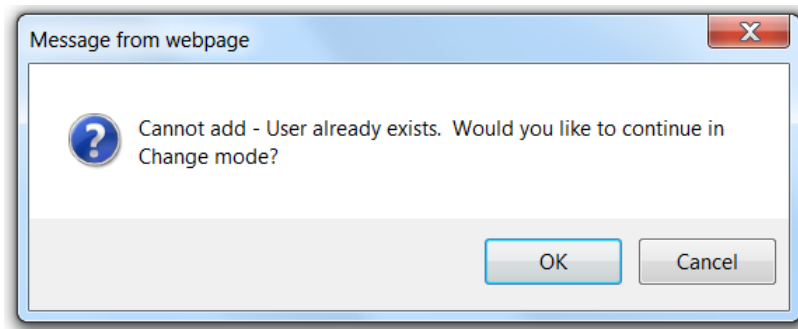
Email Address

Assurance Level

Buttons: Save, Reset, Back, Add Role



Type in the user's eAuth ID. When you tab away, the system will automatically search, and retrieve, any data about that user. If the user is already in the system, you will see this pop-up:



Clicking the “OK” button will take you to the User Maintenance screen.

User Maintenance	
eAuth User ID *	RDAREPUPDATEDATA
Name	Webster, Ben
Phone/Extn *	(201)555-5555
Fax	
Email Address	Benjamin.Webster@stl.usda.gov
Assurance Level	2
Status *	Active
<input type="button" value="Save"/> <input type="button" value="Reset"/> <input type="button" value="Back"/> <input type="button" value="Add Role"/>	

Click the “Add Role” button to be taken to the User Role Maintenance screen. Once there, you can add the user to one of your existing TINs.

User Role Maintenance	
eAuth User ID	RDAREPUPDATEDATA
Last Name	Webster
First Name	Ben
Phone/Extn	(201)555-5555
Fax	
Email Address	Benjamin.Webster@stl.usda.gov
Assurance Level	2
Status	Active
Authorized System *	RDApply Authorized
Security Role *	REPRESENTATIVE-UPDATE-DATA
Tax Id *	123456789
Loan Program *	<input type="checkbox"/> BP <input type="checkbox"/> CF <input type="checkbox"/> MH <input type="checkbox"/> FSA <input type="checkbox"/> RH <input type="checkbox"/> WW
<input type="button" value="Save"/> <input type="button" value="Reset"/> <input type="button" value="Back"/>	

If the user was not in the system, you would still be taken to the “User Maintenance” screen, where you would need to enter the user's contact information and then click the “Save” button. Once you have saved, you may click the “Add Role” button to start adding the user to one of your TINs.

## 9.0 SECURITY ROLES

When you link other users to your Tax Identification Number, you will also be able to assign them a security role. These roles are what allow users to access your application. Unless you assign other users to your application as Administrators or Representative-Signature-Certify, you will be the only person able to assign other users access to your application.

*Note: For more help on security roles please see: [Miscellaneous – Security Roles](#)*

## 10.0 WHO CAN I CONTACT FOR HELP?

If you are experiencing problems with RD Apply, please contact the Help Desk.

**E-mail:** [RD.HD@STL.USDA.GOV](mailto:RD.HD@STL.USDA.GOV)

**Phone:** (800)-457-3642; Select USDA Applications (Press 2); then select Rural Development (Press 2)

**Hours:** Monday through Friday – 7 a.m. to 5 p.m. (Central Standard Time)

**Please be prepared to provide the following information:**

- Legal Name of Organization
- eAuthentication ID
- Application ID Number
- Contact Person
- Phone Number
- Description of the specific problem
- Program you are applying for: Electric, Telecommunications, or Water & Environmental

# CREATING AN APPLICATION

## 11.0 HOME PAGE

When you login into RD Apply, you will be taken to the Home Page. Before you can get started, you must first choose an account that you would like to work on. If you accidentally click on the wrong account, you can click "Switch Account" in the Header to bring up the Customer Select box again.

Now that you have selected an account to work in, you can create a new application, submit an Authorized Representative Request, or access an existing application

Select Customer Affiliation	
TIN	Organization
999999999	Skurtu App
888888888	Test Application
	Other

Clicking "+ Add New Application" will cause a pop-up window to appear. This is the beginning of the Interview Process.



*Note: For more help on Interview Process, please see: [Common-Interview Process](#)*

Clicking "+Authorized Representative Request" will allow you to request authorized representation for your application.

*Note: For more help on Authorized Representation Request, please see: [Welcome to RD Apply - Linking your eAuth ID to a Tax Identification Number](#)*

The "Electric CWP" button navigates you to the Electric Construction Management module. Until you select a non-Electric application, you will always see this button on the Landing Page.

If you have already created an application, you can find it in the Search Results section.

Application Nbr ▼	Program ▲	Sub-Program ▲	Date Initiated ▲
3001809	Telecommunications	Infrastructure	10/23/2015

To open your application, click the hyperlinked *Application Nbr*. You will be redirected to your application's Customer screen.

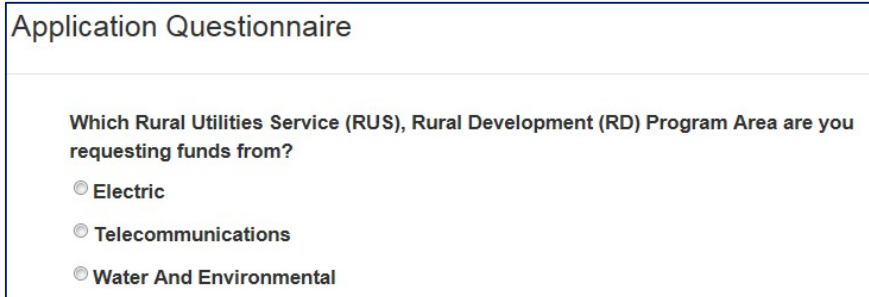
## 12.0 INTERVIEW PROCESS

After you have clicked, “+ Add New Application” a series of Interview Question pop-ups will appear:

Each answer to an interview question will determine what additional questions you will need to answer. Your answers to

all of the interview questions will drive which screens will appear in the system and what documents will become required in order for you to submit a complete application.

If you are unable to complete the interview, click the "X" button in the upper right hand corner. This will create a new pop-up with three options. You can save and exit, exit your interview without saving, or cancel the exit process and return to your current interview.



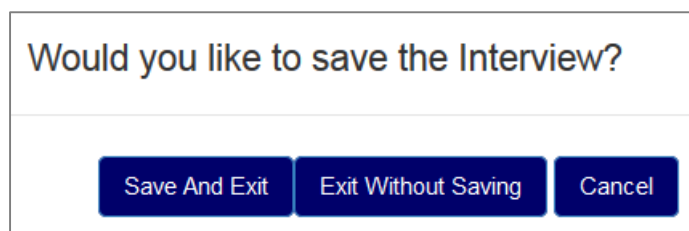
**Application Questionnaire**

Which Rural Utilities Service (RUS), Rural Development (RD) Program Area are you requesting funds from?

☐ Electric

☐ Telecommunications

☐ Water And Environmental



**Would you like to save the Interview?**

Save And Exit   Exit Without Saving   Cancel

If you are in the middle of an interview, and a different user tries to start a new interview, they will not be able to. Instead, they will see a pop-up, stating who is currently in an interview and to try again in a few moments.



