

DEP CVA GRANT MANAGEMENT SYSTEM USER GUIDE

Department of Environmental Protection (DEP)





Table of Contents

1.	Login to the Salesforce Org	2
2.	Account Details	3
	Contact	
	Apply for a Grant	
	Grant Application Tab	
	The Grant Agreement	
	Create a Reimbursement Request	
	Status Reports	
	Amendment / Change Orders	





1. Login to the Salesforce Org

• Click on the link to access the portal - https://myeco.force.com/grants



• If you do not have an account, select **Register** and complete the **registration form** on the Portal to get access.



- Once you have registered on the Portal the user will be sent an email with a link to create a password. Once the user logs in using their username and password, they will see the home page.
- There are quick links that the user can select to access:
 - Account Details





- CVA Grant Requirements
- o Apply for a Grant
- Quick Links for users to access additional information



Clean Vessel Act



The Clean Vessel Act (CVA) of 1992 was signed into law to reduce pollution from vessel sewage discharges, prohibiting the discharge of raw sewage into fresh water or within coastal salt-water limits. The act established a federal grant program administered by the U.S. Fish and Wildlife Service, which to date has awarded nearly \$150 million for states to install thousands of sewage pumpout stations. The program, housed within DEPs Office of Sustainable Initiatives, provides grants for construction and installation of sewage pumpout facilities and purchase of pumpout boats and educational programs for boaters Grant Requirements Apply for Grant



Florida Department of Environmental Protection, Clean Marina Program, 3900 Commonwealth Blvd. MS #30, Tallahassee, Florida 32399-2400

2. Account Details

To view Account details, select Account Details object.



- There are different list views under the Account Details Object:
 - Account
 - Contact
 - Grant Application
 - Grant Agreement
 - Reimbursement Request



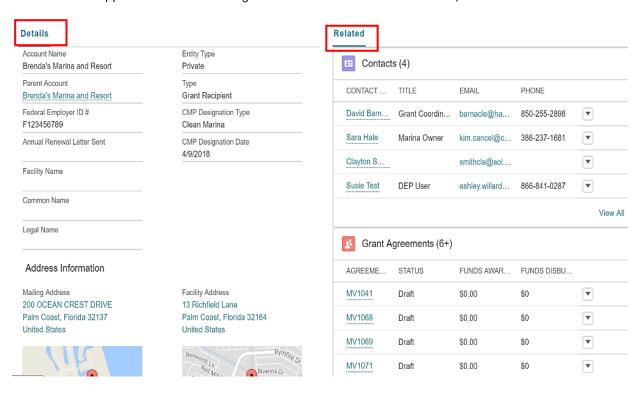




 The name of the Account is listed. To view the account details the user can click on the name of the account or select view all if there is more than one account for the user.



- When the user clicks on the name of the account, the account record will display.
- The user will view the Details tab (address, contact details etc.) and Related list tab (Contacts, Grant Applications and Grant Agreements associated to the account).





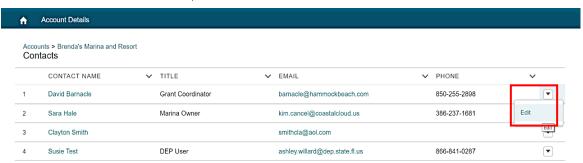


3. Contact

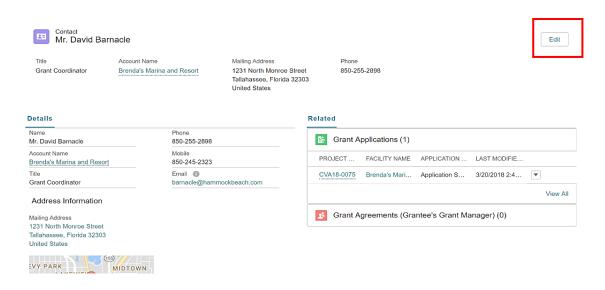
To view all contacts associated to the account select View All.

