



**United States Department of Agriculture
Rural Development**

RD Apply – Application Intake

Water & Environmental 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 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 log online and create applications in just a few minutes. 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 and 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 allow them to access USDA Web applications and services via the Internet. This includes things 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?

Anyone can create an application if they have a Level 2 eAuth ID. Once you have obtained a Level 2 eAuth ID you will be able to access RD Apply. Depending on the program you are applying for, you may need to be approved as a Authorized Representative before you can begin entering data into your application.

4.0 PROGRAMS THAT USE RD APPLY

Currently, the only programs that are using RD Apply are Electric, Telecommunications, and Water and Environmental. Eventually, more programs will be added into the system, allowing a wider range of applicants 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.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 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 and county 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.

If you have any supporting documentation for submitting the Authorized Representative Request, you can upload the supporting documentation at the bottom of the form.

Authorized Representative Request

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

*Legal Name:

*TIN:

*Primary Program:

*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:

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:

*AAR 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.

Construction Consultant: Allows the user to enter / update construction sections of the application only.

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

USDA is an equal opportunity provider and employer.

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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.

8.0 LINKING OTHER USERS TO YOUR TAX IDENTIFICATION NUMBER

After you have submitted the “Authorized Representative Request” and Rural Utilities Services 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

Select

System Id

Select

eAuth User ID

996791339

946003272

Last Name

941592334

721349966

First Name

660446193

123456789

123121234

120619770

Use * at end of eAuth User ID for wildcard search

Use * at end of Last Name for wildcard search

Use * at end of First Name for wildcard search

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 associated, you will see what role they have been assigned.

User List

Tax Id

120619770

System Id

All Systems

eAuth User ID

RDAViewOnly

Last Name

First Name

Use * at end of eAuth User ID for wildcard search

Use * at end of Last Name for wildcard search

Use * at end of First Name for wildcard search

Submit


Reset

Add User

Action: Maintain Role

eAuth User ID	Name	Status	System	Role	Tax Id	Program
RDAVIEWONLY	Schneider, Ryan	Active	RDDNLD	VIEWER	120619770	

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



Application Authorization Security Management

Help

User Maintenance

eAuth User ID *

Name

Phone/Extn *

Fax

Email Address

Assurance Level

Save

Reset

Back

Add Role

Here, you can type in the eAuth ID. If the user is already in the system, you will see a pop-up, letting you know this, and asking if you want to continue in Edit mode. Otherwise, if the user isn't in the system, you can add their contact details and click "Save" or "Add Role."

If you click "Save," then it just saves the user to the system, so that next time you can come in and look up the person by their eAuth ID. If you click "Add Role," then you are navigated to the User Role Maintenance screen

After you have successfully found a user, you have three options. You can either "Maintain Role," "Maintain User," or "Add 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
RDAVIEWONLY	Schneider, Ryan	Active	RDDNLD	VIEWER	120619770	

- **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

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
RDAVIEWONLY	Schneider, Ryan	Active	RDDNLD	VIEWER	120619770	

When you click the role, 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:
 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

Submit Reset Add User

Action: Maintain Role

eAuth User ID	Name	Status	System	Role	Tax Id	Program
RDAVIEWONLY	Schneider, Ryan	Active	RDDNLD	VIEWER	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

Save

Reset

Back

Add Role

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

Submit

Reset

Add User

Action:

Maintain Role

eAuth User ID	Name	Status	System	Role	Tax Id	Program
RDAVIEWONLY	Schneider, Ryan	Active	RDDNLD	VIEWER	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 *	<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"/>	

