SOAR

System for Online Application Review

USER MANUAL

California Natural Resources Agency

Version 1.0 July 1, 2016

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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: https://soar.resources.ca.gov. 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.

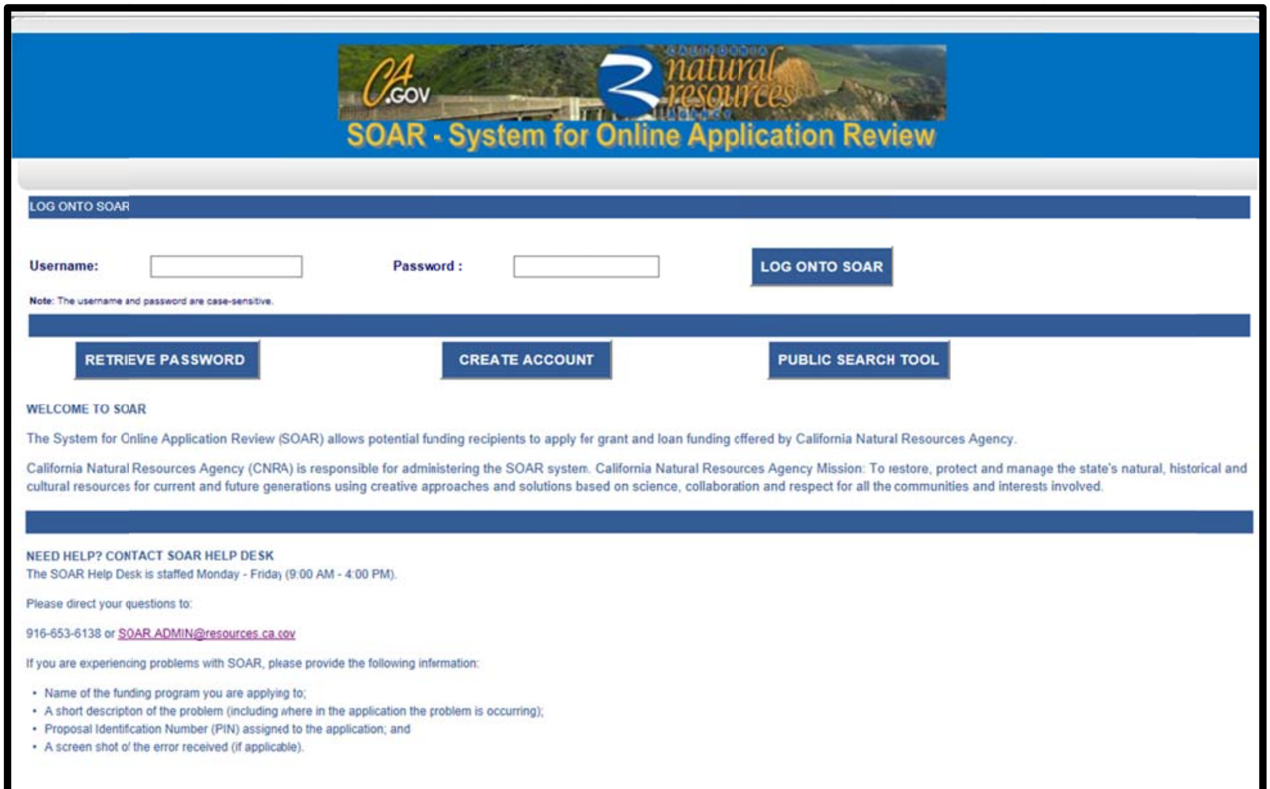


Figure 1 – System for Online Application Review (SOAR) homepage

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.

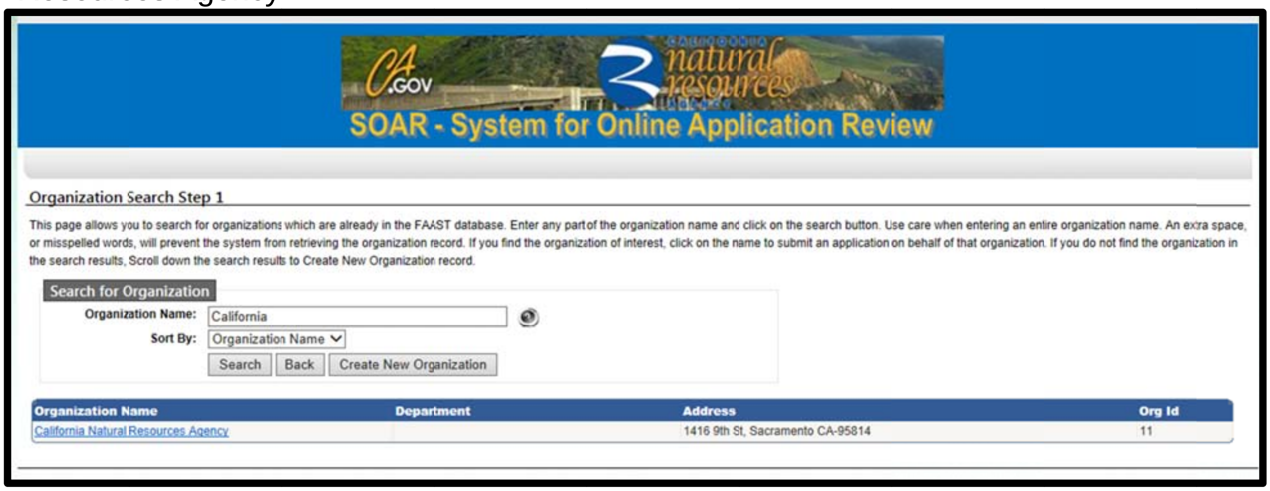


Figure 2 – Step 1: Organization Search

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.

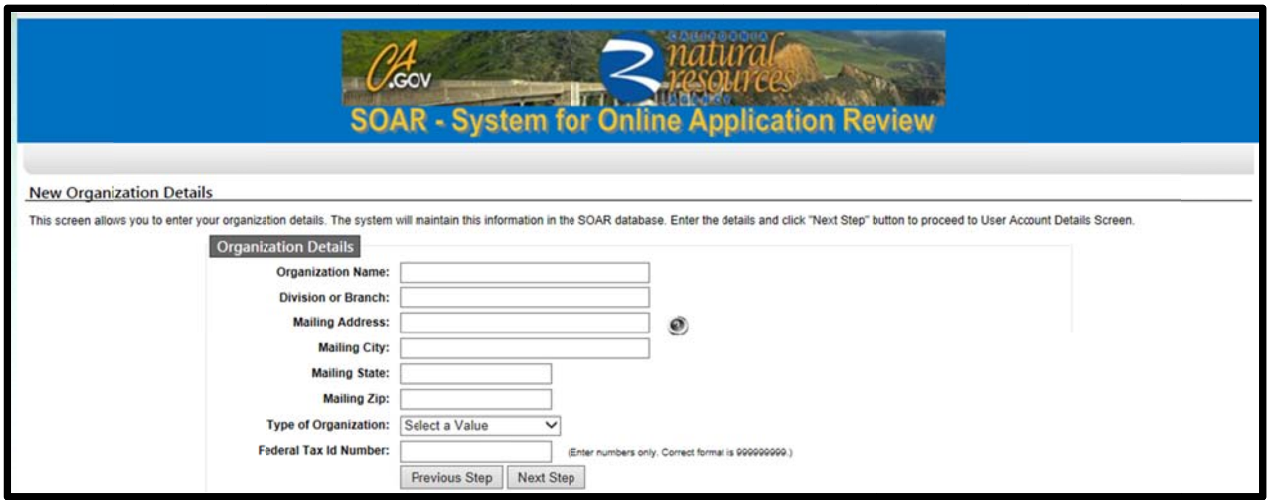


Figure 3 – New Organization Details

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.

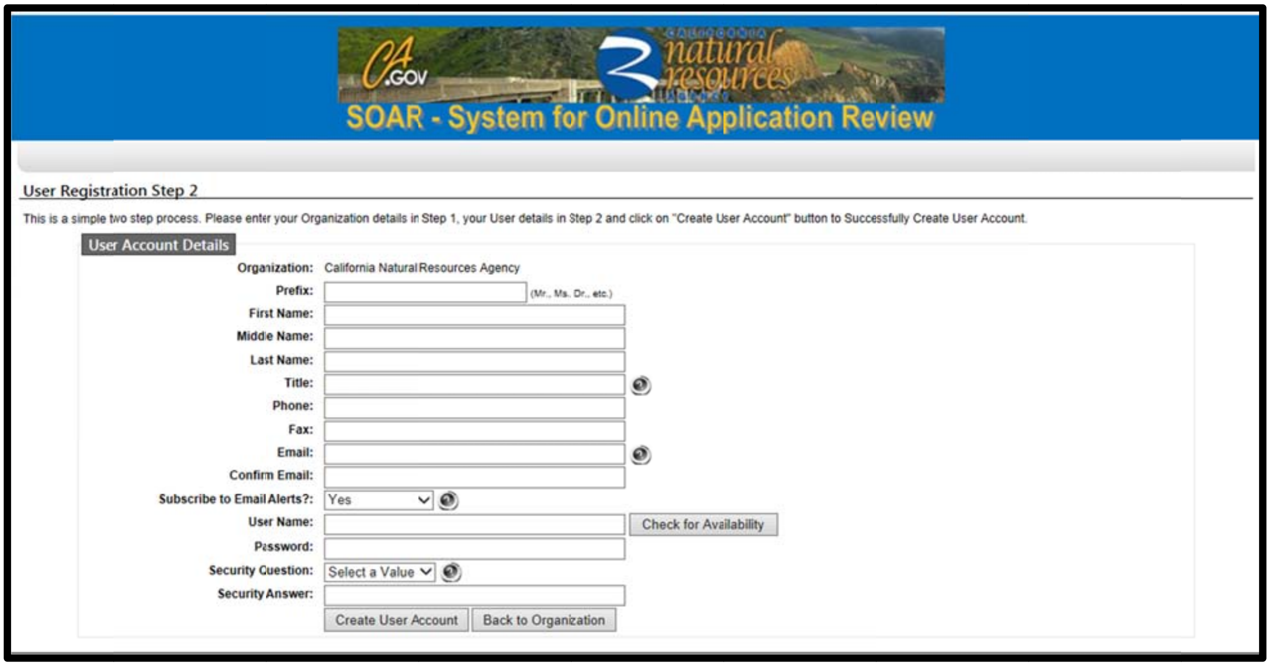


Figure 4 – Step 2: User Registration

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.

