

System for Online Application Review

USER MANUAL

California Natural Resources Agency

Version 1.0 July 1, 2016



Table of Contents

Ι.	SOA	AR: AN INTRODUCTION	1
П.	WHI	ERE TO FIND SOAR	1
Ш.	SOA	AR SIGN UP PROCESS	2
	A.	STEP 1: ORGANIZATION SEARCH 1. CREATE NEW ORGANIZATION	2 3
	В.	STEP 2: USER REGISTRATION	3
IV.	SIG	NING ONTO SOAR	5
	A.	MAIN MENU	5 6 6 6 6
		6. SYSTEM DISCLOSURE	6
V.	STA	RT A NEW APPLICATION	7
	Α.	SYSTEM DISCLOSURE	7
	В.	SELECT ORGANIZATION	7
	C.		8
	D.	GETTING STARTED	8
	Ε.	GENERAL INFORMATION	9
VI.	APP		9
	A.	NAVIGATING BETWEEN TABS 1. PREVIOUS OR NEXT BUTTONS 2. CLICKING ON TABS	10 10 10
	В.	GENERAL INFORMATION	10
	C.	PROJECT BUDGET	11
	D.	FUNDING	12
	E.	PROJECT MANAGEMENT	12
	F.	LEGISLATIVE INFORMATION	13
	G.	CONTACTS	14
	Н.	COOPERATING ENTITIES	14
	I.	QUESTIONNAIRE	15
	J.	ATTACHMENTS	16
	K.	PERFORMANCE MEASUREMENT	17
	L.	STATUS	18
	M.	FEEDBACK	18

	N.	POST-AWARD	<u> 19 </u>
VII.	SAV	ING AND PRINTING YOUR APPLICATION	19
	Α.	SAVING YOUR APPLICATION	19
	В.	PRINTING YOUR APPLICATION	19
VIII.	EDI	TING, PREVIEWING, AND SUBMITTING APPLICATION	20
	Α.	EDITING AN EXISTING APPLICATION	20
	В.	PREVIEWING YOUR APPLICATION	21
	C.	APPLICATION COMPLETION CHECK	22
	D.	SUBMITTING YOUR APPLICATION	22
IX.	ADD	DITIONAL MAIN MENU OPTIONS	23
	Α.	UPDATE YOUR USER PROFILE	24
	В.	UPDATE USER PASSWORD	25
	C.	UPDATE ORGANIZATION PROFILE	26
	D.	SYSTEM DISCLOSURE	27
Х.	RES	OURCES	28
	Α.	FREQUENTLY ASKED QUESTIONS (FAQs)	28
	В.	NOTES OR HINTS	28
	C.	SOAR HELP DESK	28

I. SOAR: AN INTRODUCTION

SOAR stands for the 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, review, and store grant Application submittals electronically.

The system requirements that will aid in the use of SOAR are as follows:

- Use Internet Explorer (version 6.0 or higher);
- Computer monitors should have a resolution of at least 1024 X 760;
- Disable pop-up blocking software;
- Use a personal computer (PC).

SOAR testing is limited to PCs with Internet Explorer. Use of MACs or web browsers other than Internet Explorer may result in difficulty in saving information, uploading attachments, or submitting an Application.

II. WHERE TO FIND SOAR

SOAR is hosted on the California Natural Resources Agency website. SOAR can be found at the following web address: <u>https://soar.resources.ca.gov</u>. The SOAR homepage serves as the portal to log onto the system and to access previously submitted applications available on the Public Search Tool page.

Ccov natural resources SOAR - System for Online Application Review
LOG ONTO SOAR Username: Password : LOG ONTO SOAR Note: The username and password are case-sensitive.
RETRIEVE PASSWORD CREATE ACCOUNT PUBLIC SEARCH TOOL WELCOME TO SCAR WELCOME TO SCAR California Natural Resources Agency (CNRA) allows potential funding recipients to apply fer grant and loan funding offered by California Natural Resources Agency. California Natural Resources Agency (CNRA) is responsible for administering the SOAR system. California Natural Resources Agency Mission: To restore, protect and manage the state's natural, historical and cultural resources for current and future generations using creative approaches and solutions based on science, collaboration and respect for all the communities and interests involved.
NEED HELP? CONTACT SOAR HELP DESK The SOAR Help Disk is staffed Monday - Friday (9:00 AM - 4:00 PM). Please direct your questions to: 916-653-6138 or <u>SOAR ADMIN/@resources.ca.cov</u> If you are experiencing problems with SOAR, please provide the following infirmation: • Name of the funding program you are applying to; • A short description of the problem (including where in the application the problem is occurring); • Proposal Identification Number (PIN) assigned to the application; and • A screen shot of the error received (if applicable).

Figure 1 – System for Online Application Review (SOAR) homepage

III. SOAR SIGN UP PROCESS

If you do not have a SOAR account, you may create one by clicking on the "**Create Account**" button on the SOAR homepage.

Creating a user account is a two-step process:

- Step 1: Organization Search; and
- Step 2: User Registration

A. STEP 1: ORGANIZATION SEARCH

General information for your organization may already be entered in SOAR. You can search the database by entering any part of the name of the organization and clicking on the "**Search**" button. A listing of organizations will appear. For example: Entering the word "california" will return the California Natural Resources Agency.

	C.cov SOAR - Sys	stem for On	Inatural	
Organization Search Ste)1	Color and of the set		
This page allows you to search fo ir misspelled words, will prevent he search results, Scroll down th	r organizations which are already in the PANS I databa he system from retrieving the organization record. If yo search results to Create New Organization record.	ou find the organization of in	terest, click on the name to submit an application on behalf of that org	anization. If you do not find the organization in
This page allows you to search for rr misspelled words, will prevent the search results, Scroll down th Search for Organization Organization Name: Sort By:	organization which are aready in the FASI databa he system from retrieving the organization eccord. If ye a search results to Create New Organization record. California Organization Name Ceate New Organization	ou find the organization of in	pancauon name and dick on the search buildon, due care when entern terest, click on the name to submit an application on behalf of that org	ng an entire organization name. An exit space anization. If you do not find the organization in

Figure 2 – Step 1: Organization Search

If the name of the organization you are representing is listed, select the organization name and proceed to Step 2: User Registration.

If your organization is not found in the displayed search results, click the "**Create New Organization**" button. You will create a new organization record in SOAR by following the instructions listed below.

1. CREATE NEW ORGANIZATION

Creating a new organization record in SOAR should occur only when your organization is not found per the search process outlined above.

Please enter the organization's contact information, such as: Name of Organization, Division or Branch, Address, City, State and Zip Code, Type of Organization and Federal Tax ID Number. Click the "**Next Step**" button to proceed to Step 2: User Registration.

Note: If the Federal Tax ID # is not known at this time, it can be entered at a later time.

<i>C</i> a so	AR - System fo	natura xesourc or Online Applic	ation Review	
New Organization Details This screen allows you to enter your organization details. The system to Occupitation Details	will naintain this information in the	SOAR database. Enter the details an	nd click "Next Step" button to proceed t	o User Account Details Screen.
Organization Name: Division or Branch: Mailing Address:				
Mailing City: Mailing State: Mailing Zip:				
Type of Organization: Federal Tax Id Number:	Stlect a Value	inter numbers only. Correct formal is 999999	000.)	

Figure 3 – New Organization Details

B. STEP 2: USER REGISTRATION

Enter user account details such as name, contact information, user name, password, and security question/answer.

Note: It is important that your email address is kept current as email is the primary means of communicating with users.

