# CDLAC On-line Application Instructions

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I. **<u>One-time Registration</u>** (APPLICANTS ONLY)

- CDLAC generates and sends out invite (Notification Letter) to Applicants with Registration Link and Registration Code
- Applicant will use their Federal Identification Number and the Registration Code provided in the Notification letter to register. All of the following must be completed:
  - CDLAC Information
  - Login Information
  - Security Information

  Then click "Create User" button

II. **<u>Creating and Assigning Access to a New Application</u>** (APPLICANTS ONLY)

- Create Application by clicking on "New Application"
- Complete all fields

Applicant Grants Access to Sponsor/Developer to complete application

***<u>NOTE</u>**: Currently, access can only be granted to the Project Sponsor or Developer*

- Applicant creates Sponsor/Developer User Account
- Applicant completes email → System sends email (with link to retrieve password) to Sponsor/Developer user with Username & Registration Code
- System retrieves password after identifying Web User Account and sends password via email to Sponsor/Developer

***<u>NOTE</u>***: PASSWORD (Applicant & User)

Passwords are case sensitive, required to be a minimum of 7 characters in length, and must have at least 1 non-alphanumeric character. (e.g. ()[]!?,.-=+*%)

<u>Applicant is "Locked Out"</u>

This happens when a user has made too many attempts to log into the system using the wrong password.

If the user does not remember his or her password, they must click on the link, 'Forgot your password?', located on the login screen. After clicking this link, the system will ask the user his or her stored security question, and if answered correctly, it will send the user an email that contains the password.

## III. **Sponsor/Developer completes application**

IMPORTANT NOTES:

All fields in the online application must be completed. If a field is left blank, the application will not be able to be submitted.

Only Exceptions:

(under "Application Details" → Online Forms →Part I for contact information)

- Second Address Line
- Middle Initial
- Phone Ext.

Place cursor on "Application Details" → Online Forms →Part I

IMPORTANT NOTES:

- All fields for firms and contact information must be completed (except where exceptions are noted above).
- Please note that for the "Applicant", there are two contacts to be completed: 1) Applicant Senior Officer; and 2) Applicant Staff Contact Person.
- If a particular type of firm is not part of the financing team, please leave it blank.
- At the bottom of each page, there is a "**Save**" button that **must** be clicked before moving on to the "Next" page. This will confirm that the information that was entered has been saved. **This step is VERY IMPORTANT**.
- At the end of each section there is a checkbox that asks to "Check if [specific section, i.e. Allocation] Information is complete". Please make sure that you check this box at the end of each section. If the information is not complete, the missing information will show in the "Pending Items" under the "Application Info" tab.

Adding Firms not listed in the drop-down boxes

EXAMPLE: Adding a new Bond Counsel Firm

- "Application Details" → Online Forms →Part I
- Click drop down box for the Bond Counsel Firm → select "***NEW Bond Counsel Firm***"
- Complete all other firm information for all other team members
- Click "Save"
- Click on "Bond Counsel Firm" link
- Complete all information
- Click "Save"
- Message will appear in red at the bottom saying "Bond Counsel Firm Information: Updated Successfully"
- Click "Next"
- The name of the new bond counsel firm should now appear under the Financing Team Information
- Click "Save"
- Click check box asking "Check if Part I is Complete". If information is required, it will appear in red and will have to be completed.

Please note that any new added firm will not be officially added to the drop down list until the application is submitted. Therefore, if you have multiple applications with the same new firm(s) in other applications, it must be added to each application.

Continue completing Part I thru Part VI.

IMPORTANT: Please note that the application will not be able to be submitted until all items in the "**Pending Items**" have been resolved.

**PLEASE NOTE:** The layout of the on-line application is the same as the hardcopy version and should be completed as such.

## IV. The On-line Application Features

- There are some fields that are formulated with calculations. These fields will have a "Click to compute….." label next to them. If it isn't clicked, the application will not be able to be submitted. (e.g.: Part II Project Financing Information – Construction and Permanent Sources sections)
- There are some fields that require information to be identified (e.g: the "Other" field for the "Sources" financing under Part II. Project Financing Information)

## V. Uploading Attachments

To Upload Attachments,

- **IMPORTANT**: All Attachments should be submitted in **pdfa** format only.
- Click on the icon next to the specific Attachment (e.g.: "Attachment D"), an instruction box will appear with a "Browse" button
- Click on the "Browse" button
- Choose the Attachment from your browser, name the attachment (e.g.: D, D-1; D-2, etc., whichever is applicable).
- Confirm that you have the correct Attachment by opening it.
- Click the "Upload File" button, then
- Click the "Add Attachment" button, then
- Click the "Save" button. (VERY IMPORTANT STEP)

## VI. User (Project Sponsor/Developer) is Locked out

- User has to inform the Applicant that they are locked out
- The Applicant has to:

Choose Application → Application Details → Part I → Project Sponsor/Developer (whichever is applicable) → click on Web Account Info tab → check box "User is Locked Out" → Save