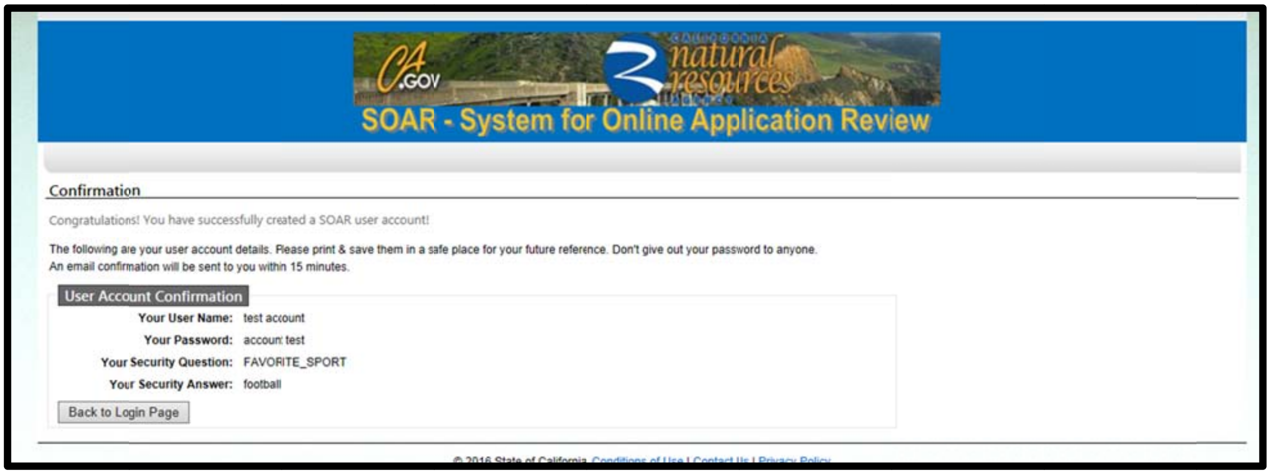


Figure 5 – User Account Confirmation

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.

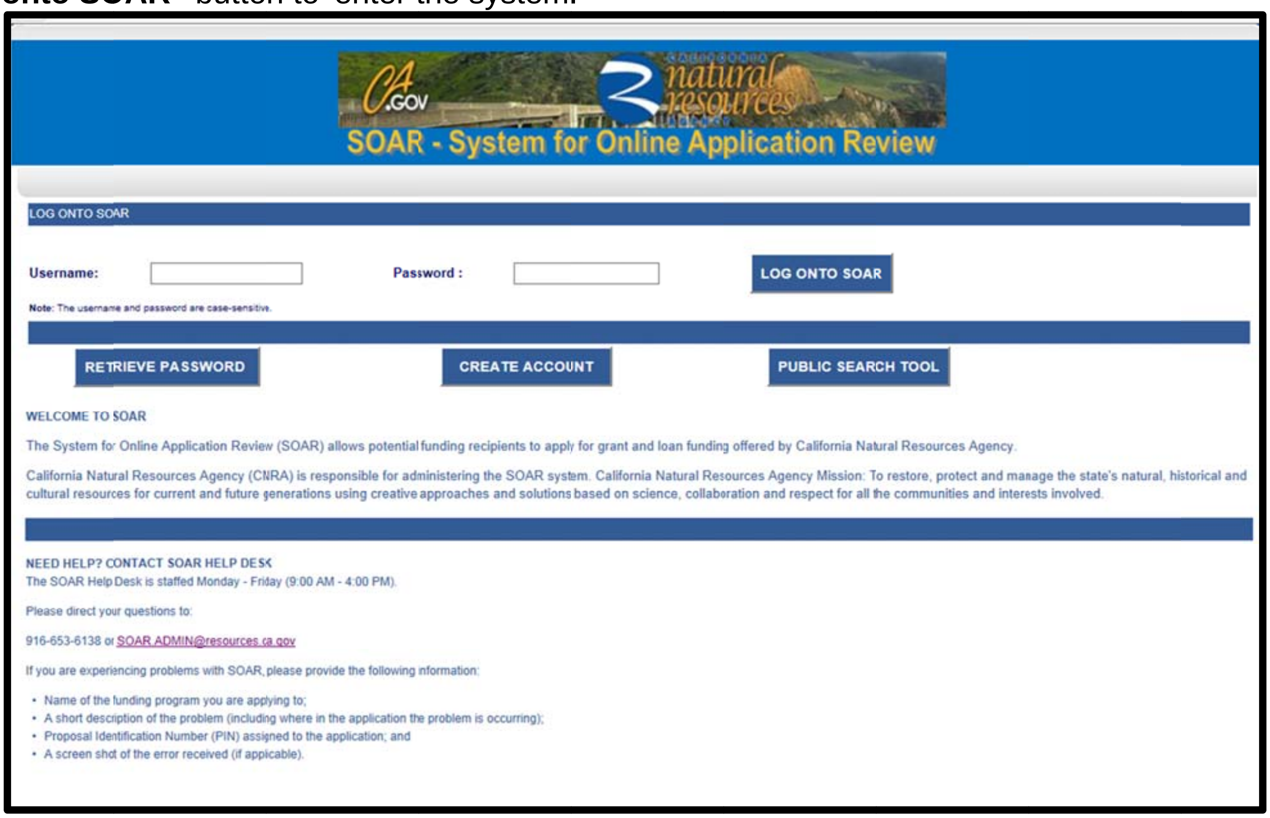


Figure 6 – Log onto SOAR

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.

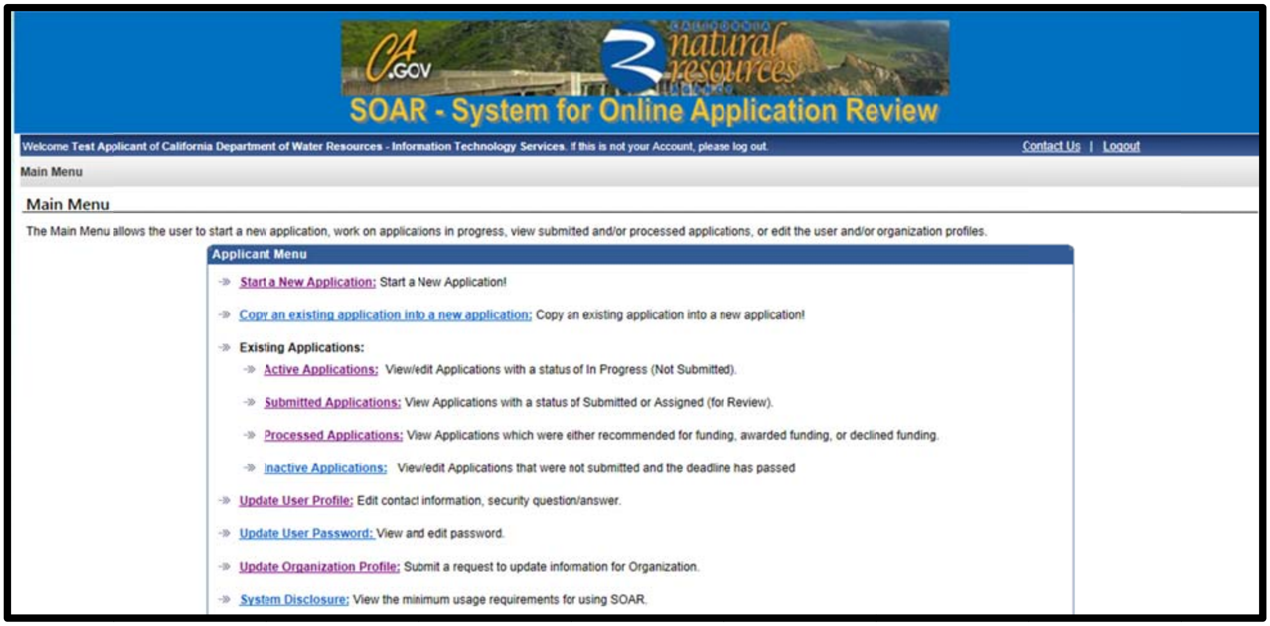


Figure 7 – Main Menu

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 <u>ADDITIONAL MAIN MENU OPTIONS</u> 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.