Related Contacts (4) CONTACT ... TITLE **EMAIL** PHONE David Barn... Grant Coordin... barnacle@ha... 850-255-2898 w Sara Hale Marina Owner kim.cancel@c... 386-237-1681 • * Clayton S... smithcla@aol.... ashley.willard... **DEP User** 866-841-0287 Susie Test View All

- The list of contacts will be displayed. The drop-down arrow at the end of the row allows the user to edit the contact record.
- To email the contact, select the contacts email address.
- To view the contact record, select the contact name.



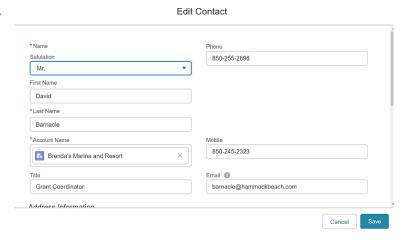
• The contact record displays the details for the contact. Select **Edit** to edit the record.







- The Edit Contact screen will display, and updates can be made to the contact record. Click Save.
- To go back to the home screen, select the Home button .



4. Apply for a Grant

• Select the link Apply for a Grant.



Clean Vessel Act

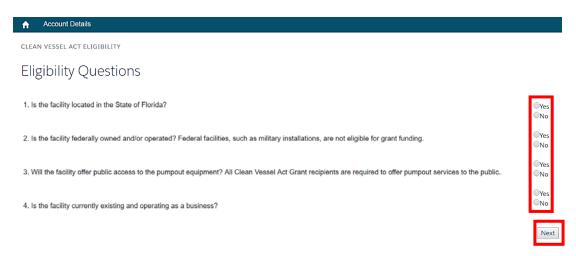


The Clean Vessel Act (CVA) of 1992 was signed into law to reduce pollution from vessel sewage discharges, prohibiting the discharge of raw sewage into fresh water or within coastal salt-water limits. The act established a federal grant program administered by the U.S. Fish and Wildlife Service, which to date has awarded nearly \$150 million for states to install thousands of sewage pumpout stations. The program, housed within DEPs Office of Sustainable Initiatives, provides grants for construction and installation of sewage pumpout facilities and purchase of pumpout boats and educational programs for boaters. Grant Requirements Grant FAQ Apply for Grant

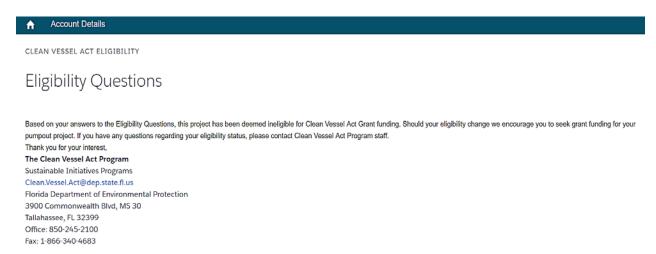
 A screen with eligibility questions will be displayed and users will select their answer (Yes or No) by clicking the button. Click Next.







• If the user has answered the questions and is determined to be ineligible to apply for the Grant funding, they will see a screen like the one below.

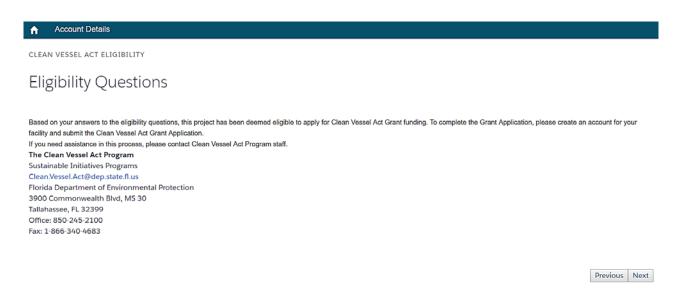


Previous Finish

• If the user has answered the questions and they are eligible to apply for the Grant, they will receive the message confirming they are eligible and that they need to create an account for their facility and to submit the grant application. Click **Next**.