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

RDVIEWONLY

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 *

Save

Save ID

Remove ID

Remove Role

Reset

Back

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

System Id

Select

eAuth User ID

996791339

Last Name

946003272

First Name

941592334

Use * at end of eAuth User ID for wildcard search

Use * at end of Last Name for wildcard search

Use * at end of First Name for wildcard search

721349966

660446193

123456789

123121234

120619770

it

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

System Id

All Systems

eAuth User ID

RDAREpUpdateData

Last Name

First Name

Use * at end of eAuth User ID for wildcard search

Use * at end of Last Name for wildcard search

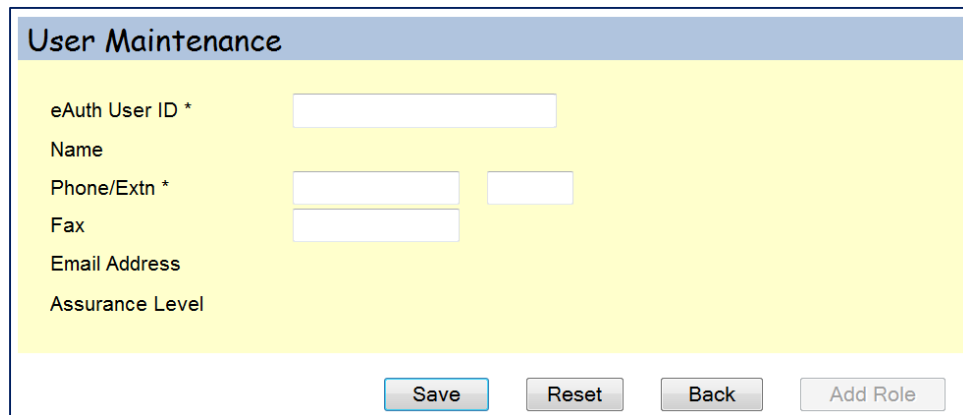
Use * at end of First Name for wildcard search

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

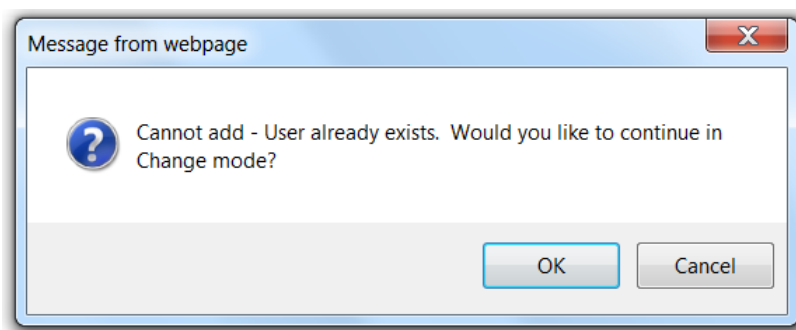
Phone/Extn *

Fax

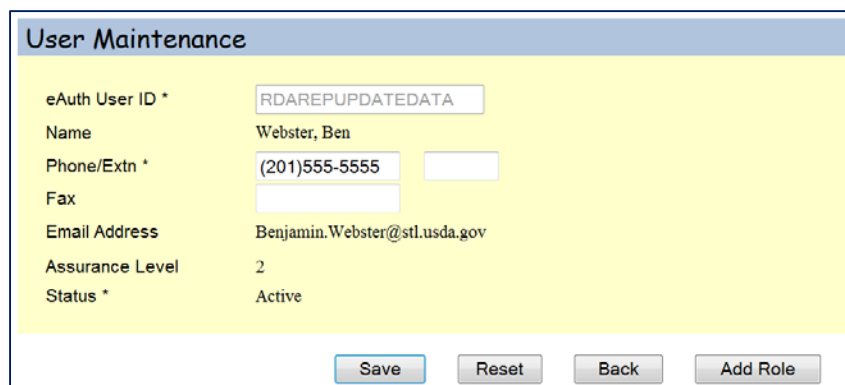
Email Address

Assurance Level

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 *

Name

Phone/Extn *

Fax

Email Address

Assurance Level

Status *

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 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 RDApply, please contact the Help Desk.

E-mail: 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
- eAuth ID
- Application ID Nbr
- Contact Person
- Phone Number
- Description of the specific problem
- Program you are applying for: Electric, Telecommunications, or Water & Environmental

CREATING AN APPLICATION

11.0 LANDING PAGE

When you login into RD Apply, you will be taken to the Landing 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.

Note: You can only switch accounts if you are on the Landing Page.

Select Customer Affiliation
×

TIN	Organization
135793579	Hartley Electric Smoke
199304170	
	Other

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

Home Notifications Admin Switch Account Electric CWP Tutorials

+ Add New Application or + Authorized Representative Request

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 access as an authorized user 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 ▲
1336	Electric	Distribution	02/03/2015

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 pop-up will appear:

Application Questionnaire

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

☐ Electric

☐ Telecommunications

☐ Water And Environmental

As you progress through the Interview, your answers will drive new questions. Your answers are also what drives which screens appear on your application, and what documents are required to submit your 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.