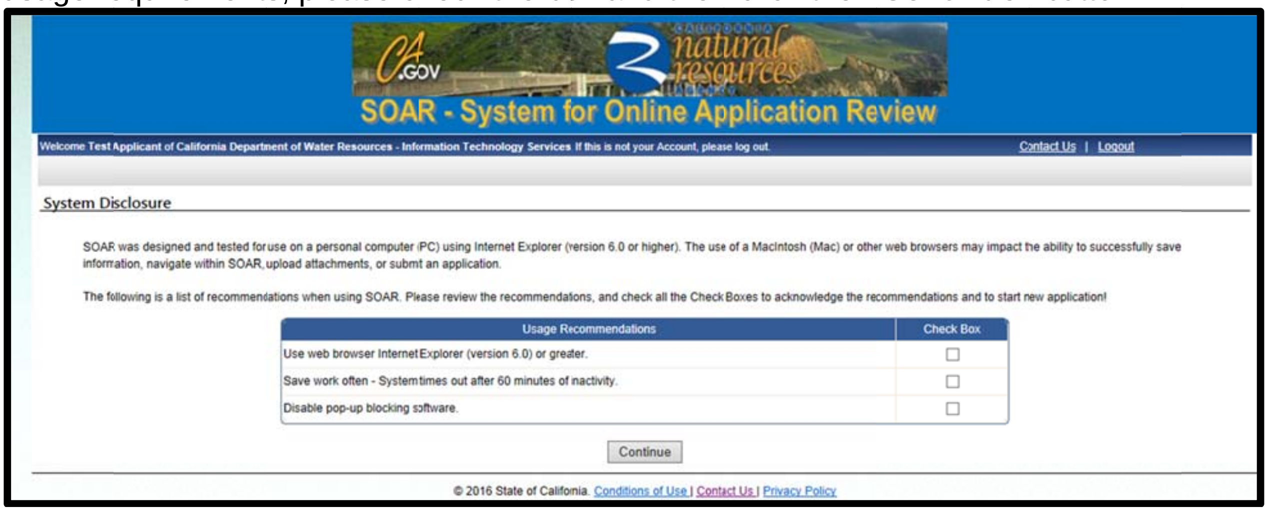


Figure 8 – Disclosure

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.

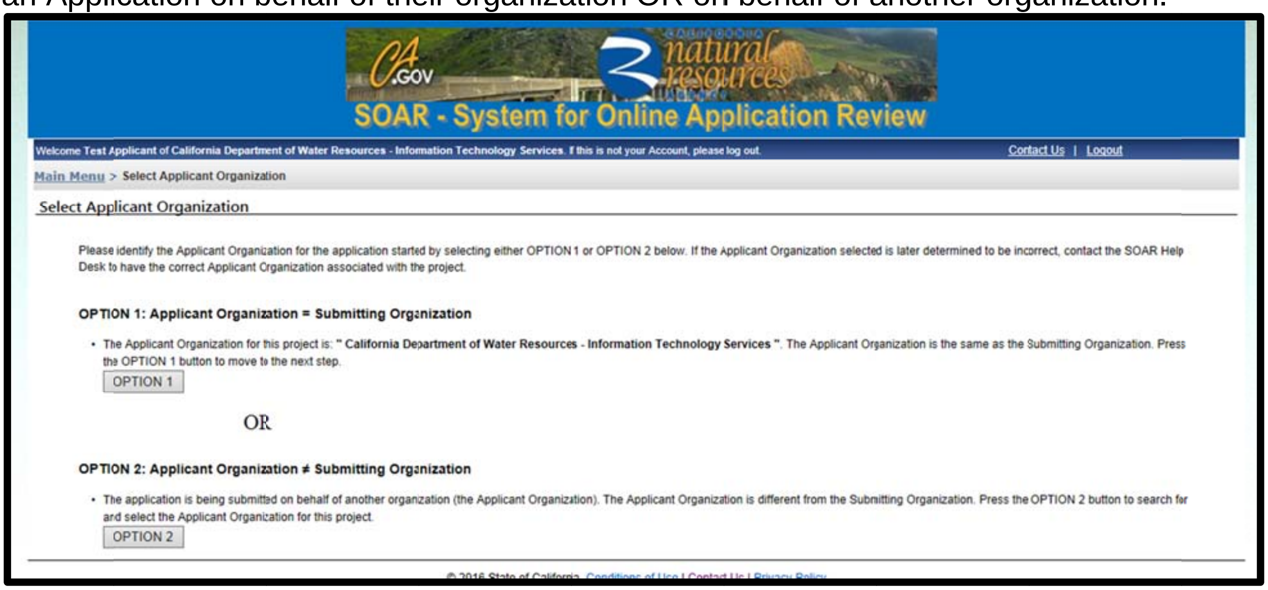


Figure 9 – Select Organization

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.

