



**United States Department of Agriculture
Rural Development**

RD Apply – Application Intake

Water & Environmental Customer User Guide

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Version 2.2

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Revision History

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2.0	Updated to include COMBO loans functionality and ability to import Preliminary Engineering Reports (PER)		January 2018
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1.0	Initial Version		
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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 Utilities Services (RUS) Programs. Instead of asking you to mail in a paper application, a process that can be slow and unwieldy, you can now go online and create applications in just a few minutes. RD Apply uses checkmarks (✓) and X marks (✗) to indicate whether 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, 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 customer information.
- **Reduced Paper Consumption** - Over time, RD Apply will save paper, which benefits the environment.

2.0 WHAT IS eAUTHENTICATION?

USDA eAuthentication (eAuth) 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 submitting forms electronically, completing surveys online, and checking the status of your USDA accounts. There are two levels of eAuth access:

- Level 1 Access allows you to:
 - Visit a USDA web page that indicates a Level 1 account is necessary
 - Obtain general information about the USDA or its agencies
 - Participate in public surveys for a USDA agency
- Level 2 Access allows you to:
 - Submit official business transactions via the Internet
 - Enter into a contract with the USDA
 - Submit forms or applications for the USDA via the Internet

To access RD Apply, you must have Level 2 eAuth access. You can apply for a Level 2 eAuth ID by selecting the **Register** button on the Login screen. After the account is created and you log in, you are redirected to Online Identification Proofing (OIDP) home page where you can choose to verify your identity online. To apply, visit [Create an Account](#).

Note: USDA will issue eAuth Accounts to individuals only. Businesses, Corporations, or other entities cannot apply for an eAuth account.

3.0 WHO CAN CREATE AN APPLICATION?

To create an application, you must 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 an Authorized Representative before you can begin entering data into your application.

4.0 PROGRAMS THAT USE RD APPLY

Programs that use 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 eAuth 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, now you can access the Identity, Credential and Access Management (ICAM) service 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, click [here](#) and select **Register for Level 2 Account**. Enter your personal information, making sure to complete all the required fields. When 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 prompt you to verify your identity. You will verify the personal information you entered into the system when registering and you will enter your Social Security Number (SSN).

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

After answering all 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 a 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 will include the entity legal name, the TIN, and the Data Universal Numbering System (DUNS) number of the business entity that is applying. In addition, you will select the primary program (Electric, Telecommunications, or Water and Environmental) and the state and county in which you will be working.

After you enter your entity's information, you will need to enter your name, your eAuth ID, and the security role you need. 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, you can enter your point of contact 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 by clicking the **+Upload** button.

Authorized Representative Request X

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

*Legal Name: <input type="text"/>	*Title: <input type="text"/>	*Primary Program: <input type="text" value="Water And Env"/>	*DUNS Nbr: <input type="text"/>	RUS ID: <input type="text"/>
			*State: <input type="text"/>	County: <input type="text"/>

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: <input type="text"/>	*eAuth ID: <input type="text"/>	*Security Role: <input type="text"/>	*Email: <input type="text" value="rdapp12@gmail.com"/>
User Name 2: <input type="text"/>	eAuth ID: <input type="text"/>	Security Role: <input type="text"/>	Email: <input type="text"/>
User Name 3: <input type="text"/>	eAuth ID: <input type="text"/>	Security Role: <input type="text"/>	Email: <input type="text"/>
User Name 4: <input type="text"/>	eAuth ID: <input type="text"/>	Security Role: <input type="text"/>	Email: <input type="text"/>
User Name 5: <input type="text"/>	eAuth ID: <input type="text"/>	Security Role: <input type="text"/>	Email: <input type="text"/>

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: <input type="text"/>	*Phone Nbr: <input type="text"/>	*Email: <input type="text"/>
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Administrator: Assigns roles to other users.
 Representative-Signature-Certif: 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

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 approved 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.

To access AASM, you must be assigned the **Administrator** or **Representative-Signature-Certify** role. If you have been assigned either of these roles, login to RD Apply and click the **Admin** button at the top of the screen to open the AASM website.



The AASM website 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.

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
RDAVIEWONLY	Schneider, Ryan	Active	RDDNLD	VIEWER	120619770	

If the user has not been added in AASM, click the **Add User** button. The following screen will display.

Application Authorization Security Management

[Help](#)

User Maintenance

eAuth User ID *

Name

Phone/Extn *

Fax

Email Address

Assurance Level

Type in the eAuth ID. If the user is already in the system, you will see a pop-up, indicating they are already in the system and prompting you to continue in Edit mode. Otherwise, if the user is not in the system, you can add their contact details and click **Save** or **Add Role**.

If you click **Save**, the system saves the user to the system allowing you to search for the user by their eAuth ID.

If you click **Add Role**, the system displays the User Role Maintenance screen.

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

After you have successfully found a user, you can have three options:

- **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

Action:

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

When you click the **Role**, the following screen displays:

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 *: RDAApply Authorized
 Security Role *: VIEWER
 Tax Id *:

Buttons: 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 a list of TINs that the user has been assigned based on the Security Role. From this screen, you can:

- **Save** – Enabled when you select a TIN. This lets you save any changes made 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 made 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 Security Role for all TINs.
- **Reset** – Clears all the fields.
- **Back** – 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

Buttons: 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 **eAuth User ID**, the following screen displays:

User Maintenance

eAuth User ID *

Name

Phone/Extn *

Fax

Email Address

Assurance Level

Status *

From this screen, you can update the user's phone number, fax number, and status.

Note: You cannot update the user's email address from this screen. If the email address is incorrect, the user must login into their eAuthentication account and update their email address.

From this screen, you can:

- **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 add a role to a user.

