



WV IJDC & WDA Project Planning, Application, & Process Certification User Guide



Software Version 3.2: Released
03/27/12

Revised: 6/12/2012

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INTRODUCTION

General Information

On July 1, 2011, the West Virginia Infrastructure & Jobs Development Council (IJDC) and the West Virginia Water Development Authority (WDA) implemented newly automated systems and redesigned processes to support the planning, management, and oversight of the State's multi-million dollar program of water and wastewater projects. The new online application process for applying for project funding is available at www.wvinfrastructure.com. Participants who have successfully completed and passed the associated training will be provided with access to the online dashboard and all relevant resources.

About This Guide

This User's Guide is meant to supplement the information presented during training and can be used as an ongoing reference tool. The guide contains information on features and functions of the online system, as well as step-by-step instructions on how to complete the new application process.

If you should have additional questions, or require information not contained within this manual, you may contact WV IJDC at:

Phone: 304.414.6501

Fax: 304.558.4609

Email: HelpDesk@wwda.org

Browser Specifications and Other Related Software

To ensure that you have access to all of the features and functions of the online application, it is recommended that you use Internet Explorer 8 or greater and that you have downloaded Formatta Filler. A link to this free download is available by clicking on the Formatta Filler logo located on the Project Dashboard home page or by going to: http://crp.formatta.com/page_Downloads/Products.html.

BENEFITS OF THE NEW ONLINE APPLICATION PROCESS

Why Change? The greatest impact the new process and online system will have is to reduce costs for everyone. Each of the benefits listed below ultimately roll-up into cost savings for the State and the rate payers.

Overall Benefits

- Improve the effectiveness of how the State's infrastructure monies are being used
- Utilize better information and tools resulting in more objective and realistic allocation of funding
- Get more projects underway faster by managing available fund balances against commitments to optimize cash flows
- Reduce time from project inception to construction
- Use data gathered across all projects to look at ways to continue to improve and strengthen the process

Benefits for Project Team Members

- Streamlined step-by-step process that is easier and less time consuming and also reduces the likelihood of errors and missing information
- Ensure strong project teams are in place prior to submitting the application
- Quicker application turnaround and approval process
- Shared responsibility and project tracking; able to see where bottlenecks are occurring and can work with the Project Manager to manage through them
- Faster payment; invoices for completed work paid within 15 days of receipt
- Opportunity to get paid for work done on the application process
- Free advertising on the website; the better you do, the better it looks for you because your track record will be posted on the website
- Access to current and historical project information to help facilitate the planning and coordination of infrastructure projects, including leveraging GIS capabilities linked to State-wide infrastructure data

BIG PICTURE OVERVIEW

Process

The process for completing the online application is similar to what was done in the past, except it is now streamlined and automated. In addition, each stage has been broken down into a step-by-step process to ensure projects are moving forward in a timely and efficient manner.

Various parts of the application and related forms will need to be completed during each of the phases of the process:



- Project Initiation
 - Preliminary Application
 - Funding Recommendation Decision
 - Revised Application
 - Binding Commitment Pre-Bid Schedule B
 - Binding Commitment Request (Checklist)
 - Bid Authorization Pre-Bid Schedule B
 - Bid Authorization Request (Checklist)
 - Bid Underrun or Overrun Request
 - Closing Post-Bid Schedule B
 - Draw Schedule Maintenance
 - Wiring Instructions Form
 - Closing Request (Checklist)
 - Draw Request
 - Budget Revision

Major Changes

In addition to automating and streamlining the application process, the most notable changes are the following:

Project Initiation

- Project screened prior to submitting any documentation
- Project is initiated through Administrator
- Critical Project Team members are identified prior to applying
- Opportunity for pre-application funding assistance
- Other projects are considered to maximize benefits to your region

Preliminary Application and Forms

- Preliminary Application broken into sections based on role (Administrator, Engineer, Accountant)
- Online allowing users to complete over time without losing work; also allows for easier tracking of status
- Every document submitted to IJDC or sent by IJDC will be available for viewing, printing, and/or saving
- GIS tool with advanced searching capabilities and access to information on all existing and in process projects

Submitting Requests

- Requesting binding commitments, bid authorization, and closing dates are now available online in a checklist format
- Documentation can be uploaded and stored as soon as it is available
- Transparency of task ownership and status

Role Clarification

- Responsibilities for each part of the process are clearly defined and aligned against areas of expertise

ROLES & RESPONSIBILITIES

The new online application process requires that team members take on a greater role than they may have in the past. In order to help facilitate projects, roles have been clarified based on areas of expertise. The following is a description of each of the roles and the related responsibilities.

Sponsor: The responsible party (typically a utility) that is requesting approval and/or funding of an infrastructure project. The primary responsibility of the Sponsor is to:

- Successfully hire and direct their project team in the completion of the identified project

Administrator: The Administrator is the individual who has been certified to provide oversight to the project and is responsible for completing the following duties:

- Assist Sponsor in the process of hiring the project team, as needed
- Pre-screening of the project
- Project Initiation Form
- Preliminary Application (Administrator Form)
- Revised Application (Optional)
- Binding Commitment Request (Checklist)
- Project budget/Schedule B
- Bid Underrun/Overrun Request Form (Optional)
- Draw Schedule
- Closing Request (Checklist)
- Draw Request Form
- Budget Revision Form (Optional)
- Monthly Reports

Engineer: The Engineer must be a licensed Registered Professional Engineer in the State of West Virginia. The Engineer is the individual who is responsible for the engineering plans and specifications, as well as other duties outlined in the Engineering Agreement and listed below:

- Preliminary Application (Engineer Form)
- Bid Authorization Request (Checklist)
- Monthly Reports

Accountant: The Accountant must be a licensed Certified Public Accountant in the State of West Virginia. The Accountant is the individual that is responsible for assisting the Sponsor with rate-related calculations and documentation, as well as other duties outlined in the Accounting Agreement and listed below:

- Preliminary Application (Accountant Form)
- Monthly Reports

Legal Counsel (Local, PSC, and/or Bond): The Legal Counsel must be licensed to practice law in the State of West Virginia. The Legal Counsel is the individual responsible for performing the duties outlined in the applicable legal agreement, as well as the following:

- Monthly Reports
- Closing (Bond Counsel)

LOG IN INFORMATION

The online Preliminary Application and related tools, forms, and documentation can be accessed on the WVIJDC website at: www.wvinfrastructure.com.

After completing the required training certification, a user account will be created and the Team Member will be granted user access to the system. At the discretion of IJDC, there may be future training required in order to keep your user account active.

The screenshot shows the 'Project Dashboard Login' page. At the top, there is a navigation bar with links for Home, Contact Us, Site Map, and Project Dashboard. Below this is the West Virginia Infrastructure & Jobs Development Council logo and contact information. A secondary navigation bar includes links for About Us, Structure, Calendar, Projects, Knowledge Center, and FAQ. The main content area is titled 'Project Dashboard Login' and contains the instruction: 'Sign in below to access your project related materials and information.' The login form has two input fields: 'Username' with the value 'Administrator' and 'Password' with masked characters. To the right of the password field are links for 'Login Help' and 'Forgot Password'. Below the input fields are 'Login' and 'Cancel' buttons. Red circles with numbers 1, 2, and 3 are placed over the Username field, Password field, and Login button respectively. The footer contains copyright information and links for Privacy Policy, Disclaimer, and Project Dashboard.

1. Enter **Username**. Your username will be included in the email you receive after successfully completing training.
2. Enter **Password**. Your password will be included in the email you receive after successfully completing training.
3. Click **Login**.

In order to access the Project Dashboard, project Team Members must have successfully completed the training certification.

PROJECT DASHBOARD

After logging into the system, you will be taken to the Project Dashboard. From the Project Dashboard you will be able to access all of the necessary forms to complete the online application. The Project Dashboard also provides access to all projects and project information stored in the WVIJDC Projects Database, as well as other helpful resources and tools.

There are three key sections to the home page of the Dashboard:

The screenshot shows the Project Dashboard interface for the West Virginia Infrastructure & Jobs Development Council. The dashboard is organized into three main sections:

- Task Manager (2):** A sidebar on the left containing links for 'Your Projects', 'Monthly Reporting', 'Project Search', and 'Sample Forms'.
- Tools (3):** A sidebar on the left containing links for 'GIS Applications', 'IJDC Policies & Guidelines', 'Public Service Commission', 'US Census Bureau', 'Help/User Guide', and 'Performance Results'.
- Project Dashboard (1):** The main content area, which includes:
 - A welcome message: "Welcome to your Project Dashboard. Through this Dashboard, you will have access to all projects and project information stored in the WVIJDC Projects Database. Use your Task Manager and Tools to keep your projects up-to-date and manage all project related information."
 - Systems Enhancements (1):** A section titled "Systems Enhancements" with a sub-heading "In an effort to continuously improve our State's On Line Project Application Tracking system, we have made the following functionality enhancements."
 - Project Initiation Form:** A section titled "Project Initiation Form" with instructions: "To initiate a new project, please download the Project Initiation form below, fill it out completely and submit it. Before downloading any project forms, first download the free Formatta Filler program by clicking the icon in the right hand column on the Project Dashboard home page, or the Forms page." Below this is a link for "Project Initiation Form".
 - New Projects:** A section titled "New Projects" with a "view all projects" link. Below it is a table with the following data:

Project Number	Sponsor	Status
2012W-1204	Kermit Municipal Water Department	Initiation Form Accepted
 - Project Quick Search:** A search box with "Project" and "Number:" labels and a "Search" button.
 - formatta Filler:** A logo for "formatta Filler" with a "Free Download" button.
 - Notifications:** A red notification box with two entries:
 - Project: 2012S-1206, 03/22/2012 - Funding Accepted Letter Available
 - Project: 2012S-1206, 03/22/2012 - IJDC Decision

1. **The Main Area** – provides a quick look at immediate tasks that need to be completed related to your project(s), new projects that have been submitted, and related notifications
2. **Task Manager** – allows you to complete various tasks related to the project
3. **Tools** – provides quick and easy access to information and resources to assist with the project

Main Area

The Main Area of the Project Dashboard home page provides a quick look at immediate tasks that need to be completed related to your project(s), new projects that have been submitted, and related notifications. The main area of the home page is also where you can go to perform a quick search for a project, download Formatta Filler, or to manage your online account.

