# SOAR: Frequently Asked Questions (FAQs)
### Updated July 1, 2016
#### TARGET AUDIENCE:  APPLICANTS

| BACKGROUND INFORMATION | GETTING STARTED | USER ACCOUNTS | COMPLETING AN APPLICATION | APPLICATION SUBMITTAL | TROUBLE SHOOTING | RESOURCES |
|---|---|---|---|---|---|---|

# BACKGROUND INFORMATION

What is SOAR?

SOAR stands for System for Online Application Review. It is a web-based system originally developed by the State Water Resources Control Board, and adapted for use by the California Natural Resources Agency to accept and store grant applications electronically.

SOAR is available 24 hours a day, 7 days a week. Any scheduled outages will be posted on the SOAR main page in red bold font.

**What are the usage recommendations?**

SOAR does not have computer system requirements, but it does have usage recommendations:
- Use of a PC and Internet Explorer (6.0 or higher);
- Disable pop-up blocking software while using SOAR; and
- Save work often – System will time out after 90 minutes of inactivity.

# GETTING STARTED

**How do I know which grant programs are currently accepting applications in SOAR?**

There are three (3) ways to know what grant programs are currently accepting applications:
- Please visit the **Resources Agency Grant Programs** page to find information about specific grant programs;
- Log onto SOAR, from applicant main menu, select the **Funding Program Resources** link under Resources to get a list of grant programs that may be using SOAR; or
- Subscribe to the email alerts from SOAR.

**What is a PIN?**
A PIN is a proposal identification number automatically assigned when an application is started.

*NOTE*:  *When you are requesting help from the SOAR Help Desk, please include the PIN in your request.*

**Where can I find more information about a specific Request for Proposal or Solicitation found in SOAR?**

Please visit the **Resources Agency Grant Programs** page to find more information about the specific grant program.

**What is included in the character count in SOAR?**

The character count in SOAR includes alphanumeric, spaces, punctuation, and hidden formatting code.  The character count in word processing programs such as MS Word, do not include the hidden formatting code as part of the word (character) counts.

**Will information I submit online be secure?**

Yes. All data transmitted through the application process is secure by using SSL encryption. This means that information traveling from your computer to the California Natural Resources Agency's servers cannot be  read if intercepted by a third party.

**Is my organization eligible to apply for loans and grants available through SOAR?**

Each grant program has specific eligibility requirements.  Please visit the **Resources Agency Grant Programs** page to find more information about the specific grant program.

# USER ACCOUNTS

**Can I sign up for a user account even though I am not ready to submit an application?**

Yes.  Having a user account will put you on the list to receive automatic emails for notification of grant programs using SOAR.

**I don't know what the Federal Tax ID is for my organization?  Can I add the Federal Tax ID number at a later time?**

Yes.  To add the Federal Tax ID number for an organization, please log onto SOAR and following steps:

- Click on UPDATE ORGANIZATION PROFILE.
- Click on the ORGANIZATION CHANGE REQUEST button.
- Add the Federal Tax ID on the right hand side under Modified Organization Details.
- Add a note as to the reason for updating the organization profile.
- Click on the **SUBMIT** button.

**I'm a consultant, should I create a separate user account for each client?**

If you are a consultant, please create a single SOAR account that associates you with your consulting firm.  The system will enable you to submit applications on behalf of multiple clients using a single username/password. At the time of starting a new application, you (as a consultant) will have the option of submitting an application on behalf of the consulting firm or on behalf of another organization (your client's organization).

**Can I submit multiple applications using the same SOAR user account?**

Yes.  With one username and password, you can submit multiple applications.

*NOTE:  If you are a consultant, please create a single SOAR account associated with your consulting firm.  This will enable you to submit applications on behalf of multiple clients using a single username/password.*

**Can I change my username?**

No.  The username cannot be changed.

**Is the password case-sensitive?**

Yes.  The password and username are both case-sensitive.