Would you like to save the Interview?

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.

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

1 2 . 1 EMERGENCY AND IMMINENT COMMUNITY WATER ASSISTANCE GRANTS (ECWAG)

ECWAG is a grant program designed to provide emergency funds to a community based on a shortage or decline in quality or quantity of water.

The interview process will prompt you asking if you are applying for ECWAG funds.

Application Questionnaire



Are you requesting funds under the Emergency and Imminent Community Water Assistance Grants (ECWAG) Program in conjunction with an emergency event such as, but not limited to, drought, earthquake, flood, tornado, hurricane, disease breakout, chemical spill, leakage, or seepage?

☒ Yes

☐ No

Back

Next

Application Questionnaire



ECWAG grants may be awarded:

- 1) Up to \$150,000 for repairs, partial replacement, or significant maintenance on an established system to remedy an acute shortage or significant decline in quality or quantity of potable water. Or,
- 2) Up to \$500,000 to correct significant declines in quantity or quality of water because of an emergency affecting water source that occurred within two years of filing an application, or to avoid a significant decline that is expected to occur during the next 12 months.

Based on the information above, will you need funding from USDA Rural Development over and above the ECWAG grant maximum for your project?

☐ Yes

☐ No

Back

If you answer "Yes" on the ECWAG question above, it will prompt you asking if the amounts awarded will be sufficient enough to cover the necessary enhancements, or if you will be requesting additional funds from RD Apply.

If you answer "Yes", you will be required to complete a full application.

If you answer "No", you will be required to complete an abbreviated application. You will also be required to upload five (5) files: *Simplified Engineering Report/Certification (SI 1778-1, Exhibit A)*, *Simplified Environmental Report (SI 1778-1, Exhibit B)*, *Conflict of Interest Policy*, *Notice of Intent to File Application* and *Audits or Financial Statement*

1 2 . 2 SPECIAL EVALUATION ASSISTANCE FOR RURAL COMMUNITIES AND HOUSEHOLD

Special Evaluation Assistance for Rural Communities and Household Programs (SEARCH) is a grant program to assist small rural communities with predevelopment feasibility studies. For more information, click [here](#).

1 2 . 3 PREDEVELOPMENT PLANNING GRANTS (PPG)

PPG is a grant system used to assist low-income communities with initial planning and development of an application for Water and Waste Disposal. For more information, click [here](#).

Application Questionnaire



Are these funds to be used only for predevelopment work, like preparing a Preliminary Engineering Report or Environmental Report under the SEARCH (Special Evaluation Assistance for Rural Communities and Household Program) or the PPG (Predevelopment Planning Grants) Program?

☐ Yes

☐ No

Back

If you answer "Yes" on either PPG or SEARCH, you will be required to complete an abbreviated application. You will also be required to upload six (6) files: *Environmental Report*, *Conflict of Interest Policy*, *Notice of Intent to File Application*, *Preliminary Engineering Report*, *Project Narrative and Cost* and *Audits or Financial Statement*.

13.0 INTERVIEW RECAP

Interview Recap is where you can see your interview answers. This is also the place where you can modify your answers, to correct any mistakes or update an old application.

What type of loan/grant are you applying for?	Storm Water	Modify
---	-------------	--------

14.0 CUSTOMER

The customer screen is where you can enter all your personal data, as well as contact information. This is where you tell Rural Utilities Services what kind of organization you are. This is also where you supply your DUNS NBR and CAGE Code, as well as any other required demographic data.

The customer screen is also where you tell Rural Utilities Services who your key contacts are and how to reach them.

General Information

***Legal Name:**

User Guide Update Test

Primary Borrower ID:

192388985

***Organizational Description:**

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

There will always be a key contact row called "Customer Contact." If you enter multiple key contacts, and delete the "Customer Contact" row, you will need to make sure to either add a "Customer Contact" or mark an existing contact as the "Customer Contact." If you only have two contacts listed, and you delete your "Customer Contact," your second key contact will automatically become your "Customer Contact."