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
RDAVIEWONLY	Schneider, Ryan	Active	RDDNLD	VIEWER	120619770	

When you click the **eAuth User ID**, the following screen displays:

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"/>	

From this screen, you will be able to select an **Authorized System**, a **Security Role**, and a **TIN** for this user. It is not required that you select a Loan Program to save a role for a user, but if choose to connect a User Role to a loan program, you can select the following:

- BP – Business Program
- CF – Community Facilities
- MH – Multi-family Housing (MFH)
- FSA – Farm Service Agency
- RH - Rural Housing
- WW – Water & Environmental (WEP)

When you click the **Save** button, you are prompted with 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, the following screen will display:

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	

From this screen, 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 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	<input type="text"/> Use * at end of eAuth User ID for wildcard search
Last Name	941592334	<input type="text"/> Use * at end of Last Name for wildcard search
First Name	721349966	<input type="text"/> Use * at end of First Name for wildcard search
	660446193	
	123456789	
	123121234	
	120619770	

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	<input type="text"/> Use * at end of eAuth User ID for wildcard search
Last Name		<input type="text"/> Use * at end of Last Name for wildcard search
First Name		<input type="text"/> Use * at end of First Name for wildcard search

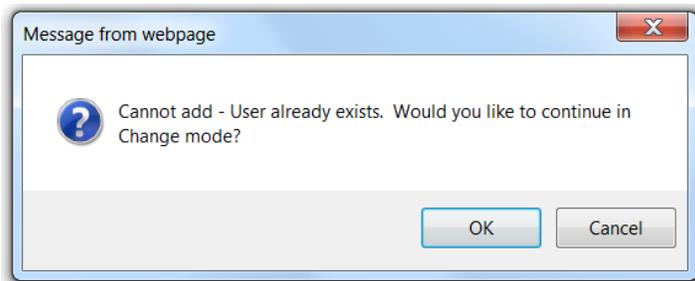
Since the user is not associated to that TIN, you will need to add them. To add a user, click on the **Add User** button. The following screen displays:

The screenshot shows a web form titled "User Maintenance" with a yellow background. The form contains the following fields:

- eAuth User ID * (text input)
- Name (text input)
- Phone/Ext * (two text inputs for area and number)
- Fax (text input)
- Email Address (text input)
- Assurance Level (text input)

At the bottom of the form are four buttons: "Save", "Reset", "Back", and "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.

The screenshot shows the "User Maintenance" form with the following populated data:

- eAuth User ID * (RDAREPUPDATEDATA)
- Name (Webster, Ben)
- Phone/Ext * ((201)555-5555)
- Fax (empty)
- Email Address (Benjamin.Webster@stl.usda.gov)
- Assurance Level (2)
- Status * (Active)

The buttons at the bottom are "Save", "Reset", "Back", and "Add Role".

Click the **Add Role** button to be taken to the User Role Maintenance screen. From here, 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 is not in the system, you are 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 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 by emailing or calling:

E-mail: RD.HD@STL.USDA.GOV

Phone: (800)-457-3642; Select USDA Applications (Press 2); then select Rural Development (Press 2); then select one of the following (Press 1-9, or #):

- 1 MFH
- 2 GRH
- 3 SFH
- 5 Agent
- 9 Leave Message
- # Hear again

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

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.

Note: If you accidentally select the wrong account, you can click "Switch Account" in the Header to bring up the Customer Select box again. This option appears only after navigating away from the Landing page, and then navigating back to the Landing Page.

Select Customer Affiliation ✕

TIN	Organization
135793579	Hartley Electric Smoke
199304170	
	Other

After you have selected an account to work on, you can create a new application, submit an Authorized Representative Request, or access an existing application. 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 the Interview Process, see [Interview Process](#).

Home
Notifications
Admin
Switch Account
Electric CWP
Tutorials

+ Add New Application

or

+ Authorized Representative Request

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, see: [Linking your eAuth ID to a Tax Identification Number](#)

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 clicking + **Add New Application**, a pop-up will appear where you can select which RUS RD Program Area from which to request funds:

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 will also drive 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 of any screen. 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?

Save And Exit
Exit Without Saving
Cancel

If you are past the first four questions of the interview, and a different user tries to start a new interview for the same Tax ID, they will not be able to start a new interview. 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 you try to start a new interview for a Tax ID for which there is already a saved interview, the application will open the previously saved interview.

12.1 SELECTING THE TYPES OF FACILITIES FOR YOUR APPLICATION

An application can include more than project or facility. Check each that apply to your application. When more than one facility is selected you will need to supply all application information for each facility.

Application Questionnaire X

What type of loan/grant are you applying for?

- Drinking Water
- Wastewater
- Storm Water
- Solid Waste

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12.2 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
X

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

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Next

Application Questionnaire
X

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

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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 and upload the following files:

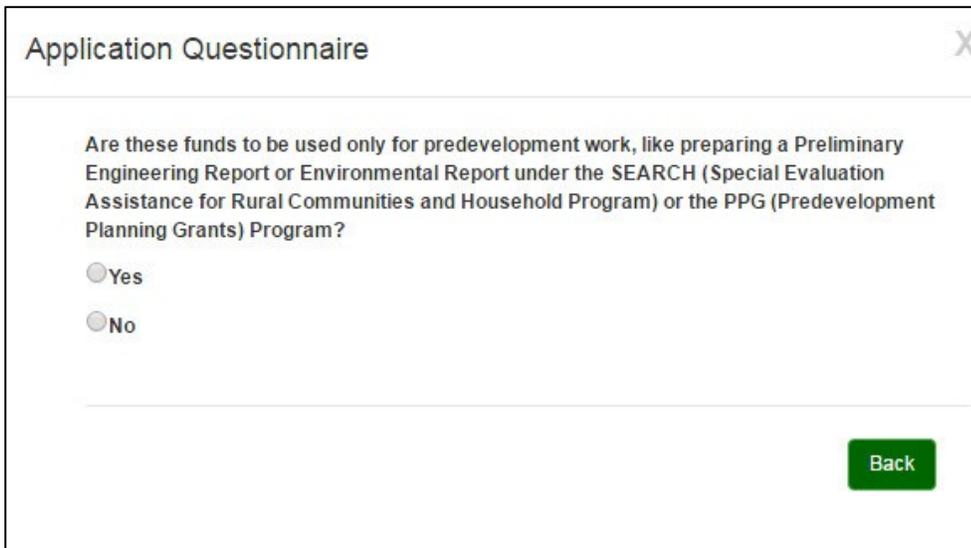
- Simplified Engineering Report/Certification (SI 1778-1, Exhibit A)
- Simplified Environmental Report (SI 1778-1, Exhibit B)
- Conflict of Interest Policy
- Notice of Intent to File Application
- Audits or Financial Statement

12.3 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](#).