The screenshot shows the Project Dashboard interface. On the left is a sidebar with navigation options. The main content area includes a welcome message, systems enhancements, a project initiation form, and a new projects table. A notification box on the right shows project updates. A search box and a 'formatta Filler' download button are also present. Red callout boxes with numbers 1 through 7 point to specific elements: 1 (Project Initiation Form icon), 2 (Project Number in table), 3 (Manage Account icon), 4 (Notifications icon), 5 (Search box), 6 (formatta Filler button), and 7 (Systems Enhancements text).

Project Number	Sponsor	Status
2012W-1204	Kermit Municipal Water Department	Initiation Form Accepted

- 1. Forms** – Forms requiring completion prior to a project being assigned a Project Number, such as the Project Initiation Form, will be shown on the home page of the Project Dashboard. Click on the icon to open up the form. The form can be saved to your desktop for completion.
- 2. New Projects** – Any new projects will be listed on the Project Dashboard home page along with the name of the Sponsor and the Status. To get additional project information, click on the Project Number. This will open up a new screen where you can view Open Project Forms, Completed Project Forms, Tasks, Notifications, and Project Team information.
- 3. Manage Account** – Click on the Manage Account icon to update your contact information or to change your password.
- 4. Notifications** – Notifications and status updates for your project will be shown on the Project Dashboard home page in the red callout box. To see notifications that are both user and project specific, click on the Notifications icon. To see the notifications for a particular project, click on the Project Number within the Project Notifications screen.

5. **Project Quick Search** – To quickly search for information on a specific project, enter all or part of the Project Number and click search.
6. **Formatta Filler** – Formatta Filler will need to be downloaded and installed on your computer in order to complete the various forms associated with the application process. This is a free download, which is available by clicking on the Formatta Filler icon.
7. **System Enhancements** – Click on the link to view functional enhancements made to the system by version and date.



Task Manager

The Task Manager tabs, located on the upper left-hand side of the Project Dashboard, are used to access information and forms related to your projects, complete monthly reports, conduct project searches to gather data, and view sample forms.



1. **Your Projects** – Click on the Your Projects tab to see a list of projects for which you are associated. Click on the Project Number to view the data for a specific project including: open project forms that need to be completed, completed project forms, tasks, notifications, and a listing of Project Team members. New Projects, if any, will be listed first and Active Projects will be listed below.

Task Manager

- Your Projects (1)
- Monthly Reporting (2)
- Project Search (3)
- Sample Forms (4)

Tools

- GIS Applications
- IJDC Policies & Guidelines
- Public Service Commission
- US Census Bureau
- Help/User Guide
- Performance Results

Project Dashboard

Administrator is logged in

Your Projects

Below is a list of projects of which you are a member. Click on a Project Number to view project data.

Project Number	Sponsor	Project Name	County	Status
2012W-1204	Kermit Municipal Water Department	More water for Kermit	MINGO	Initiation Form Accepted
2012W-1213	Eastern Wyoming Public Service District	Barkers Ridge Water	WYOMING	Initiation Form Accepted

Active Projects

Project Number	Sponsor
2012WS-1203	Ice's Run Round Service District
2012W-1215	Barrackville, T
2012W-1214	Barrackville, T
2012W-1212	Lashmeet Pu District

Your Projects: Project Number: 2012W-1214

Click on **Tasks** to see a list of all tasks related to the project. Tasks are listed with the responsible team member's name and the estimated due date or completed date.

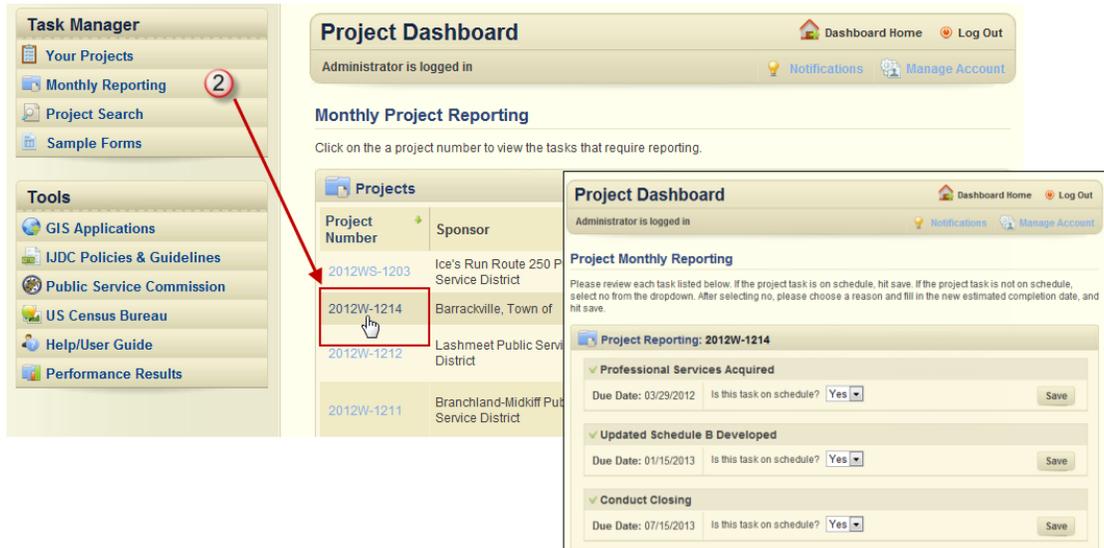
Click on **Completed Project Forms** to see copies of submitted forms, attachments, and correspondence related to the project.

Click on **Notification** to see all project related notifications.

Click on **Project Team** for team member contact information.

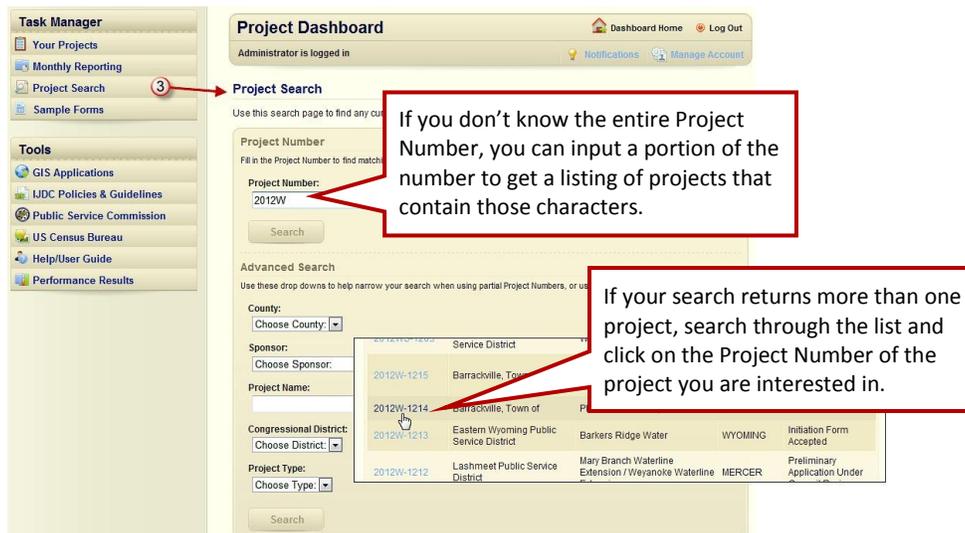
View project forms waiting to be completed.

- 2. Monthly Reports** – The Monthly Reports tab is only visible when you have tasks that need to be completed for one of your projects. Click on the Monthly Reports tab to see which projects require status updates. If more than one project is listed, click on the appropriate Project Number. See page 43 for instructions on completing Monthly Reports.



- 3. Project Search** – Click on the Project Search tab to find current and historical project information, even for projects that you are not associated. You can search by Project Number, or a portion of the Project Number, if you don't remember the entire number. You can also search by County, Sponsor, Project Name, Congressional District, or Project Type. In addition, you can search by any individual field or by a combination of fields. Use the drop down menus to further narrow your search.

Click on the Project Number to access detailed project information.



4. **Sample Forms** – Click on the Sample Forms tab to see examples of all the forms you will use throughout your project. Click on the name of the form to view a PDF example. These forms can be saved to your computer.