Key Contacts										Add New +
*Type	Prefix	*First Name	*Last Name	Org.	*Phone #	Cell #	Fax #	*Email Address	Action	
Customer C										
Customer Contact									Delete	

15.0 FACILITIES

There are eight screens you need to complete, in order for Facilities to be completed. These screens are:

- Facility Details
- Drinking Water
- Sewer
- Storm Water
- Solid Waste
- Facility Sites
- Land Rights

Drinking Water, Sewer, Storm Water, and Solid Waste are dependent on how you answered, “What type of loan/grant are you applying for?” in the interview.

<https://eper.sc.egov.usda.gov/ePER/spring/AppHomeFlow?execution=e1s1>

For example:

If you said you were applying for “Storm Water” then you will not see the Drinking Water, Sewer, and Solid Waste sub-tabs.

Facility Details, Facility Sites, and Land Rights will always be there, regardless of the type of loan you are applying for.

15.1 FACILITY DETAILS

The Facility Details screen consists of two textboxes. The first textbox is where you will describe your current facility.

The second textbox is where you will describe what your facility will look like after you finish your improvements.

The screenshot shows a web form titled "Facility Details" in a green header. Below the header, there are two sections, each with a light gray header and a large white text area. The first section is labeled "Describe the Current Facility before Improvement" and the second is labeled "Describe the Proposed Facility after Improvement". Both text areas are empty and have a small cursor icon in the bottom right corner.

15.2 DRINKING WATER

The Drinking Water screen is where you enter the details of what type of water you are using, treatment types, and quality concerns.

Water Details	
Public Water System (PWS) ID	<input type="text"/>
National Pollutant Discharge Elimination System (NPDES Permit #)	<input type="text"/>
Water Source Type	<input type="checkbox"/> Natural Lake <input type="checkbox"/> River/Stream <input type="checkbox"/> Reservoir <input type="checkbox"/> Off Stream Reservoir <input type="checkbox"/> Spring <input type="checkbox"/> Wells <input type="checkbox"/> Purchase Contract <input type="checkbox"/> Reclaimed Water

15.3 SEWER

The Sewer screen is where you enter the details of your wastewater.

Sewer Details	
National Pollutant Discharge Elimination System (NPDES Permit #)	<input type="text"/>
Wastewater Collection Type	<input type="checkbox"/> Conventional Gravity <input type="checkbox"/> Small Diameter <input type="checkbox"/> Vacuum <input type="checkbox"/> Effluent Pumps <input type="checkbox"/> Grinder Pumps <input type="checkbox"/> Hauling <input type="checkbox"/> Decentralized/On-Site <input type="checkbox"/> Lift Station <input type="checkbox"/> Pump Station/Forcemain

15.4 STORM WATER

The Storm Water screen is where you enter the details of your collection, discharge, and treatment types.

Storm Water Details	
National Pollutant Discharge Elimination System	<input type="text"/>
Stormwater Collection Type	<input type="checkbox"/> Gravity <input type="checkbox"/> Pumping
Stormwater Discharge Type	<input type="checkbox"/> Lake <input type="checkbox"/> River/Stream <input type="checkbox"/> Ocean/Estuarine
Stormwater Treatment Type	<input type="checkbox"/> Screening <input type="checkbox"/> Sedimentation <input type="checkbox"/> Swirl/Vortex <input type="checkbox"/> Natural or Constructed Wetland System

15.5 SOLID WASTE

The Solid Waste screen is where you enter the details of your treatment and collection types.

Solid Waste Details	
National Pollutant Discharge Elimination System (NPDES Permit #)	<input type="text"/>
Solid Waste Disposal Type	<input type="checkbox"/> Landfill <input type="checkbox"/> Contract Disposal
Solid Waste Treatment Type	<input type="checkbox"/> Incineration <input type="checkbox"/> Recycling <input type="checkbox"/> Composting <input type="checkbox"/> Energy Recovery <input type="checkbox"/> Physical (e.g. compacting) <input type="checkbox"/> Chemical (e.g. high temperature metal recovery) <input type="checkbox"/> Biological (e.g. digester) <input type="checkbox"/> Leachate Control System <input type="checkbox"/> Liner <input type="checkbox"/> Biogas System

15.6 FACILITY SITES

The Facility Sites screen is where you enter information about your facility(s). To add a new facility, click the “Add New +” button. You must have at least one Primary Facility listed.