12.4 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 X

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

One of the early questions in the interview is “Will these funds be used for construction?”. The question pertaining to a PPG grant will only appear if the funds will not be used for construction and you have answered “No” to that previous interview question.

If you answer "Yes" on either PPG or SEARCH, you will be required to complete an abbreviated application. There will be required documents in the Document tab based on your answers to the interview questions.

13.0 INTERVIEW RECAP

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

Interview Recap		
Question	Answer	Actions
Which Rural Utilities Service (RUS), Rural Development (RD) Program Area are you requesting funds from?	Water And En	
Please validate the Legal Name is correct for the application you are creating.	Susan Cert Tr	Modify
Is this your entity's first application with Rural Utilities Service (RUS), Rural Development (RD)?	Yes	Modify

Note: Data shown on the subsequent screens of the application are dependent on how you answered, "What type of loan/grant are you applying for?" in the interview. For example: If you responded drinking water and storm water, the data on the subsequent screens will display for drinking water and storm water only.

14.0 CUSTOMER

The Customer screen allows you to enter all your personal data and contact information. This screen allows you to indicate various details about your organization, to supply your DUNS NBR and CAGE Code, as well as any other required demographic data.

General Information	
*Legal Name:	New Application
Primary Borrower ID:	606499376
*Organization Description:	
Tax ID Nbr:	996791339
*Type of Applicant:	<input type="checkbox"/> NA
*DUNS NBR:	
*Civil Rights:	<input type="checkbox"/> Minority Owned Businesses
CAGE Code:	
	<input type="checkbox"/> Disability Owned Businesses
	<input type="checkbox"/> Women Owned Businesses

Note: 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." You will need to click the "Details" button to enter contact data such as name, address, contact phone numbers, etc.

Key Contacts				Add New +
*Type	*First Name	*Last Name	Action	
Customer Contact			Details	Delete

15.0 IMPORT ENGINEERING DATA

The Import Engineering Data screen provides a list of Preliminary Engineering Reports (PERs) that have been completed in the ePER system. This screen allows you to import the PER data into the RD Apply WEP application saving you from having to re-enter the information.

The first section of the screen shows you a list of PERs for the Project Types selected during the interview and that have been completed in the ePER system for the selected account.

*Note: The Import options are available only for applications that have **not** been submitted.*

Report Number	Project Name	Date Initiated	Date Completed	Revision	Project Type	Action
2092	Susan PERI Test Sept 2017	08/08/2017	11/09/2017	Revision 1 of 1790	<input type="checkbox"/> Drinking Water <input type="checkbox"/> Wastewater <input type="checkbox"/> Solid Waste <input type="checkbox"/> Storm Water	<input type="button" value="Import Report & Data"/> <input type="button" value="Import Report Only"/>
14030	Susan PERI Test Sept 2017	11/21/2017	11/21/2017	Revision 1 of 1790	<input checked="" type="checkbox"/> Drinking Water <input checked="" type="checkbox"/> Wastewater <input type="checkbox"/> Solid Waste <input type="checkbox"/> Storm Water	<input type="button" value="Import Report & Data"/> <input type="button" value="Import Report Only"/>

There are two import options:

- Import Report & Data, which allows you to import all of the data from the report and a PDF copy of the report to the WEP application. This data will be populated on other screens in the application and the report will appear as an attachment on the Document screen.
- Import Report Only, which allows you to import only a PDF copy of the report. The PDF copy will appear as an attachment on the Documents screen in the Required Attachments section as shown below.

Upload Status	Category	Document Type	Description	File Name
✗	Application	Notice of Intent to File Application	<input type="text"/>	
✗	Engineering	Documentation of Health and Sanitary Issue - Storm Water	<input type="text"/>	
✓	Engineering	Preliminary Engineering Report	This is from EPER Import process	PER14141.pdf

To import the PER data, select one or more project types to import from the ePER system and click the Import Report & Data button. An informational message will display indicating that the import has been successful.

Note: The system displays a warning message allowing you to proceed with the import, overwriting the previously imported data, or to cancel the import request.

The second section of the screen displays ePER import history including Report Number, Date Imported, and Project Type.

Report Number	Date Imported	Project Type
2775	04/20/2018 10:07	<input checked="" type="checkbox"/> Drinking Water <input checked="" type="checkbox"/> Wastewater <input checked="" type="checkbox"/> Solid Waste <input checked="" type="checkbox"/> Storm Water <input type="checkbox"/> Reports Only

16.0 FACILITIES

The following page are included in the Facilities section:

- FacilityDetails
- Drinking Water*
- Waste Water*
- Solid Waste*
- Storm Water*
- Facility Sites
- Land Rights

* The Drinking Water, Waste Water, Solid Waste, and Storm Water options are visible depending on how you answered, “What type of loan/grant are you applying for?” in the interview. For example: If you responded drinking water and storm water, only those options will be available in the drop-down and only data for those options will display in the application.

Facility Details, Facility Sites, and Land Rights will always display, regardless of the type of loan for which you have applied. Land Rights data is optional. All other facility pages are required to be completed.

16.1 FACILITY DETAILS

The first section of the Facility Details screen allows you to select the Project Type you want to work on:

The screenshot shows a green header bar with the word "Facility" in white. Below it, there is a label "Select the Project Type you want to work on now:" followed by a dropdown menu. The dropdown menu is open, showing four options: "Drinking Water" (highlighted in blue), "Wastewater", "Solid Waste", and "Storm Water".

Note: Each time the Project Type drop-down box is seen in the application, you can select the type of project data you want to be included on the screen. This allows you to filter the data and work with specific project types.

The second section of the 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.

Enter the details about your facility and click the Save button. Current and Proposed Facility descriptions are available to be imported from the ePER system.

Note: Facility Detail data is available to be imported from the ePER system.

16.2 DRINKING WATER

The Drinking Water screen allows you to identify options being used in your Drinking Water facility. There are several sections on the screen:

- Source
- Treatment (type and quality concerns)
- Distribution
- Storage

Drinking Water

Public Water System (PWS) ID

National Pollutant Discharge Elimination System (NPDES Permit #)

If Drinking Water is Being Purchased - Cost per 1,000 gallons or 100 cu.ft.