**Warning: Another user has an unfinished interview for this TIN**

There is an interview in progress by Tammy Orlet, please try again in a few minutes.

OK

If there is a saved interview, then the user will have the option to either start a new interview or continue the existing interview.

*Note: For more help on required documents, please see: [Telecommunications Application Documents](#)*

## 13.0 INTERVIEW RECAP

Interview Recap is where you can see your interview answers. This is also where you can modify your answers if you need to change a previously submitted response.

*For example:*

John Smith originally said that he needed funds for an acquisition. But a few months later, he realizes that the acquisition is not going to happen. John Smith would then need to go under the Interview tab, click the "Modify" button for the question "What is the Nature of the Network changes being made?", and remove Acquisitions as part of his funds request.

Interview Recap		
Question	Answer	Actions
Which Rural Utilities Service (RUS), Rural Development (RD) Program Area are you requesting funds from?	Telecommunications	
Please validate the Legal Name is correct for the application you are creating.	Continman Telecom	Modify
Is this your entity's first application with Rural Utilities Service (RUS), Rural Development (RD)?	Yes	Modify
What type of funding opportunity are you applying for?	Telecommunications Infrastructure	Modify
Are your company's depreciation rates regulated by a state regulatory commission?	No	Modify
What type of funds are you applying for?	Cost of Money	Modify
Are you using non-loan funds during the forecast period?	No	Modify
What is the Nature of the Network changes being made? NOTE: An applicant may not request loan funds solely for Acquisition and/or Refinance purposes. You must also include one of the following options: Upgrade Existing Network, Expanding Existing Network, or Building a New Network.	Upgrade Existing Network, I	Modify

## 14.0 CUSTOMER

The customer screen is where you can enter all your organizational data, as well as contact information. This is

General Information

Legal Name:

Organizational Description:

Organizational Type:

where you tell RUS what kind of organization you are. This is also where you supply your RUS ID, DUNS Nbr, CAGE Code, and key contacts information, as well as any other required demographic data.

*Note: In order to submit your application, you must supply at least one key contact and one valid address.*

# 15.0 LOAN REQUEST

The top of the Loan Request screen is where you can enter all the details about your project, as well as the technology type you plan to use.

Interview

Customer

Loan Request

Service Area(s)

Construction

Financials

Competition

\*Project Title

Purpose

\*Technology Type

☐ BPL

☐ DSL

☐ Fixed Wireless - Licensed

☐ Fixed Wireless - Unlicensed

☐ Hybrid-Fiber-Coax

☐ FTTH

☐ Satellite

☐ Other

The bottom of the Loan Request screen is broken into two sections:

- Loan Amount
- Nature of Network Changes

The Loan Amount section is where you enter in the loan amount you are requesting from RD Apply.  
The Nature of Network Changes section is where you explain how you will be using the loan.

Loan Amount	
* Cost of Money	<input type="text"/>
* FFB	<input type="text"/>
* Hardship	<input type="text"/>
Total Loan Request	\$0

Nature of Network Changes	
* Upgrade Existing Network	<input type="text"/>
* Expand Existing Network	<input type="text"/>
* Build New Network	<input type="text"/>
* Acquisition	<input type="text"/>
* Refinance	<input type="text"/>
* Other	<input type="text"/>
Total	\$0

The Loan Amount section will show the loan type(s) you selected in the Interview. The Nature of Network Changes will show the Nature of Network change(s) you selected in the Interview. Your data will automatically total as it is entered into the different fields.

*Note: Your loan amount options will change, depending on whether you selected "Farm Bill" or "Infrastructure" in the interview.*

In order to submit your application, the "Total Loan Request" total amount must match your "Total Nature of Network Changes" total amount.



#### Key Program Tips:

- Acquisition amount on Loan Request screen must match the Acquisition amount on the Acquisitions screen
- If you are a Farm Bill Applicant, your Acquisition amount cannot be more than 50% of the loan requested
- If you are requesting funds for Refinancing, your Refinance amount cannot be more than 40% of the loan requested
- The "Upgrade Existing Network," "Expanding Existing Network," and "Building New Network" total amount(s) must match the Capital Investment Workbook total located on the Capital Investment Summary sub-tab (if you enter data on the Loan Request screen, you must go back and re-save Loan Request after entering data in Capital Investment Workbook).

## 16.0 SERVICE AREA MAPPING

This screen is where you can draw your Service Area(s). You will have the option to either draw your Service Area(s) or upload an existing Shapefile of your Service Area(s).

### 16.1 CREATING A SERVICE AREA

To create a Service Area Map, click on “Add New” button and provide the information request in the “Add New Service Area” pop-up.

*Note: You must select whether or not your Service Area is Funded or Non-Funded, and what type of services you will be providing in that Service Area.*

After entering your data, if you select “Save and Exit,” you will be re-directed back to the Service Area screen.

If you click on “Draw/Upload,” the initial drawing page will load and several tools will appear across the top of the screen: Draw, Upload, Layers, Legend, Instructions, Save, Save and Exit, and Exit.

You are now ready to create your Service Area.

**Add New Service Area**

\*Program Type:  
Telecommunications

\*Funding Type:  
Telecommunications Infrastructure Loan

\*Area Name:

\*Service Area is:  
☒ Funded ☐ Non-Funded

\*Check all services to be provided within the service area:  
☐ Voice ☐ Video ☐ Data

Comments:

**Draw/Upload** **Save and Exit**

### 16.2 DRAWING A SERVICE AREA

To draw your service area, select the Draw feature in the upper left-hand corner of the screen. Once you have a done so, the following Editing Tools will be displayed: Polygon, FreeHand, Select, Cut, Delete, and Edit.



You will also see three Select Tools options: Select City, Select Blocks, and Create Polygon.

The Polygon tool allows you to draw a point-by-point polygon by clicking the left mouse button to create polygon points on the map. To begin, click the Polygon button under Editing Tools. Use the mouse to select your desired polygon points on the map. When you are finished, double-click the left mouse button to close the shape.

*Note: It is important to click slowly so that the application properly registers each point/vortex that is clicked on the map.*





## 16.4 UPLOADING A MAP

To upload a Shapefile, click on the “Upload” button at the top of the screen, select the Area Type (Base or Unserved) and then browse for the .zip file you want to upload. Select the file to upload and click on the “Upload” Button. The “Loading” page will appear while the Shapefile is being uploaded. If the Shapefile loads successfully, the Map will render the Service Area(s), which can then be edited by using the Draw feature.

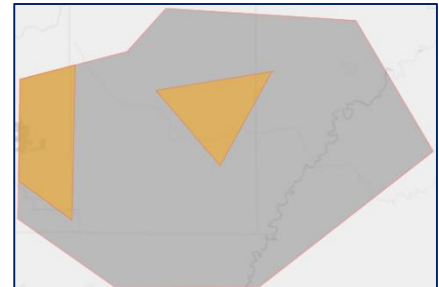
Below are the file specifications for zipped Shapefiles:

1. All map areas must be closed, non-overlapping polygons with a single, unique identifier.
2. The Shapefile must have an assigned projection with an accompanying .prj file.
3. The Shapefile must use an unprojected (geographic) WGS84 geographic coordinate system.
4. The Shapefile must be submitted as a \*.zip file. This can be done with a WinZip or in Windows by selecting the files associated with a Shapefile, right-clicking the files, then clicking “Send” to Compressed (zipped) fold. Be sure that your \*.zip file contains only one Shapefile.
5. \*.zip file size must not exceed 2GB

## 16.5 DRAWING UNSERVED AREAS

For Farm Bill applications, at least 15% of the proposed Service Area must be unserved. Unserved areas are created much the same way as Base areas are created. Click on the “Draw” feature in the upper left-hand corner of the screen and select “Unserved” as the Area Type. Select the tool you wish to use to draw the unserved area. Please note that the system will not allow you to create Unserved Areas without first creating a Base Layer.