The screenshot displays the Project Dashboard interface. On the left, there is a sidebar with two main sections: 'Task Manager' and 'Tools'. The 'Task Manager' section includes links for 'Your Projects', 'Monthly Reporting', 'Project Search', and 'Sample Forms'. The 'Tools' section includes links for 'GIS Applications', 'IJDC Policies & Guidelines', 'Public Service Commission', 'US Census Bureau', 'Help/User Guide', and 'Performance Results'. The 'Sample Forms' link is circled in red with the number '4' and a red arrow pointing to the 'Project Forms' section on the dashboard. The 'Project Forms' section is titled 'Project Forms' and contains a sub-section 'Example Forms'. Below this, there are three main categories of forms: 'Project Initiation Phase' (containing 'Project Initiation Form'), 'Project Application Phase' (containing 'Preliminary Application (Administrator)', 'Preliminary Application (Engineer)', 'Preliminary Application (Accountant)', 'Administrator Revised Application Form', and 'Funding Recommendation Decision'), and 'Monthly Reporting/Milestones'. A red box highlights the text 'Click on any of the forms to view a PDF example.' with a red arrow pointing to the 'Example Forms' section.

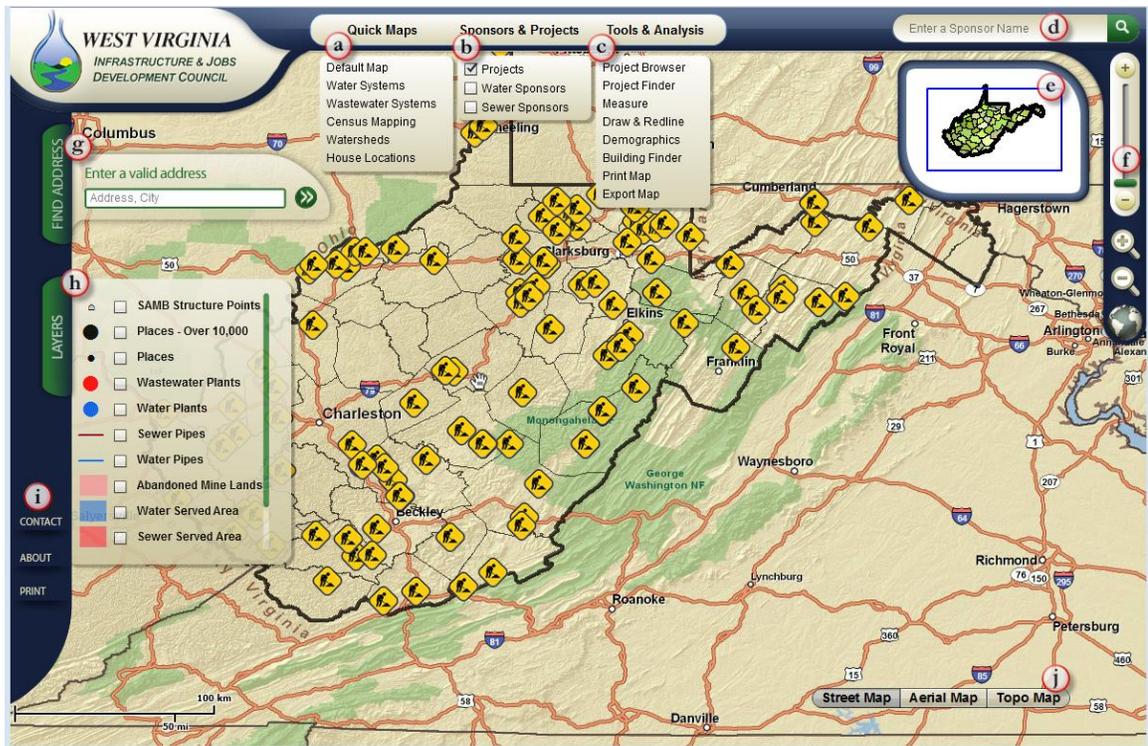
Tools

The Tools tabs, located on the lower left-hand side of the Project Dashboard, provide Project Teams with quick and easy access to online resources and systems for gathering relevant information about proposed projects.



1. **GIS Applications** – Clicking on the GIS Applications tab launches the GIS Web Application in a new browser window. (Please note that this application may require that you download a plug-in; follow the onscreen instructions to complete the download.)

The GIS application is a research application tool that can be used to support the process of pre-screening projects and applying for funding.



Overview of Features and Functions of the GIS Application

- a. **Quick Maps** – Click on Quick Maps to turn on and off key data layers for the map including water systems, wastewater systems, census mapping, watersheds, and house locations.
- b. **Sponsors & Projects** – Click here to show Water and Waste Water Sponsors and view project locations. You can view one, two, or all three options.
- c. **Tools & Analysis** – Click here to access various tools including:
 - Project Analyzer Tool: Select Project Type and/or Current Status, then Analyze Projects by different parameters. Results will be color-coded.
 - Project Browser Tool: View a list of all projects associated with the GIS. Click the Project Number to zoom to the Project on the map.
 - Project Finder Tool: Select query criteria and click the “Find” button to execute various queries related to project information.
 - Measure Tool: Choose a measurement tool and click on the map to measure.
 - Draw & Redline Tool: Draw Shapes and/or add text to the map area.
 - Demographics Tool: Highlight an area on the map using a selection tool to see the resulting demographics data.
 - Building Finder Tool: Use a selection tool to highlight an area and then view the resulting number of buildings within the selection.
 - Print Map Tool: Enter the Title and/or Subtitle of the map, then select the paper size, and click “Print”. This generates a PDF that can be saved or printed.
 - Export Map Tool: View and/or save the generated JPEG version of the map area.
 - Served Structures Tool: View served and unserved addresses at a State, County, or Custom level. Results are listed and graphed.
- d. **Quick Search** - Enter the Sponsor name to do a quick search.
- e. **Locus Map** – Draw a box around the area of the map you want to zoom in on.
- f. **Slider** – Use the slider to zoom in or out on the map. Click on the Globe to return to a map of the whole state. Click the Magnifying Glasses to zoom in (+) or out (-).
- g. **Find Address** - Enter address to zoom in on a specific location.
- h. **Layers** – Check the boxes to add layers of detail to the map.
- i. **Contact, About, Print** – Click on the appropriate tab to get WIJDC contact information, obtain additional information about the GIS application, or to select a map area/view from which you can create a PDF file that can be saved and/or printed.
- j. **Background Maps** – Click each option to change the background map. Each map has an associated maximum zoom, so if no background is seen, zoom out.

Getting Project Detail

To get detailed information about a specific project area, use the various zoom in features to help you obtain a targeted view. Click on the Sponsor icon to get information about current services in this area. Click on the Project icon to get detailed information about current projects in this area.

The screenshot shows the West Virginia Infrastructure & Jobs Development Council website. The header includes the logo and navigation tabs for 'Quick Maps', 'Sponsors & Projects', and 'Tools & Analysis'. A map is displayed with a 'Street Map' and 'Aerial Map' selector. A 'Sponsors & Projects' menu is open, showing 'Projects', 'Water Sponsors', and 'Sewer Sponsors'. Two pop-up windows are visible: one for project '20115-0007' and another for 'Clay Municipal Waterworks'. The project pop-up includes details like 'Project Type: Water', 'Description: Extend Pipe 500ft', 'Sponsor: Town of Clay', 'Project ID: 2011W-0042', and 'Status: Preliminary Application Accepted'. The sponsor pop-up includes 'Contact Name: Dwanna Murphy', 'City: Clay', 'State: WV', 'Utility Type: WM', 'Regional Council: 3', 'Customers: 625', and 'Internal ID: 742'. Both pop-ups have links for 'More info', 'Project Portal', and 'Project Team'. A 'LINKS' sidebar is on the left.

Project Information

Sponsor Information

Click on these links to get More Information, go to the Project Portal, or get contact information on the Project Team.

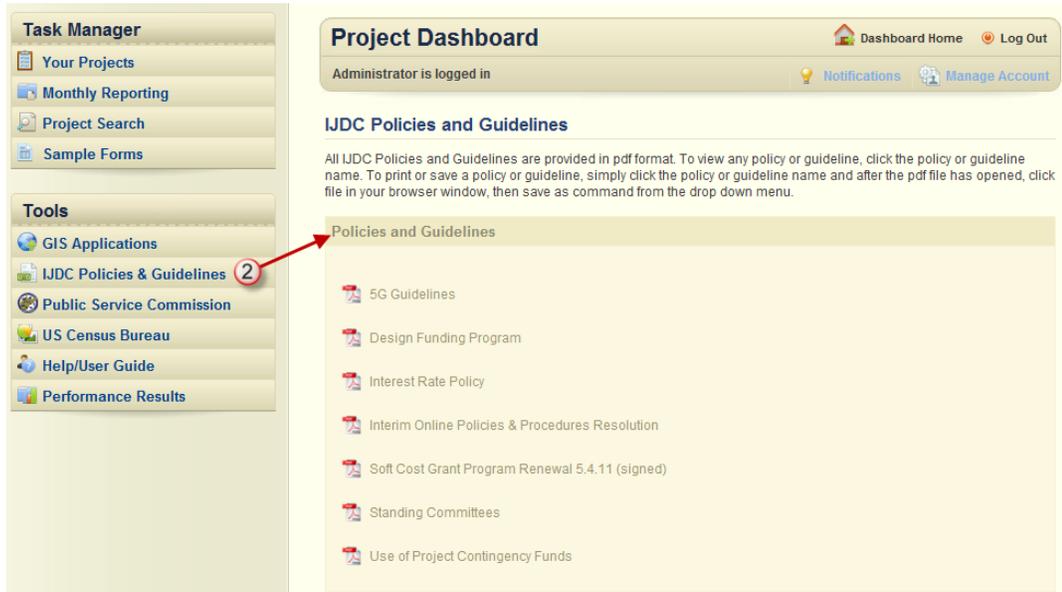
Click on these links to get More Information, a Project List, or a PSC Report.