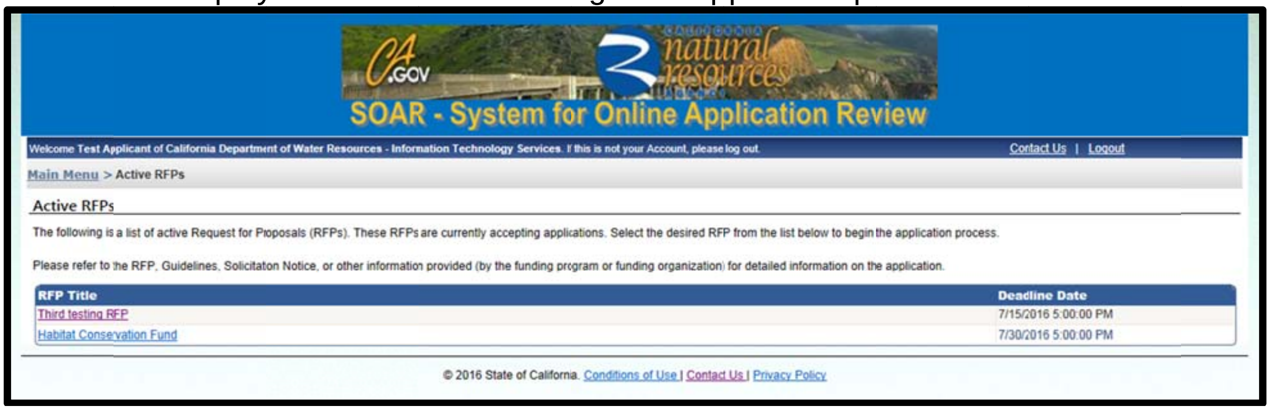


Figure 10 – Active RFPs

D. GETTING STARTED

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

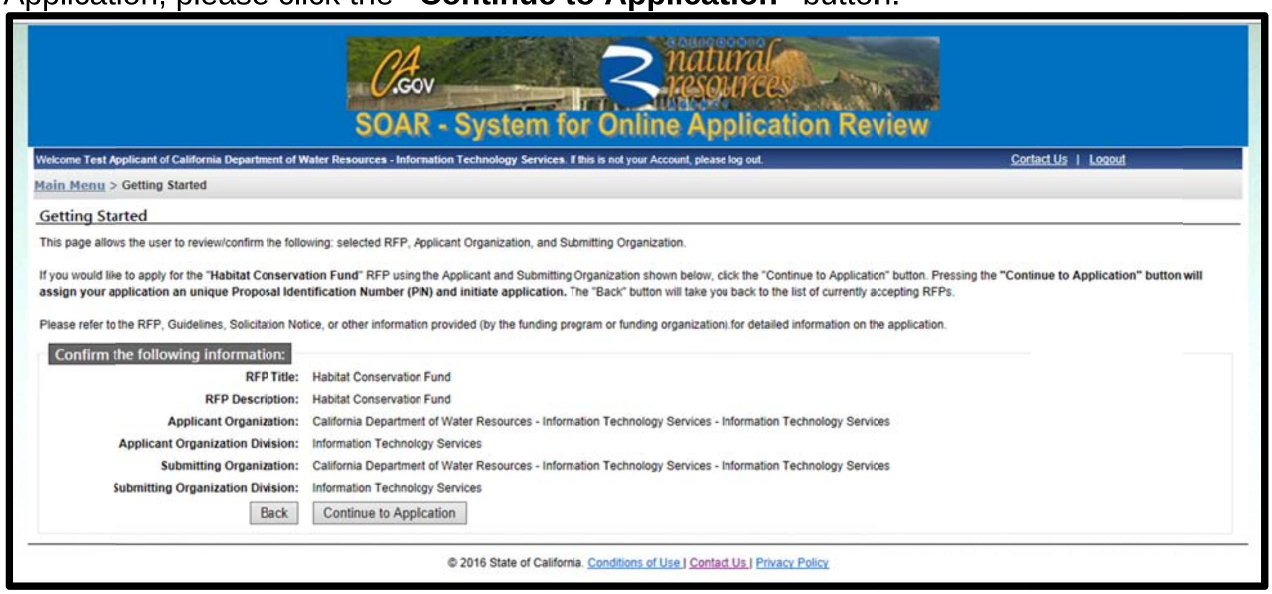


Figure 11 – Getting Started

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

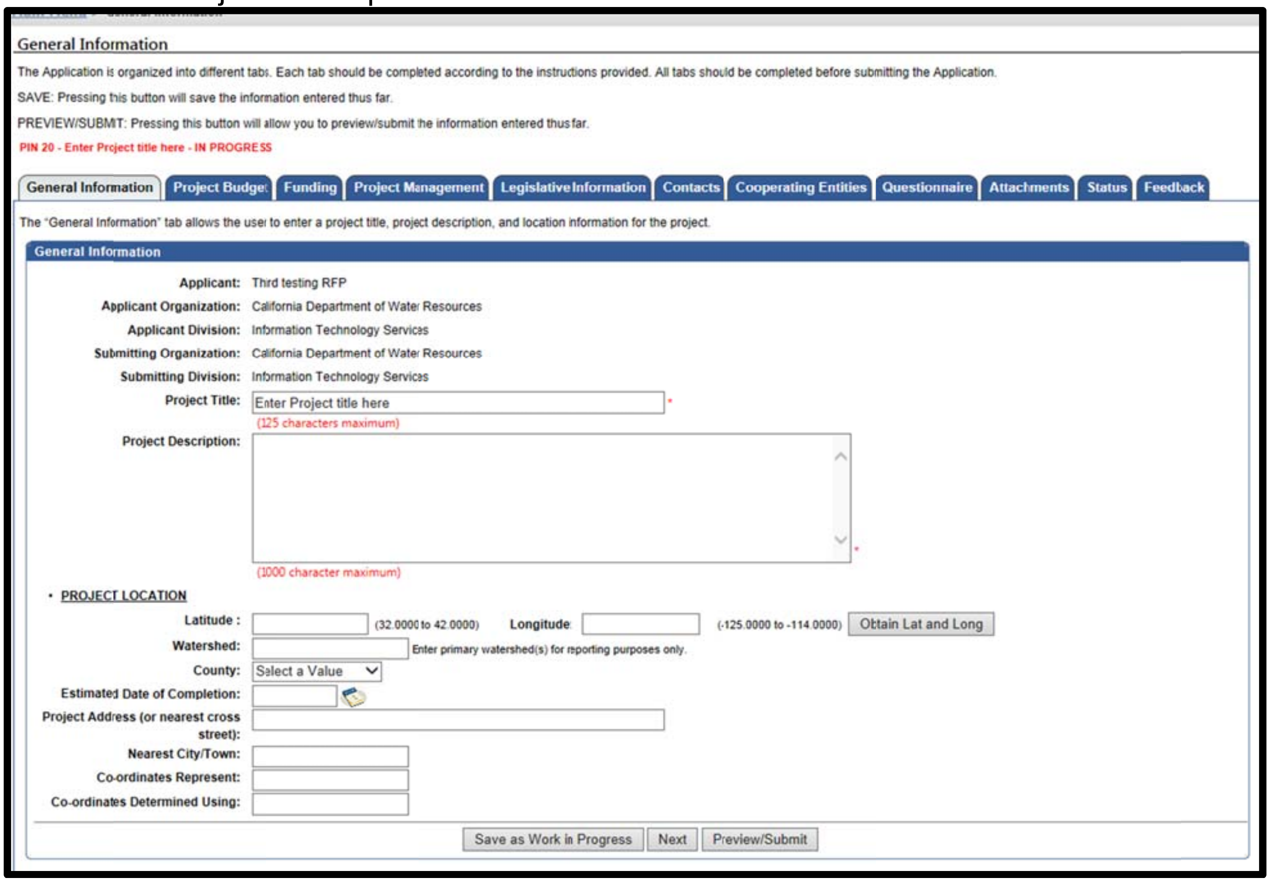


Figure 12 – General Information

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.

Figure 13 – Previous or Next Buttons

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

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.

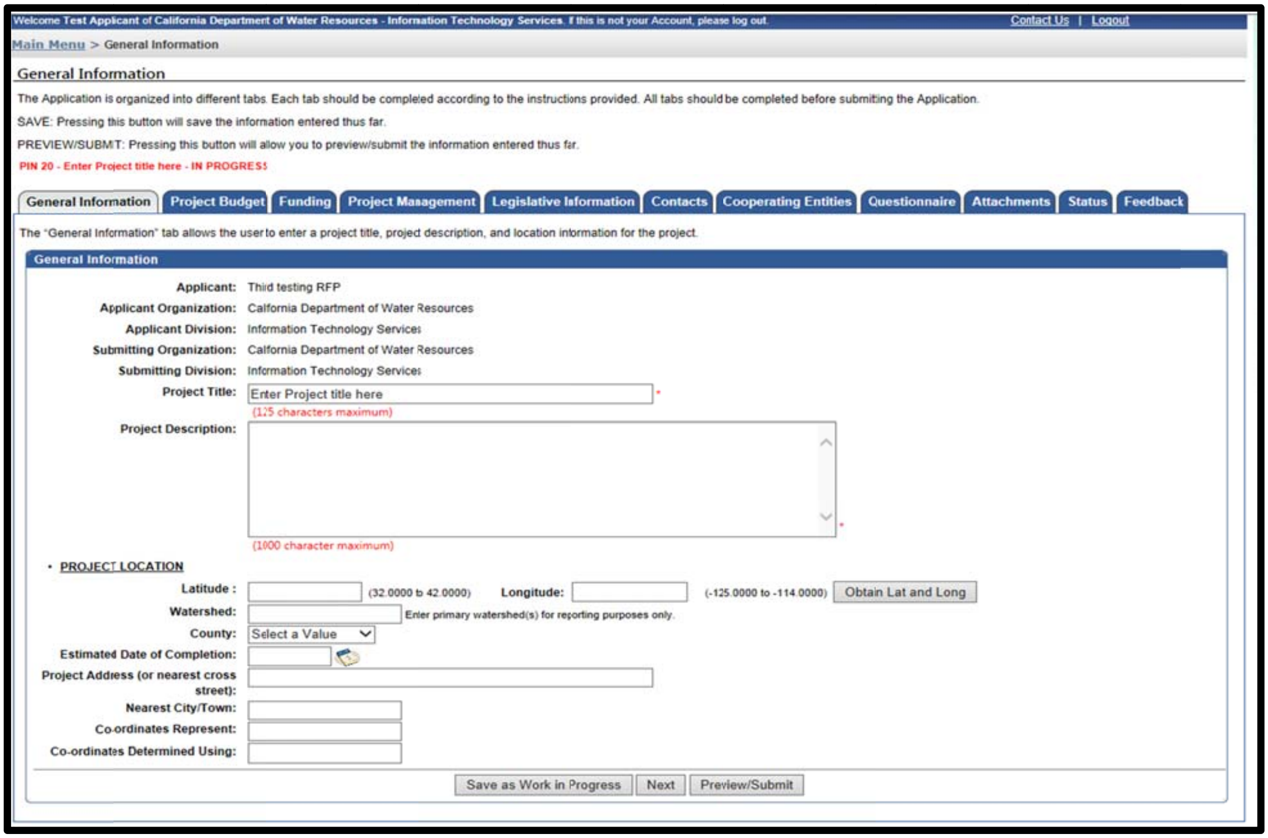


Figure 15 – General Information

Note: To find the latitude and longitude of the project, there is a button on the right-hand 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.

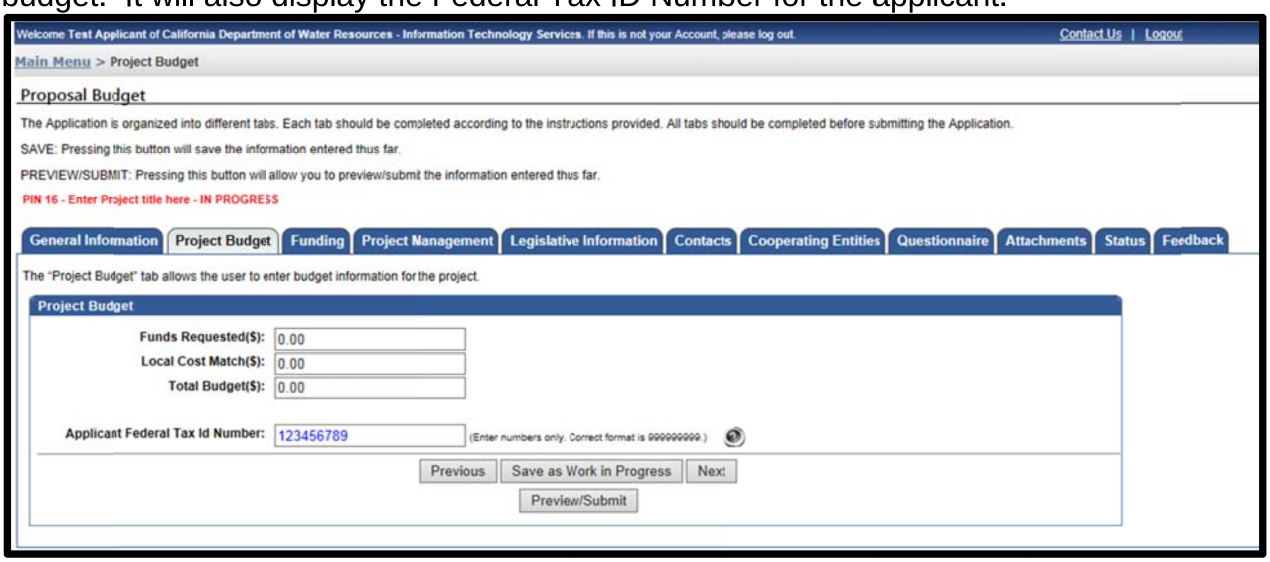


Figure 16 – Project Budget

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.

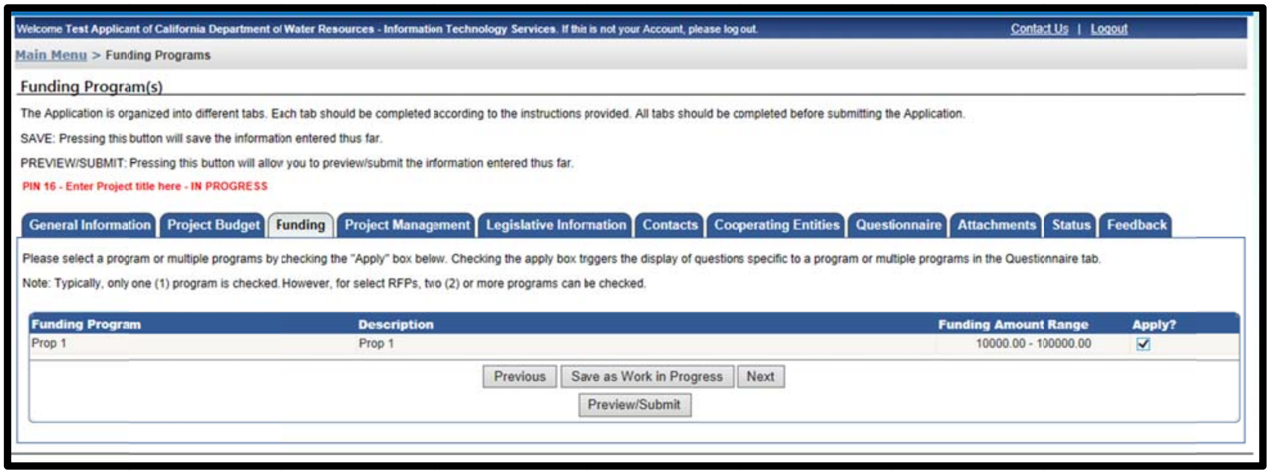


Figure 17 – Funding

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.