**I forgot my username and/or password.  What should I do?**

If you forgot your username or password please either:
- Use the "Retrieve Password" feature on the SOAR main page; or

Contact the SOAR Help Desk by email at **soar.admin@resources.ca.gov** or by telephone at (916) 653-6138 Monday through Friday from 9:00AM - 4:00PM.

**I don't want to receive any more SOAR email announcements.  How can I unsubscribe from the SOAR email alerts?**

To unsubscribe from the SOAR email alerts, please do the following:
- Log onto SOAR;
- Click on Update User Profile option on Main Menu;
- Select NO from the Subscribe to Email Alerts drop-down menu;
- Click the SAVE CHANGES button; and
- Click the LOGOUT link on upper right hand corner.

# COMPLETING AN APPLICATION

**When is a Proposal Identification Number (PIN) assigned?**

A PIN number is automatically assigned when an application is started. The PIN will appear on the screen in red text just above the application tabs. When you are requesting help from the SOAR Help Desk, please include the PIN in your request.

**My project spans across multiple Counties.  What should I enter for County?**

When your project spans across several counties, you should select "Multiple Counties" from the "County" drop down list. If your project is a statewide project, you should select "Statewide" from the "County" drop down list.

**What should I enter in the Latitude and Longitude fields?**

For the latitude and longitude coordinates, select a single point for your project. This information will be used for GIS maps to show general distribution of funding throughout the state.

*NOTE: If your project is a multi-regional project, we understand that one point may not be the best representation of your project. More details on how to enter the latitude and longitude may be described in the solicitation notice for the RFP or funding program you are applying for. Please visit the Resources Agency Grant Programs page to find the link to the specific RFP.*

**Where can I find the latitude and longitude for a project location?**

On the General Information tab in the application, there is a button titled OBTAIN LAT and LONG. Click on this button to locate your project on a map. The latitude and longitude for a given location will be display along the bottom of the map.

**Does the Latitude and Longitude need to be entered in degrees?**

No. The latitude and the longitude should be entered in decimals. The latitude for California has a range of 32.0000 to 42.0000. The longitude for California has a range of -125.0000 to -114.0000.

**Can my application be saved before submittal, and completed at a later date?**

Yes. You may start an application, save your work as "in progress" and return to SOAR at a later time to work on your application as many times as you need. The application is considered in-progress until it has been submitted or the application deadline has passed.

*NOTE: Applicants are encouraged to initiate their applications early so they know what information is needed to complete the application.*

**Is it possible to copy and paste text into the SOAR application?**

Yes. You may copy text contained in word processing documents, spreadsheets or emails and paste directly into the SOAR application.

*NOTE: Formatted text copied and pasted into SOAR may include hidden formatting code (characters) which count towards the maximum allowed characters in a text field. To ensure you have utilized the maximum allowed characters in a text field, please first paste the text into Notepad to clear the formatting before pasting into SOAR.*

**How do I know which supporting documents (i.e., project narrative, budget, project map) to submit with my application?**

Consult the solicitation notice or guidelines for the grant program you are applying for. Please visit the **Resources Agency Grant Programs** page to find more information about the specific grant program and its solicitation notice or guidelines. It will have details on what comprises a completed application. These supporting documents will be submitted as electronic attachments.

**Is there a preferred file format for attachments?**

It is recommended that attachments be converted to .pdf. This file format is easy to open. However, please refer to the solicitation notice or guidelines for the grant program you are applying to for specific information on attachments. You can check the **Resources Agency Grant Programs** page to find the program guidelines or solicitation notice.

**How do I upload a document in SOAR?**

All documents associated with the application should be uploaded via the ATTACHMENT tab in SOAR. For step-by-step instructions on how to upload documents in SOAR, please the User Manual found on the Main Menu under Resources.

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**I have a file to attach which is larger than 25 megabytes.  How do I submit the attachment?**

When a single file is larger than 25 megabytes (mb), it cannot be submitted through the SOAR system as is. The document will need to be split into several smaller size files and uploaded via SOAR.

