

System Requirements/Recommendations:

- A high speed internet connection is strongly recommended. Options include:
 - **Cable** - such as Road Runner or Comcast
 - **DSL** (digital subscriber line) - through a phone company
 - **Satellite** - such as Wildblue for areas where DSL and cable services are unavailable
 - Useful Resource for more information:
 - High Speed Internet Access Guide- <http://www.high-speed-internet-access-guide.com/>
- Supported Operating Systems and Supported Browsers:
 - The system has been developed and tested using the Operating Systems and Browsers listed. Other Operating Systems and/or Browsers may work, but if problems are encountered we may be unable to provide assistance.
- Assistive Technologies:
 - In order to be in compliance with the Statewide Technology Policy P04-002, the purpose of which is to make state agency web-based internet applications accessible to persons with disabilities, this system has been tested and will be supported for the screen readers listed.
- Any additional technical questions can be sent to MSR@dhcr.state.ny.us
- **Don't wait until the last minute!!!** - This cannot be stressed enough...
 - There are a lot of factors involved in using an Internet Application - the users PC and Internet Connection, the agency's ISP, firewalls, web servers, application servers and databases all have to be working in sync and **normally** they do.
 - We will do everything possible to make sure the items within our control are functioning as they should, but the agency can't take responsibility for factors outside our control.
 - It is in your best interest to start early and get data into the system as soon as it is available. Waiting until the last minute could hurt your chances for a successful submission.
 - If a situation should arise where large numbers of applicants are unable to complete their submission due to issues with DHCR equipment etc., the agency will address the issue as necessary.
 - Little sympathy, however, will be given in cases where it is determined that an incomplete submission was due to an applicant leaving insufficient time to complete the process. All updates in the system are audited and the agency will be able to tell when an application is started and how often it has been accessed.

Next slide -> DHCR Home Page

- To access the system start from the DHCR Home Page at www.dhcr.state.ny.us
- Select the Community Development tab at the top of the screen where the yellow arrow is pointing.

Next slide - > CD Web Page

- Select the Community Development Web Applications link where the yellow arrow is pointing.
- **Note:** on this page you can also access the Unified Funding Materials - see link at the bottom of the page.

Next slide - > CD Online Web Page

- Registered users can select the Login to CD Online link to enter the system.
- **Note:** Information on how to become a registered user is show at the bottom of this page and is also included in your packet.

Next slide - > CD Online Login Page

- Once your Registration is processed by DHCR, you will be emailed a User ID and system generated Password.
- The first time you login the system will prompt you to change your password.
- Additionally, users designated as Security Managers will have to enter the Federal ID Number of the Organization they are working for the first time they log in.
- If at some point you forget your password you can enter your User ID and click the Forgot Your Password? link on this page and a new system generated Password will be emailed to you.

Next slide - > CD Online Main Menu

- Once you have successfully logged in you will be on the Main Menu.
- The Main Menu is broken into 4 sections:
 - Banner/Navigation
 - Information and alerts
 - Organization
 - Applications
- The **Banner/Navigation** section appears at the top of each page.
- The **Information and Alerts** section of this page provides links to the:
 - General System Information page which explains how to use the system and includes things like how to navigate and save your information.
 - Frequently Asked Questions page which will be populated through out the application process as applicants ask questions.
 - Application Instructions page which provides information on how to enter and submit an application, as well as detailed instructions for completing the application Exhibits. **Note:** A link to the Application Instructions is also included in the Banner/Navigation section and is available on every page.
 - If at anytime you encounter problems or have questions send an email to MSR@dhcr.state.ny.us
 - The Alert section will be used to provide information on recent changes, system maintenance etc.
- The **Organization** section lists the organization or organizations that you are registered for.
- The **Applications** section lists the applications currently in the system for your Organization(s).

Next slide -> CD Online General System Information

- Before attempting to start an application it is recommended that you read the General System Information page and familiarize yourself with the topics listed.