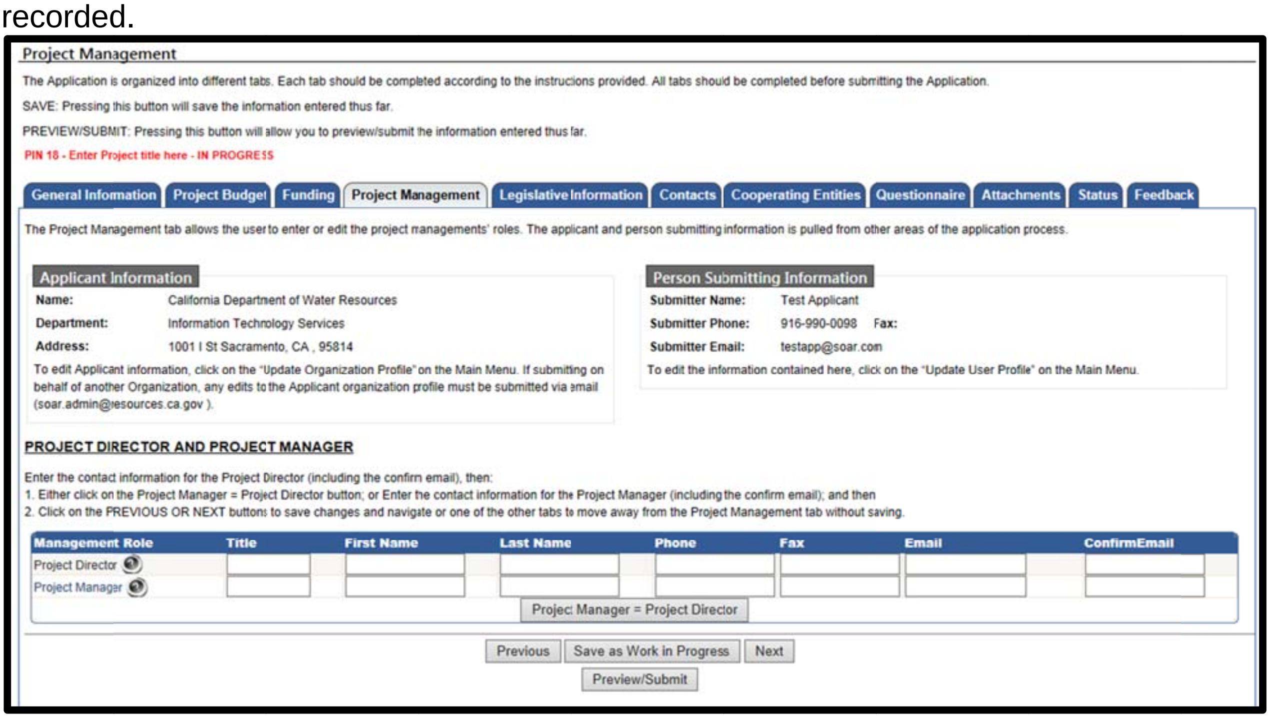


Figure 18 – Project Management

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.

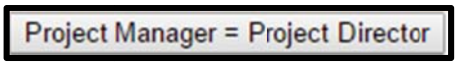


Figure 19 – Project Manager Same as Project Director Button

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.

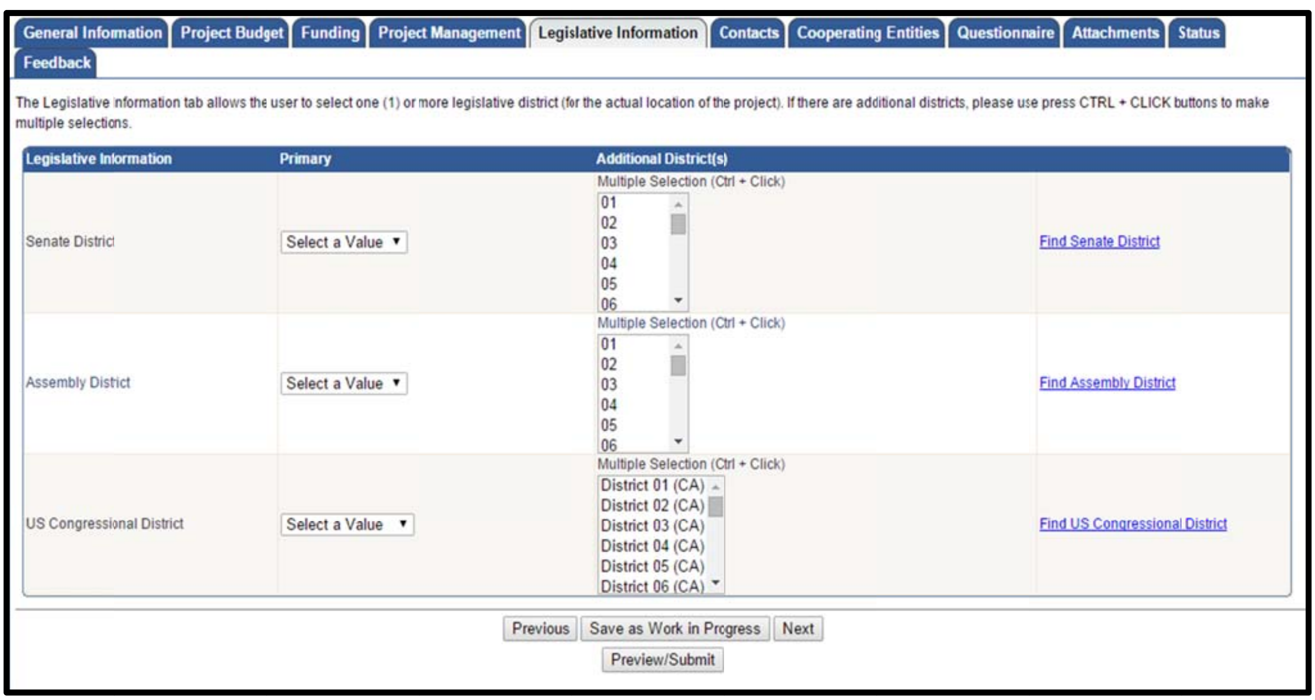


Figure 20 – Legislative Information

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.

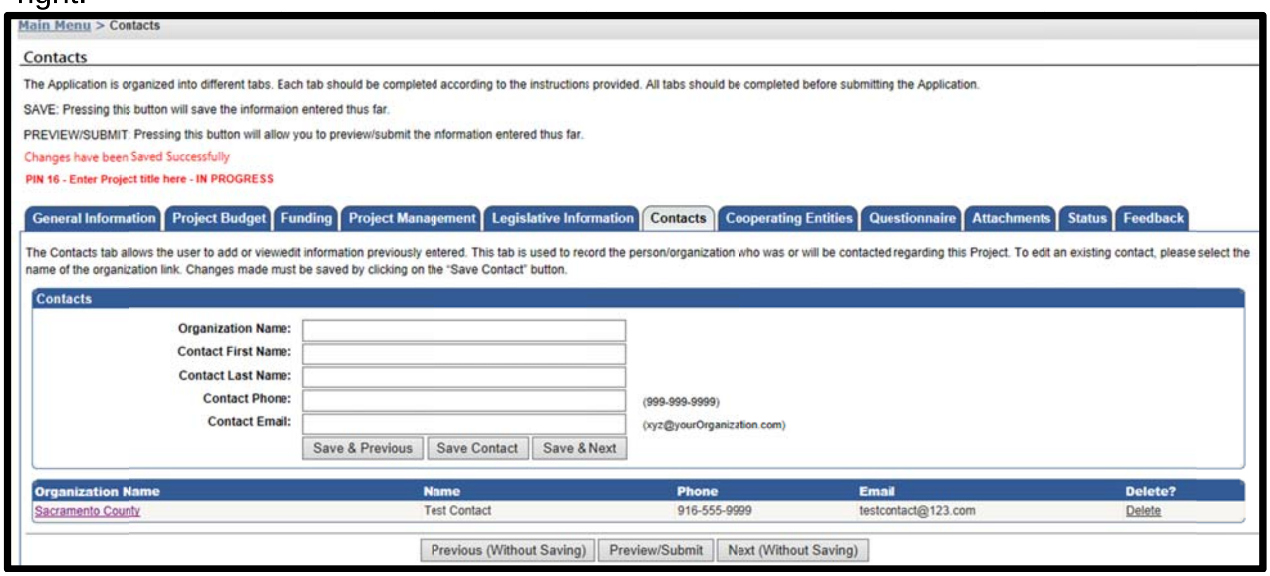


Figure 22 – Contacts

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.

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.