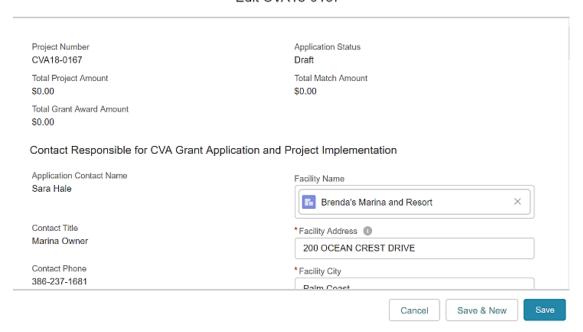






The Application screen will display. Complete all fields.

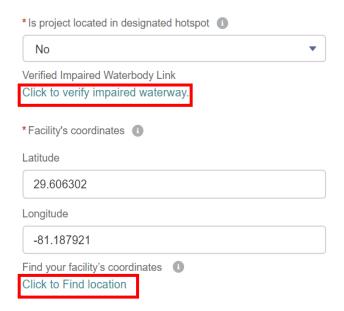
Edit CVA18-0167



- In the application there are fields where the applicant will need to select a link that will take them to an external page where they can verify:
 - Impaired waterway
 - Find the facility location/coordinates

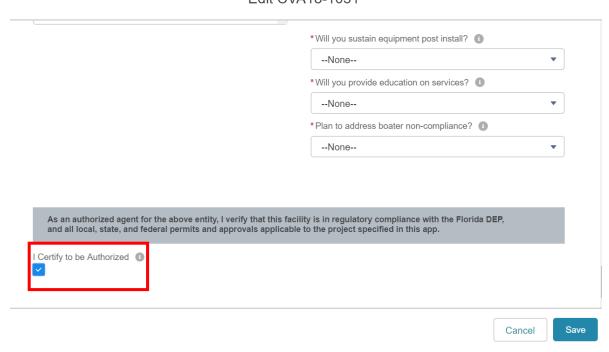






<u>PLEASE NOTE</u>: Users <u>MUST select the Certify checkbox</u>. This is to confirm the user is an
authorized agent for the named entity, and to verify that their facility is in regulatory compliance
with the Florida Department of Environmental Protection, and all local, state, and federal permits
and approvals applicable to their project. The application cannot be submitted if this checkbox
is not checked.

Edit CVA18-1031

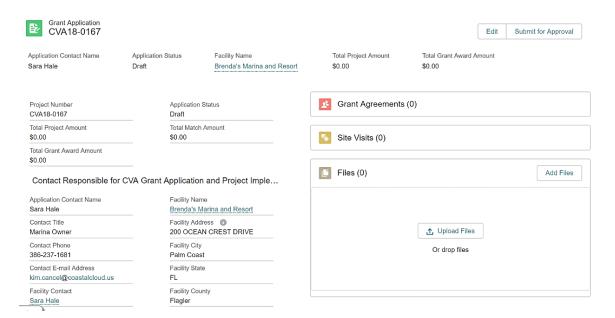


9





Once the application has been completed the Grant Application record will be displayed. The
application status will be displayed in **Draft status**.



Scroll down to the end of the screen. The Application Budget Categories will need to be added
to the Grant Application. Enter the amounts and click into the next row; the calculations are done
automatically, and they are saved automatically by clicking out of the field.