Facility Sites to be reported are for the application enterprise only. An entry for at least your Primary Facility site is required with a simple description. The Address fields are required with a Facility Type, Description, State, Zip Code, County and Congressional District, but the Street Address can be two cross streets or some other type of identifying information if the facility does not have an address.

*Facility Type	*Description	*Street 1	Street 2	*City	*State	*Zip Code	*County	*Congressional District	Action
Discharge Po	dld	123 v		aff	Illinois	62221	St. Clair	17th	Delete

15.7 LAND RIGHTS

The Land Rights screen is where you can enter information about how much land you have and how much you will acquire.

Number of Acres To Be Acquired - Fee Simple	<input type="text"/>
Number of Acres To Be Acquired - Lease	<input type="text"/>
Acres To Be Acquired - Purchase Price	<input type="text"/>
Acres To Be Acquired - Value	<input type="text"/>
Number of Acres Now Owned - Fee Simple	<input type="text"/>
Number of Acres Now Owned - Lease	<input type="text"/>
Acres Now Owned - Purchase Price	<input type="text"/>
Acres Now Owned - Value	<input type="text"/>

16.0 VOLUME/FLOW

Volume/Flow is split apart into two sections: Retail and Wholesale. You can switch back and forth by clicking on the sub-tabs on the Volume/Flow screen.

16.1 RETAIL

The Retails screen is where you enter any information about the water you sell to retailers. You must answer whether or not you sell retail water, and whether or not you will be adding any new connections with this project.

Interview Customer Facilities **Volume/Flow** Project Cost Financial Service Area(s) Documents Summary/Submit

Retail Wholesale

*Do you sell retail water? ☐ Yes ☐ No

Total Annual Gallons Sold to Retail Customers (do not include wholesale)

Of the Total Annual Gallons Sold, how many Gallons were Sold to Single Family Dwellings

What are the total number of existing connections on the system

Of the total number of existing connections, how many are Single Family Dwellings

*What is the Total Annual Revenue from Retail Sales

*Will you be adding new connections with this project? ☐ Yes ☐ No

How many new connections will be added to the system

What is the connection tap fees

How many new connections will be single family dwellings

16.2 WHOLESALE

The Wholesale screen is where you enter any information about the water you sell wholesale.

If you do not sell water wholesale, you must answer “No” to, “Do you sell water to entities who in turn resale water to their customers?” in order to submit the application.

Interview Customer Facilities **Volume/Flow** Project Cost Financial Service Area(s) Documents Summary/Submit

Retail **Wholesale**

*Do you sell water to entities who in turn resale water to their customers? ☒ Yes ☐ No

If yes, what is the price per 1,000 gallon(s) or 100 cubic feet that you charge. ☐ Per 1,000 Gallon ☐ Per 100 Cubic Feet

When was the last time you had a price increase to these customers? MM/DD/YYYY

Wholesale Volume (projected) Add New +

*Wholesale User Name	*Annual Volume	Monthly Volume	*Unit	Action
<input type="text"/>	<input type="text"/>	0	<input type="text"/>	Delete

Save Print

If you do sell water wholesale, you will need to fill out the screen in order to submit the application. If you have multiple projected wholesale volumes, you can add a new row for each by clicking the “Add New +” button.



Note: If you are applying with a Sewer app, the Wholesale screen will ask whether or not you provide contracted bulk sewer treatment.

17.0 PROJECT COST

While the Project Cost is a separate Tab from the Financial Tab, it still contains financial data.

This screen has two sections. The first section collects data pertaining to high level project data. The second section collects project costs.

Request Info

Request Info			
Proposed Start Date:	<input type="text"/>		Proposed End Date:
			<input type="text"/>
Date Application made available to the Inter-governmental Review Process:	<input type="text"/>		State Clearinghouse ID Number:
			<input type="text"/>

Project Cost

Project Cost Add New +			
Cost Classification	Description	Cost	Action
<input type="text"/>	<input type="text"/>	<input type="text"/>	Delete
		\$0.00	

18.0 FINANCIAL

There are seven screens you need to complete, in order for Financials to be completed. These screens are:

- Balance Sheet
- Other Income
- Short Lived Asset
- Proposed Funding
- Debt
- Proposed O&M


18.1 BALANCE SHEET

Balance Sheet is separated into several sections to collect data on Certificates of Deposits, Accounts Receivables, Customer Deposits and Reserve accounts.