	C.Gov SOAR - S	ystem for O	natural resources nline Application Review
User Registration Step 2			
This is a simple two step process. Please enter your Orga	anization details ir Step 1, y	our User details in Step 2 an	d click on "Create User Account" button to Successfully Create User Account.
User Account Details			
Organization:	California NaturalResource	s Agency	
Prefix:		(Mr., Ms. Dr., etc.)	
First Name:			1
Midde Name:			
Last Name:			Ĩ
Title:			ĨØ
Phone:			
Fax:			
Email:			
Confirm Email:			
Subscribe to Email Alerts?:	Yes 🗸 🥑		
User Name:			Check for Availability
Password:			
Security Cuestion:	Select a Value 🗸 🕥		
Security Answer:			
2 - 11 - 11 - 11 - 11 - 11 - 11 - 11 -	Create User Account	Back to Organization	

Figure 4 – Step 2: User Registration

Select a User Name and Password for your account. Click the "**Check for Availability**" button to verify whether the user name selected is available. To activate your SOAR user account, click the "**Create User Account**" button.

Note: The password is case sensitive.

After successfully creating a user account, a confirmation screen can be printed for your records. Please use the FILE | PRINT function on your browser and please keep it in a safe place for future reference. A confirmation email will be sent within 24 hours.

		C.Gov	stem for O	Anatur <i>xesqui</i> Inline Appli	ces cation Re	view	
Confirmation							
Congratulations! You have succe	sfully created a SOAR us	er account!					
Congratulations! You have succe The following are your user accoun An email confirmation will be sent to	isfully created a SOAR us details. Please print & sav you within 15 minutes.	er account! e them in a safe place fo	r your future reference. D	ion't give out your passwor	d to anyone.		
Congratulations! You have succe The following are your user accoun An email confirmation will be sent to User Account Confirmation Your User Name	sfully created a SOAR us details. Please print & sav you within 15 minutes.	er account! 9 them in a safe place fo	r your future reference. D	ion't give out your passwor	d to anyone.		
Congratulations! You have succe The following are your user account An email confirmation will be sent t User Account Confirmation Your Dassword Your Password	ssfully created a SOAR us details. Rease print & sav you within 15 minutes.	er account! 9 them in a safe place fo	r your future reference. D	ton't give out your passwor	d to anyone.		
Congratulations! You have succe The following are your user account An email confirmation will be sent t User Account Confirmation Your Confirmation Your Security Question Your Security Question	details. Rease print & sav you within 15 minutes.	er account! 9 them in a safe place fo	r your future reference. D	ion't give out your passwor	d to anyone.		
Congratulations! You have succe The following are your user account An email confirmation will be sent t User Account Confirmation Your Confirmation Your Security Question Your Security Answer Your Security Answer	details. Please print & sav you within 15 minutes. test account account test FAVORITE_SPORT football	er account! e them in a tafe place fo	r your future reference. D	ion't give out your passwor	d to anyone.		

Figure 5 – User Account Confirmation

To log in to SOAR, click the "Back to Login Page" button.

IV.SIGNING ONTO SOAR

On the SOAR homepage, enter your Username and Password and click the "Log onto SOAR" button to enter the system.

C.cov
LOG ONTO SOAR
Username: Password : LOG ONTO SOAR
Note: The usernane and password are case-sensitiv.
RETRIEVE PASSWORD CREATE ACCOUNT PUBLIC SEARCH TOOL
WELCOME TO SOAR
The System for Online Application Review (SOAR) allows potential funding recipients to apply for grant and loan funding offered by California Natural Resources Agency.
California Natural Resources Agency (CNRA) is responsible for administering the SOAR system. California Natural Resources Agency Mission: To restore, protect and manage the state's natural, historical and cultural resources for current and future generations using creative approaches and solutions based on science, collaboration and respect for all the communities and interests involved.
NEED HELP? CONTACT SOAR HELP DESK The SOAR Help Desk is staffed Monday - Friday (9:00 AM - 4:00 PM).
Please direct your questions to:
916-653-6138 or SOAR ADMIN@resources (a gov
If you are experiencing problems with SOAR, please provide the following information:
Name of the lunding program you are applying to; A short description of the problem (including where in the application the problem is occurring); Pronocal Identification Number (PIN) assimed to the application; and
 A screen shd of the error received (if appicable).

Figure 6 – Log onto SOAR

A. MAIN MENU

After signing in, the Main Menu will appear. The Main Menu allows you to submit a new application, work on existing application(s) or update your user and organization profile.



Figure 7 – Main Menu

1. START A NEW APPLICATION

This link will direct the user to the Application initiation process. Section V below has additional information about how to start a new Application.

2. EXISTING APPLICATIONS

This section of the Main Menu allows the user to choose which set of applications to view: Active, Submitted, Processed, and Inactive. Sections VI through VIII have additional information about how to complete, save, edit, print, preview, or submit your Application.

3. UPDATE USER PROFILE

This link allows the user to edit contact information, and the security question and answer.

4. UPDATE USER PASSWORD

This link allows the user to view and edit the password for the account.

5. UPDATE ORGANIZATION PROFILE

This link allows the user to update information for the Organization via a change request.

6. SYSTEM DISCLOSURE

This link allows the user to view the minimum usage requirements for SOAR.

Note: See ADDITIONAL MAIN MENU OPTIONS for more information

V. START A NEW APPLICATION

Select the "Start a New Application" link on the Main Menu.

A. SYSTEM DISCLOSURE

Once the link is clicked, the "**System Disclosure**" page is displayed. This page is displayed each time a new Application is started. After reading through each of the usage requirements, please check the box and then click the "**Continue**" button.

SOAR - System for Online Application	on Review	
elcome Test Applicant of California Department of Water Resources - Information Technology Services If this is not your Account, please log out.	<u>Contact Us</u> Logout	
ystem Disclosure SOAR was designed and tested foruse on a personal computer PC) using Internet Explorer (version 6.0 or higher). The use of a MacIntosh (i information, navigate within SOAR, upload attachments, or submt an application.	Mac) or other web browsers may impact he ability to successfully sav	ve
The following is a list of recommendations when using SOAR. Please review the recommendations, and check all the CheckBoxes to acknow	ledge the recommendations and to start rew application!	
Usage Recommendations		
Usa web browser InternetExplorer (version 6.0) or greater.		
Use web browser InternetExplorer (version 6.0) or greater. Save work often - Systemtimes out after 60 minutes of inactivity.		
Use web browser InternetExplorer (version 6.0) or greater. Save work often - Systemtimes out after 60 minutes of nactivity. Disable pop-up blocking software.		

Figure 8 – Disclosure

B. SELECT ORGANIZATION

The Select Organization screen allows the user to identify whether they are submitting an Application on behalf of their organization OR on behalf of another organization.

Chev natural resources SOAR - System for Online Application Rev	iew
Welcome Test Applicant of California Department of Water Resources - Information Technology Services. I this is not your Account, please log out.	Contact Us Logout
Main Menu > Select Applicant Organization	
Select Applicant Organization	
Please identify the Applicant Organization for the application startid by selecting either OPTION 1 or OPTION 2 below. If the applicant Organization selected Desk b have the correct Applicant Organization associated with the project. OPTION 1: Applicant Organization = Submitting Org:nization • The Applicant Organization for his project is: " California Department of Water Resources - Information Technology Services ". The Applicant Organization to move to the next step. OPTION 1 button to move to the next step.	is later determined to be incorrect, contact the SOAR Help anization is the same as the Submitting Organization. Press
OR	
OPTION 2: Applicant Organization ≠ Submitting Org:nization	
The application is being submitted on behalf of another organization (the Applicant Organization). The Applicant Organization is different from the Submit and select the Applicant Organization for this project. OPTION 2	tling Organization. Press the OPTION 2 button to search fer
@ 2016 State of California. Conditions of Lice I Contact Lie I Privacy Delicy	

Figure 9 – Select Organization

C. ACTIVE RFPs

This screen displays a list of RFPs currently accepting applications. Select an RFP from the list displayed on the screen to begin the application process.