The screenshot shows a topographic map of a project area. A callout box says 'Use the Print feature to create a PDF file for saving or printing.' Another callout box says 'Click on the various base layer map options to change the view.' The map shows contour lines, a river, and a project area marked with a yellow icon. A legend at the bottom left shows a yellow icon and the text '2011W-0038 Clay extension'.

Use the Print feature to create a PDF file for saving or printing.

Click on the various base layer map options to change the view.

- IJDC Policies and Guidelines** – All IJDC Policies and Guidelines related to the application and funding process are provided in PDF format. To view any policy or guideline, click the policy or guideline name. To print or save a policy or guideline, click the policy or guideline name and after the PDF file has opened, click file in your browser window, then choose the print or save as command from the drop down menu. The policies are also accessible on the IJDC home page under the Project Center tab.



- Public Service Commission** – Click on the Public Service Commission tab to open the Public Service Commission of West Virginia website in a new window where you can easily access information that will help you in completing the application forms, including a utility’s most recent Annual Report and current rate information.



- US Census Bureau** – Click on the US Census Bureau tab to open the US Census Bureau website in a new window. The website opens directly to the West Virginia quick facts page. From here, you can quickly and easily access population and medium household information for a specific county and/or city.

Task Manager

- Your Projects
- Monthly Reporting
- Project Search
- Sample Forms

Tools

- GIS Applications
- IJDC Policies & Guidelines
- Public Service Commission
- US Census Bureau** (4)
- Help/User Guide
- Performance Results

Project Dashboard

Administrator is logged in

Welcome to your Project Dashboard. Through this Dashboard, you will have access to all projects and project information stored in the WVJDC Projects Database. Use your Task Manager and Tools to keep your projects up-to-date and manage all project related information.

Systems Enhancements

In an effort to continuously improve our State's On Line Project Application Tracking system, we have made the following functionality enhancements.

Project 2012W-1201
04/05/2012 - Project Status Updated

Project 2012W-1214
04/05/2012 - Project Status Updated

U.S. Census Bureau

State & County QuickFacts

Select a State | USA QuickFacts | What's New | FAQ

West Virginia counties- selection map | West Virginia cities- place search | More West Virginia data sets | Share this page

Barbour County, West Virginia

Further information | Want more? Browse data sets for Barbour County

People QuickFacts	Barbour County	West Virginia
Population, 2011 estimate	NA	1,855,364
Population, 2010	16,589	1,852,994
Population, percent change, 2000 to 2010	6.6%	2.5%
Population, 2000	15,557	1,808,344
Persons under 5 years, percent, 2010	5.7%	5.6%
Persons under 18 years, percent, 2010	21.7%	20.9%
Persons 65 years and over, percent, 2010	16.6%	16.0%

- Help/User Guide** – Click on Help/User Guide to access FAQs or to obtain a downloadable version of this User Guide. For additional help, you can also contact the Help Desk at:

Phone: 304.414.6501

Fax: 304.558.4609

Email: HelpDesk@wwda.org

Task Manager

- Your Projects
- Monthly Reporting
- Project Search
- Sample Forms

Tools

- GIS Applications
- IJDC Policies & Guidelines
- Public Service Commission
- US Census Bureau
- Help/User Guide** (5)
- Performance Results

Project Dashboard

Administrator is logged in

Help/User Guide

Help FAQ

To view the answer to any of these common questions, simply click the + icon. To close an answer, simply click the - icon. To expand all answers, click the expand all button at the top right of the page. After expanding all answers, click the close all button at the top right to close all of the answers.

- How do you remove an attached document on the Project Initiation Form or Application Forms to attach a new document (before submission)?
- When I try to submit an application-related form and get an error, why does it go to another page?
- Do submittals go back to Council or just thru the Project Manager?
- Does the ability to track the progress of a project continue and include an agency's processes once an application is recommended for funding to a specific funding agency?
- How is Sponsor detail information updated from Council Applications?
- When completing a form - can you complete one part now, save it, and complete the rest of the form later?
- How hard is it to modify the project schedule due to funding problems or delays?
- Does the system work on MACs?

A copy of the User Guide can also be obtained from the IJDC’s home page. Click on Project Center and then Getting Started.

WEST VIRGINIA
INFRASTRUCTURE & JOBS DEVELOPMENT COUNCIL
 180 Association Drive, Charleston, WV 25311 T 304.414.6501 F 304.414.0866

Home Contact Us Site Map Project Dashboard

About Us Council Members Committees Calendar Active Projects **Project Center** FAQ

Project Center

Getting Started Pre-Application Information Application & Forms Post Project Information

Getting Started

User Guide (PDF)

Log in to the Project Dashboard to access all of your project related materials

Need to File a New Project Application or Update a Previously Filed Application Online System?

Here is a step-by-step guide to Getting Started:

1. Decide on the overall project scope.
2. Hire or Designate an IJDC Certified Project Administrator. (Are you an Administrator that needs to be Certified? Or Did you hire an Administrator that needs to be Certified? [Click Here!](#))
3. Direct the IJDC Certified Project Administrator to Complete the Project Initiation Form online by logging into the Project Dashboard at www.wvinfrastructure.com.
4. Once your project's Project Initiation Form is complete, submitted to IJDC, and accepted by IJDC, you are ready to have your IJDC Certified Project Administrator, IJDC Certified Project Engineer, and IJDC Certified Project Accountant fill out the three parts of the IJDC Application online. (Are you an Administrator, Engineer, or Accountant that needs to be Certified? or Did you hire an Administrator, Engineer, or Accountant that needs to be Certified? If so, [Click Here!](#))
5. From there, the Project will be reviewed for completeness by IJDC staff, then forwarded to the IJDC Staff Technical Review Committee.
6. If your Project is found to be Technically Feasible by the IJDC Staff Technical Review Committee, then it is forwarded to the IJDC Funding Committee.
7. If the IJDC Funding Committee recommends a funding package for your Project, it is then placed on the monthly full Council IJDC meeting for approval and action. (For Meeting Dates, please see the Calendar on the left of this page.)
8. After the full Council IJDC meeting, the Project Sponsor and Project Team will receive written notification of the decisions of the IJDC, and if the Project is approved, the IJDC Certified Project Administrator will receive a link via email

6. Performance Results –The Performance Results tab is an online tracking system that monitors performance against tasks. Although the results are available to everyone, Performance Results will primarily be used by Administrators to identify reliable Project Team members who have a track record of meeting performance expectations. Information is available on individuals, firms, and projects.

Task Manager

- Your Projects
- Monthly Reporting
- Project Search
- Sample Forms

Tools

- GIS Applications
- IJDC Policies & Guidelines
- Public Service Commission
- US Census Bureau
- Help/User Guide
- Performance Results** (6)

Project Dashboard Dashboard Home Log Out

Administrator is logged in Notifications Manage Account

Performance Results

Reports and graphs related to performance against project tasks are available under this tab.

COMPLETING THE FORMS

Only the forms related to *your* role will be available on *your* Project Dashboard. In addition, to help minimize confusion, you will only have access to forms in the order in which they are to be completed. For example, the Project Initiation Form must be completed, sent, and accepted in order for the link for the next form in the process, the Preliminary Application, to show up on your Project Dashboard. If you log into a project and there are no Open Project Forms, it means that there is an approval pending on something that was previously submitted.

Forms that can be submitted more than one time, such as the Budget Revision or Draw Request, must be completed and processed one at a time. If a form is being processed it will show up as red with a light bulb next to it, indicating that it is in the process of being approved and no further action on the form can be taken at this time.

The status in the right hand corner will let you know where you are in the process.

The screenshot shows a project dashboard for Project Number 2012W-1214. The project name is Phase II Water Project, sponsored by Barrackville, Town of, in BARBOUR County, with a prior project number of 2010W-0001. The status is Under Construction. The dashboard lists several forms: Wiring Instructions (open), Draw Schedule Maintenance (open), and Budget Revision (being processed, indicated by a red lightbulb icon). A note indicates that Draw is also being processed. The dashboard also includes links for Completed Project Forms, Tasks, Notifications, and Project Team.

Project Name	Sponsor	County	Prior Project Number
Phase II Water Project	Barrackville, Town of	BARBOUR	2010W-0001

Forms

Example of an open form waiting to be completed.

Example of a form that can be submitted again, after the current form is finished being processed.

Budget Revision is being processed

Draw is being processed

Completed Project Forms | Tasks | Notifications | Project Team

Project Pre-screening & Initiation

Project Application Planning & Preparation (Administrator)

Prior to submitting a Project Initiation Form, the Administrator (with help from other Project Team members as necessary) needs to complete the pre-screening necessary to ensure the project being proposed is reasonable and viable, and that all requirements have been met. In addition, the new IJDC Project Pre-screening Guidelines will require that all of the funding agencies' requirements be completed prior to submitting the Project Initiation. This policy is to ensure that all necessary and required paperwork is in place and only projects that have merit are being submitted.

The Project Dashboard on the WV IJDC website (www.wvinfrastructure.com) has tools and resources available to help with the pre-screening process including:

- Collected data from current and past projects, which can be used as a reference for any current projects being considered
- Access to GIS Applications, which include maps, locations of existing and proposed water and sewer plants, committed projects, projects to be bid, etc.
- Copies of IJDC Policies and Guidelines, which provide details about the requirements
- Links to the Public Service Commission and the US Census Bureau so you can quickly and easily access data needed to complete forms
- Overview of Performance Results, which can be used when considering potential Project Team members

See pages 8-19 for information on how to access the Project Dashboard and the related tools and resources.