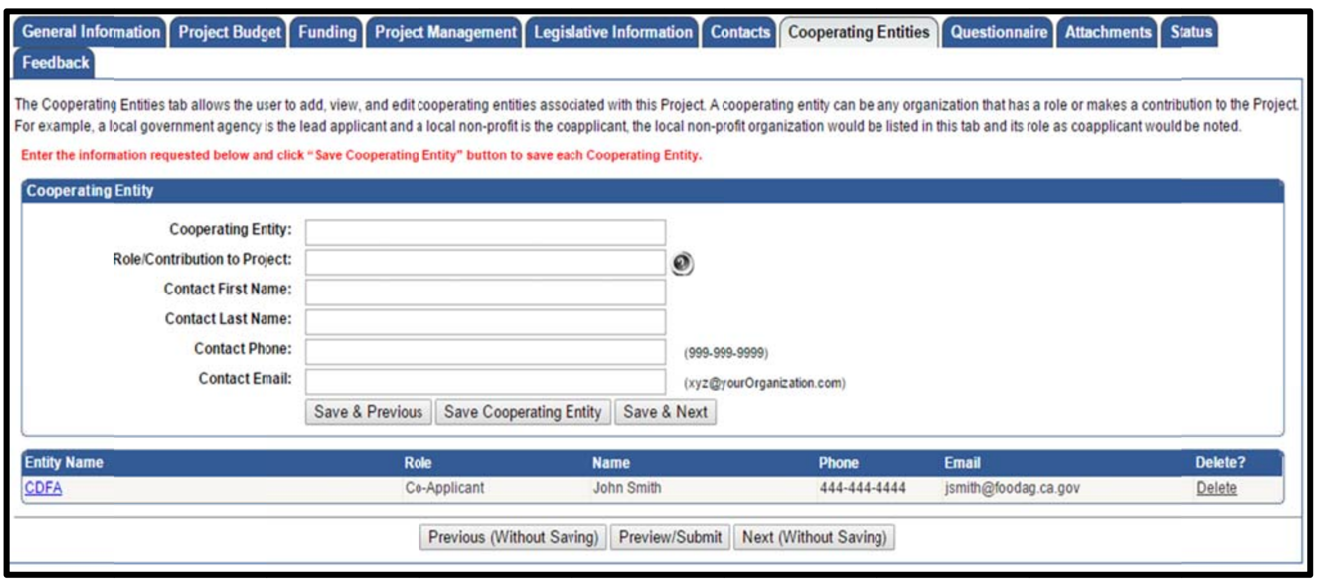


Figure 24 – Cooperating Entities

I. QUESTIONNAIRE

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

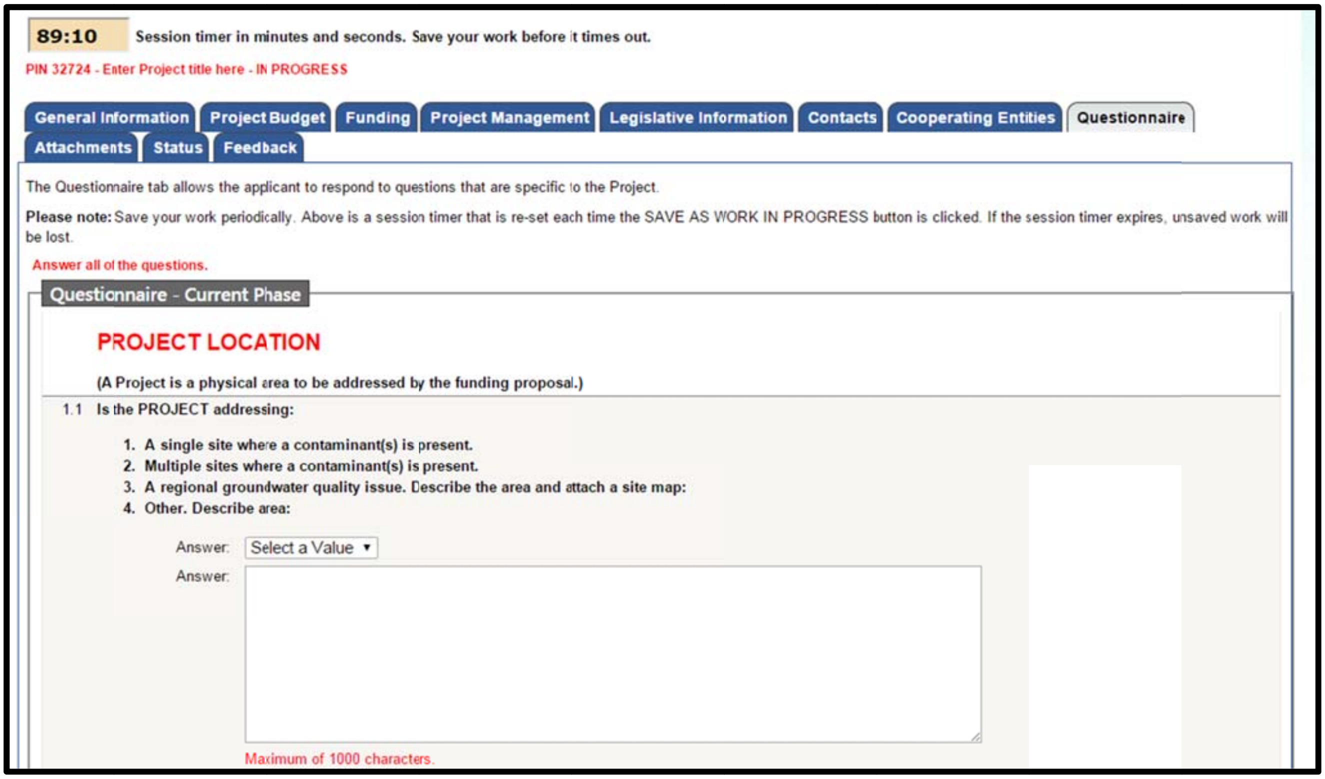


Figure 25 – Questionnaire

*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.

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.

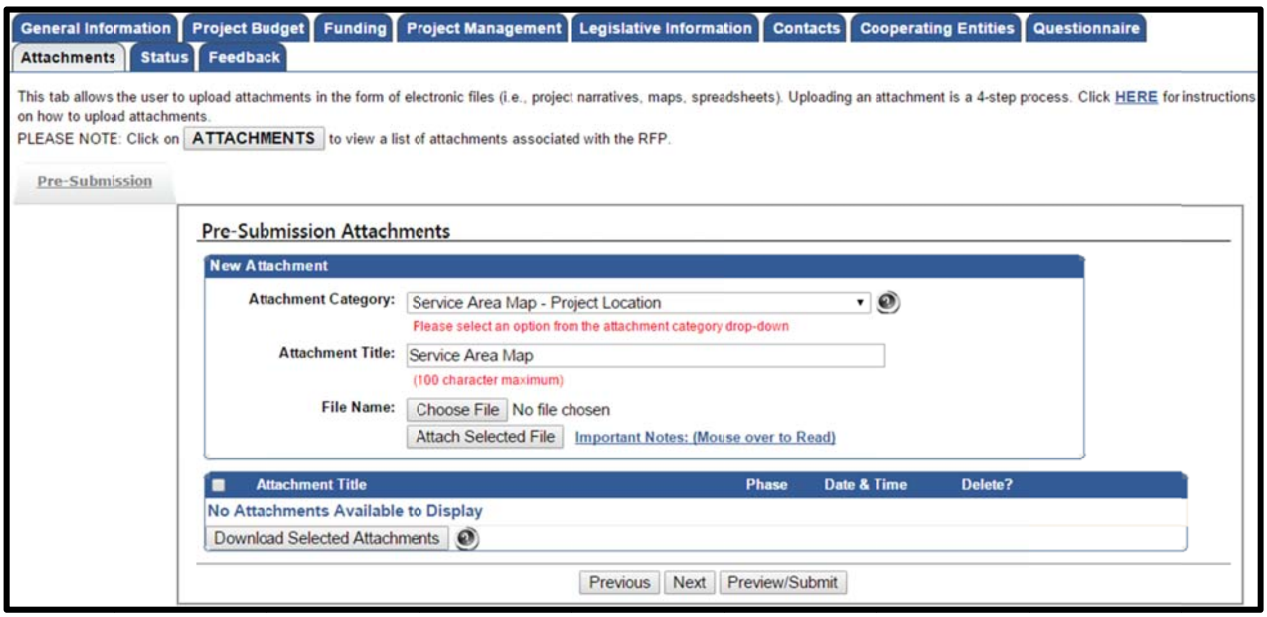


Figure 27 – Attachments

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%

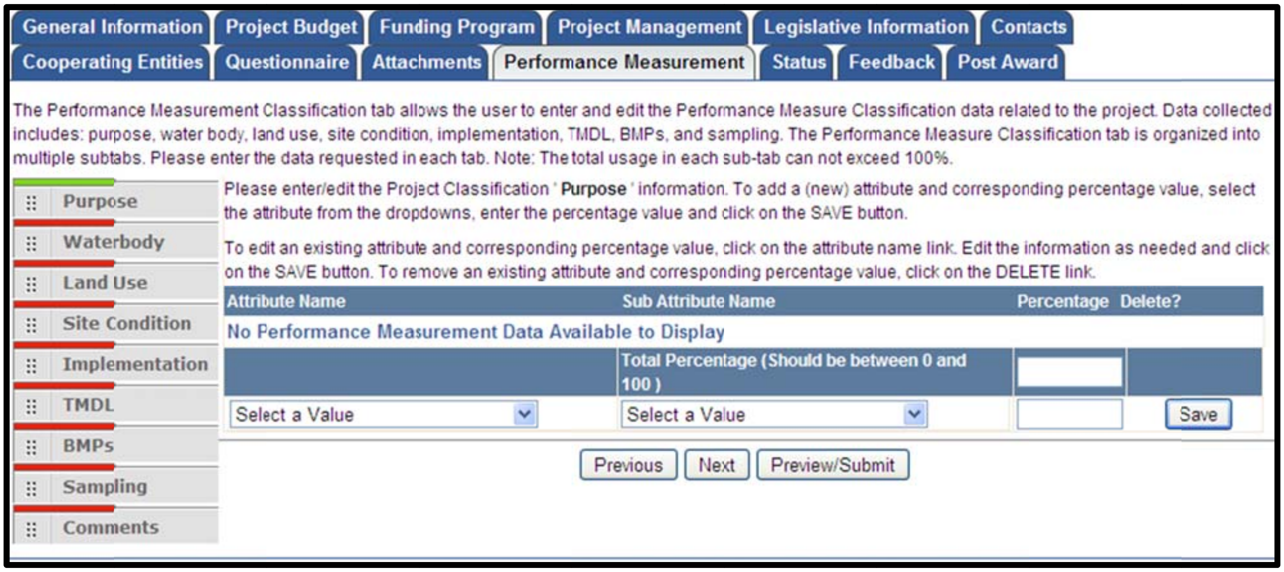


Figure 28 – Performance Measurement

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.