<i>Cla</i> son	R - System for Online Application Re	view
Velcome Test Applicant of California Department of Water Resources - In	ornation Technology Services. If this is not your Account, pleaselog out.	Contact Us Logout
tain Menu > Active RFPs		
Active RFPs		
The following is a list of active Request for Ptoposals (RFPs). These RF Please refer to the RFP, Guidelines, Solicitaton Notice, or other information	Ps are currently accepting applications. Select the desired RFP from the list below to begin ticr provided (by the funding program or funding organization; for detailed information on t	n the application process. The application.
RFP Title		Deadline Date
Third testing REP		7/15/2016 5:00:00 PM
Habitat Conservation Fund		7/30/2016 5:00:00 PM
	© 2016 State of California. <u>Conditions of Use Contact Us Privacy Policy</u>	

Figure 10 – Active RFPs

D. GETTING STARTED

This screen displays key information about the RFP selected. To initiate the Application, please click the "**Continue to Application**" button.

	SOAP System for Online Application Boy	(in)
nome Test Applicant of California Department of V	SUAR - System for Online Application Rev	Cortact Us 1 Looout
ain Menu > Getting Started		
etting Started		
his page allows the user to review/confirm the follo	wing: selected RFP, Applicant Organization, and Submitting Organization.	
you would like to apply for the "Habitat Conserva isign your application an unique Proposal Iden ease refer to the RFP, Guidelines, Solicitation Not	tion Fund" RFP using the Applicant and Submitting Organization shown below, cick the "Continue to Application tiffication Number (PN) and initiate application. The "Back" button will take you back to the list of currently ac ice, or other information provided (by the funding program or funding organization) for detailed information on the	n" button. Pressing the "Continue to Application" button will cepting RFPs. e application.
you would like to apply for the "Habitat Conserva usign your application an unique Proposal Iden lease refer to the RFP, Guidelines, Solicitaion Not Confirm the following information: RFP Title:	tion Fund" RFP using the Applicant and Submitting Organization shown below, cick the "Continue to Application tiffication Number (PN) and initiate application. The "Back" button will take you back to the list of currently ac ice, or other information provided (by the funding pregram or funding organization. for detailed information on the Habitat Conservatior Fund	" button. Pressing the "Continue to Application" button will cepting RFPs.
you would like to apply for the "Habitat Conserva ssign your application an unique Proposal Ider. lease refer to the RFP, Guidelines, Solicitaion Not Confirm the following information: RFP Title: RFP Description:	tion Fund" RFP using the Applicant and Submitting Organization shown below, cick the "Continue to Application tiffication Number (PN) and initiate application. The "Back" button will take you back to the list of currently ac ice, or other information provided (by the funding program or funding organization. for detailed information on the Habitat Conservatior Fund Habitat Conservatior Fund	" button. Pressing the "Continue to Application" button will cepting RFPs.
you would like to apply for the "Habitat Conserva ssign your application an unique Proposal Iden lease refer to the RFP, Guidelines, Solicitaion Not <u>Confirm the following information:</u> RFP Title: RFP Description: Applicant Organization:	tion Fund" RFP using the Applicant and Submitting Organization shown below, click the "Continue to Application triffication Number (PN) and initiate application. The "Back" button will take you back to the list of currently ac lice, or other informatiin provided (by the funding program or funding organization. for detailed information on the Habitat Conservatior Fund Habitat Conservatior Fund California Department of Water Resources - Information Technology Services - Information Technology Services	n" button. Pressing the "Continue to Application" button will cepting RPPs. application.
you would like to apply for the "Habitat Conserva ssign your application an unique Proposal Iden lease refer to the RFP, Guidelines, Solicitaion Not Confirm the following information: RFP Title: RFP Description: Applicant Organization Division:	tion Fund" RFP using the Applicant and Submitting Organization shown below, cick the "Continue to Application titification Number (PN) and initiate application. The "Back" button will take you back to the list of currently ac sice, or other information provided (by the funding pregram or funding organization; for detailed information on the Habitat Conservatior Fund Habitat Conservatior Fund California Department of Water Resources - Information Technology Services - Information Technology Services	n" button. Pressing the "Continue to Application" button will cepting RPPs. e application.
you would like to apply for the "Habitat Conserva ssign your application an unique Proposal Iden lease refer to the RFP, Guidelines, Solicitaion Not Confirm the following information: RFP Title: RFP Description: Applicant Organization Submitting Organization:	tion Fund" RFP using the Applicant and Submitting Organization shown below, cick the "Continue to Application titification Number (PN) and initiate application. The "Back" button will take you back to the list of currently ac sice, or other information provided (by the funding pregram or funding organization. for detailed information on the Habitat Conservatior Fund Habitat Conservatior Fund California Department of Water Resources - Information Technology Services - Information Technology Services California Department of Water Resources - Information Technology Services - Information Technology Services	" button. Pressing the "Continue to Application" button will cepting RFPs. e application. 15
you would like to apply for the "Habitat Conserva ssign your application an unique Proposal Iden ease refer to the RFP, Guidelines, Solicitaion Not Confirm the following information: RFP Title: RFP Description: Applicant Organization Submitting Organization Division: Submitting Organization Division:	tion Fund" RFP using the Applicant and Submitting Organization shown below, cick the "Continue to Application tification Number (PN) and initiate application. The "Back" button will take you back to the list of currently acc lice, or other information provided (by the funding pregram or funding organization: for detailed information on the Habitat Conservatior Fund Habitat Conservatior Fund California Department of Water Resources - Information Technology Services - Information Technology Services California Department of Water Resources - Information Technology Services - Information Technology Services California Department of Water Resources - Information Technology Services - Information Technology Services	n" button. Pressing the "Continue to Application" button will cepting RFPs. e application.

Figure 11 – Getting Started

E. GENERAL INFORMATION

Once the **"Continue to Application"** button has been clicked, the application form appears. A new screen titled General Information appears. There are 2 required fields that must be filled in order to initiate the Application:

Project Title;

Project Description

General Information	
The Application is organized into different	tab;. Each tab should be completed according to the instructions provided. All tabs should be completed before submitting the Application.
SAVE: Pressing his button will save the in	nformation entered thus far.
PREVIEW/SUBMIT: Pressing this button	will allow you to preview/submit he information entered thus far.
PIN 20 - Enter Project title here - IN PROG	RESS
General Information Project Bud	ge: Funding Project Management Legislative Information Contacts Cooperating Entities Questionnaire Attachments Status Feedback
The "General Information" tab allows the	user to enter a project title, project description, and location information for the project.
General Information	
Applicant:	Third testing RFP
Applicant Organization:	California Department of Water Resources
Applicant Division:	Information Technology Services
Submitting Organization:	California Department of Water Resources
Submitting Division:	Information Technology Services
Project Title:	Enter Project title here
	(125 characters maximum)
Project Description.	^
	~
	1000 de contra contra contra
. DRO JECT LOCATION	(2000 character maximum)
I atituda :	
Watersheds	(32.000 to 42.000) Longitude (125.000 to -114.000) Ottain Lat and Long
watershed:	Enter primary watershed(s) for reporting purposes only.
County:	Salect a value
Project Address for pearest cross	
street):	
Nearest City/Town:	
Co-ordinates Represent:	
Co-ordinates Determined Using:	
	Save as Work in Progress Next Preview/Submit
L	

Figure 12 – General Information

Click the "**Next**" button to save the information and continue on to the rest of the Application.