Project Team Identification/Training (Administrators, Engineers, Accountants, Legal Counsels)

Anyone wishing to be on a team for a project that is being submitted through IJDC must complete training and receive certification. To read about the online, self-paced training from the website, click on Getting Started under the Project Center Menu. To access the training directly, click here:

http://www.wvinfrastructure.com/online_training/training/index.html.

It is also recommended that you review the Performance Results tab on the Project Dashboard under Tools prior to selecting your Project Team. The Performance Results can provide you with insight on how project team members performed on past projects.

Project Initiation Form (Administrator)

The Administrator will need to complete the Project Initiation Form to identify the Project Team and list the project basics (e.g., Country, Project Description, Project Area, Project Type, etc.). The Project Initiation Form also includes a section for applying for pre-application funding assistance.

Pre-application Funding Assistance (PFA)

Pre-application funding assistance (PFA) is available if the requirements of preparing the pre-application form create an undue hardship on the Sponsor. Go to the IJDC Policy and Guidelines section under the Tools tab to view more information regarding PFA requests.

The PFA is applied for on the Project Initiation Form and requires that the applicant list the related costs, attach associated executed agreements for line items showing a dollar amount, and attach a brief description of why the costs create an undue hardship on the Sponsor. Applicants can request funding for up to 50% of the total cost amount or \$5,000, which ever is greater.

Steps for Completing the Project Initiation Form

1. Go to www.wvinfrastructure.com and log in to the website to view the Project Dashboard home page. See page 7 for instructions on how to log in to the website.
2. Download and install Formatta Filler. See page 71 for tips on using Formatta Filler.
3. Click on the Project Initiation Form link on the Project Dashboard to open a blank form.



4. Complete the Project Initiation Form. This form can be downloaded and saved to your computer for completion at a later date.
5. After completing the Project Initiation Form click the Save & Submit button. A Save As dialog box will be displayed allowing you to save a copy of the completed form to your computer and another copy is automatically submitted to the IJDC for review. A message indicating that the “form was sent successfully” will be displayed. Incomplete forms and/or missing attachments will be flagged by the system and a pop-up message will appear indicating what information is needed to continue.
6. The project is assigned a Project Number and the Project Status on the Project Dashboard will updated to: Initiation Form Submitted.
7. After IJDC reviews the form, an email is sent to the Project Team notifying them that the Project Initiation form has been accepted and that they can proceed to the next phase of the process.

Project Number	Sponsor	Project Name	County	Status
2012W-1214	Barrackville, Town of	Phase II Water Project	BARBOUR	Initiation Form Accepted

To ensure you receive the emails sent by the IJDC related to your project status, add imageadmin@wwda.org to the safe sender list or address book to prevent it from potentially being filtered as junk mail or spam.

Sample Project Initiation Form



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Project ID

West Virginia Infrastructure and Jobs Development
Project Initiation Form

I. Project Team

All Fields with an * are Required

For each of the required boxes, click on the drop down menu to choose the appropriate person for your project team.

Contact information is prepopulated based on the name that is chosen

Required fields are noted with an *.

*1. Sponsor	*2. Coordinator
Name: Barrackville, Town of	Name: [Drop Down]
County: Marion	County: [Drop Down]
Contact: Donna Hall	Contact: [Drop Down]
Address: P O Box 6	Address: [Drop Down]
Phone: (304) 366-9372/(304) 366-5693	Phone: [Drop Down]
Fax: (304) 366-3053	Fax: [Drop Down]
Email: rgeorge@thesolutiondesigngroup.com	Email: [Drop Down]

*3. Engineer	*4. Accountant
Name: Erin the Engineer	Name: Ashley the Accountant
Organization: Engineering is Fun	Organization: Accounting Firm A
Address: 123 Plans and Specs Street	Address: 145 Number Way
Phone: 304-555-1112	Phone: 304-555-5553
Fax: [Blank]	Fax: [Blank]
Cell: [Blank]	Cell: [Blank]
Email: engineer@rgeorge.com	Email: [Drop Down]

Only team members who have completed the training certification will appear on the drop down lists and are eligible to be included on your project team.

This box is only to be checked if the information is incorrect for one of your team members. If you need to update your contact information, you can do so through the Project Dashboard home page under Manage Account.

Click here if any of the above contact information for a Project Team member is incorrect. If clicked, you will be contacted by IJDC to get updated contact information.



**West Virginia Infrastructure and Jobs Development
 Project Initiation**

II. Project Basics

*1. Project Description 255 Max Chars

*2. Local Project Name

3. Prior Project Number Exists

*4. Prior Project Number

*5. Project Type

*6. Project Category

*7. Existing Source/Treatment

*8. Proposed Source/Treatment

*9. District

*10. Primary County

12. Secondary County

*11. Primary Project Area

13. Secondary Project Area

III. Preapplication Funding Request

1. Click here if the Requirements of Preparing the Preliminary Application Form of Hardship on the Sponsor. Fill in the Required Budget and Request Amounts Below.

Budget	Amount	
Engineering	\$5,000	<input type="button" value="Attach"/>
Legal	\$5,000	<input type="button" value="Attach"/>
Accounting	\$5,000	<input type="button" value="Attach"/>
Administration	\$5,000	<input type="button" value="Attach"/>
Other- Please Explain Here	\$0	<input type="button" value="Attach"/>
Total	\$20,000	

(Request Amount Cannot be more than 50% of the Total) 2. PFA Request Amount:

If Requesting Preapplication Funding Assistance, Please Attach a Brief Description of why those Costs Constitute a Hardship on the Sponsor.

After clicking on Save & Submit, a pop-up window will appear allowing you to save the form to your desktop while simultaneously sending the form to the IJDC.

Submission Date
3/22/2012

After the form has been successfully sent, the date of the form submittal will be displayed.

For additional tips on using Formatta Filler see page 76.

Preliminary Application Submittal and Approval

Three-Part Preliminary Application (Administrator, Engineer, and Accountant)

Once the IJDC Director has accepted the Project Initiation Form, the online system will automatically generate a Project Number and a link to the Preliminary Application will be placed within the project detail page on the Administrator, Engineer, and Accountant's Project Dashboard. Team members will only see and have access to the form for which they are responsible.

The Project Team will have 6 months to complete and submit the 3-part application, including the required attachments. If the application is not completed within the 6-month time frame, the Project Team will need to start over with a new Project Initiation Form being submitted in order to generate a new Project Number.

Accessing the Preliminary Application

The screenshot shows the website interface for the West Virginia Infrastructure & Jobs Development Council. It includes a navigation menu with links like 'Home', 'Contact Us', and 'Site Map'. The main content area features a 'Project Dashboard Login' section with fields for 'Username' (containing 'Accountant') and 'Password'. A red callout box points to the login fields with the text 'Log in to the Project Dashboard.'

Below the login section is the 'Project Dashboard' for an administrator. It displays a 'Your Projects' table with columns for Project Number, Sponsor, Project Name, County, and Status. A red callout box points to the table with the text 'Search for the project on either the Project Dashboard or under Your Projects. Click on the appropriate Project Number.'

The table contains the following data:

Project Number	Sponsor	Project Name	County	Status
2012W-1213	Kermit Municipal Water Department	More water for Kermit	MINGO	Initiation Form Accepted
2012W-1213	Eastern Wyoming Public Service District	Barkers Ridge Water	WYOMING	Initiation Form Accepted
2012W-1214	Barrackville, Town of	Phase II Water Project	BARBOUR	Initiation Form Accepted

Below the table is a detailed view for 'Project Number: 2012W-1214'. It shows project details and a 'Forms' section. A red callout box points to a 'Download Formatta Filler if you have not done so already.' link. Another red callout box points to a 'Preliminary Application Form (Administrator)' link with the text 'Click on the Preliminary Application link to open the application in Filler.'

Steps for Completing the Preliminary Application Form (Administrator)

1. Go to www.wvinfrastructure.com and log into the website to view the Project Dashboard home page.
2. Conduct a Project Quick Search from the home page or search for the appropriate project within the Your Projects tab.
3. Click on the Preliminary Application Form (Administrator) link to open a blank form.
4. Complete the Preliminary Application Form (Administrator). This form can also be downloaded and saved to your computer for completion at a later date.
5. After completing the form, click the Save & Submit button. A Save As dialog box will be displayed, allowing you to save a copy of the completed form to your computer and another copy is automatically submitted to the IJDC. A message indicating that the “form was sent successfully” will be displayed. Incomplete forms and/or missing attachments will be flagged by the system and a pop-up message will appear indicating what information is needed to continue.
6. After receiving all three parts of the Preliminary Application (Administrator, Engineer, and Accountant forms), the IJDC staff will review the forms for completeness. Incomplete applications will be rejected and a letter will be sent via email notifying the appropriate team member(s) of the reason(s) for the rejection and a list of documents that need to be re-submitted. A link will be included in the email for uploading the correct file(s).
7. A Project Manager (PM) is assigned to the project. The PM reviews the project schedule and either approves or works with the Engineer to make adjustments.
8. After the schedule is approved, the IJDC Technical Review Committee reviews the project and determines feasibility.
9. Projects that are considered technically feasible are forwarded to the IJDC Funding Committee and the Project Team is notified. A project notification indicating that the application is Under Council Review will be posted on the Project Dashboards of all Team Members. Project Teams will also be notified if the recommendation is for the application to be tabled or returned due to technical issues.
10. IJDC Funding Committee reviews the application and recommends appropriate funding option(s).