The system will show how much of the Service Area is unserved. If the % of Unserved is less than 15%, the system will generate a notification when you exit, notifying you that the Service Area is currently less than 15% unserved. When drawing unserved Areas, any portion that is drawn outside of the Base Service Area will be cut to fit within the Base Service Area.



## 16.6 TOOLBAR ITEMS



**Layers:** Allow users to access the display layers.

*Note: As more layers are activated, more data must be collected, causing the system to take longer to display your drawn Service Areas. Sometimes, you may need to zoom in closer to the map in order to see the Layers appear on the screen.*

**Legend:** Holds the colors the users will see on the map as Layers are applied.

**Instructions:** This shows the Instructions for using the Service Area Mapping Tool.

**Save, Save and Exit, Exit:** Once you are finished drawing, you may click “Save,” “Save and Exit,” or “Exit.” Save will save your progress without exiting. Save and Exit will save your progress and return you to the Service Area(s) Tab. Exit will return you to the Service Area(s) tab without saving your progress.

**Edit/View Data:** Allows you to review the data you entered on the Add New Screen and enter Alternate Data for the Census provided information. If you provide any alternative information, you will be required to enter a Justification.

**Hide:** Allows you to minimize the toolbar.

## 16.7 VIEWING CENSUS DATA

RD Apply allows you to view the census data for each Service Area that you draw/upload.

Service Area(s)							<a href="#">Add New +</a> <a href="#">View All</a>
Service Area Name	Population	Housing Units	Households	Businesses	Square Miles	% of Rural vs. Urban	Actions
Service Area #1	158421	67358	63280	7434	8258	99.28%	<a href="#">Edit / View Map</a> <a href="#">Delete</a>
Service Area #1 - Alternate	0	0	0	0	0	0.00%	<a href="#">Edit / View Data</a>

**Edit/View Data:** Allows you to review the data you entered on the Add New Screen and enter Alternate Data for the Census provided information. If you provide any alternative information, you will be required to enter a justification.

Service Area #1	Existing	Alternate
<b>Total Population</b>	<input type="text" value="158,421"/>	<input type="text" value="0"/>
<b>Total Housing Units</b>	<input type="text" value="67,358"/>	<input type="text" value="0"/>
<b>Total Households</b>	<input type="text" value="63,280"/>	<input type="text" value="0"/>
<b>Total Businesses in Zip Codes</b>	<input type="text" value="7,434"/>	<input type="text" value="0"/>
<b>Total Square Miles</b>	<input type="text" value="8,258"/>	<input type="text" value="0"/>
<b>Percent of Rural vs. Urban</b>	<input type="text" value="99.28%"/>	<input type="text" value="0.00%"/>
<b>Explanation for changes in detail</b>	<input type="text"/>	

*For example:*

If the census data says that the Median Household Income is \$54,307 but you know that it is really \$54,650, you can type that into the "Alternate" text field.

## 17.0 CONSTRUCTION

### 17.1 BUILDOUT TIMELINE

The Buildout Timeline screen is where you can enter any relevant timelines and milestones for the Capital Investment Workbook.

Buildout Timeline and Milestones		
Time Period	List All Relevant Milestones	Support for Reasonableness/Data Points
Year 1 ▾	Milestone 1	Support for Milestone 1

You will be able to enter data for years 1-5, with up to ten entries per year. To add a new row, click on the “Add New +” button and select the year you would like to fill out.

*Note: All years must have at least one entry in order to save with no errors.*

### 17.2 CAPITAL INVESTMENTS WORKBOOK

*Note: In order to complete the Capital Investments Workbook, you need to have a saved Service Area.*

#### Adding a Capital Investments Workbook

When you first open the Capital Investments Workbook it will default to Workbook #1. You can add more workbooks by clicking the “Add Workbook Project +” button.

To associate a workbook with a Service Area(s), click the “Select Service Area(s)” button. This will cause a pop-up to appear. You can either select an existing Service Area(s) that was created using the Service Area mapping tool, or you can select “Other.” If you select “Other,” you will need to type a name into the field in order to save.

Service Area(s) X

☐ #1
 ☐ #2
 ☐ Check Edit

☐ SA 3
 ☐ NEW SA

Cancel

Ok

*Note: If you have not created a Service Area(s) yet, you will only see “Other.”*

After saving your selected Service Area(s) your current workbook will be renamed to match the Service Area(s). Once you add a Service Area(s) it will be displayed in the Service Area(s) module under the “Select Service Area(s)” button.

### Deleting a Capital Investments Workbook

To delete your Capital Investments Workbook you must click on the “Delete” button next to the “Add Workbook Project +.” After clicking the “Delete” button, a confirmation message will appear, asking if you are sure you want to continue. If you click the “Continue” button, your Workbook will be deleted, as well as any “Other” Service Area(s) associated to that workbook. It will not delete any Service Area(s) that you have created on the Service Area screen.

If you are down to your last workbook, clicking the “Delete” button will only clear your date contained within the Workbook; you must have at least one Workbook in order to proceed with your application.

*Note: The “Delete” button in each row will only delete that specific line. It will not delete the entire workbook.*

## 17.3 CAPITAL INVESTMENTS WORKBOOK SUMMARY

The Capital Investments Workbook Summary Screen is a view-only screen. It shows you the “RUS Funded Amount,” “Non RUS Funded Amount,” and the “Total” for each Service Area(s) per category entered on the Capital Investments Workbook.

Immediately following the “Other Upfront Costs” section, there will be an “Aggregate Total” section. This section will display the RUS Funded, Non RUS Funded, and Total Budget Costs for all of the Service Areas.



#### Key Program Tip:

- The “Upgrade Existing Network,” “Expanding Existing Network,” and “Building New Network” total amount(s) on the Loan request screen must match the Total RUS Funded Costs on the Capitol Investment Workbook Summary screen.

## 17.4 DEPRECIATION

All Telecom applications will have a Depreciation Schedule screen. However, whether the Depreciation Rate (Percentage) field is entered or calculated depends on an interview question:

**If you answer “No” to following interview question:**

- Are your company’s depreciation rates regulated by a state regulatory commission?

Then the depreciation rates are calculated based on the section and the item selected in the Project Assets dropdown. The depreciation rate will also calculate what your Economic Life in Years is.

*For example:*

If Video Equipment is selected, it has a depreciation rate of 10.00% and an economic life of 10 years.

Equipment		
Project Assets	Depreciation Rate (Percentage)	Economic Life (Years)
Video Equipment ▾	10%	10.00

**If you answer “Yes” to the following interview question:**

- Are your company’s depreciation rates regulated by a state regulatory commission?

Then you will need to enter the Depreciation Rate (Percentage).

Equipment		
Project Assets	Depreciation Rate (Percentage)	Economic Life (Years)
Engineering ▾	<input type="text"/>	<input type="text"/>

In order to submit your application, you must fill out the fields for Years 1-5. As you enter data, the “Total(s)” fields will automatically sum your amounts.