Note: The General Information tab above may have additional required fields that your RFP will not.

VI. APPLICATION FORM

The Application is organized into various tabs. Section A below provides information regarding how to navigate between tabs. A description of each tab is provided in the following Sections B through N.

Note: Each RFP may elect to display/include different tabs in the Application. The tabs described in the following sections may or may not be included in the program you are applying to. The General Information tab appears in all RFPs.

A. NAVIGATING BETWEEN TABS

There are several ways to navigate between tabs.

1. CLICKING ON TABS

Another way to navigate in SOAR is to click the tabs. Clicking a new tab will not save the information entered on the current tab.

Note: A pop-up message will appear if you have entered information on a tab and attempt to navigate to another tab without saving.



Figure 13 – Application Tabs

Note: The active tab is grey and the non-active tabs are blue

2. PREVIOUS OR NEXT BUTTONS

One way to navigate in SOAR is to click the "**Previous**" or "**Next**" button. Using the "**Previous**" or "**Next**" button will also save the information entered. Clicking the "**Save as Work in Progress**" button will save the information entered on the current tab. Clicking on "**Preview/Submit**" will display a preview of your application.

Previous	Save as Work in Progress	Next
	Preview/Submit	

Figure 13 – Previous or Next Buttons

Note: The "**Previous**" or "**Next**" buttons will save any updates, unless the buttons appear as follows:

Previous (Without Saving)	Preview/Submit	Next (Without Saving)
r revious (vvitriout Saving)	Treview/Subinit	Next (Without Saving)

Figure 14 – Previous (Without Saving) or Next (Without Saving) Buttons

B. GENERAL INFORMATION

The General Information tab contains information about a project such as project title, project description and project location. If any changes are made, click on **"Save as Work in Progress"** or **"Next"** buttons.

Welcome Test Applicant of California Depart	rtment of Water Resources - Information Technology Services. If this is not your Account, please log out. Contact Us Logout	
Main Menu > General Information		
General Information		
The Application is organized into different	t tabs. Each tab should be completed according to the instructions provided. All tabs should be completed before submitting the Application.	
SAVE: Pressing this button will save the in	information entered thus far.	
PREVIEW/SUBMT: Pressing this button v	will allow you to preview/submit the information entered thus far.	
PIN 20 - Enter Project title here - IN PROGE	iRES3	
General Information Project Bud	oget Funding Project Malagement Legislauve information Contacts Cooperating Entrues Questionnaire Attachments Status Fit	redback
The "General Information" tab allows the	user to enter a project title, projed description, and location information for the project.	
General Information		
Applicant:	Thid testing RFP	
Applicant Organization:	Calfornia Department of Water Resources	
Applicant Division:	Information Technology Services	
Submitting Organization:	Calfornia Department of Water Resources	
Submitting Division:	Information Technology Service:	
Project Title:	Enter Project title here	
Project Description:	(125 characters maximum)	
Project Description.	^	
	~	
	(1000 sharester manimum)	
- BRO IECT LOCATION	(1/00 character maximum)	
Latitude :		
Watershed	(32.0000 b 42.0000) Longitude: (-125.0000 to -114.0000) Obtan Lat and Long	
watersned.	Erter primary watershed(s) for reporting purposes only.	
Estimated Date of Completion:		
Project Address (or nearest cross		
street):		
Nearest City/Town:		
Co-ordinates Represent:		
Co-ordinates Determined Using:		
	Save as Work in Progress Next Preview/Submit	
L]

Figure 15 – General Information

Note: To find the latitude and longitude of the project, there is a button on the righthand side labeled "Obtain Lat and Long".

C. PROJECT BUDGET

The Project Budget tab contains the funds requested, local cost match, and total project budget. It will also display the Federal Tax ID Number for the applicant.

Welcome Test Applicant of California Departme	nt of Water Res	ources - Information Techn	ology Services. If this is not your	Account, please log out.	Contact	Us Logour
Main Menu > Project Budget						
Proposal Budget						
The Application is organized into different tab	s. Each tab sho	uld be completed accordin	ig to the instructions provided. A	All tabs should be completed before su	bmitting the Application.	
SAVE: Pressing this button will save the infor	mation entered	thus far.				
PREVIEW/SUBMIT: Pressing this button will	allow you to pre	view/submt the informatio	n entered thus far.			
PIN 16 - Enter Project title here - IN PROGRES	S					
Constal Information Draiget Budget	Funding	Droject Nanagement	Logislative Information	Contacts Cooperating Entities	Quartiannaira Attrahmanta	Status Fordback
Project Budget Project Budget Funds Requested(\$): Local Cost Match(\$):	0.00	mation forthe project.				
Total Budget(\$):	0.00					
Applicant Federal Tax to Number:	123456789	(Enter	numbers only. Correct format is 9999	20000.) 🕘		_
		Previous	Save as Work in Progress	Next		
			Preview/Submit			

Figure 16 – Project Budget

D. FUNDING

The Funding tab contains a list of available funding programs associated with the RFP. The ability to select more than one funding program is dependent on the RFP. Please click the check box under the heading "**Apply**" to select the applicable funding program(s) even if there is only one available. If any changes are made, click the "**Save as Work in Progress**" or "**Previous**" or "**Next**" buttons to navigate to a new tab.

Welcome Test Applicant of California Departm	nent ol Water Resources - Information Tec	chnology Services. If this is not your Account, please logout.	at Us Logout
Main Menu > Funding Programs			
Funding Program(s)			
The Application is organized into different ta	abs. Each tab should be completed accord	ding to the instructions provided. All tabs should be completed before submitting the Application.	
SAVE: Pressing this button will save the infi	ormation entered thus far.		
PREVIEW/SUBMIT: Pressing this button with	Il allov you to preview/submit the informa	tion entered thus far.	
PIN 16 - Enter Project title here - IN PROGRE	ESS		
General Information Project Budg Please select a program or multiple program Note: Typically, only one (1) program is che	et Funding Project Management ms by checking the "Apply" box beliw. Cl acked. However, for select RFPs, tvo (2)	t Legislative Information Contacts Cooperating Entities Questionnaire Attachments hecking the apply box trggers the display of questions specific to a program or multiple programs in the Questi or more programs can be checked.	Status Feedback
Funding Program	Description	Funding Amoun	Range Apply?
Prop 1	Prop 1	10000.00 - 1	000000
		Previous Save as Work in Progress Next Preview/Submit	

Figure 17 – Funding

E. PROJECT MANAGEMENT

The Project Management tab displays the information for the organization and the person submitting an Application. This tab is also where the Project Director (authorized representative) and the Project Contact (day-to-day contact) information is recorded.