Next slide -> CD Online Application Instructions

- It is also highly recommended that you read section 1. General Application Information in the CD Online Application Instructions.
- This section outlines the steps necessary to successfully submit an application.
- We will briefly walk through each of these steps now:
 - Verifying your Organization Information
 - Beginning a new Application
 - Validating your Application
 - Certifying and Submitting your Application
 - Uploading Attachments

Next slide - > Step 1 - Verifying Your Organization Information:

- The first thing you should do is verify that the information DHCR has on file for your Organization is correct.
- On the Main Menu in the Organization section select the edit link where the yellow arrow is pointing

Next slide -> Organization Update:

- On the Organization Update page you can review and update, if necessary, the information associated with your Organization. **Note:** Each of the categories shown on this slide - A. General Applicant Information, B. Type of Applicant, C. Phone and Internet Data etc. each have a number of data elements that can be updated associated with them. Only the category names are shown here to give you an idea of the types of information included.

Next slide - > Step 2 - Beginning a new Application

- On the Main Menu in the Applications section enter the name of your Application/Project, select Capital Project as the Application Type and click the Submit Button where the yellow arrow is pointing.

Next slide - > The Exhibit List

- When you successfully add a new application you will automatically be transferred to the Exhibit List.
- This page lists all 10 Exhibits with links to each section within each Exhibit. Select the edit link associated with the Exhibit/Section you would like to work on.
- **Note:** While it is not necessary to start at the top and work through the application in exhibit order, there are some exhibits that are dependant on information entered in a previous exhibit/section.
- Be sure to carefully read the Application Instructions for each Exhibit as you complete it.

Next slide - > Back to the Main Menu

- **Note:** The status of your application is 'in progress'.
- The Options of view, edit, delete and validate are now available for your application.
- View will open a printable version of your application in a new window.
- Edit will transfer you to the Exhibit List page where you can select which exhibit/section you would like to update.
- Delete will allow you to delete your application. A pop up box will ask you to confirm the deletion. Be careful, once you delete it, it's gone.
- Validate will take you to the validation screen.

Next slide - > Step 3 - Validating your application

- Once you have entered all of the information for your application you will have to validate it.
- The Validation Process is done in 3 steps.
 - Step 1 checks to make sure all required exhibits have been entered
 - Step 2 verifies that the information entered for each exhibit is complete
 - Step 3 verifies that the information entered across exhibits is consistent
- Any errors encountered will be displayed on the screen. You need to correct the errors and run the validation process again.
- In order to pass validation all 3 steps must be successfully completed.
- Once you have successfully validated the certify link will be made available.

Next slide - > Step 4 - Certifying and Submitting your Application

- The certify link will only be made available to users who were designed as authorized signatories when they were registered.
- The authorized signatory must enter the certification screen and enter their password. This will electronically 'sign' the application.
- **Note:** Once the certification is signed the application is submitted and can no longer be changed.

Next slide - > Back to the Main Menu

- **Note:** The status of your application is 'certified' and the assigned SHARS ID is displayed.
- The available options are now view and attachments.
- **Note:** Your application has been submitted but is not complete until the attachments have been uploaded.

Next slide - > Step 5 - Uploading Attachments

- There are two types of attachments, those that are required and those that are optional.
- Required attachments must be uploaded for every application.
- Optional attachments are those that are not required for every application, but may be required for certain applications. It is very important to read the Attachment Instructions carefully to determine whether or not a particular optional attachment may be required for your particular application type.
- If you determine that an attachment is not required you must select the omit link to indicate that you are knowingly not including the attachment.

Next slide - > Selecting an Attachment to Upload

- When you select an add link you will be transferred to a screen which will allow you to browse the files on your computer and select one for upload. When the upload is complete you will be returned back to the Attachment Upload Screen.

Next slide - > Back to the Attachment Upload Screen

- **Note:** You have the option to delete attachments you have uploaded.
- Once you are finished adding and omitting attachments click the submit button.

Next slide - > Attachment Certification

- Click ok to indicate that you have completed the Attachment Submission.

Next slide - > Back to the Main Menu

- **Note:** The status of your application is 'completed'. Your application submission is now complete.
- The view and attachment options remain available so that you can view the information you have submitted.