Year 1	Year 2	Year 3	Year 4	Year 5	Total
<input type="text" value="\$5,000"/>	<input type="text" value="\$5,000"/>	<input type="text" value="\$5,000"/>	<input type="text" value="\$5,000"/>	<input type="text" value="\$5,000"/>	<input type="text" value="\$25,000"/>
<input type="text" value="\$5,000"/>	<input type="text" value="\$5,000"/>	<input type="text" value="\$5,000"/>	<input type="text" value="\$5,000"/>	<input type="text" value="\$5,000"/>	<input type="text" value="\$25,000"/>

## DEPRECIATION PRIOR LOANS AND DEPRECIATION NON LOANS

These are two sub-tabs found under the Construction Tab.

If you answer “Yes” to the following interview question:

- Do you have a previous RUS loan for which you will be completing construction during the 5 year forecast period?

Then the Depreciation Prior Loans sub-tab will appear.

Depr PL									
Equipment <span>Add New +</span>									
Project Assets	Depreciation Rate (Percentage)	Economic Life (Years)	Year 1	Year 2	Year 3	Year 4	Year 5	Total	Actions
Routing Equipment	9.09%	11.00	\$7,675	\$7,878	\$7,878	\$7,878	\$7,878	\$39,187	Delete
Totals:			\$7,675	\$7,878	\$7,878	\$7,878	\$7,878	\$39,187	

If you answer “Yes” to the following interview question:

- Are you using non-loan funds during the forecast period?

Then the Depreciation Non Loans sub-tab will appear.

Depr NL									
Equipment <span>Add New +</span>									
Project Assets	Depreciation Rate (Percentage)	Economic Life (Years)	Year 1	Year 2	Year 3	Year 4	Year 5	Total	Actions
Video Equipment	10.0%	10.00	\$234	\$1,234	\$5,342	\$234	\$234	\$7,278	Delete
Totals:			\$234	\$1,234	\$5,342	\$234	\$234	\$7,278	

*NOTE: All depreciation screens share the same drop-downs and fields, as well as the same calculation formulas.*



## 18.0 ACQUISITION

If you selected the Acquisition checkbox in the following interview question:

- What is the Nature of the Network changes being made?

Then the Acquisitions tab will appear. You will need to complete Acquisitions in order to submit your application.

*Note: You can enable/disable the Acquisitions screen by modifying your interview question.*

You can enter up to two acquisitions per application. In order to select more than one acquisition, you will need to answer “Yes” to the following question on the Acquisitions screen:

- Are you acquiring more than one Company and/or Physical Assets?

When you answer “Yes,” then you can fill out the details of your second acquisition at the bottom of the screen. If you answer “No,” then that extra section will be hidden.

Are you acquiring more than one Company and/or Physical Assets? ☐ Yes ☒ No

*Note: If you answered yes to: “Are you acquiring more than one Company and/or Physical Assets?” on the Acquisitions screen, then the Total Purchase Price of both acquisitions must equal the Acquisition amount on the Loan Request screen.*

The answers you select for “Organization Type” and “Acquisition Type” affects what is displayed on the screen.

Organization Type	Proposed Purchase Price	Acquisition Type
<input type="text"/>	<input type="text"/>	<input type="text"/>



### Key Program Tip:

- If you modify your answers on the Acquisitions screen to hide a segment, or modify an interview question to hide the entire tab, when you change the answer back to the original value, your data will still be there.
- If you do have an acquisition, you will need to make sure that the amount you enter on the Acquisitions screen matches the amount you entered on the Loan Request screen.
- Always enter each county on its own line.

## 19.0 FINANCIALS

There are six screens you need to complete in order for Financials to be finished on the Summary/Submit screen. These screens are:

- Subscriber Projections
- Non-Operating Revenue
- Balance Sheet
- Income Statement
- Cash Flows
- Debt and Equity Funding

*Note: All the financial screens, except for Subscriber Projections and Debt & Equity Funding, make up the Proforma. You may export the Proforma to an Excel Worksheet on any of the Proforma screens. You can still export the Subscriber Projections and Debt & Equity Funding screens to an Excel spreadsheet by clicking on the “Export to Excel” button on each respective screen. They will **not** appear in the Proforma workbook.*

Some screens are dependent on other sections of your application.

*For example:*

Enter your Revenue and Expense data in the white input fields. The system will calculate your “Non-Operating Net Income” by finding the difference between your revenue and expenses.

Non-Operating Revenue										Add New +
Item	3 Years Prior	2 Years Prior	1 Year Prior	Base Year	Year 1	Year 2	Year 3	Year 4	Year 5	Action
Non Op Rev Test	\$1,500	\$2,500	\$3,500	\$4,500	\$5,500	\$6,500	\$7,500	\$8,500	\$9,500	Delete
Non Op Rev Test	\$1,000	\$1,000	\$1,000	\$1,000	\$1,500	\$1,500	\$1,500	\$1,500	\$1,500	Delete
Total:	\$2,500.00	\$3,500.00	\$4,500.00	\$5,500.00	\$7,000.00	\$8,000.00	\$9,000.00	\$10,000.00	\$11,000.00	

Expense Schedule										Add New +
Items	3 Years' Prior	2 Years' Prior	1 Years' Prior	Base Year	Year 1	Year 2	Year 3	Year 4	Year 5	Action
Expense Test	\$1,500	\$1,500	\$1,500	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	Delete
Totals:	\$1,500.00	\$1,500.00	\$1,500.00	\$1,200.00	\$1,200.00	\$1,200.00	\$1,200.00	\$1,200.00	\$1,200.00	
Non-operating Net Income:	\$1,000.00	\$2,000.00	\$3,000.00	\$4,300.00	\$5,800.00	\$6,800.00	\$7,800.00	\$8,800.00	\$9,800.00	

## 19.1 SUBSCRIBER PROJECTIONS

*Note: In order to complete the Subscriber Projections section, you need to have a saved Service Area.*

Subscriber Projections is collected and displayed by Service Area.

Each detail line will collect data to define:

- Service Offering (Voice, Video, Data, etc.)
- Customer base (Residential or Business)
- Number of Current Subscribers
- Price per Month
- Projected Subscribers for each of the next 5 years

Additional detail lines can be added to define multiple Service Areas or multiple Service Offerings per Service Area.

Subscriber Projections											Add New+
Service Area	Service Offering	Service Level Offering	Residential or Business	Current Subscribers	Year 1	Year 2	Year 3	Year 4	Year 5	Price(\$/Month)	Actions
Select Area(s)	Voice	Voice over c	Residen	15000	4500	7500	11500	13500	14750	\$64.00	Delete
Selected Areas: Wyoming											

If you enter in multiple Service Offerings of the same type, the Price per Month (*Price (\$/Month)*) under the Totals will display the average. All other fields are the sum.



### Key Program Tip:

- If you are an applicant proposing a penetration rate of greater than 20% in any given Service Area, you must enter separate projections for those Service Areas. Do not use the multi-select Service Area feature for those Service Areas.
- If you are an applicant proposing a penetration rate of greater than 20% in any given Service Area, you must provide a Market Survey for that Service Area.

A summary section will display Totals by Service Offering. The Price per Month (*Price (\$/Month)*) displayed will be the average of all Prices for each Offering.