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**West Virginia Infrastructure and Jobs Development
 Preliminary Application Form Administrator**

All Fields with an * are Required for Submission

I. General Project

Sponsor	Barrackville, Town of	Expiration Date	09/22/2012
Type	Water	Secondary County	
Category	Line Extension		
Project Number	2012W-121		BARBOUR
Prior Project Number	2010W-000		PHILIPPI
Description	Water project to serve 50 customers.		

Information from the Project Initiation Form will be pre-populated into the Preliminary Application Form.

II. General Administrative

*1. Customers Served - Existing

*2. Customers Served - New

*3. Is the Sponsor Requesting Emergency Status as Defined by WV Code § 31-15A-2?

4. Emergency Status Request Documentation

5. Median Household Income

*6. IJDC Income Survey Requested?

*7. Status of Engineering Agreement

*8. Status of Accounting Agreement

9. List the adjacent or nearby water, sewer or stormwater utilities

*10. Have the adjacent or nearby water, sewer or stormwater utilities been notified with regard to this application?

*11. Does this project infringe on the service area of an adjacent or nearby water, sewer or stormwater utility?

The Median Household Income will be pre-populated based on the primary project area or county identified in the Project Initiation Form.

Use the GIS Tools on the Project Dashboard to help identify nearby utilities.



**West Virginia Infrastructure and Jobs Development
Preliminary Application Form Administrator**

II. General Administrative (cont.)

*1. Has the sponsor completed and filed its most recent performance measures as required by PSC?

Drop down menus make answering questions on the application quick and easy.

*2. Does the sponsor have a formal asset management plan in place?

*3. Has the sponsor completed the annual maintenance audit for the current year?

*4. Has the Office of Environmental Health Services (OEHS) completed a capacity development analysis of the sponsor's operation/system within the last five years?



Complete the budget using the numbers from your executed agreements.

West Virginia Infrastructure and Jobs Development

III. General Budget

Preliminary Application Form

Construction			
Construction Cost Estimate	2,000,000.00		0.00
Construction Contingency	\$200,000.00	Cons	\$2,200,000.00
Technical Services			
Preliminary Design (D)	40,000.00	Final Design (D)	
		Design Fees (D) Subtotal	
		Design Fees to Construction %	3.64
Study & Report	8,000.00	Bidding & Negotiation	5,000.00
Resident Project	0,000.00	Engineering During Construction (C)	20,000.00
Construction (C) Subtotal	\$80,000.00	Operation	12,000.00
Geotechnical Engineering (SS)	5,000.00	Establish/Demonstrate Design Criteria (SS)	4,500.00
Land Surveys & Easement Prep (SS)	6,000.00	Engineering Surveys & Topo (SS)	6,000.00
Mat'ls & Equip Inspections (SS)	8,000.00	Add'l Copies of Eng. Documents (SS)	7,000.00
Extra Travel & Subsistence (SS)	4,000.00	Value Engineering (SS)	5,000.00
Redesign Requested or Approved (SS)	5,500.00	Expert Witness Before Agencies (SS)	5,400.00
Final Investigations (SS)	7,600.00	Preparation of Funding Applications (SS)	4,000.00
Land Planning & Partitioning Activities (SS)	6,300.00	Env't Assessment & Impact Statement (SS)	5,800.00
Add'l Studies & Design for Const.	0.00	Pro (SS)	7,000.00
Assessment of Completed Project (SS)	5,600.00		
Special Services (SS) Subtotal	\$92,700.00	Total Technical Services Fee Subtotal	\$277,700.00
		Total Fee to Construction %	12.62
Legal Services			
Local Project Attorney	45,000.00	PSC Attorney	23,000.00
Lands & ROW Attorney	37,000.00	Legal Services Subtotal	\$105,000.00
Administrative Services			
Project Administrator	75,000.00	Project Accountant (CPA)	12,000.00
Other Administrative Costs		Administrative Services Subtotal	\$87,000.00
Financing			
Interim Financing	0.00	Capitalized Interest	0.00
Bond Counsel/Other Closing Costs	25,000.00	Financing Subtotal	\$25,000.00
Permits			
Permits	33,000.00	Permits Subtotal	\$33,000.00
Land Costs			
Land Acquisition	67,000.00	Easements	8,000.00
Fee Takes		Land Costs Subtotal	\$75,000.00
TOTAL PROJECT BUDGET			
Project Contingency	\$30,135.00	TOTAL PROJECT BUDGET	\$2,832,835.00

Tab between each of the fields to complete the budget.

Project Contingency is calculated as 5% of the total Legal, Administrative, Financing, Permits, and Lands Costs.

You must enter a value even if it is \$0.

Totals and subtotals will automatically be calculated for you.

Explanation of other administrative costs
 255 max. chars
 Explanation of land, easement & fee take estimates
 255 max. chars

None

Project cr

If a dollar amount is allocated for Other Administrative Costs or Land Costs, an explanation must be provided.

Prev. Page

Next Page



If you have a letter of commitment from any funding source, use the drop down menu to choose the source, then complete the information in the boxes, and attach a copy of the letter.

**West Virginia Infrastructure and Jobs
 Preliminary Application Form Administrator**

IV. Project Funding Information

*1. Does the project currently have committed funds?

Source	Source Name	Amount	Rate	Years	Date Committed	Letter
USEDA		\$500,000.00	0.00	0	03/29/2012	<input type="button" value="Attach"/>
					//	<input type="button" value="Attach"/>
					//	<input type="button" value="Attach"/>
					//	<input type="button" value="Attach"/>
					//	<input type="button" value="Attach"/>

Source name is only required if you select Private Source from the drop down menu.

*2. Is the sponsor requesting an IJDC Soft Cost Grant to cover other funding sources' ineligible costs? Amount

*3. Is the sponsor requesting planning and design funds? Amount

4. Engineering Agreement (Only required if requesting planning & design funds)

If you select Yes for any of the items, you must submit the corresponding documentation.

*5. PSC approval of engineering agreement?

6. Evidence of filing for PSC approval of engineering agreement

7. Engineering agreement PSC case number

*8. Documentation of compliance with WV Code § 5G-1-1



**West Virginia Infrastructure and Jobs Development
 Preliminary Application Form Administrator**

V. Job Creation

1. Describe the area's economic conditions and needs for the project
 255 max. chars

2. Describe the economic impact of the project
 255 max. chars

(Describe the area's economic conditions and needs for the project.)

(Describe the economic impact of the project, as well as the economic impact of the project.)

*3. Will there be permanent jobs created by this project?

No

Nature of Job	# Permanent Full-Time Jobs	# Permanent Part-Time Jobs



**West Virginia Infrastructure and Jobs Development
 Preliminary Application Form Administrator**

V. Job Creation (cont.)

*4. Number of temporary jobs created by project during construction

*5. Have any businesses committed financially to the project?

Name of Business	Nature of Business	Commitment Amount	Jobs Retained	Jobs Created

VI. Training

*1. Is the project sponsor a Public Service District?

If the answer to this question is Yes, you will need to enter each Board Member's name and training information in the table below.

Board Member Name	Date of Most Recent PSC Training Seminar Attended	PSC District
	//	
	//	
	//	
	//	
	//	

2. Does the project in any way involve service by a Public Service District?

If the answer to this question is Yes, you will need to answer Question #3 and enter each Board Member's name and training information in the table below.

3. Name of the Public Service District involved in the project

Board Member Name	Date of Most Recent PSC Training Seminar Attended	PSC District
	//	
	//	
	//	
	//	
	//	

[Prev. Page](#)

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West Virginia Infrastructure and Jobs Development Preliminary Application Form Administrator

VII. Attachments

*1. Executed Sponsor Certification

Attach

*2. Uniform Bidding Procedures and Acknowledgement

Attach

To complete the application, you must attach the requested documentation. To download a blank copy of either agreement, click on the corresponding hyperlink below.

[Click Here to Download a Blank Copy of the Sponsor Certification Letter](#)

[Click Here to Download a Uniform Bidding Procedures & Acknowledgement](#)

Click on Save & Submit to save a copy of the application to your computer and send a copy to the IJDC.

Save & Submit

Submission Date
3/29/2012

To ensure you receive the emails sent by the IJDC related to your project status, add imageadmin@wvwdc.org to the safe sender list or address book to prevent it from potentially being filtered as junk mail or spam.