[Balance Sheet](#)
[Other Income](#)
[Short Lived Asset](#)
[Proposed Funding](#)
[Debt](#)
[Proposed O&M](#)

Enterprise - Current Assets

Input the total cash that the facility has in its bank account(s) (current Assets).

Date of Financial Information: 

What is the total cash that the facility has in its bank account(s)?

Do you have any Certificate of Deposits or other term certificates in addition to the cash listed above? 

18.2 OTHER INCOME

This screen is designed to collect all types of income from the business operation as well as non-operating income.

[Balance Sheet](#)
[Other Income](#)
[New Connections/Tap Fee](#)
[Short Lived Asset](#)
[Proposed Funding](#)
[Debt](#)
[Proposed O&M](#)

Add New +

Type of Income	Description	Yearly Income	Action
<input type="text"/>	<input type="text"/>	<input type="text"/>	Delete
Total:		<input type="text" value="\$0.00"/>	

18.3 SHORT LIVED ASSET

This screen will collect a list of all Short Lived Assets, Replacement Costs and the Useful Life. The Annual Reserve is system generated.

Balance Sheet	Other Income	New Connections/Tap Fee	Short Lived Asset	Proposed Funding	Debt	Proposed O&M
---------------	--------------	-------------------------	--------------------------	------------------	------	--------------

Add New +

Description	Replacement Cost	Useful Life	Annual Reserve	Action
<input type="text"/>	<input type="text"/>	<input type="text"/>	\$0.00	Delete
Total:	\$0.00		\$0.00	

18.4 PROPOSED FUNDING

This screen collects the amount of Funds supplied by each of the sources.

Balance Sheet	Other Income	New Connections/Tap Fee	Short Lived Asset	Proposed Funding
---------------	--------------	-------------------------	-------------------	-------------------------

Proposed Funding

RD Amount	<input type="text"/>
Applicant	<input type="text"/>
Federal	<input type="text"/>
State	<input type="text"/>
Local	<input type="text"/>
Other	<input type="text"/>
Total Proposed Funding	\$0.00

18.5 DEBT

This screen is designed to collect data to define all the Loans.

[Balance Sheet](#)
[Other Income](#)
[New Connections/Tap Fee](#)
[Short Lived Asset](#)
[Proposed Funding](#)
[Debt](#)
[Proposed O&M](#)

Please enter any existing Debt with Terms.
Please enter any Other Funding sources with Terms for the proposed Project.

Existing and Proposed Debt [Add New +](#)

Type of Loan	Owed To	Purpose	Terms(yrs)	Date of First Payment	Annual Payment	Annual Reserve	Interest Rate	Due Date	Action
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="MM/DD/YYYY"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="MM/DD/YYYY"/>	Delete

18.6 PROPOSED O&M

This screen collects data pertaining to operating and maintenance expenses. The same expense can be entered multiple times. The description associated to each one should be different.

[Balance Sheet](#)
[Other Income](#)
[Short Lived Asset](#)
[Proposed Funding](#)
[Debt](#)
[Proposed O&M](#)

What do you anticipate your annual Operation and Maintenance Expenses to be for your facility in the first year of operation once the proposed project has been completed? Use the information in the Preliminary Engineering Report and enter data below:

[Add New +](#)

Expense Item	Description	Annual Amount	Action
<input type="text"/>	<input type="text"/>	<input type="text"/>	Delete

19.0 SERVICE AREA MAPPING

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

19.1 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. 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.

19.2 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.

The Polygon tool also has a Census Block precision feature. Once you are zoomed in enough to see the Census Blocks, you can hold down the Control Button. This will allow the Map pointers to connect to a Census Block. You will see a Cross-hairs pointer appear that indicates the functionality is enabled.

The FreeHand allows you to draw a Service Area by clicking and holding the left mouse button while dragging the mouse. To begin, click the FreeHand button under Editing Tools. Use the mouse to draw your proposed service area. Once you are finished free-hand drawing your Service Area shape, release the left mouse button.