**How do I upload more than one file for a specific attachment category**

Select the appropriate attachment category, which then populates the Suggested Attachment Title field. If you have more than one of a particular type of attachment, i.e. you have two project maps, you can add some text to the end of the Suggested Attachment Title such as "1 of 2" or "2 of 2". Then, proceed as before and browse your computer system to select the actual file to be attached.

**Who should be entered on my application on the Contacts tab or the Cooperating Entities tab?**

Please refer to the solicitation notice or guidelines for information on who should be entered on the Contacts or the Cooperating Entities tab.

**When is my application due?**

The application deadline is set by each grant program. Please refer to the solicitation notice for the specific grant program to determine the due date. You can check the **Resources Agency Grant Programs** page to find the program guidelines or solicitation notice.

**NOTE**: *A reminder email is sent to those who have started an application one (1) day before the application deadline.*

**I accidently started 3 applications.  How can I delete them?**

Only the SOAR Administrator can delete an application. Please contact the SOAR Help Desk by email at **soar.admin@resources.ca.gov** or by telephone (916) 653-6138 Monday through Friday from 9:00AM - 4:00PM and provide the following information:
- Proposal Identification Number (PIN) for each application; and
- Reason for deletion.

# APPLICATION SUBMITTAL

**What is the Application Completion Check?**

The Application Completion Check is a behind-the-scenes validation of the application to check for required fields and attachments. The validation results are displayed either in green or red. If the results are in green, the application is complete is ready to be submitted. If the results are in red, you must return to the application to enter the missing required information or upload the missing required attachments. If the validation results show that the application is complete, please read the certification statement and enter your initials and then click the SUBMIT button.

**I can't submit my application. Results from the Application Completion Check show that I'm missing required attachments. I have verified that the attachments are uploaded.**

Selecting from the attachment category drop-down on the attachment tab is necessary as it is the only way of letting SOAR know that a required attachment has been uploaded. If you did not use the attachment category drop-down on the attachment tab when uploading a required attachment, please go back to the attachment tab to do so.

**When is my application considered submitted?**

Your application is considered submitted when you type in your initials and click the "Submit Application Now" button. A confirmation screen will appear verifying you submitted and you will receive a conformation email stating that SOAR has received your application.

**What happens to my application after I submit it?**

Applications undergo an eligibility screening by grant program staff. Applications that are deemed eligible by the grant program staff are then assigned for review. Applicants will be notified of any funding decisions by the grant program.

**I have submitted my application. The deadline has not passed. I just noticed an error. How do I fix an error on my application?**

To correct an error once your application has been submitted, you must contact the SOAR Help Desk by email at **soar.admin@resources.ca.gov** or by telephone (916) 653-6138 Monday through Friday from 9:00AM - 4:00PM. The application will be returned to the applicant. The application will need to be submitted again, after whatever changes/corrections are made, and before the deadline.

*NOTE: Your application cannot be edited after the application submission due date has passed.*

**Should I retain copies of all submitted materials?**

The SOAR system will maintain an electronic copy of your submitted application. The decision to keep a copy of the submitted materials is up to you.

**How do I verify that the application was successfully submitted?**

There are several ways to verify that an application has been successfully submitted in SOAR:

- Confirmation screen letting you know you have successfully submitted an application in SOAR;
- Confirmation email is automatically sent to the email address for the submitter; or
- Checking for your application in SUBMITTED APPLICATIONS on the Main Menu.

**I submitted my application and I have not yet received a confirmation e-mail. Is there a problem?**

You may have to wait up to 4 hours before receiving a confirmation e-mail. Or you can verify that your application is submitted by logging onto SOAR, clicking the "Submitted Applications" link and verifying that the PIN appears on the list of submitted applications.

**When will I know if the project is recommended to receive funding?**

In most cases, the grant program will contact the applicant organization directly if selected to receive funding. Please check with the grant program for any updates or announcements regarding who has been recommended to receive funding. To find the contact information for a specific grant program, please visit the **Resources Agency Grant Programs** page to find the contact information for the grant program.