Is Drinking Water Source Adequate No Selection No Yes

Proposed Number of Miles of Line:

Drinking Water Supply Quality

16.3 WASTE WATER

The Waste Water screen allows you to identify options being used in your Waste Water facility. There are several sections on the screen:

- Collection
- Treatment
- Biosolids, Materials, & Energy Recovery
- Effluent Discharge

Wastewater

National Pollutant Discharge Elimination System (NPDES Permit #)

If Wastewater Treatment is by Contract - cost per 1,000 gallons or per 100 Cubic Feet Per 1,000 Gallon Per 100 Cubic Feet

Waste Water

National Pollutant Discharge Elimination System (NPDES Permit #)

16.4 SOLID WASTE

The Solid Waste screen allows you to identify options being used in your Solid Waste facility. There are several sections on the screen:

- Collection
- Treatment
- Disposal
- Other

Solid Waste

National Pollutant Discharge Elimination System (NPDES Permit #)

If Solid Waste Disposal is by Contract - cost per ton.

16.5 STORM WATER

The Storm Water screen allows you to identify options being used in your Storm Water system. There are several sections on the screen:

- Collection
- Treatment
- Discharge

Storm Water

National Pollutant Discharge Elimination System (NPDES Permit #)

Note: All options for all project types are available to be imported from the ePER system.

16.6 FACILITY SITES

The Facility Sites screen allows you to enter information about your facility(s). After selecting Facility Sites, you need to select the Project Type you want to work on:

Facility Sites

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, 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.

Select the Project Type you want to work on now:

Drinking Water
Wastewater
Solid Waste
Storm Water

You must enter details for the Primary Facility for each project type selected in the interview.

*Facility Type	*Description	*Street 1	Street 2	*City	*State	*Zip Code	*County	*Congressional District	Action
Primary Facility									Delete

To add a new facility type, click the “Add New +” button to add a new row. Then use the drop-down menu to select the type for the new row.

Facility Type	Description	Street 1	Street 2	City	State	Zip Code	County	Congressional District	Action
Primary Facility	Drinking Water Primary Facility	123 Main Street		Ottumwa	Iowa	52501	Wapello	2nd	Delete
Task									Delete

Note: Facility Site information is not available in the ePER system.

16.7 LAND RIGHTS

The Land Rights screen is where you can enter information about how much land you have and how much you will acquire. After selecting Land Rights, you need to select the Project Type you want to work on. Then, you can enter details about the land including:

- Number of acres to be acquired (fee simple, lease)
- Acquired acreage purchase price and value
- Number of acres owned (fee simple, lease)
- Owned acreage purchase price and value

Note: Land Rights data is available to be imported from the ePER system.

Land Rights

Select the Project Type you want to work on now:

Drinking Water
Wastewater
Solid Waste
Storm Water

17.0 VOLUME/FLOW

Volume/Flow is split into two sections: Connections Information and Wholesale. You can switch back and forth by clicking on the screen titles on the Volume/Flow screen.

Volume/Flow data applies only to Drinking Water and Waste Water.

17.1 CONNECTIONS INFORMATION

The Connections Information screen allows you to enter information about the water you sell to direct customers or to your retail customers. First you need to select the Project Type you want to work on. Then, you can enter details:

Connections Information

Select the Project Type you want to work on now:

Drinking Water
Wastewater

After selecting the Project Type, indicate whether you sell retail water and whether you will be adding new connections:

Connections Information - Details

*Do you sell water (or provide waste disposal service) to residential, industrial, or business users? Yes No

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

If you respond Yes to either of these questions, additional fields will display allowing you to enter details about the water (total gallons sold, existing connections, and annual revenue) and about the new connections (how many and tap fees).

17.2 WHOLESALE

The Wholesale screen allows you to enter information about the water you sell wholesale. First you need to select the Project Type you want to work on. Then, you can enter details:

Wholesale

Select the Project Type you want to work on now:

Drinking Water
Wastewater

After selecting the Project Type, indicate whether you sell water to entities that resell:

Wholesale - Detail

*Do you sell water to entities who in turn resell water to their customers? Yes No

If you respond Yes, additional fields will display allowing you to enter unit measurement (gallons or cubic feet) and date of last price increase.

Wholesale - Detail

*Do you sell water to entities who in turn resell water to their customers? Yes No

*Is the unit price charged per 1,000 gallons or per 100 cubic feet? Per 1,000 Gallon Per 100 Cubic Feet

*When was the last time you had a price increase to these customers?

In addition, the Wholesale Volume section displays for you to enter the wholesale user name, annual volume and unit price for each of your wholesale customers. Monthly volume calculates automatically based on the Annual Volume entered. If you need to add another user, click the Add New + button. A Totals section displays the total Annual and Volume amounts. Additionally, wholesale data may be modified or deleted as necessary.

Wholesale Volume (projected) Add New +				
*Wholesale User Name	*Annual Volume	Monthly Volume	*Unit Price	Action
<input type="text"/>	<input type="text"/>	0	<input type="text"/>	Delete
Totals		0	0	

Notes: 1) If working with Waste Water, the Wholesale screen will ask whether you provide contracted bulk sewer treatment.
 2) Connections Information and Wholesale data are not available to be imported from the ePER system

18.0 PROJECT SCHEDULE

The Project Schedule screen displays project schedule details including the proposed start date and end date. The start and end dates in this section are the earliest and latest dates across all project types in the project schedule. In addition, you can select the date your application was made available and indicate your state clearinghouse ID if applicable.

Project Schedule			
Proposed Start Date:	<input type="text" value="08/01/2017"/>	Proposed End Date:	<input type="text" value="12/15/2019"/>
Date Application made available to the Inter-Governmental Review Process (if applicable):	<input type="text" value="mm/dd/yyyy"/>	State Clearinghouse ID (if applicable):	<input type="text"/>

The second section of the screen displays Project Schedule Milestone details, including the individual project start and end dates for each project type. Input the date information in the project schedule milestones with the exception of the intergovernmental review date and ID.