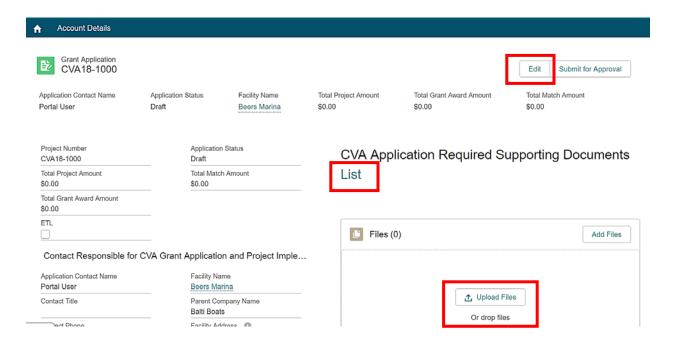
Application Budget Categories

Tasks	Category	Total Amount	75% Grant	25% Match
Permits	Miscellaneous Expenses	15,000.0000	\$11,250.0000	\$3,750.0000
Site Preparation	Contractual Services		\$0.0000	\$0.0000
Site Preparation	Salaries		\$0.0000	\$0.0000
Renovation	Contractual Services		\$0.0000	\$0.0000
Renovation	Salaries		\$0.0000	\$0.0000
Equipment Purchase	Equipment Purchase	250,000.0000	\$187,500.0000	\$62,500.0000
Equipment Installation	Contractual Services	15,000.0000	\$11,250.0000	\$3,750.0000
Equipment Installation	Salaries		\$0.0000	\$0.0000
Operations Of Equipment	Contractual Services		\$0.0000	\$0.0000
Operations Of Equipment	Salaries		\$0.0000	\$0.0000
Maintenance and Repair	Contractual Services		\$0.0000	\$0.0000
Maintenance and Repair	Salaries		\$0.0000	\$0.0000
Maintenance and Repair	Miscellaneous Expenses		\$0.0000	\$0.0000
Sewage Hauling	Contractual Services		\$0.0000	\$0.0000
Pumpout Signage	Miscellaneous Expenses		\$0.0000	\$0.0000
Pumpout Signage	Salaries		\$0.0000	\$0.0000
Educational and Instructional Materials	Miscellaneous Expenses		\$0.0000	\$0.0000
	Total Project Amount 100%	\$280000.0000		
	Total Grant Award Amount (up to 75%)		\$210000.0000)
	Total Match Amount (no less than 25%)			\$70000.0000

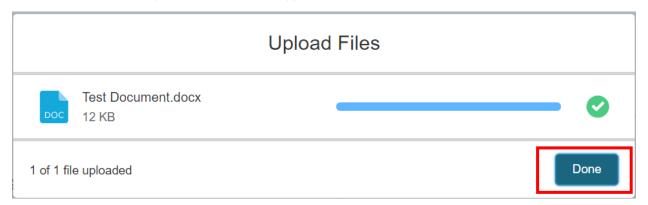




- Users will have the option to edit the application details by selecting the Edit button.
- <u>Please Note</u>: it is recommended that applicants view the checklist of required documents. <u>Select List</u> to access this information.
- The user will upload their required documents as part of their Grant Application record. To do this, they will select Upload Files. They will select the file stored on their PC and select Open.



• The file will be uploaded to the Grant Application. Select **Done**.



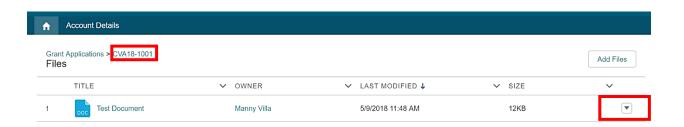
The Grant Application record will display the attached file.



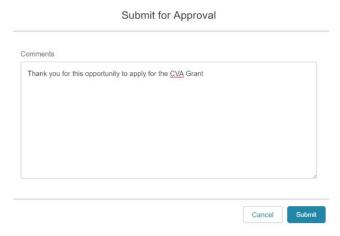




 To delete a file, select View All. This will open the list view of your files. Select the drop-down arrow next to the file to be deleted. Select Delete. Select the Grant Application name to go back to the Grant Application screen.



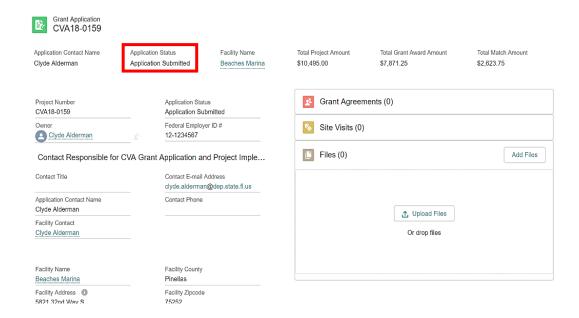
- Once the user is ready to submit their application they will select Submit for Approval
 Submit for Approval
- The Submit for Approval comments screen will display, and the user can include any comments and select Submit.