he Application is organized into AVE: Pressing this button will si REVIEW/SUBMIT: Pressing this IN 18 - Enter Project title here - I General Information Proj	different tabs. Each tab sh ave the information entered s button will allow you to po N PROGRESS	ould be competed accordin d thus far. review/submit he information	ng to the instructions provid on entered thus far.	ed. All tabs should be co	mpleted before submitt	ing the Application.	
AVE: Pressing this button will s. REVIEW/SUBMIT: Pressing this IN 18 - Enter Project title here - I General Information Project	ave the information entered s button will allow you to po N PROGRESS	d thus far. review/submit he informatio	on entered thus far.				
REVIEW/SUBMIT: Pressing the IN 18 - Enter Project title here - I General Information Proje	s button will allow you to p N PROGRESS	eview/submit he informatio	on entered thus far.				
IN 18 - Enter Project title here - I General Information Proje	N PROGRESS						
General Information Proj							
General Information Proj							
	ect Budgel Funding	Project Management	Legislative Information	on Contacts Coop	erating Entities Q	uestionnaire Attachr	nents Status Feedback
The Project Management tab all	ws the user to enter or ed	t the project managements	roles. The applicant and p	erson submitting informa	tion is pulled from othe	r areas of the application p	rocess.
Applicant Information				Person Submitti	ng Information		
Name: Califo	mia Department of Water I	Resources		Submitter Name:	Test Applicant		
Department: Inform	ation Technology Services			Submitter Phone:	916-990-0098 Fa	x:	
Address: 1001	St Sacramento, CA , 958	14		Submitter Email:	testapp@soar.com		
To edit Applicant information, c behalf of another Organization, (soar.admin@iesources.ca.gor	lick on the "Update Organi any edits to the Applicant).	zation Profile" on the Main I organization profile must be	Menu. If submitting on a submitted via amail	To edit the information	n contained here, click	on the "Update User Profile	* on the Main Menu.
PROJECT DIRECTOR AND inter the contact information for L. Either click on the Project Mar 2. Click on the PREVIOUS OR N	PROJECT MANAGE the Project Director (incluc ager = Project Director bu EXT buttons to save chan	R ling the confirn email), ther tton; or Enter he contact in ges and navigite or one of	t: formation for the Project Ma the other tabs to move awa	anager (including the con y from the Project Manaj	firm email); and then gement tab without sav	ing.	
Management Role	Title	First Name	Last Name	Phone	Fax	Email	ConfirmEmail
Project Director	-			-			
Project Manager			Project Manager	- Drainet Director			
			Projec. Manager	- Project Director			
			Previous Save as V Preview	Vork in Progress N w/Submit	lext		

Figure 18 – Project Management

Note: If the email addresses entered under the email and confirm email columns differ, a pop-up message will appear.

Enter Project Director and Project Manager contact information. If the Project Contact is the same as the Project Director, fill in the Project Director information, then click the **"Project Manager = Project Director"** button.

Project Manager = Project Director

Figure 19 – Project Manager Same as Project Director Button

F. LEGISLATIVE INFORMATION

The Legislative Information tab allows you to enter the project's legislative districts. Enter the Senate District(s), Assembly District(s), and US Congressional District(s) in which your project is located.

Note: To find the legislative district, click the links to the right to look up the district by *Zip* Code.

If your project covers multiple districts: 1) Enter the primary district in the first field; and 2) Select additional districts in the field labeled "**Multiple Selection (CTRL+Click)**" by pressing and holding the CTRL key, while clicking to select additional districts.

Itiple selections.	to the user to select one (1) of more registration		
egislative Information	Primary	Additional District(s)	
ienate Distric	Select a Value V	Multiple Selection (Ctrl + Click) 01 02 03 04 05 06	Find Senate District
ssembly Distict	Select a Value V	Multiple Selection (Ctrl + Click) 01 02 03 04 05	Find Assembly District
S Congressional District	Select a Value V	Multiple Selection (Ctrl + Click) District 01 (CA) District 02 (CA) District 03 (CA) District 05 (CA) District 05 (CA)	Find US Congressional District

Figure 20 – Legislative Information

G. CONTACTS

The Contacts tab allows you to enter or edit the details of the people you have contacted or will be contacting with regards to the development of your proposal.

After entering the details for a contact, click the "**Save Contact**" button. The contact will then be listed in the table below under the heading, "**Organization Name**". Repeat the process to add additional agency contacts.



Figure 21 – Contacts

NOTE: The **"Save Contact"** button must be clicked. Otherwise, information is lost when you navigate away from the Contacts tab.

To edit the details for an existing contact, click the contact's name. The contact's information will populate the text fields. Make the edits and click the **"Save Contact"** button.

To permanently remove (delete) a contact, click the "**Delete**" link in the column to the right.

Main Menu > Costacts						
Contacts						
The Application is organized into different tabs. Each	h tab should be comple	tel according to the	instructions provid	ed. All tabs should be completed b	efore submitting the Application.	
SAVE: Pressing this button will save the information	entered thus far.					
PREVIEW/SUBMIT Pressing this button will allow y	ou to preview/submit th	e nformation entere	d thus far.			
Changes have been Saved Successfully						
PIN 16 - Enter Project title here - IN PROGRESS						
General Information Project Budget Fun	nding Project Man	agement Legis	lative Informatio	n Contacts Cooperating E	Intities Questionnaire Attachments	Status Feedback
The Contacts tab allows the user to add or viewedit	information previously	extered. This tab is	used to record the	person/organization who was or w	Ill be contacted regarding this Project. To edit	an existing contact, please select the
name of the organization link. Changes made must	be saved by clicking or	the "Save Contact"	button.			
Concernant of the second se						
Contacts						
Organization Name:						
Contact First Name:						
Contact Last Name:						
Contact Phone:				(999-999-9999)		
Contact Email:				(xyz@yourOrganization.com)		
	Save & Previous	Save Contact	Save & Next			
Organization Name		Name		Phone	Email	Delete?
Sacramento County		Test Contact		916-555-9999	testcontact@123.com	Delete
		Previous (Withou	ut Saving) Pre	eview/Submit Next (Without	Saving)	

Figure 22 – Contacts

H. COOPERATING ENTITIES

The Cooperating Entities tab allows you to add and/or edit cooperating entities. Cooperating entities are organizations involved in the project (i.e., subcontractor, implementing agency, education and outreach, consultant, stakeholder). After entering the details for a cooperating entity, click the "**Save Cooperating Entity**" button. The entity will then be listed in the table below under the heading, "**Entity Name**". Repeat the process to add additional cooperating entities.

Save Cooperating Entity

Figure 23 – Save Cooperating Entity Button

NOTE: The **"Save Cooperating Entity"** button must be clicked otherwise the information is lost if you navigate away from the Cooperating Entities tab.

To edit the details for an existing cooperating entity, click the entity's name. The entity's information will populate the text fields. Make your edits and click the **"Save Cooperating Entity"** button.

To permanently remove (delete) a cooperating entity, click the "**Delete**" link in the column to the right.

General Information Project Budget Feedback The Cooperatiny Entities tab allows the user to For example, a bcal government agency is the Enter the information requested below and click	Funding Project add, view, and edited lead applicant and a l	Management	Acgislative Information associated with this is the coapplicant, the low each Cooperating	Project. A cooperation	Cooperating Entities	anization that has a role or makes n this tab and its role as coapplica	ents Siatus
Cooperating Entity Cooperating Entity: Role/Contribution to Project: Contact First Name: Contact Last Name: Contact Phone: Contact Email:	Save & Previous	Save Coopera	ting Entity] Save	(999-919-9999) (xyz@rourOrgani & Next	zation.com)		
Entity Name	Role	•	Name		Phone	Email	Delete?
CDFA	C+-;	Applicant	John Smith		444-444-4444	jsmith@foodag.ca.gov	Delete
		Previous (Withou	ut Saving) Preview	w/Submit Next	Without Saving)		

Figure 24 – Cooperating Entities

I. QUESTIONNAIRE

The Questionnaire tab is a series of questions specific to the Application. Please answer all the questions according to the solicitation instructions.