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.

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.

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.

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.

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.

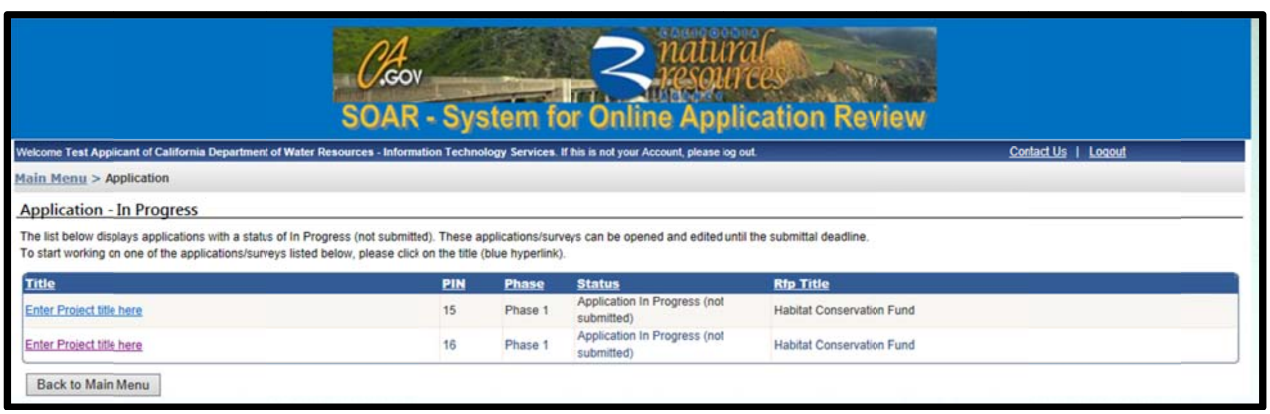


Figure 35 – Applications (In Process)

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”.

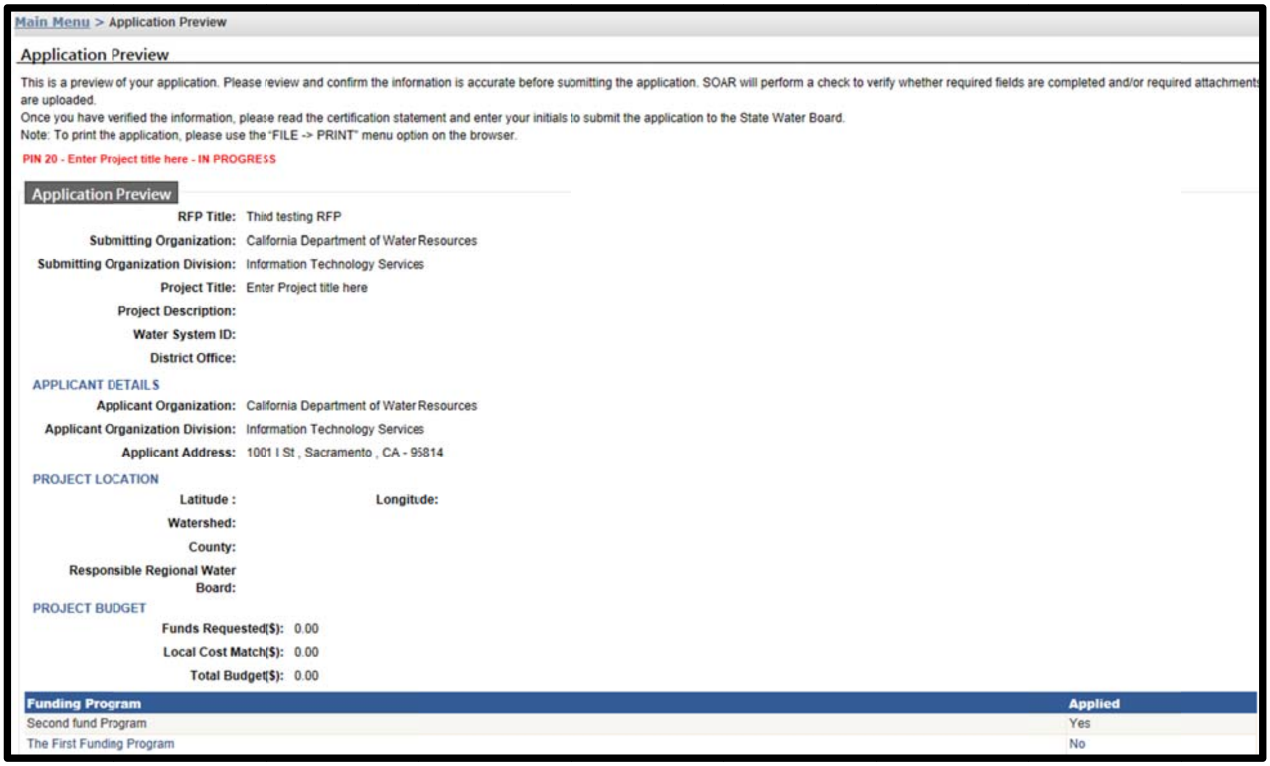


Figure 36 – Application Preview Screen (Part A)

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”.**

Application/Survey Completeness Check Results

The completion check indicates that the application/survey is INCOMPLETE. Please review the following list of incomplete or missing information:

- One (1) or more attachments required by the RFP/Survey is missing. Please return to the Application/Surveys Attachment tab to upload the missing attachment(s).
- Federal Tax ID for the Applicant Organization is needed. Please return to the Application/Survey¿s Project Budget tab to enter the Federal Tax ID.

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 Organization 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 appication, 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.

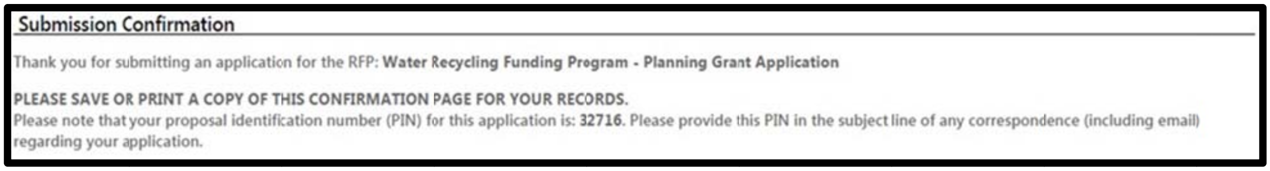


Figure 40 – Submission Confirmation

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.

Title	PIN	Phase	Status	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
Save american rivers	14	Phase 1	Submitted (application read-only)	Third testing RFP

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.

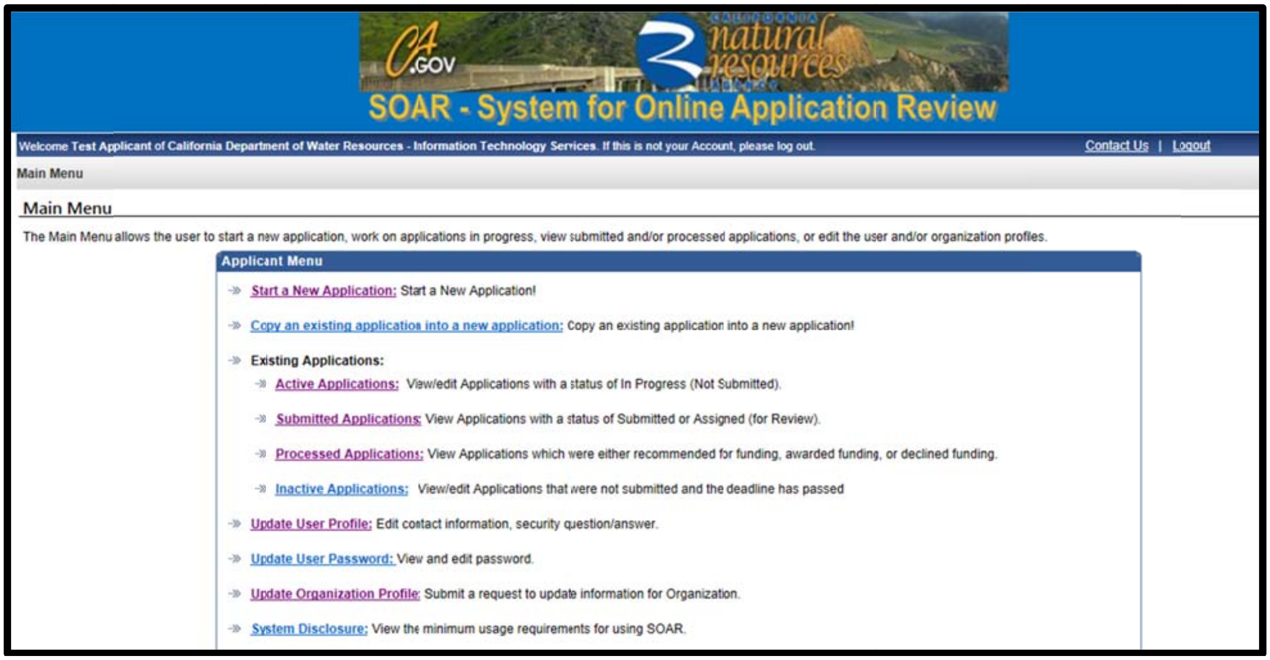


Figure 42 –Main Menu

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.