Steps for Completing the Preliminary Application Form (Engineer)

1. Go to www.wvinfrastructure.com and log into the website to view the Project Dashboard home page. See page 7 for instructions on how to log in to the website.
2. Download and install Formatta Filler if you have not already done so already. See page 71 for tips on using Formatta Filler.
3. Conduct a Project Quick Search from the home page or search for the appropriate project within the Your Projects tab.
4. Click on the Preliminary Application Form (Engineer) link to open a blank form.
5. Complete the Preliminary Application Form (Engineer). This form can also be downloaded and saved to your computer for completion at a later date.
6. After completing the form, click the Save & Submit button. A Save As dialog box will be displayed allowing you to save a copy of the completed form to your computer and another copy is automatically submitted to the IJDC. A message indicating that the “form was sent successfully” will be displayed. Incomplete forms and/or missing attachments will be flagged by the system and a pop-up message will appear indicating what information is needed to continue.
7. After receiving all three parts of the Preliminary Application (Administrator, Engineer, and Accountant forms), the IJDC staff will review the forms for completeness. Incomplete applications will be rejected and a letter will be sent via email notifying the appropriate team member(s) of the reason(s) for the rejection and a list of documents that need to be re-submitted. A link will be included in the email for uploading the correct file(s).
8. A Project Manager (PM) is assigned to the project. The PM reviews the project schedule and either approves or works with the Engineer to make adjustments.
9. After the schedule is approved, the IJDC Technical Review Committee reviews the project and determines feasibility.
10. Projects that are considered technically feasible are forwarded to the IJDC Funding Committee and the Project Team is notified. A project notification indicating that the application is Under Council Review will be posted on the Project Dashboards of all Team Members. Project Teams will also be notified if the recommendation is for the application to be tabled or returned due to technical issues.
11. IJDC Funding Committee reviews the application and recommends appropriate funding option(s).



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**West Virginia Infrastructure and Jobs Development
Preliminary Application Form Engineer**

All Fields with an * are Required for Submission

I. General Project

Sponsor	Barrackville, Town of	Expiration Date	09/22/2012
Type	Water	Primary County	BARBOUR
Category	Line B	Area	PHILIPPI
Project Number	2012V	County	
Prior Project Number	2010WV-0001	Secondary Project Area	

Project Description: Water project to serve 50 customers.

Required fields are noted with an *.

Information from the Project Initiation Form will be pre-populated into the Preliminary Application Form.

II. General Information

*1. Status of Plans/Spec (%)	<input type="text" value="0"/>
*2. Project Longitude	<input type="text" value="-81.60000000"/>
*3. Project Latitude	<input type="text" value="38.56000000"/>

This information will be pulled into and included in the GIS tool indicating this project's location.



**West Virginia Infrastructure and Jobs Development
 Preliminary Application Form Engineer**

III. Project Schedule to Construction

Milestones	MM/DD/YYYY
Professional Services Acquired	
All Agreements Signed	
Plans & Specifications Approved	
All Permits Submitted	
Final Plans & Specs Approved	
Rule 42 Completed	
Municipal Rate Ordinance Completed	09/29/2012
Request for Proposals Issued	10/15/2012
File PSC Certificate	11
80% ROWS	12
Request Authority	13
Advertise for Bids	13
Bid Opening	03/19/2013
100% ROWS, Easements & Land Acquisitions Recorded	04/18/2013
All Permits and Clearances Obtained	05/28/2013
PSC Certificate Final	06/15/2013
Loan Closing / Award Contracts	07/15/2013
Start Construction	
Project Completion	

See page 72 for instructions on how to turn on/off the pop-up calendar.

After this form has been accepted, and the IJDC Project Manager has approved the schedule, these dates will be used to automatically populate each task under the tab marked "Tasks" within the project's Dashboard.

You are only required to check this box if after clicking Save & Submit, you receive a pop-up message indicating that one or more of your dates do not meet the requirements.

After clicking on Save & Submit, a pop-up window will appear allowing you to save the form to your desktop while simultaneously sending the form to the IJDC.

After the form has been successfully sent, the date of the form submittal will be displayed.

To ensure you receive the emails sent by the IJDC related to your project status, add imageadmin@wwvda.org to the safe sender list or address book to prevent it from potentially being filtered as junk mail or spam.

*1. Preliminary Engineering Report

*2. Project Area Map

I acknowledge that I was notified that one or more of the schedule dates do not meet the requirements from the IJDC.

Submission Date 3/29/2012

Steps for Completing the Preliminary Application Form (Accountant)

1. Go to www.wvinfrastucture.com and log into the website to view the Project Dashboard home page. See page 7 for instructions on how to log in to the website.
2. Download and install Formatta Filler if you have not already done so already. See page 71 for tips on using Formatta Filler.
3. Conduct a Project Quick Search from the home page or search for the appropriate project within the Your Projects tab.
4. Click on the Preliminary Application Form (Accountant) link to open a blank form.
5. Complete the Preliminary Application Form (Accountant). This form can also be downloaded and saved to your computer for completion at a later date.
6. After completing the form, click the Save & Submit button. A Save As dialog box will be displayed allowing you to save a copy of the completed form to your computer and another copy is automatically submitted to the IJDC. A message indicating that the “form was sent successfully” will be displayed. Incomplete forms and/or missing attachments will be flagged by the system and a pop-up message will appear indicating what information is needed to continue.
7. After receiving all three parts of the Preliminary Application (Administrator, Engineer, and Accountant forms), the IJDC staff will review the forms for completeness. Incomplete applications will be rejected and a letter will be sent via email notifying the appropriate team member(s) of the reason(s) for the rejection and a list of documents that need to be re-submitted. A link will be included in the email for uploading the correct file(s).
8. A Project Manager (PM) is assigned to the project. The PM reviews the project schedule and either approves or works with the Engineer to make adjustments.
9. After the schedule is approved, the IJDC Technical Review Committee reviews the project and determines feasibility.
10. Projects that are considered technically feasible are forwarded to the IJDC Funding Committee and the Project Team is notified. A project notification indicating that the application is Under Council Review will be posted on the Project Dashboards of all Team Members. Project Teams will also be notified if the recommendation is for the application to be tabled or returned due to technical issues.
11. IJDC Funding Committee reviews the application and recommends appropriate funding option(s).



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**West Virginia Infrastructure and Jobs Development
 Preliminary Application Form Accountant**
 All Fields with an * are Required for Submission

I. General Project

Sponsor	Barrackville, Town of	Expiration Date	09/22/2012
Type	Water	Primary County	BARBOUR
Category	Line Extension	Primary Project Area	PHILIPPI
Project Number	2012W-12	Information from the Project Initiation Form will be pre-populated into the Preliminary Application Form.	
Prior Project Number	2010W-00		
Description	Water project to serve 50 customers.		

Required fields are noted with an *.

II. General Financial Information

*1. Project Sponsor Type

2. Ultimate Beneficiary Utility

3. Sponsor's most recent fiscal year's Public Service Commission Annual Report Date:

4. Have Sponsor's Financial Audits been completed for the last three fiscal years?

5. Most Recent Audit Date

*6. Most Recent Audit

*7. Is the Sponsor requesting a waiver of the Required Draft Rule 42?

8. Draft Rule 42 Waiver

9. Draft Rule 42 Test Year

10. Draft Rule 42 Test Year Exception Explanation
 255 Max Chars.

11. Draft Rule 42 12. Latest Rate Tariff 13. Financial Statement for Non-Utility Entity (if applying for loan)

If the ultimate beneficiary of the project is different than the Sponsor, identify it here.

[Next Page](#)



**West Virginia Infrastructure and Jobs Development
 Preliminary Application Form Accountant**

IV. Financial Status and Rates

- 1. Date of Last Rate Increase
- 2. Percentage of Last Rate Increase %
- 3. PSC Case Number
- 4. Ordinance Effective Date
- *5. Is There an Pending Project or Funding Application not Included in Current Rates that will affect Future Rates?

Item	Current Amount	Going-Level Adjustments	Pending Project Adjustments	Proposed Project Adjustments	Total
Operating Revenues - Annual	\$570,471.00	\$20,000.00		\$74,000.00	\$664,471.00
Interest Income and Other Miscellaneous Revenues	\$785.00				\$785.00
Other Revenues	\$0.00			\$0.00	\$0.00
Total Revenues	\$571,256.00	\$20,000.00	\$0.00	\$74,000.00	\$665,256.00
Operation and Maintenance Budget + Admin. Fee	\$450,000.00	\$10,000.00		\$37,700.00	\$497,700.00
Taxes, Other Than Income	\$15,900.00	\$0.00		\$0.00	\$15,900.00
Debt Service	\$90,000.00	\$0.00		\$27,000.00	\$117,000.00
Reserves	\$12,000.00	\$0.00		\$7,000.00	\$19,000.00
Capital Additions	\$0.00	\$0.00		\$0.00	\$0.00
Surplus	\$0.00	\$0.00		\$0.00	\$0.00
Average Monthly Rate Cost per Customer per 4,000 Gallons/Month	\$61.24	\$0.73		\$2.14	\$64.11

You must enter a value for each required field, even if the amount is \$0.00.

- *6. Are the above Rates reflective of the listed Annual Report?

Prev. Page

Next Page



**West Virginia Infrastructure and Jobs Development
 Preliminary Application Form Accountant**

IV. Financial Status and Rates (cont.)

- *1. Current 4,000 Gallon Rate List the resulting 4,000 gallon rate from the Draft Rule 42 calculations.
- *2. DR42P 4,000 Gallon Rate DR42P Rate Cash Flow
- *3. Maximum 4,000 Gallon Rate Max Rate Cash Flow
- *4. Current Minimum Bill Use a 5%, 40-year loan to calculate the maximum rate. Gallons
- *5. Is the Current Rate above based on the Test Year?

V. Preferred Funding

- *1. Please list the proposed Draft Rule 42 funding package Click Reset to clear the fields below.

Source	Source Name	Amount	Rate	Years
CWSRF SRF Non-DIS		\$1,000,000.00	0.00	0
CWSRF SRF District1.7!		\$1,000,000.00	0.50	40
RUS Loan		\$832,835.00	3.75	40

To ensure you receive the emails sent by the IJDC related to your project status, add imageadmin@wwda.org to the safe sender list or address book to prevent it from potentially being filtered as junk mail or spam.