89:10 Session timer in minutes and seconds. Save your work before it times out. PIN 32724 - Exter Project title here - IN PROGRESS General Information Project Budget Funding Project Management Legislative Information Contacts Cooperating Entities Questionnaire
Attachments Status Feedback
The Questiomaire tab allows the applicant to respond to questions that are specific to the Project. Please note: Save your work periodically. Above is a session timer that is re-set each time the SAVE AS WORK IN PROGRESS button is clicked. If the session timer expires, unsaved work will be lost.
Answer all of the questions. Questionnaire - Current Phase PROJECT LOCATION (A Project is a physical area to be addressed by the funding proposal.)
1.1 Is the PROJECT addressing: 1. A single site where a contaminant(s) is present. 2. Multiple sites where a contaminant(s) is present. 3. A regional groundwater quality issue. Electrible the area and attach a site map: 4. Other. Describe area:
Answer: Select a Value Answer:
Maximum of 1000 characters.

Figure 25 – Questionnaire

Note: For the purpose of security, SOAR times out after ninety minutes of inactivity. As a courtesy, the Questionnaire tab has a session timer which is located above the tabs. To ensure that your work is saved, you must click the **"Save as Work in Progress"** button before the session timer runs out. The session timer resets each time the **"Save as Work in Progress"** button is clicked.

J. ATTACHMENTS

The Attachments tab allows you to upload attachments (electronic files) to the Application. Attachments may be required or optional and can include documents such as project narrative, budget, or maps. Each attachment is limited to 10 megabytes (MB).

To upload an attachment, select the Attachment Category from the drop-down menu. Your application cannot be submitted IF a required attachment is missing. Selecting an Attachment Category will pre-populate the Attachment Title field. The Attachment Title field is editable. If necessary, you may attach multiple files within one Attachment Category. Please add 1 of 2, 2 of 2, etc., to the end of the Attachment Title, to relate the files.

Click the "**Choose File**" button to locate the file on your computer. After locating the file, click on the file and click the "**Open**" button to select the file for upload to the Application. Click the "**Attach Selected File**" button to begin the upload process.

Attach Selected File

Figure 26 – Attach Selected File Button

Note: The upload process could take several minutes depending on the size of the file and the speed of your internet connection. Please wait until the file completely uploads before attempting to upload additional files or navigating to other tabs.

Once the attachment has been successfully uploaded, the attachment title and corresponding information will appear listed in the table below under the heading, Attachment Title. Please repeat the process to upload additional files.

To permanently remove (delete) an attachment, click the "**Delete**" link in the column to the right.

General Information	Project Budget Funding	Project Management Legislative Information Contacts Cooperating Entities Questionnaire
Attachments Status	Feedback	
This tab allows the user to on how to upload attachme PLEASE NOTE: Click on	upload attachments in the form of nts. ATTACHMENTS to view a lis	electronic files (i.e., project narratives, maps, spreadsheets). Uploading an attachment is a 4-step process. Click <u>HERE</u> for instructions at ef attachments associated with the RFP.
Pre-Submission		
	Pre-Submission Attachr	nents
	New Attachment	
	Attachment Category:	Service Area Map - Project Location
	Attachment Title:	Service Area Map
	File Name:	(100 character maximum) Choose File No file chosen Attach Selected File Important Notes: (Mouse over to Read)
	Attachment Title	Phase Date & Time Delete?
	No Attachments Available Download Selected Attachr	to Display nents
		Previous Next Preview/Submit

Figure 27 – Attachments

K. PERFORMANCE MEASUREMENT

The Performance Measurement tab allows users to enter performance measurement data related to the project. Data is organized into multiple sub-tabs including: purpose, water body, land use, site condition, implementation, total maximum daily load (TMDL), best management practices (BMPs), and sampling.

In each sub-tab various project attributes are selected and the corresponding percentages specified. The total percentage for the sub-tab cannot be greater than 100%

Ge Co	General Information Project Budget Funding Program Project Management Legislative Information Contacts Cooperating Entities Questionnaire Attachments Performance Measurement Status Feedback Post Award								
The inclumut	Performance Measure des: purpose, water b iple subtabs. Please e	ment Classification tab albws the user to entr ody, land use, site condition, implementation, inter the data requested in each tab. Note: The	er and edit the Performance Measure Classification data TMDL, BMPs, and sampling. The Performance Measure atotal usage in each sub-tab can not exceed 100%.	a related to the project. Data collected e Classification tab is organized into					
	Purpose Please enter/edit the Project Classification ' Purpose ' information. To add a (new) attribute and corresponding percentage value, select the attribute from the dropdowns, enter the percentage value and click on the SAVE button.								
	Waterbody	To edit an existing attribute and corresponding percentage value, click on the attribute name link. Edit the information as needed and							
	Land Use	on the SAVE button. To remove an existing at	tribute and corresponding percentage value, click on the	DELETE link.					
	Site Condition	Attribute Name	Sub Attribute Name	Percentage Delete?					
	Site condition	No Performance Measurement Data Available to Display							
	Implementation		Total Percentage (Should be between 0 and 100)						
	TMDL	Select a Value	Select a Value	Save					
::	BMPs		Providence Name Providence Providence						
8	Sampling		Previous Next Preview/Submit						
	Comments								

Figure 28 – Performance Measurement

L. STATUS

The Status tab displays the status history for the Application. The status will update as it makes its way through the Application submittal and review process.

Note: The most current status is listed at the top.

General Information Project Budget Funding Project Management Questionnaire Attachments Status									
The Status taballows the user to view the progress/status of the application. This tab is for viewing only.									
Phase	Status	Modified By	Status Date						
PHASE1	Application In Progress (not subnitted)	dfa_staff	9/29/2015 2:40:53 PM						
Previous Next									

Figure 29 – Status

M. FEEDBACK

The Feedback tab displays feedback from technical reviewers who reviewed the Application. Feedback is displayed only after the review process has been completed.

General Information	Project Budget	Funding	Project Management	Legislative Information	Contacts	Cooperating Entities	Questionnaire		
Attachments Status	Feedback						201		
The Feedback tab displays comments from the review process. Please note that feedback is available only after the review process has been completed.									
Feedback	Feedback Posted Date								
No Notes Available	No Notes Available to Display								
Previous Next									

Figure 30 – Feedback

N. POST-AWARD

The Post Award tab is where post-award attachments can be uploaded. Post-award attachments are project deliverables after a project has been awarded funding. For detailed instructions on how to upload post-award attachments, place cursor over the "Attachment Instructions (Mouse over to Read)". The "**Required Attachments**" button will produce a list of the required post-award attachments.

General Information Proj	ect Budget Funding Program Project Management Legislative Information Contacts							
Cooperating Entities Que	stionnaire Attachments Performance Measurement Status Feedback Post Award							
 The Pos: Award Attachments tab allows the user to upload project deliverables and other attachments after a project has been awarded funding. The attachments are in the form of electronic files (i.e., project narratives, maps, spreadsheets). Uploading an attachment is a 4-step process. Read instructions on how to upload an attachment here: <u>Attachment Instructions (Mouse over to Read)</u> PLEASENOTE: Click on Requirement Attachments to view of a list of attachments associated with the RFP/Survey. 								
New Attachment								
Attachment Category:	Select a Sample Title 💌							
Attachment Title:								
File Name:	Browse							
	Attach Selected File Important Notes: (Mouse over to Read)							
Attachment Title	Phase Date Attached Approved? Approved By Approved Date Delete?							
No Attachments Available	to Display							
	Previous							

Figure 31 – Post-Award

VII. SAVING AND PRINTING YOUR APPLICATION

A. SAVING YOUR APPLICATION

You can ensure that data entered will be saved before leaving a work area on the Application by clicking the "**Save as Work in Progress**" button at the bottom of each tab.