When drawing a Map, please do not cross/overlap lines or try to connect the start and end points. This may result in your map not drawing or loading properly, which may yield an error message. The map will auto-connect the start and end points for you.



The Select Blocks tool allows you to include specific census blocks in a polygon. The feature only works when zoomed in enough to see the Census Blocks appear on the map. To begin, zoom in on the area you wish to include. Once the census blocks appear, the Select Blocks Button will become enabled. Click the Select Blocks button under Select Tools. Use the left mouse button to click on the census blocks that you want to include in your polygon. Once you are finished, click the “Create Polygon” button Select Tools.

After you are finished drawing your Service Area, a “Loading” Page will appear as the Map is rendered. Please wait, as rendering maps may take some time.

19.3 EDITING A SERVICE AREA

If you need to edit your map, click on the “Select” button under the Editing Tools and then left click on the Service Area you wish to edit. Once you have the Service Area selected, click on the “Edit” button under the Editing Tools. To edit the polygon, simply move the mapping pointers as needed. When you are finished editing your map, you will need to click the “Stop Edit” button under the Editing Tools.

If you need to cut a shape out of your polygon, click on the “Select” button under the Editing Tools and then left click on the service area you wish to edit. Once you have the Service Area selected, click on the “Cut” button under the Editing Tools. The Cut function works similar to the Free-hand function, in that you must click and hold the left mouse button while dragging the mouse to select the area you wish to cut from the polygon.



Note: If you intend to make edits to the Base layer of your Service Area, you must make those edits prior to drawing/editing any Unserved layers.

19.4 UPLOADING A SHAPEFILE

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

19.5 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 Service Area Mapping.

Hide: Clicking the “Hide” button will collapse the toolbar.

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.

19.6 VIEWING CENSUS DATA

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

Service Area(s)					Add New +	View All
Service Area Name	Population	Square Miles	% of Rural vs. Urban	Actions		
Test Service Area	0	35	100.00%	<div>Edit / View Map</div> <div>Delete</div> <div>Edit / View Data</div>		

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.

Test Service Area	Existing	Alternate
Total Population	<input type="text" value="0"/>	<input type="text" value="0"/>
Total Square Miles	<input type="text" value="35"/>	<input type="text" value="0"/>
Percent of Rural vs. Urban	<input type="text" value="100.00%"/>	<input type="text" value="0.00%"/>
Explanation for changes in detail	<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.

20.0 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 Sub-tabs under the Documents Tab must be completed in order for the Documents Tab to be marked as finished.

20.1 ATTACHMENTS

The Attachments Pill 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.

Attachments Certifications

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.

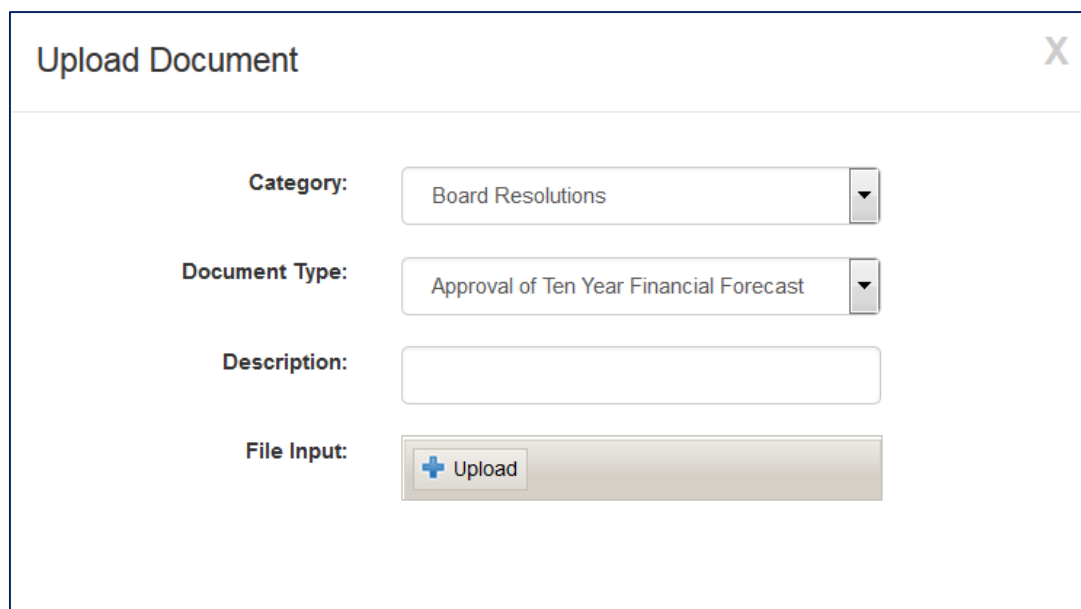
Upload Status	Category	Document Type	Description	File Name	Date	Uploaded By	Action
✖	Application	Notice of Intent to File Application	<input type="text"/>			NA.	+ Upload