Project Schedule Milestones Add New +				
*Project Type	*Scheduled Milestone	Description	*Date	Action
Drinking Water <input type="text"/>	Proposed Start of Construction <input type="text"/>	start of construction in the rain of the day	<input type="text" value="08/01/2017"/>	Delete

To add additional project schedule milestone details, click the Add New + button:

Project Schedule Milestones					Add New +
*Project Type	*Scheduled Milestone	Description	*Date	Action	
<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value="mm/dd/yyyy"/>	<input type="button" value="Delete"/>	
<ul style="list-style-type: none"> Drinking Water Waste Water Solid Waste Storm Water 	<ul style="list-style-type: none"> Proposed Start of Construction Proposed End of Construction Milestone Date 				

Note: All project schedule data is available to be imported from the ePER system.

19.0 PROJECT COST

This page allows the entry of all the costs to complete your project. Each project cost must be associated to a specific project type (facility) and Cost Classification.

This screen includes a display filter that allows you to select the type of project data you want included on the screen. This allows you to view data records for a specific project type(s). You will see this display filter on several other screens throughout the application.

Include in Display: Drinking Water Wastewater Solid Waste Storm Water

The first section allows you to view and/or enter Project Cost information.

Project Cost					Add New +
*Project Type	*Cost Classification	Description	Cost	Action	
<input type="text" value="Drinking Water"/>	<input type="text" value="Equipment"/>	<input type="text" value="Drinking Water source project cost e"/>	<input type="text" value="\$552,000.00"/>	<input type="button" value="Delete"/>	

To add project cost information, click the Add New + button to add a new row.

Project Cost					Add New +
Project Type	Cost Classification	Description	Cost	Action	
<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="button" value="Delete"/>	
<ul style="list-style-type: none"> Drinking Water Waste Water Solid Waste Storm Water 	<ul style="list-style-type: none"> Architectural, Engineering & Planning Bond Counsel Contingencies Development Engineering - Additional Services Engineering - Construction Administration Engineering - Design Engineering - Inspections Engineering - PreDevelopment Environmental Equipment Initial Operation & Maintenance Initial Reserve Interest Land & Rights Legal Services Other Refinancing (Other Debt) Training (TAT) 				

Note: If you add a new Project Cost record and the selected Project Type is not selected in the display filter, the system will automatically include the project type in the display filter and all records for the project type will display on the screen.

The second section of the screen displays Project Cost Summaries by Project Type and by Cost Classification. The summary data is dynamically updated as data is entered in the first section of the screen.

Notes: 1) All project cost data is available to be imported from the ePER system.

2) The total project cost for each project type must be equal to the amount of funding for a project type entered on the Proposed Funding page.

20.0 FINANCIAL

You must complete the following screens to complete the Financials section:

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

20.1 GENERAL FUNDS BALANCE SHEET

The General Funds Balance Sheet screen has a question at the top of the page to indicate whether your entity operates with a General Fund. When “No” is clicked the remainder of the page is hidden and no more information is required. When “Yes” is selected, each piece of information must be filled out or indicated that it not applicable.

At the top of the page there is a field for the date of financial information. Your financial information should be within the past 90 days. However, the date entered should accurately match the financial information entered.

The General Funds Balance Sheet screen is separated into two sections for the entry of Assets and Liabilities & Equities. Each section also contains subsections. The Assets section has subsections for Current Assets, Restricted Cash, Other Current Assets, and Fixed Assets. The Liabilities & Equities section has subsections for Current Liabilities and Long Term Liabilities.

Each subsection has a radio button selection of “Yes” or “No” to indicate whether you have data to enter for that section. If you select “No”, then the section is hidden and no data for that section is required. If you select “Yes”, the section remains open and at least one asset must be entered.

All subsections with a radio button operate in the same manner. These include Current Assets, Restricted Cash, Fixed Assets and Current Liabilities. Below is an example of the Restricted Cash subsection shown for both a “Yes” and “No” answer to the radio button.

No has been selected for the Restricted Cash subsection, so the section is hidden, and no data will be required.

Restricted Cash

*Do you have Restricted Cash? Yes No

Yes has been selected and at least one asset must be entered. Use the drop-down menu to select the appropriate asset type and enter the amount. The Add New button can be used to insert more assets. Additionally, assets may be deleted or modified as needed.

Restricted Cash Add New +

*Do you have Restricted Cash? Yes No

Asset Type	Amount	Action
<div style="border: 1px solid #ccc; padding: 2px; width: fit-content;"> Customer Deposits Debt Reserves Required O&M Reserves Depreciation Reserves Other </div>		Delete
	\$0	

Within some subsections there are individual data fields. Each data field must either have a value entered or the “Not Applicable” checkbox must be selected. All subsections with individual data field operate in the same manner. These include the Other Current Asset and Long-Term Liabilities subsections. Below is an example of the Other Current Assets subsection with both an entered value and an indication of “Not Applicable”.

Other Current Assets		
Asset Type	Amount	Not Applicable
Accounts Receivable	<input type="text" value="\$4,500"/>	<input type="checkbox"/>
Less: Allowance for doubtful accounts	<input type="text" value="\$0"/>	<input checked="" type="checkbox"/>
Inventories	<input type="text" value="\$16,000"/>	<input type="checkbox"/>
Prepayments	<input type="text" value="\$0"/>	<input checked="" type="checkbox"/>
Total Current Assets	<input type="text" value="\$20,500"/>	

Totals for each subsection are automatically calculated and your Net Worth and Total Liabilities & Equity are shown at the bottom of the page.

Note: General Funds Balance Sheet information is not available in the ePER system.

20.2 ENTERPRISE BALANCE SHEET

Enterprise Balance Sheet screen information must be entered for each project type (facility) selected during the interview. So you must first select the project type for the data entered on the page.

From this point on, the Enterprise Balance Sheet page functionality is identical to the General Funds Balance Sheet page.

Balance Sheet

Select the Project Type you want to work on now:

Drinking Water
Wastewater
Solid Waste
Storm Water

At the top of the page there is a field for the date of financial information. Your financial information should be within the past 90 days. However, the date entered should accurately match the financial information entered.

The Enterprise Balance Sheet screen is separated into two sections for the entry of Assets and Liabilities & Equities. Each section also contains subsections. The Assets section has subsections for Current Assets, Restricted Cash, Other Current Assets, and Fixed Assets. The Liabilities & Equities section has subsections for Current Liabilities and Long Term Liabilities.

Each subsection has a radio button selection of "Yes" or "No" to indicate whether you have data to enter for that section. If you select "No", then the section is hidden and no data for that section is required. If you select "Yes", the section remains open and at least one asset must be entered.