**Where do I upload a post award document (such as a Final Project Summary Report)?**

Final project documents can be uploaded on the Post-Award attachment sub-tab. To get to the sub-tab, do the following:
- Confirm you have access to the PIN in SOAR;
- Log onto SOAR;
- Click on PROCESSED APPLICATIONS on the Main Menu;
- Click on the Title of the Awarded Project;
- Click on the Attachment tab;
- Select from the Attachment Category drop-down;
- Modify the file title (if applicable);
- Browse computer for the file that will be uploaded;
- Click on the Upload Selected File button.
- Scroll down to view the list of documents uploaded on the Post-Award attachment sub-tab.

# TROUBLE SHOOTING

**I received an error while using SOAR.  What should I do?**

If you receive an error, please contact the SOAR Help Desk by calling (916) 653-6138
 or emailing **soar.admin@resources.ca.gov**.

The following information is useful in troubleshooting the error you encountered:
- What kind of computer is being used;
- What kind of internet browser is used to access SOAR;
- Which tab in SOAR did the error occur?  If it occurred within the SOAR application, please identify the tab you were on;
- PIN assigned to the application; and
- Screen shot of the error.

**Help! I'm using a PC and Internet Explorer.  I am unable to:**
- **Navigate within SOAR;**
- **Unable to log out of SOAR;**
- **Inability to delete attachments; or**
- **Inability to add or delete organizations on the Cooperating Entity tab.**

Since November 2013, some SOAR users using Internet Explorer (version 9.0 or higher) have reported one of the above issues. After checking the SOAR system, it was determined it is not a SOAR issue, but rather a browser (Internet Explorer) compatibility view setting issue. In order to resolve the browser compatibility issue, please follow the instructions listed below:

- Open the Internet Explorer Browser window;
- Go to the SOAR website at **https://soar.resources.ca.gov**;
- Go to TOOLS (on Internet Explorer);
- Click COMPATIBILITY VIEW SETTINGS;
- Add the ca.gov website;
- On the bottom, click Display All Websites in Compatibility View;
- Click Close; and
- Log onto SOAR to verify the issue has been resolved (i.e., try doing what you were unable to do before).

**Every time I try to save on the questionnaire tab, I get an error.  Why?**

A likely cause is that one or more of the responses in the text fields has exceeded the character count in SOAR. Whenever this occurs, an error message appears. To successfully save the responses in the text fields, please shorten the responses and/or try saving the responses individually by clicking the SAVE AS WORK IN PROGRESS button each time a response is entered. This way you will know when the character count has been exceeded.

**I created an account to upload a post award document but I can't see the project. Why can't I see the project on my list of applications?**

Applications in SOAR are associated with users, not organizations. If you need access to a proposal that was submitted by someone else within your organization, please send an email to the SOAR Help Desk by email at **soar.admin@resources.ca.gov** or by telephone ( 916) 653-6138 Monday through Friday from 9:00AM - 4:00PM. The email should contain the following information:

- Proposal Identification Number (PIN).
- Name of the person who submitted the application.
- Reason why you need access (i.e., did the person leave the organization).

Then the SOAR Administrator will associate the PIN to your account and you will be able to see the application.

**I can't find where to upload the post award documents?**

For projects that have been awarded funding, post award documents should be uploaded via the POST AWARD attachment sub-tab. If you do not see this sub-tab when you are viewing the application, please contact the SOAR Help Desk by email at **soar.admin@resources.ca.gov** or by telephone at 653-6138 Monday through Friday from 9:00AM - 4:00PM. The email should include the Proposal Identification Number (PIN) or Grant Agreement Number.

# RESOURCES

**User Manual**

A step-by-step guide on using SOAR is provided in the form of a User Manual that can be found by clicking here: **Soar User Manual**

**SOAR Help Desk**

The SOAR Help Desk is open from Monday through Friday from 9:00AM – 4:00PM. Please contact the SOAR Help Desk for technical assistance with SOAR. All program related questions will be referred to Grant Program staff.

- Email at **soar.admin@resources.ca.gov**; or
- Telephone (916) 653-6138.