To delete an attachment, you must click the “Delete” button next to that attachment. A message will appear, asking if you are certain 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 blue 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, .psx, .vsdx, pptx, .pps

20.2 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. To sign a certification, you can click on either the hyperlinked name of the certification or the

WATER AND WASTE ELIGIBILITY CERTIFICATION

Certification for commercial credit and outstanding judgments

The undersigned certifies, to the best of his or her knowledge and belief, that:

1. The organization is unable to finance the proposed project from its own resources or through commercial credit at reasonable rates and terms.
2. No outstanding judgment has been obtained and recorded by the United States of America in a Federal Court (other than in the United States Tax Court).

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

Save

Print

“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.

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.”

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.

21.0 SUMMARY/SUBMIT

The Summary/Submit screen will show you a list of all your Tabs and Sub-tabs, along with their status. This is where you can track your application to see what is needed to submit. 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
<p>A minimum of one Address is required.</p> <p>A minimum of one Key Contact is required.</p> <p>Cage Code is required.</p>	

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.

21.1 SUBMITTING AN APPLICATION

Once all 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; you will no longer be able to edit them unless Rural Utilities Services Staff returns your application.

What does “Returned Application” mean?

A “Returned Application” means Rural Utilities Services Staff looked over your submitted application and noticed that something was either incorrect or missing something. 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

22.0 PRINT SCREENS

At the bottom of each screen 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.

23.0 EXPORT TO EXCEL

On 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.

24.0 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."

25.0 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.

26.0 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.

27.0 NOTIFICATIONS

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

For example:

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

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 Accepted	07/22/2015	3000757	Water And Environmental	Water And Environmental	View Details
Application Processed	07/22/2015	3000757	Water And Environmental	Water And Environmental	View Details

Email

Notifications 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.

28.0 NOTIFICATIONS - SUBSCRIBE AND UNSUBSCRIBE

28.1 ACCESSING THE NOTIFICATION SYSTEM

After logging into RD Apply click the “Notifications” Tab in header bar. This will open a screen called, “View Your Notifications.” On this screen is 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 subscriptions you no longer want.



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28.2 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.

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 the customer’s application.

You can select either a customer or state; you cannot select both. To select a state, you must select the blank space on the Customer list. If you select a customer, then the State dropdown will be disabled. Likewise, if you select a state, and then decide to select a customer, the subscription will use the state the customer supplied in their application.

After you have selected which values you want, click the “Save” Button. The system will save the chosen values 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	Delete
Environmental Document Approved	Electric	Distribution	*All Customers	AK	Delete

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. Notification Type
 - a. New Application Created
 - b. Application Submitted
 - c. Application Returned
 - d. Application Accepted
 - e. Application Pushed to Processing System
4. State
 - a. All USA States plus US Territories
5. County
 - a. Based off of which state you selected

28.3 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.

29.0 SECURITY ROLES

29.1 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 they can and cannot do while using your Tax Identification Number.

29.2 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.

29.3 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 an application.
- **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.
- **Construction Consultant:** Allows the user to enter / update construction sections of the application only.
- **Viewer:** Allows the user to view the application with not update access.

29.4 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

30.0 REQUIRED DOCUMENTS

If you are creating a Water and Environmental application, these are attachments needed to submit your application.

Water and Environmental attachments:

- Notice of Intent to File Application
- Preliminary Engineering Report
- Financial Statements (Annual Report)
- Audits (most recent copy)
- Environmental Report