To fill out a Subscriber Projection, first click on the “Select Area(s)” button. This will open a pop-up where you can select any of your existing Service Area(s), already created using the Service Area Mapping tool. Once you add a Service Area(s) it will be displayed in the Service Area(s) module under the “Select Service Area(s) button.

Service Area(s)

☐ #1
 ☐ #2
 ☐ Check Edit

☐ SA 3
 ☐ NEW SA

Cancel

Ok

As you begin entering in data for each Service Area(s)'s Subscriber Projections, the "Totals By Service Offering" will automatically sum your amounts.

Totals By Service Offering							
Service Offering	Current Subscribers	Year 1	Year 2	Year 3	Year 4	Year 5	Price(\$/Month)
Voice	15000	4500	7500	11500	13500	14750	\$64.00
Data	0	0	0	0	0	0	\$0.00
Video	0	0	0	0	0	0	\$0.00
Voice/Data	0	0	0	0	0	0	\$0.00

## 19.2 DEBT AND EQUITY FUNDING

This screen is separated into six sections – Long Term Debt Obligations – USDA Rural Development, Long Term Debt Obligations – Existing USDA RUS, Long Term Debt Obligations – Proposed Loan Request, Long Term Capital Lease Obligations, Funded Debt – Other and Equity Contributions. The intent is to gather Loan information concerning RUS and Non-RUS Funding.

Long-term Debt Obligations - USDA Rural Development												Add New +
Lender	Loan Description	Principal Amount	Annual Interest Rate	Term of Loan in Years	Number of Payments per Year	Annual Payment Amount	Start Date of Loan	Loan Secured by Company Assets	Security Evidenced by UCC	State of UCC Filing	Date of UCC Filing	Action
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	MM <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	MM <input type="text"/>	Delete

## 19.3 PROFORMA

### NON-OPERATING REVENUE

This screen collects both Revenue and Expense data. The first section, Non-Operating Revenue, collects information about your revenue. The second section, Expense Schedule, collects information about your expenses.

Each time you enter a new row you will have to name the Item. You can add as many Items as you need.

When filling out this screen, you will need to enter data from your three historical years, the base years, along with five years of projected future amounts. As you enter in the data, the Total line will automatically display your accumulated Revenue or Expenses Totals.

*Note: If you are not reporting any non-operating revenues or expenses for any given year, input a \$0 for that year.*

Non-Operating Revenue	
Item	3 Years Prior
abc	\$1,100
Total:	\$1,100.00
Expense Schedule	
Items	3 Years' Prior
abcd	\$500
Totals:	\$500.00
Non-operating Net Income:	\$600.00

The Non-Operating Net Income is located at the bottom of the screen. As you enter in your revenue and expenses amounts, the system will automatically calculate what your Non-Operating Net Income will be. This is done by subtracting your Expenses from your Revenue.

*Note: Your Non-Operating Net Income data is automatically carried over to populate Line Item 7, "Non-Operating Revenues" on the Income Statement.*

## BALANCE SHEET

This screen collects data about your Assets, Liabilities and Equities. When filling out this screen, you will need to enter data from the last four years as well as five years of projected future amounts.

Year of Application:

2017

ASSETS									
Current Assets	Previous Year 4 2013	Previous Year 3 2014	Previous Year 2 2015	Previous Year 1 2016	Future Year 1 2017	Future Year 2 2018	Future Year 3 2019	Future Year 4 2020	Future Year 5 2021
1. Cash and Equivalents	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2. Cash - RUS Construction Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Once you have selected your "Year of Application," it will automatically become Future Year 1 for all of the financial screens. All of the other future and previous years will be calculated automatically, based off the year you selected.

*Note: Total Assets must match Total Liabilities & Equity.*

## INCOME STATEMENT

The Income screen is designed to collect Revenue and Expense data.

Item	Previous Year 4 2013	Previous Year 3 2014	Previous Year 2 2015	Previous Year 1 2016	Future Year 1 2017	Future Year 2 2018	Future Year 3 2019	Future Year 4 2020	Future Year 5 2021
Local Network Services Revenues	<input type="text" value="\$0"/>	<input type="text" value="\$0"/>	<input type="text" value="\$0"/>	<input type="text" value="\$0"/>	<input type="text" value="\$0"/>	<input type="text" value="\$0"/>	<input type="text" value="\$0"/>	<input type="text" value="\$0"/>	<input type="text" value="\$0"/>
a. Broadband	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
b. Voice	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

*Note: Line 16 – Non-Operating Net Income is pulled from the Non-Operating Revenue screen.*

**Several calculations are generated at the bottom of the statement:**

**EBITDA:** Earnings before Interest, Taxes, Depreciation and Amortization = Total Net Income or Margins + Total Fixed Charges + Taxes + Depreciation + Amortization.

**EBIT:** Earnings before Interest and Taxes = Total Net Income or Margins + Total Fixed Charges + Taxes.

**TIER:** Times Interest Earned Ratio = (Total Net Income or Margins + Total Fixed Charges) ÷ Total Fixed Charges.

**DSCR:** Debt-Service Coverage Ratio = (Total Net Income or Margins + Total Fixed Charges + Depreciation + Amortization) ÷ (Interest on Funded Debt + Other Interest Expense + Principal Payments on Long-Term Debt and Capital Leases).

## CASH FLOWS

Cash Flow is a collection of Cash Flow data from Operating, Investing and Financing Activities. Beginning Cash and Net Income (Loss) are pulled from the Income Statement. It is important to note that Cash Flow shows eight years of data (not nine years like the other financial screens). For example, year 2014 on the Income Statement will feed the column for year 2015 on the Cash flow screen.

Beginning Cash (Cash & Equivalents plus RUS Const. Fund)								
Cash Flow from Operating Activities								
Net Income (Loss)								
Adjustments to Reconcile Net Income (Loss) to Net Cash Provided by Operating Activities								
Add Depreciation								

## 20.0 COMPETITION

This screen is where you can list out any companies that might compete in your Service Area(s). If you have multiple competitors, click the “Add New +” button to add more lines. You can also assign multiple Service Area(s) to a competitor.

Competition							Add New+
Service Area	Competitor Name	Service Offering	Service Level Offering	Residential or Business	Price (\$/Month)	Actions	
<a href="#">Select Area(s)</a>	Competitor #1	Voice	A-Level	Residential	\$15.00	<a href="#">Delete</a>	
Selected Areas: Test Area							

To list a competitor, first click on the “Select Area(s)” button. This will open a pop-up where you can select any of your existing Service Area(s), already created using the Service Area Mapping tool. Once you add a Service Area(s) it will be displayed in the Service Area(s) module under the “Select Service Area(s) button.

After you have selected your Service Area(s), you can enter your Competitor's Name, their Service Offering(s), and their Service Level Offering(s). You can also select whether they provide their services to Businesses or Residences, and what their price per month is.

## 21.0 ENVIRONMENTAL

In order to enter data on the Environmental screen, both the Capital Investments Workbook and Service Area sections need to be completed. If they are not, you will see a blank screen with the following message:

Environmental data cannot be entered until the Capital Investments Workbook has projects entered on the Construction screen.

Capital Investment Workbook - Workbook #1

Workbook #1 Service Areas :

Once the Capital Investments Workbook is completed, the Environmental screen will be editable.