- A confirmation message displays that the grant has been approved. The status will then be changed from Draft to Application Submitted.
- The user will receive an email letting them know their application has been received by DEP.



5. Grant Application Tab

 Select the Grant Application tab to view the grant application. To open the application, click on the Project Number.



 Once the Grant Application has been submitted to DEP for approval and they have approved the submitted application, the application status will change to Application Approved.



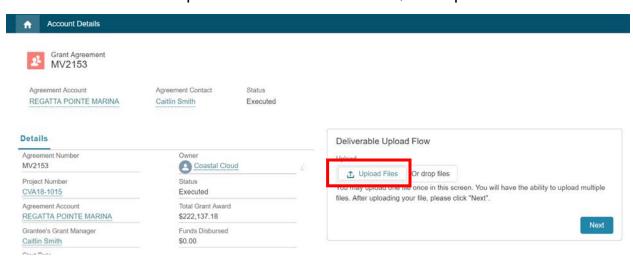


6. The Grant Agreement

- Select the Grant Agreement tab to view the grant application. To open the application, click on the Agreement Number.
- The status of the Agreement is displayed. The user will be notified via email once the Agreement has a Status of Executed (i.e. it has been approved).



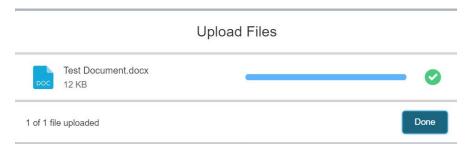
• The user will need to **upload their Deliverables**. To do this, select **Upload Files**.



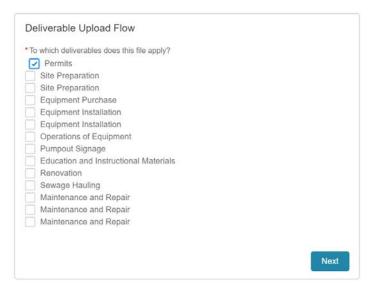
- They will select the file stored on their PC and select Open.
- The upload screen will display showing that the file was uploaded successfully. Click **Done**.
- Click Next







Select the Deliverable that is associated with the file that was uploaded. Click next



• Select the **checkbox** to add another Deliverable file upload. Click **Next**.



• This will take you to the screen where you can select the file and go through the upload process again.

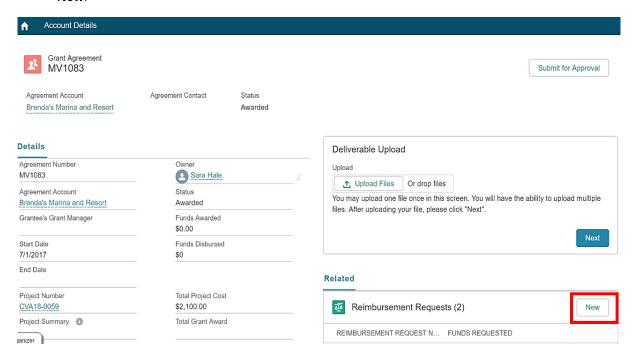




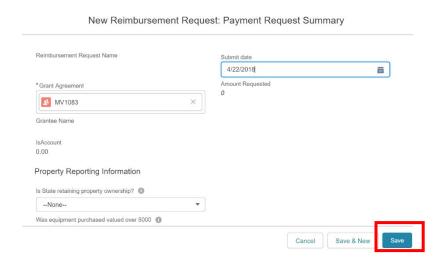


7. Create a Reimbursement Request

- Navigate to the Account Tab and select the Grant Agreement by clicking on the Agreement Number.
- The Agreement record will display. Scroll down to the Reimbursement Request related list. Select New.



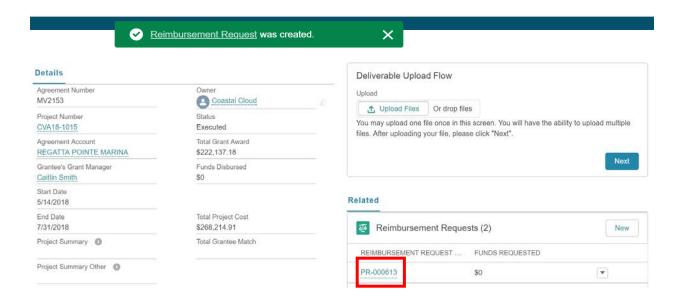
• The Reimbursement Request screen displays. Complete all the fields and select Save.