Save as Work in Progress	Save as	Work in	Progress
--------------------------	---------	---------	----------

Figure 32 – Save as Work in Progress Button

NOTE: Information entered on a tab will not save if you use the Back or Forward buttons on your Web browser.

B. PRINTING YOUR APPLICATION

To print your Application, click the **"Preview/Submit"** button. This button is located on all tabs of the Application except "Status", "Feedback", and "Post Award" tabs. A preview of the entire Application is displayed. Use the print function on your web browser to print. Click the **"Back to Application"** button to exit preview.

Preview/Submit

Figure 33 – Preview/Submit Button

VIII. EDITING, PREVIEWING, AND SUBMITTING APPLICATION

A. EDITING AN EXISTING APPLICATION

Applications can be started, saved as a work in progress, and edited up until the time the deadline passes. Once submitted, an Application can no longer be accessed for editing.

To access an Application for editing from the Main Menu, click the "Active Applications" link to view a list of the applications available for editing.

Figure 34 – Active Applications

Select the Application to be edited. This will open your Application and allow you to continue working on the Application.

Note: Once an Application has been submitted, the status changes to "Submitted or Assigned for Review". Once an Application is submitted, you are no longer able to edit. If prior to the deadline, you submit an Application by mistake, please contact the SOAR Help Desk for assistance.

S	Cov DAR - Sys	stem fo	natura Kesour or Online Appli	cation Review
Welcome Test Applicant of California Department of Water Resource	s - Information Techno	logy Services.	If his is not your Account, please og or	nt <u>Contact Us</u> <u>Loqout</u>
Main Menu > Application				
Application - In Progress				
The list below displays applications with a status of In Progress (m To start working on one of the applications/surreys listed below, pi	ot submitted). These an ease clict on the title (oplications/surv blue hyperlink)	veys can be opened and edited until	the submittal deadline.
Title	PIN	Phase	Status	Rfp Title
Enter Project title here	15	Phase 1	Application In Progress (not submitted)	Habitat Conservation Fund
Enter Project title here	16	Phase 1	Application In Progress (not submitted)	Habitat Conservation Fund
Back to Main Menu				

Figure 35 – Applications (In Process)

B. PREVIEWING YOUR APPLICATION

Previewing the Application is a good way to ensure the Application is complete and accurate prior to submittal. To preview the Application, click the **"Preview/Submit"** button. This button is located on all tabs of the Application, except "Status", "Feedback", and "Post Award".

Main Menu > Application Preview		
Application Preview		
This is a preview of your application. Pie are uploaded. Once you have verified the information, Note: To print the application, please use	ease review and confirm the information is accurate before submitting the application. SOAR will perform a check to verify whether required fields are completed and/c please read the certification statement and enter your initials to submit the application to the State Water Board. e the "FILE -> PRINT" menu option on the browser.	or required attachment
PIN 20 - Enter Project title here - IN PROC	GRESS	
Application Preview		
RFP Title:	Thild testing RFP	
Submitting Organization:	California Department of WaterResources	
Submitting Organization Division:	Information Technology Services	
Project Title:	Enter Project title here	
Project Description:		
Water System ID:		
District Office:		
APPLICANT DETAILS		
Applicant Organization:	California Department of WaterResources	
Applicant Organization Division:	Information Technology Services	
Applicant Address:	1001 I St., Sacramento , CA - 95814	
PROJECT LOCATION		
Latitude :	Longitude:	
Watershed:		
County:		
Responsible Regional Water Board:		
PROJECT BUDGET		
Funds Reque	ested(\$): 0.00	
Local Cost M	tatch(\$): 0.00	
Total Bu	idget(\$): 0.00	
Funding Program	Applied	
Second fund Program	Yes	
The First Funding Program	No	

Figure 36 – Application Preview Screen (Part A)

Project Management Role Project Director: Authorized Representative	First Name	Last Name	Phone	Fax	Email
Project Manager: Day to day contact Applicant Information Name: California Department of Water Resources Division: Information Technology Services		Person Submitti Submitter Name: Submitter Phone:	ng Information Test Applicant 916-990-0098		
Address: 100111St Sacramento, CA, 95814 Federal Tax ID: 123456789 DUNS Number:		Submitter Fax: Submitter Email:	testapp@soar.com		
Legislative Information	Primary		Additional District(s))	
Senate District					
Assembly District					
US Congressional District					
Contacts	Name		Phone	Email	
There are no CONTACTS to display.			the second second		
Cooperating Entities	Role	Name	Phone	e Ema	iii

Figure 37 – Application Preview Screen (Part B)

Once the information has been reviewed and confirmed, you have two choices: 1) return to the Application; or 2) run a completion check on the Application. If the

Application needs edits, click the **"Back to Application"** button. If the Application is complete, click the **"Application Completion Check"** button.

C. APPLICATION COMPLETION CHECK

Running an Application completion check will alert you of any missing required information such as the Federal Tax ID, requested funding amount, other general information, or attachments.

NOTE: The Application completion check will not check for any unanswered questions in the Questionnaire. It is the user's responsibility to confirm compliance with the solicitation instructions.

The missing required information will be displayed, at the bottom of the page under the title "**Application Completeness Check Results**".



Figure 38 – Application Completeness Check

If the Application is missing information, click the **"Back to Application"** button to complete.

NOTE: SOAR will not allow an Application to be submitted if a required attachment is missing.

D. SUBMITTING YOUR APPLICATION

After running the completion check on the Application, if the Application is complete, the "Certification and Submission Statement" will appear. To submit the Application, read the "Certification and Submission Statement", enter your initials, and click the "Submit Application" button.

Certification And Submission Statement								
The proposal appears complete. Please enter initials to certify accuracy of the application and then click on the 'Submit Application' button to submit the application.								
Please read the following certification and submission statement before submitting the application.								
I, certify under penalty of perjury the following:								
 The information entered on behalf of the Applicant Orçanization is true and complete to the best of my knowledge; 								
 I am an employee of or a consultant for the Applicant Organization and I am authorized to submit the application on behalf of the Applicant Organization; and I understand that any false, incomplete, or incorrect statements made may result in the disqualification of this application. 								
By signing this application, I waive any and all rights to privacy and confidentiality of the proposal on behalf of the Applicant to the extent provided by law.								
To submit this application, please enter your initials certifying the accuracy of the application and click the "Submit Application" button. If you are not ready to submit your application, please click on the "Back to Application" button.								
Back to Application								
Submission Date: 10/2/2015 3:10:32 PM Enter Your Initials: Submit Application								

Figure 39 – Certification and Submission Statement

Once the "Submit Application" button is clicked, a "Submission Confirmation" screen will appear to confirm your Application has been received. In addition, an email will be sent within 24 hours to confirm the receipt of your Application.

Submission Confirmation
Thank you for submitting an application for the RFP: Water Recycling Funding Program - Planning Grant Application
PLEASE SAVE OR PRINT A COPY OF THIS CONFIRMATION PAGE FOR YOUR RECORDS. Please note that your proposal identification number (PIN) for this application is: 32716. Please provide this PIN in the subject line of any correspondence (including email) regarding your application.

Figure 40 – Submission Confirmation

Another way of confirming the successful submission of an Application is to click the **"Back to Main Menu"** button on the "Submission Confirmation" screen. On the Main Menu, the Application you submitted will now appear under **"Submitted Applications"** link.