All subsections with a radio button operate in the same manner. These include Current Assets, Restricted Cash, Fixed Assets and Current Liabilities. Below is an example of the Restricted Cash subsection shown for both a "Yes" and "No" answer to the radio button.

No has been selected for the Restricted Cash subsection, so the section is hidden, and no data will be required.

Restricted Cash

*Do you have Restricted Cash?

Yes

No

Yes has been selected and at least one asset must be entered. Use the drop-down menu to select the appropriate asset type and enter the amount. The Add New button can be used to insert more assets. Additionally, assets may be deleted or modified as needed.

Restricted Cash Add New +

*Do you have Restricted Cash? Yes No

Asset Type	Amount	Action
<div style="border: 1px solid black; padding: 2px;"> Customer Deposits Debt Reserves Required O&M Reserves Depreciation Reserves Other </div>	<input type="text"/>	Delete
	\$0	

Within some subsections there are individual data fields. Each data field must either have a value entered or the “Not Applicable” checkbox must be selected. All subsections with individual data field operate in the same manner. These include the Other Current Asset and Long-Term Liabilities subsections. Below is an example of the Other Current Assets subsection with both an entered value and an indication of “Not Applicable”.

Other Current Assets		
Asset Type	Amount	Not Applicable
Accounts Receivable	<input type="text" value="\$4,500"/>	<input type="checkbox"/>
Less: Allowance for doubtful accounts	<input type="text" value="\$0"/>	<input checked="" type="checkbox"/>
Inventories	<input type="text" value="\$16,000"/>	<input type="checkbox"/>
Prepayments	<input type="text" value="\$0"/>	<input checked="" type="checkbox"/>
Total Current Assets	<input type="text" value="\$20,500"/>	

Note: Enterprise Balance Sheet information is not available in the ePER system.

20.3 OTHER INCOME

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

This screen also includes a display filter that allows you to select the type of project data you want included on the screen. This allows you to view data records for a specific project type(s).

The first section allows you to view and/or enter Other Income Details:

Other Income - Details Add New +					
*Project Type	*Type of Income	*User Assessed	*Description	*Yearly Income	Action
<input type="text" value="Drinking Water"/>	<input type="text" value="Other Operating Income"/>		Drinking Water OP Wholesale	<input type="text" value="\$675"/>	Delete

To add additional operating or non-operating incomes, click the Add New + button to add a new row:

Other Income - Details Add New +

*Project Type	*Type of Income	*User Assessed	*Description	*Yearly Income	Action
<input type="text"/>	Delete				

Drinking Water
Waste Water
Solid Waste
Storm Water

Operating Income - Retail
Operating Income - Wholesale
Other Operating Income
Non-Operating Income
Non-Operating Income - Assessments
Non-Operating Income - GO/Taxes
Non-Operating Income - Interest Income
Non-Operating Income - Membership
Non-Operating Income - Rent Income
Non-Operating Income - Tap Fees
Non-Operating Income - Other
Solid Waste - Other Revenue

Additionally, income data may be modified or deleted as necessary.

The second section of the screen displays Income Summary information by Project Type and Income Type.

Notes: 1) All other income data is available to be imported from the ePER system, except assessed users.

2) For Income Types of Assessments and GO Bonds, you must enter the number of assessed users in the User Assessed field.

20.4 SHORT LIVED ASSET

This screen allows you to enter details about Short Lived Assets and their Replacement Costs and Useful Life. The Annual Reserve is system generated. After navigating to the Short Lived Asset screen, you must indicate whether you have Short Lived Assets to report, and if you do, you must indicate the project types with short lived assets.

In the example below, the “Yes” radio button is selected indicating the Applicant does have short lived assets. Additionally, each project type has been “checked” to indicate that every facility has short lived assets.

Short Lived Asset

*Does the applicant have any Short Lived Assets to report? Yes No

*If Yes, check project types with Short Lived Assets? Drinking Water Wastewater Solid Waste Storm Water

This screen also includes a display filter that allows you to select the type of project data you want included on the screen. This allows you to view data records for a specific project type(s).

Include in Display Drinking Water Wastewater Solid Waste Storm Water

The first section allows you to view and/or enter Short Lived Asset details:

Short Lived Assets - Details Add New +

*Project Type	*Description	*Replacement Cost	*Useful Life	Annual Reserve	Action
Drinking Water	Drinking Water SLA1	\$250,000.00	0-5 Years	\$50,000.00	Delete

To add Short Lived Asset details, click the Add New + button to add a new row:

Short Lived Assets - Details					Add New +
*Project Type	*Description	*Replacement Cost	*Useful Life	Annual Reserve	Action
<input type="text" value="▼"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="▼"/>	\$0.00	Delete
<ul style="list-style-type: none"> Waste Water Drinking Water Solid Waste Storm Water 			<ul style="list-style-type: none"> 0-5 Years 6-10 Years 11-15 Years 		

The second section of the screen displays Short Lived Asset Summary information by Project Type with totals for Replacement Cost and Annual Reserves.

Note: Short Lived Asset data is available to be imported from the ePER system.

20.5 PROPOSED FUNDING

This screen collects the amount of Funds supplied by each of the sources. This screen also includes a display filter that allows you to select the type of project data you want included on the screen. This allows you to view data records for a specific project type(s).

The first section allows you to view and/or enter proposed funding details:

Proposed Funding - Details					Add New +
*Project Type	*Funding Source	Funding Source Description	*Funding Amount	Actions	
<input type="text" value="▼"/>	<input type="text" value="▼"/>	<input type="text"/>	<input type="text"/>	Delete	
Total Of Displayed Funding Sources:			\$0.00		

To add Proposed Funding details, click the Add New + button to add a new row:

Proposed Funding - Details					Add New +
*Project Type	*Funding Source	Funding Source Description	*Funding Amount	Actions	
<input type="text" value="▼"/>	<input type="text" value="▼"/>	<input type="text"/>	<input type="text"/>	Delete	
<ul style="list-style-type: none"> Drinking Water Waste Water Solid Waste Storm Water 	<ul style="list-style-type: none"> ARC Bureau of Indian Affairs CDBG/HUD Commercial Lender EDA EPA Forest Service Health and Human Services Housing and Urban Development Indian Health Services Miscellaneous Other Other State Funds Public Private Partnership State Revolving Loan Fund Rural Development Applicant Local 				

Additionally, proposed funding data may be modified or deleted as necessary.