Each project entered on the Capital Investments Workbook will be shown on the Environmental screen. The data shown in the "Project," "Description," and "Nbr of Unit/Route/Miles/New Towers" fields are pulled over from the Capital Investments Workbook screen. The "Supplemental Description" and "Citation" fields are optional and will not affect your application's submittal.

Project	Cap. Investment Workbook Description	Nbr of Unit/Route Miles/New Towers	Special circumstances	Proposed Classification	Action
Switching	hh	1000.0	<input type="radio"/> Yes <input checked="" type="radio"/> No		<a href="#">View Details</a>
Routing	ok	2.0	<input type="radio"/> Yes <input checked="" type="radio"/> No		<a href="#">View Details</a>

You will have to select a "Classification" dropdown value. If you select Category Exclusion (CatEx), then you will not have to enter the "Details." If you select any other values, then you must fill out the "Details" section.

In the "View Details" section, all the fields are required, except for "Mitigation and Monitoring."

Details

Category: Network and Access Equipment

ROW/Site Description: Residential Development

Mitigation and Monitoring: Test Mitigation and Monitoring

Land Jurisdiction: Private

Other Federal Involvement: Department of Energy - Western Area Power Administration

## 22.0 DOCUMENTS

The Documents Tab is where you can upload attachments and sign certifications. Some attachments and certifications are required, based on your interview questions. Until you have uploaded/signed the required document, you will not be able to submit your application.

When a document has a red “X” next to it, it means it has not been completed. When a document has a green checkmark next to it, it means it has been completed successfully. If there is no red “X” or green checkmark, then that document is optional. If you decided to update that document, then the status will change to either a red “X” or a green checkmark.

All Pills under the Documents Tab must be completed in order for the Documents Tab to be marked as finished.

### 22.1 ATTACHMENTS

The Attachments Sub-Tab is located under the Documents Tab. This is where you can upload any required attachments as well as upload any additional attachments that you may have.

#### Uploading a Required Attachment

To upload an attachment, click on the “Upload” button to open a dialog box to search for your file. Once you have selected your file, the dialog box will close and your file will be uploaded.

*Note: If you want to add a description to your attachment, you must enter it before uploading your document. Once you have uploaded the document, the field will be locked down and you must delete your attachment to enter a description.*

Required Attachments							
Below is a list of Attachments required to complete this Application. Please upload the Attachment requested for each row marked with an ✖. Upon successful completion of the upload, the row is marked with a ✔. If more than one upload is required by a Category/DocumentType, please select the Blue “Upload” Button on the right of the “Additional Attachments” Section at the bottom of this screen.							
Upload Status	Category	Document Type	Description	File Name	Date	Uploaded By	Action
✖	Certifications	Design Certification(s)	<input type="text"/>			NA	<a href="#">+ Upload</a>

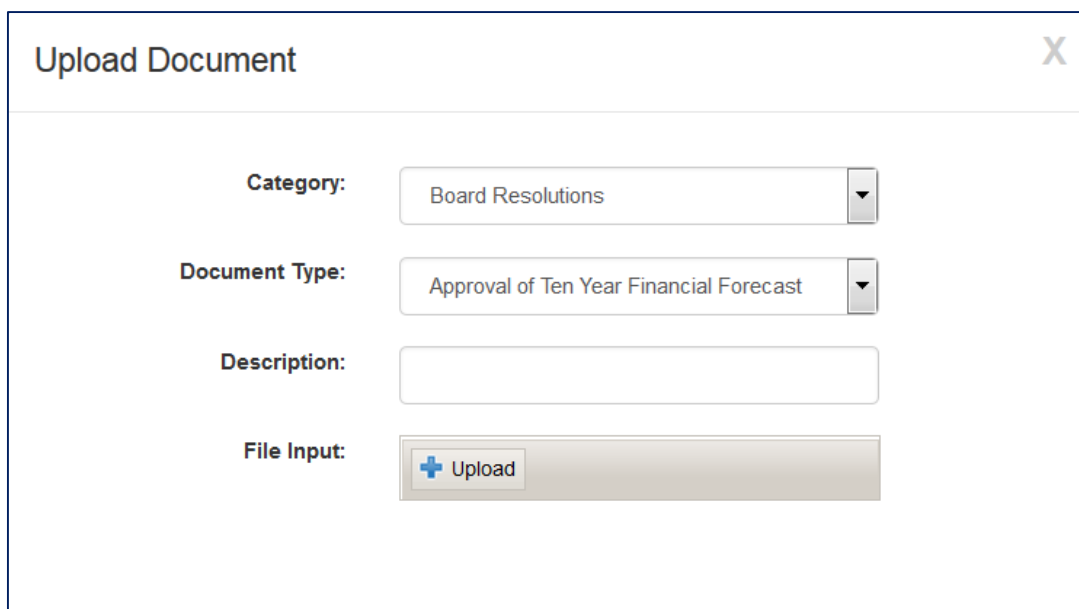
To delete an attachment, you must click the “Delete” button next to that attachment. A message will appear, asking if you are certain that you wish to delete this attachment. You must confirm that you are certain in order to delete your attachment.



### Uploading Multiple Attachments

After you have uploaded your initial attachment, you will have the optional to upload multiple attachments for that same Category and Document Type. Click the “Add” button next to the initial document you uploaded.

A pop-up will appear, with the same Category and Document Type as the initial attachment.



The screenshot shows a modal window titled "Upload Document" with a close button (X) in the top right corner. The form contains the following fields:

- Category:** A dropdown menu with "Board Resolutions" selected.
- Document Type:** A dropdown menu with "Approval of Ten Year Financial Forecast" selected.
- Description:** A text input field.
- File Input:** A button with a plus icon and the text "Upload".

If you want to add a description, do so before you upload your attachment. Click the “Upload” button to browse for your file. Once you have selected it, the modal will close and you will see your uploaded attachment.

### Uploading an Additional Attachment

To upload an Additional Attachment you must click on the “Upload” Button in the Additional Attachments header. Clicking it will open a modal that lets you select the Category, the Document Type, and then browse for the attachment.

The Document Type dropdown box is dependent on the Category dropdown. If you change your choice in the Category dropdown then it will change the choices available in the Document Type dropdown.

After uploading your attachment it will appear under the Additional Attachments with a green checkmark. If you want to delete this attachment, you must click the “Delete” button next to it.

#### The only accepted file types are:

.doc, .pdf, .xls, .ppt, .xlsx, .docx, .vsd, .bmp, .gif, .jpeg, .jpg, .png, .tiff, .tif, .txt, .zip, .dot, .dotx, .xlt, .xltx, .pot, .potx, .ppsx, .vsdx, pptx, .pps

## 22.2 CERTIFICATIONS

The Certifications Pill is located under the Documents Tab. This is where you can sign any required certifications, as well as any optional certifications.

**CERTIFICATION REGARDING ARCHITECTURAL BARRIERS**

All facilities financed with Rural Utilities Service (RUS) loans that are open to the public, or in which physically handicapped persons may be employed or reside, must be designed, constructed, and/or altered to be readily accessible to, and usable by, handicapped persons. Standards for these facilities must comply with the Architectural Barriers Act of 1968, as amended, 42 U.S.C. 4151 et seq.) and with the Uniform Federal Accessibility Standards (UFAS), (Appendix A to 41 C.F.R. subpart 101-19.6).

As a prospective primary participant recipient of financial assistance from RUS, this organization commits to carry out RUS' established policy to comply with the requirements of the above referenced law to the effect that all facilities must be readily accessible to and usable by handicapped persons.