Application - Submitted or Assigned					
The list below displays applications with a status of	Submitted or Assigned for Review. T	o view an appli	ication/survey, click on the title (bue hy	perlink).	
Title	PIN	Phase	<u>Status</u>	Rfp Title	
Enter Project title here	4	Phase 1	Submitted (application read-only)	Third testing RFP	
Enter Project title here	8	Phase 1	In review (application read-only)	Third testing RFP	
Cleaning up xyz lake	9	Phase 1	Submitted (application read-only)	Third testing RFP	
Enter Project title here	13	Phase 1	Submitted (application read-only)	Third testing RFP	
Course annual sea church	14	Phase 1	Submitted (application read-only)	Third testing REP	

Figure 41 – Application Submitted or Assigned

NOTE: Once an Application is submitted, the status will change to **"Submitted"** or **"Assigned for Review"** and it will become "read-only". You will no longer be able to edit any information.

IX. ADDITIONAL MAIN MENU OPTIONS

To return to the Main Menu, you may click on the "Main Menu" link in the upper left hand corner of the screen. On the Main Menu, there are several links that allow for updating a user profile, user password, organization profile, or viewing the usage requirements for SOAR.

SOAR - System for Online Application Review						
Welcome Test Applicant of Califor	nia Department of Water Resources - Information Technology Services. If this is not your Account, please log out.	Contact Us Logout				
Main Menu						
Main Menu						
The man mend allows use user	Applicant Menu Start a New Application; Start a New Application! Copy an existing application; Start a New Application! Copy an existing applications: Active Applications: Active Applications; View Applications with a status of In Progress (Not Submitted). Submitted Applications; View Applications with a status of Submitted or Assigned (for Review). Processed Applications; View Applications that were not submitted and the deadline has passed Update User Profile; Edit cottact information, security question/answer. Update User Password; View and edit password. Update Organization Profile; Submit a request to update information for Organizaton. System Disclosure; View the minimum usage requirements for using SOAR. 					

Figure 42 – Main Menu

A. UPDATE USER PROFILE

This option on the Main Menu allows for the user to update contact information as well as the security question and answer.

Update User Profile		
Update User Profile allows the user to update contact information	on as vell as the password and security question/answer	T _e
User Details		
Organization:	Caliornia Department of Water Resources	
User Name:	testapp	
User Type:	APFLICANT	
Prefix:	1	(Mr., Ms., Dr., etc.)
First Name:	Test	
Middle Name:		
Last Name:	Applicant	
Title:	Staff	Ø
Phone:	916-990-0098	
Fax:		
Email:	tesiapp@soar.com	٢
Subscribe to Email Alerts?:	No 🗸 🚳	
Password Question:	Favorite sport 🗸 🥥	
Password Answer:	basket ball	
	Save Changes	

Figure 43 – Update User Profile

B. UPDATE USER PASSWORD

To change the password, click the "**Update User Password**" link on the Main Menu. The Update User Password screen will appear. Make the change to the password and click the "**Save New Password**" button to save and return to the Main Menu.

Welcome Test Applicant of Califo	ornia Department of Water Resources	Information Technology Services. If his is not your Account, please bg out.	Contact Us Logout
Main Menu > Update User p	profile		
Update User Password			
This screen allows you to enter	r or update useraccount Password d	tails that include Password, Password Question and Password Answer.	
User D	etails		
	Old Password:		
	Confirm New Password:		
	F	ave New Password	

Figure 44 – Update User Profile

C. UPDATE ORGANIZATION PROFILE

To submit a request to change the organization profile or to view previously submitted change requests, click the "**Update Organization Profile**" link on the Main Menu.

pdate Org	anization Profile					
he following is	e following is a list of previously submitted requests to update the Organization Profile. Click on the Request ID to view the previously submitted request.					
Request ID	Organization	Requested By	Request Date	Request Reason	Status	
3	Rivera's WQ Firm	sicimoon	07/29/2008	Wrong Federal Tax ID number	APPROVED	
5	Rivera's WQ Firm	sicimoon	08/04/2008	Need to change the federal tax id number!	REJECTED	
Z	Rivera's WQ Firm	sicimoon	08/05/2008	new fed tax id.	APPROVED	
8	Rivera's WQ Firm	sicimoon	08/05/2008	New tax id number.	REJECTED	
2186	Rivera's WQ Firm	sicimoon	03/28/2013	sfdddfdsdsfdfsds4fdf	APPROVED	
2187	Rivera's WQ Firm	sicimoon	03/28/2013	dfsdfdfdsddfdf	APPROVED	
2188	Rivera's WQ Firm	sicimoon	03/28/2013	xzcxcxzc	APPROVED	
2189	Rivera's WQ Firm	sicimoon	03/28/2013	sdfsdfdsdf	APPROVED	
2206	Rivera's WQ Firm	sicimoon	04/11/2013	need to change tile	REJECTED	
2286	Rivera's WQ Firm	sicimoon	06/13/2013	update the organization name.	REJECTED	
3886	Rivera's WQ Firm	iby.erik	05/14/2014	Update address	APPROVED	
3887	Rivera's WQ Firm	iby.erik	05/14/2014	new address	APPROVED	

Figure 45 – Update Organization Profile

To submit a request to change an organization profile, please click the **"Organization Change Request**" button. On the Request to Update Organization screen, enter the updated information and click the **"Submit"** button. The change request will be reviewed by a SOAR administrator who will approve or deny the request. An email notification will be sent with the decision.

Main Menu > Update Organization Profik	e > Request Details		
Request to Update Organization			
Update Organization Profile page allows the user I To edit information, pease fill in the blanks below. approve or deny (with instructions on how to proce	o propose edits for an organization. To submit the proposed edis for review, please click on the "Submi ed).	t' button to send he proposed edits in the form of a request. SOAR staff will review	the proposed edits and either
Organization Details			
	Original Organization Details	Modified Organization Details	
Change Request ID:	0	0	
Organization ID:	1	1	
Organization Name:	California Department of Water Resources	California Department of Water Resources	
Division or Branch:	Information Technology Services	Information Technology Services	
Mailing Address:	1001 I St	1001 I St	
City:	Sacramento	Sacramento	
State:	CA	CA	
Zip:	95814	95814	
Type of Organization:	WATER_BOARD	Regional or State Water Quality Control Board 🗸	
Federal Tax ID:	123456789	123456789	
Reasons to Update:	(250 characters maximum) Submit	<u>`</u> .	

Figure 46 – Request to Change Organization Profile

D. SYSTEM DISCLOSURE

The system disclosure screen outlines the basic requirements to use SOAR.

System Disclosure	
SOAR was designed and tested for use on a personal conputer (PC) using Internet Explorer (version 6.0 or higher). The use of a MacIntosh (Mac) or other web browsers may impact the ability to successfully save information, navigate within SOAR, upload attachments, or submit an application.	
The following is a list of recommendations when using SCAR. Usage Recommendations Use web browser Internet Explorer (version 6.0) or greater. Save work often - System times out after 90 minutes of inactivity.	
Close	

Figure 49 – System Disclosure

X. **RESOURCES**

If you have any questions or need assistance, you have several resources at your disposal:

- Frequently Asked Questions (FAQs), located on the SOAR Main Menu;
- Notes or hints located throughout the SOAR Application form; and
- SOAR Help Desk.

A. FREQUENTLY ASKED QUESTIONS (FAQs)

A link to the FAQs can be found on the SOAR Main Menu under Resources

B. NOTES OR HINTS

The Application form contains a series of helpful notes or hints throughout. These are identified with the following icon:



C. SOAR HELP DESK

The SOAR Help Desk is open from Monday – Friday from 9:00AM to 4:00PM. Questions or problems can be reported via:

E-mail: soar.admin@resources.ca.gov

Phone: (916) 653-6138