The second section of the screen displays Funding Summary information by Project Type and Funding Source.

Note: The funding amount for each project type must be equal to the amount of project costs for that project type entered on the Project Cost page.

20.6 DEBT

This screen is designed to collect data to define all outstanding Loans or for current loans planned for the project. After selecting the Debt screen, you need to indicate whether you have any existing debt or other funding with terms to report. If you respond Yes, you must indicate the project types with debts. This screen also includes a display filter that allows you to select the type of project data you want included on the screen. This allows you to view data records for a specific project type(s).

Debt

*Does the applicant have any Existing Debt with Terms or Other Funding sources with Terms to report? Yes No

If Yes, check the project types with Debts Drinking Water Wastewater Solid Waste Storm Water

The first section allows you to view and/or enter details about existing and proposed debt. To view additional details such as who the debt is owed to, initial issuance amount, purpose, security, and income source, click the Details button.

Existing and Proposed Debt												Add New +
*Project Type	*Type of Loan	*Owed To	*Balance Owed	*Terms (yrs)	*Date of First Payment	*Annual Payment	Annual Reserve	Reserve on Hand	*Interest Rate	*Maturity Date	Action	
Drinking Water	Proposed New Loan (other than USDA)	Drinking		20	09/01/2017	\$535,000	\$53,500		4.7500%	12/01/2017	Details Delete	

To add additional debt information, click the Add New + button to add a new row:

Existing and Proposed Debt												Add New +
*Project Type	*Type of Loan	*Owed To	*Balance Owed	*Terms (yrs)	*Date of First Payment	*Annual Payment	Annual Reserve	Reserve on Hand	*Interest Rate	*Maturity Date	Action	
					mm/dd/yyyy					mm/dd/yyyy	Details Delete	

The second section of the screen displays Debt Service Summary information by Project Type.

Note: All debt data is available to be imported from the ePER system.

20.7 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. This screen also includes a display filter that allows you to select the type of project data you want included on the screen. This allows you to view data records for a specific project type(s).

The first section of the screen allows you to view and/or enter details about Proposed O&M:

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? Using the information from the Preliminary Engineering Report, enter the data below:

*Project Type	*Expense Item	Description	*Annual Amount	Action
Drinking Water	Administrative/Office	Drinking Water source O	\$500,000.00	Delete

To add additional information, click the Add New + button to add a new row:

Proposed O&M				
Add New +				
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? Using the information from the Preliminary Engineering Report, enter the data below.				
*Project Type	*Expense Item	Description	*Annual Amount	Action
<input type="text"/> <ul style="list-style-type: none"> Drinking Water Waste Water Solid Waste Storm Water 	<input type="text"/> <ul style="list-style-type: none"> Administrative/Office Contract Services - Other Contract Waste Treatment Contract Water Purchase Engineering Insurance Legal Other Repairs/Maintenance Salaries/Benefits Supplies Utilities 	<input type="text"/>	<input type="text"/>	<input type="button" value="Delete"/>

Additionally, Proposed O&M expenses may be modified or deleted.

The second section of the screen displays Expense Summary information by Project Type and Expense Item/Type.

Note: All O&M data is available to be imported from the ePER system.

21.0 SERVICE AREA MAPPING

This screen allows you to draw your Service Area(s). You will have options to either draw your Service Area(s) or upload an existing Shapefile. You will also be able to draw two types of area: "Existing" or "Proposed New".

Note: All service area mapping data is available to be imported from the ePER system.

21.1 CREATING A SERVICE AREA

To create a Service Area Map, click on the "Add New" button and provide the information requested in the "Add New Service Area" pop-up. You must select at least one project type; if your project includes more than one project type, you may select multiple project types and an identical map will be created for each project type selected.

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. You may double click on an area of the displayed map to zoom in to the area. You may continue to double click until you are satisfied that you can draw your map detail accurately.

Add New Service Area
X

*Project Type: Drinking Water Waste Water Solid Waste Storm Water

*Program Type:

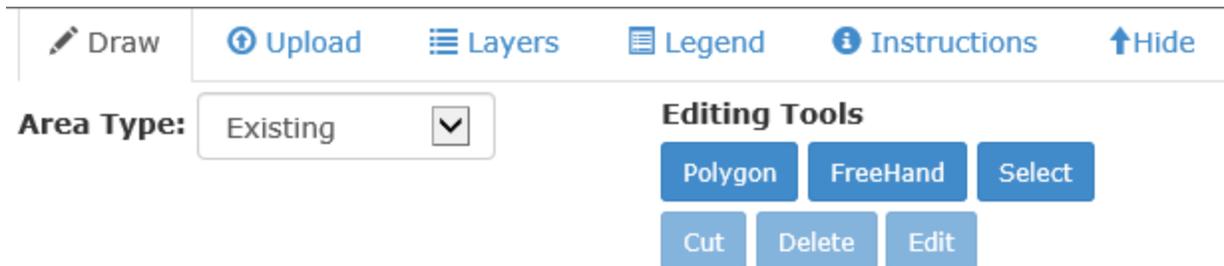
*Area Name:

Comments:

21.2 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 done so, the following Selections or Editing Tools will be displayed: Area Type, Polygon, FreeHand, Select, Cut, Delete, and Edit.

Before starting to draw your Service Area, you should specify what type of Service Area you want to draw. An Area Type of “Existing” will be selected as the default choice after **Draw** is clicked. An Existing Area must be drawn before a Proposed New Area is able to be drawn.



After you have drawn both an Existing and a Proposed New Area on the map, you can distinguish the Existing Area (dark shade) from the Proposed New Area (light shade).



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.