We,  (the Applicant) hereby certify that, as a prospective recipient under the Rural Broadband Access Loan and Loan Guarantee Program, we are in compliance, or will be in compliance upon completion of the project, with the above referenced law.

☐ sign that everything above is correct to the best of my knowledge.

To sign a certification, you can click on either the hyperlinked name of the certification or the "Edit" button. This will open up a modal with the certification text in it. You must fill out any input fields and click the "I sign" checkbox in order for that certification to receive a green checkmark. Saving without signing will result in the certification receiving an incomplete status.

*Note: In order to edit, sign, or delete a certification you must have the Representative-Signature-Certify security role. You can only receive this role by submitting an Authorized Representative Request, and having RUS Staff assign you the role.*

To clear out a signed certification, you must click the "Delete" button next to a certification. This will delete all data inside the certification and set its status back to a red "X."

## 22.3 LICENSES & AGREEMENTS

The Licenses & Agreements Pill is located under the Documents Tab. You must choose a status for each License or Agreement. The following statuses will make a License or Agreement become required:

- Draft
- Existing In-Hand/No Modifications Needed
- Existing In-Hand/Modifications Needed

If you pick one of those statuses, the Licenses & Agreements status will stay as a red “X” until you upload a file.

Upload Status	Document Type	Status	Comments
✓	Certificate of Public Convenience and Necessity (CPCN)	Not Required - RUS/Telecom already has a copy on file	
✗	Franchise Agreement(s)	<div> <input type="text"/> <ul style="list-style-type: none"> <li>Not Required - RUS/Telecom already has a copy on file</li> <li>Not Required</li> <li>Draft</li> <li>Existing/In-Hand No Modifications Needed</li> <li>Existing/In-Hand Modifications Needed</li> <li>Applied but Pending</li> <li>Contingent upon Award</li> <li>Not Available Until Project is Funded</li> </ul> </div>	
✓	Internet Service Agreement		

If you pick any other status, then that License & Agreement will change to a green checkmark and no upload will be required.

To upload an attachment, you must first click on the “Browse” button to open a dialog button to search for your file. Once you have found your file and exited the dialog box, your file will automatically upload.

*Note: If you have browsed for multiple files for multiple Licenses & Agreements, clicking “Upload” will only upload that specific file. It will not upload any other browsed file. If you need to upload multiple licenses and agreements for a single category, you can upload them under the “Additional Licenses & Agreements” section at the bottom of the screen.*

To delete a License & Agreement, you must click the “Delete” button next to that License & Agreement. A message will appear, asking if you are certain you wish to delete the License & Agreement. You must confirm that you are certain in order to delete your License & Agreement.

You can also enter in comments next to each License & Agreement. These will only be saved when you click the “Save” button at the bottom of the screen.

### The only accepted file types are:

.doc, .pdf, .xls, .ppt, .xlsx, .docx, .vsd, .bmp, .gif, .jpeg, .jpg, .png, .tiff, .tif, .txt, .zip, .dot, .dotx, .xlt, .xltx, .pot, .potx, .ppsx, .vsdx, pptx, .pps

## 23.0 SUMMARY/SUBMIT

The Summary/Submit screen will show you a list of all your Tabs and Pills, along with their status. This is where you can track your application to determine what items are still needed in order to submit a complete application.

When a Tab or Pill has a green checkmark, you know that that screen is complete. If it has a red “X” instead, you know that it still needs some work.

✓	INTERVIEW
✗	CUSTOMER
A minimum of one Address is required.	
A minimum of one Key Contact is required.	
Cage Code is required.	

The Summary/Submit screen is also where you can see error messages next to any screen marked with a red “X.” These error messages tell you specifically what is needed in order to submit your application. You can click on a hyperlinked Tab or Pill name to be taken back to that screen.

### 23.1 SUBMITTING AN APPLICATION

Once you receive all green checkmarks on the “Summary/Submit” screen, the “Submit” Button will become enabled. You will receive a message asking if you are sure you want to submit. After you say yes, your application will be submitted. All of the fields and screens inside your application will be greyed out and you will no longer be able to edit them unless RUS Staff returns your application. If your application has been returned, then all the fields and screens will be editable once more.

#### What does a “Returned Application” mean?

A “Returned Application” means RUS Staff looked over your submitted application and noticed that something was either incorrect or missing. Whenever an application is returned, you will receive a message telling you why it was returned. After you update your application, you will have to resubmit your application.

# MISCELLANEOUS

## 24.0 PRINT SCREENS

At the bottom of some screens there is a “Print” button that will let you open a print-friendly PDF of that screen.

Some screens, such as Certifications and Board Resolutions, do not have “Print” buttons at the bottom of the screen. Instead, you have to click to open the individual certification or Board Resolution to access the print button.

## 25.0 EXPORT TO EXCEL

At the bottom of some screens there is an “Export to Excel” Button that will let you download an Excel copy of that screen.

*Note: If you export the Excel sheet and make changes in the workbook, it will not affect the screen. If you export the Excel sheet and then make changes in the screen, you have to re-download the Excel sheet for it to show the changes.*

## 26.0 INFORMATIONAL MESSAGES

While completing your application, you might see several different informational messages. These messages are to help notify you if you are missing any required data. Some messages just let you know whether or not your screen saved successfully or not. The messages are color-coordinated to help you quickly determine their meaning.

The different statuses are as follows:

### Blue Status

- Data successfully saved.

If you receive a blue status, it means you have saved your data successfully and that there are no issues for you to look at. A blue status is the equivalent of a green checkmark.

### Yellow Status

- The data has been successfully saved but there are errors you need to fix before you can submit:

If you receive a yellow status, it means that there are errors or data is missing from the screen. While you can save your screen, you will not be able to submit your application.

### Red Status

- Selling Company Name is required.

If you have received a yellow status, you will also receive red statuses. Red statuses tell you what is needed in order to save your screen and submit your application. A red status is the equivalent of a red "X."

## 27.0 CONNECTION TIME-OUT

If you have been inactive for thirty minutes, the system will prompt you to select either "Stay Active" or "Log Out." If you do not respond, the system will automatically log you out. You will need to log back into RD Apply, to continue your application.

## 28.0 APPLICATION STATUS

The application will go through several statuses on its way to being accepted.

- **New** – This application is being worked on by the applicant.
- **Submitted** – The applicant has submitted the application and it is ready to be reviewed by RUS staff. The application is now locked down to the applicant.
- **Returned** – The application has been returned by RUS staff. The application is unlocked and the applicant must go back in and resubmit the application.
- **Accepted** – The application has been accepted by RUS staff. The application is still locked down to the applicant.
- **Loan Processing** – The application has been pushed to CPAP. The application can no longer be returned and is locked down.

## 29.0 NOTIFICATIONS

You will receive notifications for any applications that you are assigned to.

*For example:*

“Sarah Jane submitted Application Nbr: 1234 for Alpha Electric on May 1, 2015. The confirmation number is 1234567890.”

*Note: You will automatically receive an email when you create an event, such as creating an application. Other users on your application will not receive that email notification, unless they actively subscribe to the event.*

### WHERE TO FIND NOTIFICATIONS

Notifications are sent to two locations. The first location is inside the RD Apply system. The second location is your eAuthentication email.

#### RD Apply

To access Notifications inside the RD Apply system, you will need to login and click the “Notifications” Tab in the header bar. This will open a screen called, “View Your Notifications” that will list out all your notifications.