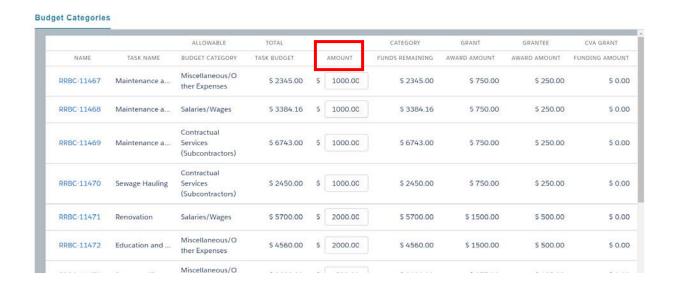




• The Reimbursement Request record is saved. The user can scroll to the Reimbursement related list and select the link to open the Reimbursement request.



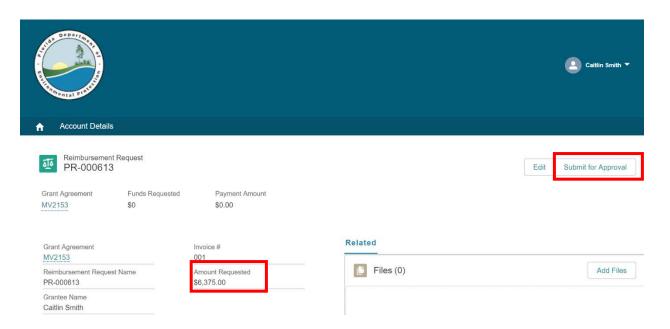
 The record will display the Budget Categories. Update the amount being requested for reimbursement under the Amount column for each Budget Category. Refresh the screen so all the information is populated.



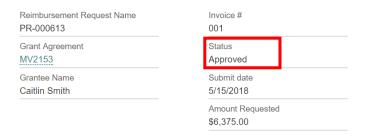




- Note: When adding amounts in the Budget Category table, the values will automatically be saved when you click out of the amount field. There is no save button required. Additionally, the calculations will be adjusted automatically.
- Select **Submit for Approval**. The Submit for Approval comments box will display, add any relevant comments (if any) and select **Submit for Approval**.



• DEP will process the Payment Reimbursement request and Approve / Reject the request. If approved the status is changed to Approved.







8. Status Reports

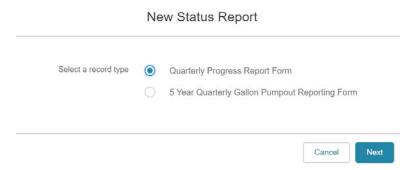
- The portal user will create Status Reports and 5-year Gallon Reporting.
- Navigate to the Grant Agreement object.



- Scroll to the Status Report related list.
- Select New.



- Select either:
 - o Quarterly Progress Report Form
 - o 5 Year Quarterly Gallon Pumpout Reporting Form
- Click Next

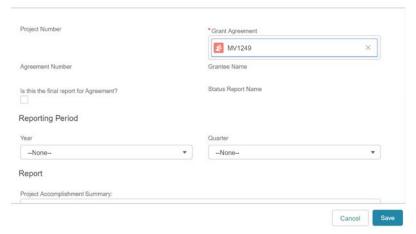


• For this example, we selected the record type - Quarterly Progress Report Form. The form will be displayed, and the portal user must fill in the fields and click on **Save**.





New Status Report: Quarterly Progress Report Form



• The Status report is submitted, and the record is displayed in the Status related list.



9. Amendments / Change Orders (Read Only)

- The User will have Read Only access to view the Amendment/Change Order records.
- To access the Amendment/Change Order related list navigate to a Grant Agreement record and scroll to the Amendment/Change Order related list.
- Click on the Amendment Name to view the record.