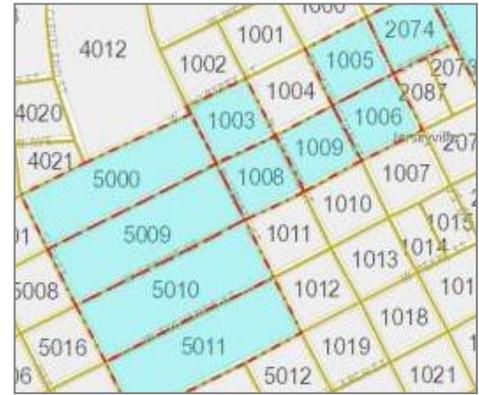
The Polygon tool also has a Census Block precision feature. Once you are zoomed in enough to see the Census Blocks, you can hold down the Control Button. This will allow the Map pointers to connect to a Census Block. You will see a Cross-hairs pointer appear that indicates the functionality is enabled.

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.

21.3 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 unsaved layers.

21.4 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

21.5 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 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) screen. Exit will return you to the Service Area(s) screen without saving your progress.

21.6 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	Project Type	Population	Square Miles	% of Rural vs. Urban	Actions	
DW Area 1	Drinking Water	6950	282.48	100.00%	Enter Connections for MHI	Edit / View Data
					Edit / View Map	Delete

Enter Connections for MHI: The number of residential connections for Census Designated Places, Counties, and Subdivisions/Townships are required to be entered for each service area. After you click on the Enter Connections for MHI button, a modal displays prompting you to enter the number of connections. When all the connection fields are entered, you can push Save to save your data and return to the Service Area page.

Enter connections here

Number Of Residential Connections

Income

<input type="text" value="756"/>	\$41,133,960
<input type="text" value="600"/>	\$32,646,000
<input type="text" value="1000"/>	\$81,250,000
<input type="text" value="2356"/>	\$155,029,960

Save

Export to Excel

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.

DW Area 1	Existing	Alternate
Total Population	6,950	0
Total Square Miles	282.48	0
Percent of Rural vs. Urban	100.00%	0.00%
Explanation for changes in detail		

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.

Edit/View Map: Allows you to edit and review the map as needed.

22.0 DOCUMENTS

The Documents screen allows you to 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 screens under the Documents screen must be completed for the Documents screen to be marked as finished.

22.1 ATTACHMENTS

The Attachments section is located under on Documents screen. This section allows you to upload any required attachments as well as upload any additional attachments that you may have.

Required Attachments
Add New +

Uploading an attachment only saves the description for that specific attachment.
 For WEP applicants only - If you need an example of what a 'Notice of Intent to File Application' is, click on the Help link in the top right hand corner of your screen.
 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
✔	Engineering	Preliminary Engineering Report	<input type="text" value="This is from"/>	PER14021.pdf	12/15/2017	M. Clem	Delete Add

Note: The PIR report is available to be imported from the ePER system. For more information, see section 15.0 Import Engineering Data.

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 disabled, and you will not be able to enter a description (you'll will have to delete the attachment, enter a description, and then upload the attachment again).

To delete an attachment, 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.

Upload Document

Category:

Document Type:

Description:

File Input:

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 pop-up 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.

Additional Attachments							Upload
Please attach additional documentation not included above to assist review of the loan application.							
Upload Status	Category	Document Type	Description	File Name	Date	Uploaded By	Action

Clicking the Upload button will open a pop-up that lets you select the Category, the Document Type, and then browse for the attachment.

The options available in the Document Type dropdown is dependent on the selection made in the Category dropdown. If you change your choice in the Category dropdown, the system will change the options 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 section is located on the Documents screen. This section allows you to 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 “Sign” link. This will display the certification text. You must fill out any input fields, click the “I sign” checkbox at the bottom of the certificate, and click the Save button 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.

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

23.0 SUMMARY/SUBMIT

The Summary/Submit screen will display a list of all the sections, along with their status. This screen allows you to monitor your application to see what is needed to submit. When a section has a green checkmark, you know that the screen is complete. If it has a red “X” instead, you know that it still needs some work.

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 the hyperlinked name to be taken back to that screen.

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

23.1 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.

After submission it will take a moment or two for the system to generate a composite of all your application data. When complete, a “View Submitted Application” button will appear, and you will be able to view or save the document containing all your application data.

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

24.0 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.

25.0 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.

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 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

For the applications you are connected to, you will receive notifications.

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” screen 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.

30.0 NOTIFICATIONS - SUBSCRIBE AND UNSUBSCRIBE

30.1 ACCESSING THE NOTIFICATION SYSTEM

After logging into RD Apply click on “Notifications” in the header bar. This will open a screen titled Notification Details. On this screen is a button labeled “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

To create a subscription, you need make selection in the following dropdowns:

1. Application
2. Program
3. NotificationType
4. Customer

Since the Notifications Module will be used across multiple Applications, with different programs and notifications, the options in the Notification Type drop downs are dependent on the Program selection (meaning that the options in the Notification Type differ depending on the Program Type selected). You are able to select multiple customers in the Customer dropdown.

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

Manage Your Subscription

Application:

Customer:
Aiken Electric Cooperative, Inc.
Benton Rural Electric Association
Blue Ridge Electric Membership Corporation

Program:

Notification Type:
Application Accepted
Application Returned
Application Submitted

After you have selected which values you want, click the “Save” Button. The system will save the chosen values and display the new notification in the Subscribed Notification section. 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.

Subscribed Notifications					
Show <input type="text" value="10"/> entries		Search: <input type="text"/>			
Notification Type ▲	Program ⚙	Customer ⚙	State ⚙	County ⚙	Action ⚙
Application Submitted	Water And Environmental	Aiken Electric Cooperative, Inc.	SC		<input type="button" value="Delete"/>

DROPDOWN VALUES

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

1. Application
 - RD Apply
2. Program
 - Electric
 - Telecommunications
 - Water and Environmental
3. NotificationType
 - All Notifications (except Authorized Representative Requests)
 - Application Accepted
 - Application Returned
 - Application Submitted
 - Loan Processing
 - If Electric was selected as the Program, the following also appear:
 - Long Range Financial Forecast Approved
 - Long Range Financial Forecast Completed by Borrower
 - Long Range Financial Forecast Returned
 - New Application

30.3 DELETING A SUBSCRIPTION

To delete a subscription, locate the subscription in the Subscribed Notification section and click the “Delete” button. 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 they 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 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.

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 REQUIRED DOCUMENTS

The documents required in the Document tab are based on your answers to the interview questions. If you are creating a Water and Environmental application, the following basic attachments are an example of what you may be required to submit with your application:

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