You will be able to filter the notifications by Notification Type, Notification Date, Application Number, Program, Sub-Program, and State. You will also be able to search for notifications either by “Application Nbr” or by typing search criteria into the “Search” box under “Search Results.”

To see the full notification text, you will need to click on the “View Details” button next to the specific notification. Clicking it will cause a pop-up to appear with the notification text.

Search Results					
Show 10 entries			Search: <input type="text"/>		
Notification	Notification Date	Application Nbr.	Program	Sub-Program	Message
Application Submitted	03/01/2015	1810	Electric	Distribution	<a href="#">View Details</a>
Application Returned	03/03/2015	1810	Electric	Distribution	<a href="#">View Details</a>

#### Email

Notification emails will always be sent to your eAuthentication email. Other than location, there is no difference between the email notification and the RD Apply system notification.

## 30.0 NOTIFICATIONS - SUBSCRIBE AND UNSUBSCRIBE

### 30.1 ACCESSING THE NOTIFICATION SYSTEM

After logging into RD Apply, click the “Notifications” Tab in the header bar. This will open a screen called, “View Your Notifications.” You will then be able to see a button called, “Subscribe to Notifications.”



Clicking this button will open a new window called, “Manage Your Subscriptions” where you can subscribe to different notifications. This is also where you can delete any subscriptions you no longer want.

### 30.2 CREATING A SUBSCRIPTION

In order to create a subscription, you will have to filter via dropdown lists. The dropdowns are:

1. Application
2. Program
3. Notification Type
4. State
5. County
6. Customer

Since the Notifications Module will be used across multiple Applications, with different programs and notifications, the Program and Notification Type Dropdowns are dependent on each other. The Customer and Counties Dropdowns will be multi-select dropdowns.

You must first pick a value for Program to pick a value for Notification Type.

Manage Your Subscription

In order to subscribe to “New Application” notifications, you can only filter by customer. If you select a state, you will not receive a notification when new applications have been created.

<b>Application:</b> RDAPPLY	<b>Customer:</b> All Customers Default Company Name ID:null Default Company Name ID:null
<b>Program:</b> Select Program	<b>State:</b>
<b>Notification Type:</b>	<b>Counties:</b>

Save

*Note: The State Dropdown is optional and is not dependent on any other dropdown.*



The State dropdown pulls in the state from the Headquarters or Mailing Address supplied on the Customer Screen in your application. The County dropdown will only be populated after you select a state. You will be able to select multiple counties.

After you have selected which filters you want, click the “Save” Button. The system will save the chosen filters and display it below under, “Subscribed Notifications.”

Subscribed Notifications					
Show 10 entries		Search:			
Notification Type	Program	Sub-Program	Customer	State	Action
Application Submitted	Telecommunications	Telecommunications	*All Customers	AK	<a href="#">Delete</a>
Environmental Document Approved	Electric	Distribution	*All Customers	AK	<a href="#">Delete</a>

After saving, the dropdowns will be cleared and you will be able to add another subscription. Once a subscription has been saved, you will start getting notifications for that specific subscription.

After saving, the dropdowns will be cleared and you will be able to add another subscription. Once a subscription has been saved, you will start getting notifications for that specific subscription.

## DROPDOWN VALUES

The dropdowns are filtered based on the values you pick. For example:

1. Application
  - a. RD Apply
2. Program
  - a. Based off of what Application was chosen
    - i. If RD Apply then...
      1. Electric
      2. Telecommunications
      3. Water and Environmental
3. Sub-Program
  - a. Based off of what Program was chosen
    - i. If RD Apply then...
      1. Telecommunications
        - a. Infrastructure
        - b. Farm Bill Broadband
4. Notification Type
  - a. New Application Created
  - b. Application Submitted
  - c. Application Returned
  - d. Application Accepted
5. State
  - a. All USA States plus US Territories
6. County
  - a. Based off of which state you selected

### 30.3 DELETING A SUBSCRIPTION

To delete a subscription, you will need to find a specific subscription and click the “Delete” Button next to it. This will delete the subscription and you will no longer receive email notifications.

## 31.0 SECURITY ROLES

### 31.1 WHAT DO THE DIFFERENT ROLES MEAN?

Each role has different security permissions attached to it. When you assign a user a security role, you are effectively limiting what the user can and cannot do while using your Tax Identification Number.

### 31.2 HOW MANY ROLES CAN ONE PERSON HAVE?

Each person can only have **one** security role for a Tax Identification Number.

*For example:*

Your Financial Consultant cannot have both the Financial Consultant security role and the Administrator security role for Tax Identification Number 123456789. However, they can have the Financial Consultant security role for Tax Identification Number 123456789 and the Administrator security role for Tax Identification Number 987654321.

### 31.3 WHAT TYPES OF SECURITY ROLES ARE AVAILABLE?

There are several security roles that range in the amount of access a user can have in an application.

#### Available security roles:

- **Administrator:** Allows the user to grant representative roles to other users assigned to the same Tax ID and create/update applications.
- **Representative-Signature-Certify:** Allows the user to enter / update an application and submit applications to the USDA. Also allows the user to provide signatures and authorize certifications for the application. Allows the user to grant representative roles to other users assigned to the same Tax ID.
- ***You can only receive this role by submitting an Authorized Representative Request, and having RUS Staff assign you the role.***
- **Representative-Update Data:** Allows the user to enter / update an application.
- **Engineering Consultant:** Allows the user to enter / update engineering sections of the application only.
- **Financial Consultant:** Allows the user to enter / update financial sections of the application only.
- **Legal Consultant:** Ability to view the entire application, and only upload and delete attachments.
- **Viewer:** Allows the user to view the application with no update access.

### **31.4 WHO CAN ASSIGN SECURITY ROLES?**

Only the Administrator or Representative-Signature-Certify can assign security roles to a user. To become an Administrator, you either have to fill out an Authorized Representative Request or ask your current application Administrator to add you as an Administrator. You can only become a Representative-Signature-Certify by filling out an Authorized Representative Request.

# APPENDIX

## 32.0 TELECOMMUNICATIONS APPLICATION DOCUMENTS

These are the attachments required to submit a Telecommunications application.

**Telecommunications only attachments:**

- Legal Opinion
- Real Property Schedule
- Organizational Chart
- Proposed Network Diagram
- System Design
- Assumptions Used to Support Financial Forecast

**If this is your first application with RD Apply:**

- Articles of Incorporation
- Bylaws or Operating Agreement
- Board of Directors or Managing Members

**If you are applying for a Farm Bill Broadband Loan:**

- Management Experience and Compensation
- Competitor Strategic Plan

**If you are applying for an Infrastructure Loan application:**

- Existing Network Diagram

**If you are applying for an acquisition:**

- Acquisition Agreement

**If you are delinquent on federal debt:**

- Outstanding Federal Debt

**If you are requesting Substantially Underserved Trust Area (SUTA) consideration:**

- SUTA Attachments

**If you have a Parent Operation:**

- Parent Organizational Chart
- Parent historical financial statements

**If you have a Subsidiary Operation \*AND\* are applying for a Farm Bill Loan:**

- Subsidiary Organizational Chart
- Subsidiary historical financial statements

**If you rely on services provided by an Affiliated Operation:**

- Audited Financial Statement – or – Unaudited statements and tax returns for previous year