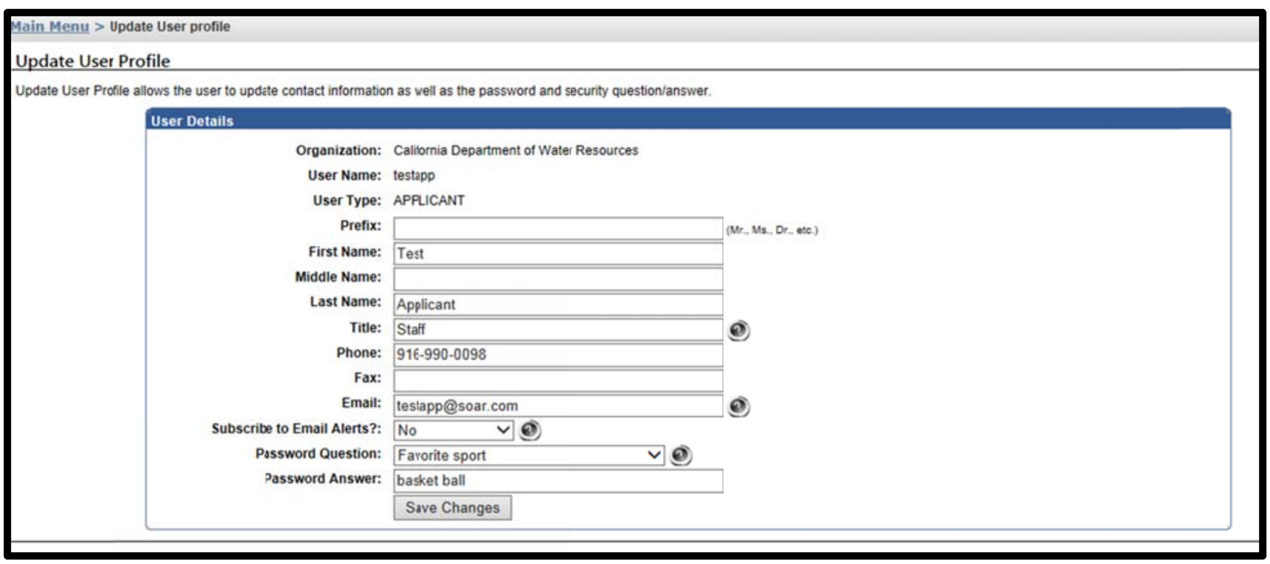


Figure 43 – Update User Profile

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.

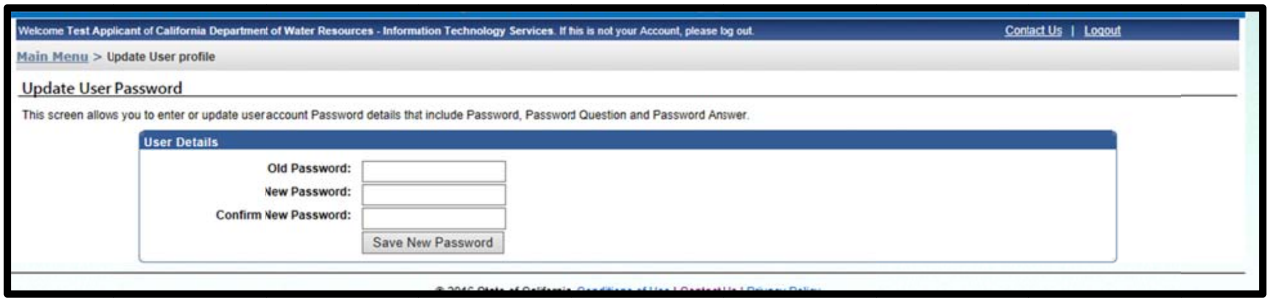
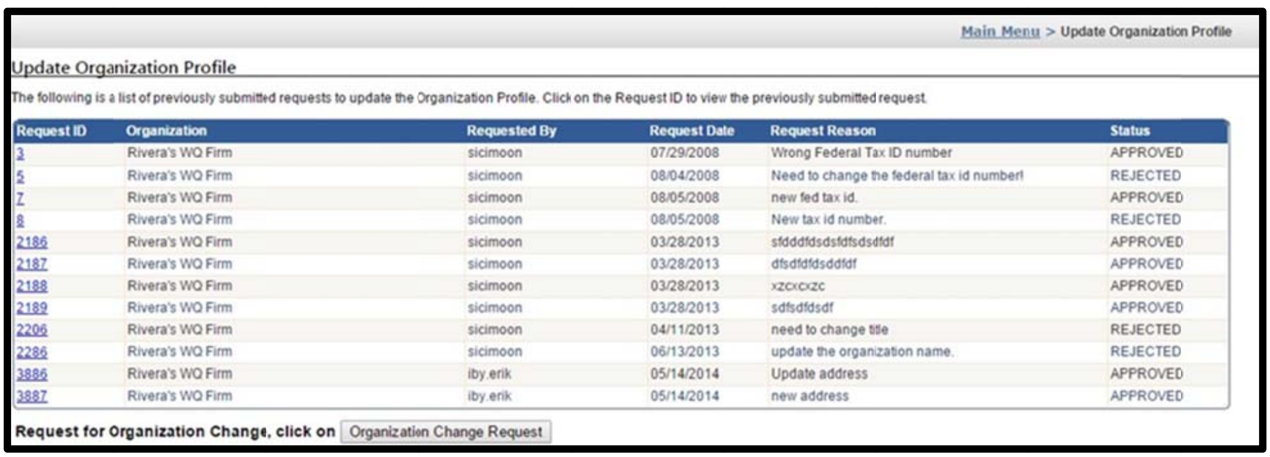


Figure 44 – Update User Profile

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.



Main Menu > Update Organization Profile

Update Organization Profile

The 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
7	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	sfdddfdsdsfdfsdsdfdf	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 title	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

Request for Organization Change, click on Organization Change Request

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.

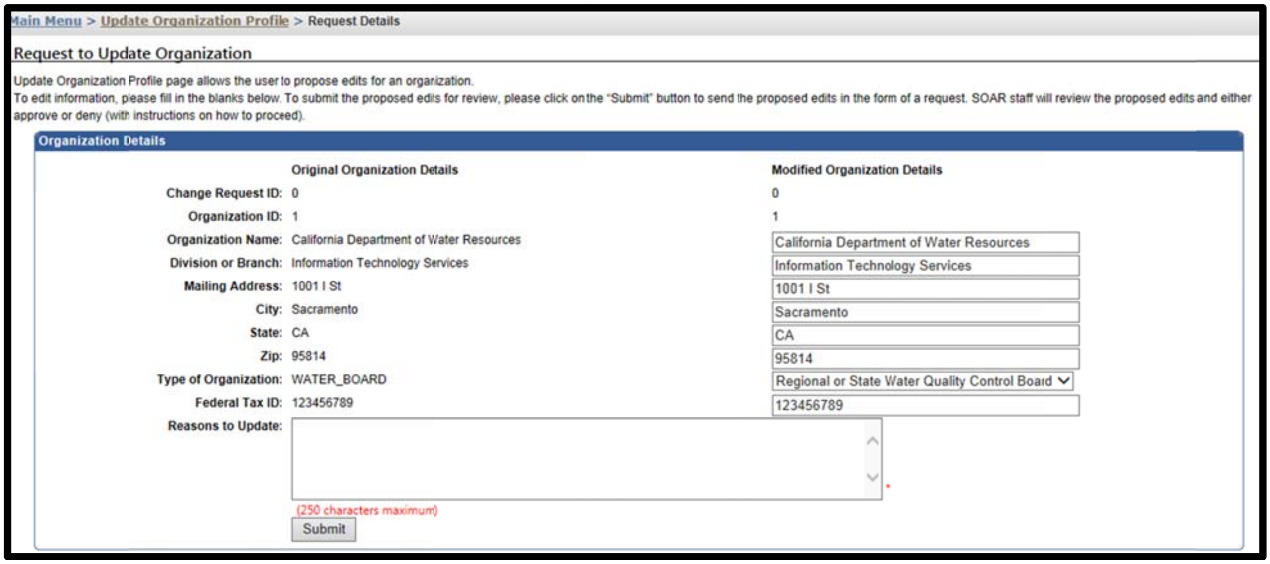


Figure 46 – Request to Change Organization Profile

D. SYSTEM DISCLOSURE

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

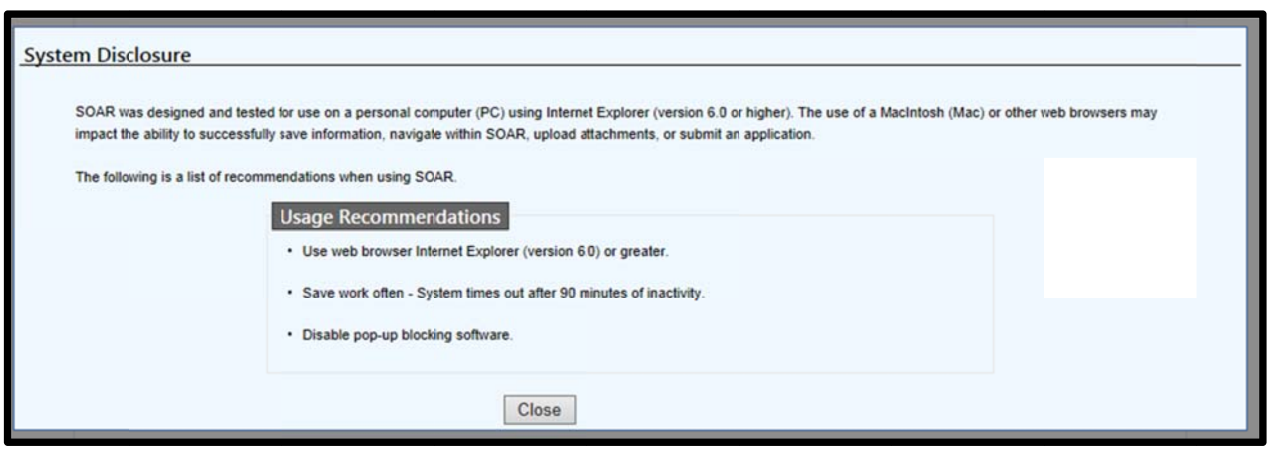


Figure 49 – System Disclosure

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