- 2. Intention to seek SCBG letter

After clicking on Save & Submit, a pop-up window will appear allowing you to save the form to your desktop while simultaneously sending the form to the IJDC.

Submission Date
3/29/2012

After the form has been successfully sent, the date of the form submittal will be displayed.

Project Tracking & Schedule Updates

Monthly Reporting (Administrator, Engineer, Accountant, Legal Counsel)

Monthly Reporting is a new quick and easy process that begins once you have an approved Preliminary Application and continues until the project completion. This report is required every month for any member of the team that has outstanding tasks related to an active project. If a team member does not have any outstanding tasks for the current month, then the project will not appear within their Monthly Reporting tab.



Monthly Reporting provides valuable information for both the IJDC and the Project Team. The IJDC will be able to look at monthly reports across all projects and analyze where bottlenecks are occurring in the process. They can then use this information to help identify ways to help alleviate issues in the future. The information provided will also help the IJDC better manage cash flow and investments, because monies will be invested against realistically identified project milestones. In addition, the information from Monthly Reporting will be trackable within the Performance Results tab. This will provide project team members the ability to run reports on team and individual performance.

Every project team member has their own set of tasks based on their responsibilities, therefore all team members, including the Administrator, Engineer, Accountant, and Legal Counsel(s), will need to perform Monthly Reporting. The initial date assigned to each task is based on the original milestone calendar that the Engineer created in the Preliminary Application Form, but this can be adjusted once you are at the Monthly Reporting screen.

WEST VIRGINIA INFRASTRUCTURE & JOBS DEVELOPMENT COUNCIL
188 Association Drive, Charleston, WV 25311 T 304.414.8001 F 304.414.0868

West Virginia Infrastructure and Jobs Development Preliminary Application Form Engineer

III. Project Schedule to Construction

Milestones	MM/DD/YYYY
Professional Services Acquired	03/29/2012
All Agreements Executed & Approved, excluding Const.	04/29/2012
Plans & Specs Submitted to Applicable Agencies	05/24/2012
All Permits Submitted	06/28/2012
Final Plans & Specs Approved	07/11/2012
Rule 42 Completed	08/29/2012
Municipal Rate Ordinance Completed	09/29/2012
Request for All Binding Commitments	10/18/2012
File PSC Certificate Case	11/15/2011
80% ROWS & Easements, and 100% Land Acq. Recorded	12/29/2012
Request Authorization to Bid	01/15/2013
Advertise for Bids	02/28/2013
Bid Opening	03/15/2013
100% ROWS, Easements & Land Acquisitions Recorded	04/18/2013
All Permits and Clearances Obtained	05/28/2013
PSC Certificate Final	06/15/2013
Loan Closing / Award Contracts	07/15/2013
Start Construction	08/27/2013
Project Completion	10/31/2013

*1. Preliminary Engineering Report



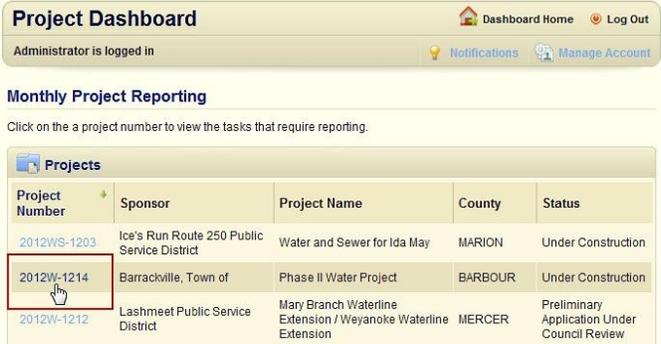
Project Dashboard Dashboard Home Log Out
Administrator is logged in Notifications Manage Account

Project Monthly Reporting
Please review each task listed below. If the project task is on schedule, hit save. If the project task is not on schedule, select no from the dropdown. After selecting no, please choose a reason and fill in the new estimated completion date, and hit save.

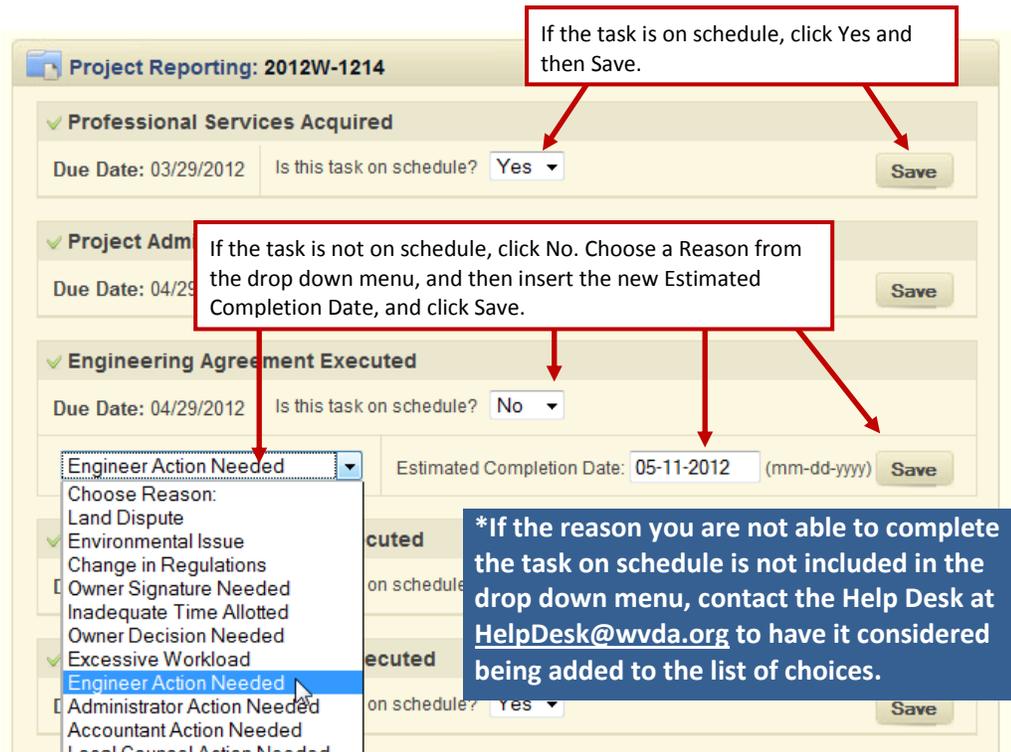
Project Reporting: 2012W-1214

- Professional Services Acquired**
Due Date: 03/29/2012 Is this task on schedule?
- Updated Schedule B Developed**
Due Date: 01/15/2013 Is this task on schedule?
- Conduct Closing**
Due Date: 07/15/2013 Is this task on schedule?
- Develop and Submit Final Draw Request**
Due Date: 10/31/2013 Is this task on schedule?

Steps for Completing Monthly Tracking

1. Go to www.wvinfrastructure.com and log into the website to view the Project Dashboard home page. See page 7 for instructions on how to log in to the website.
2. Click on the Monthly Reporting tab under the Task Manager. The Monthly Reporting tab will not be visible if you do not have any projects that have outstanding tasks.
 
3. Choose the project you want to report on and click on the Project Number to see the list of current tasks associated with the project. If you have already completed the report for the month, or if there are no outstanding tasks related to a particular project, then the project will not be listed.
 

Project Number	Sponsor	Project Name	County	Status
2012WS-1203	Ice's Run Route 250 Public Service District	Water and Sewer for Ida May	MARION	Under Construction
2012W-1214	Barrackville, Town of	Phase II Water Project	BARBOUR	Under Construction
2012W-1212	Lashmeet Public Service District	Mary Branch Waterline Extension / Weyanoke Waterline Extension	MERCER	Preliminary Application Under Council Review
4. For each task in the list, choose either Yes or No. If the project task is on schedule, click Save. If the project task is not on schedule, choose No from the drop down menu, then select a reason from the Choose Reason drop down menu*, enter the new anticipated completion date, and click Save. Repeat until all tasks have been updated and/or saved.



If the task is on schedule, click Yes and then Save.

If the task is not on schedule, click No. Choose a Reason from the drop down menu, and then insert the new Estimated Completion Date, and click Save.

*If the reason you are not able to complete the task on schedule is not included in the drop down menu, contact the Help Desk at HelpDesk@wvda.org to have it considered being added to the list of choices.

- Once the Monthly Reporting is complete and any requested date changes approved the task status will be updated under Your Projects > Project Number > Tasks.

The screenshot shows a 'Project Dashboard' for 'Project Number: 2012W-1214'. The dashboard includes a sidebar with 'Task Manager' and 'Tools', and a main content area with project details and a task list. Annotations highlight key features:

- Task Manager:** A sidebar menu with options like 'Your Projects', 'Monthly Reporting', and 'Project Search'.
- Project Details:** Information such as 'Project Name: Phase II Water Project', 'Sponsor: Barrackville, Town of', and 'County: BARBOUR'.
- Task List:** A table of tasks with status icons (e.g., red circle for incomplete, green checkmark for completed) and responsible team members (e.g., 'Erin the Engineer', 'Andy the Administrator').

Annotations include:

- 'Each Task will have a designated icon indicating its status.'
- 'Contact information for each Project Team member is easily accessible from this screen as well.'
- 'You can see who is responsible for each task and the associated completion or due date.'

Task Name	Status	Responsible Team Member	Completion/Due Date
Professional Services Acquired	Incomplete	Andy the Administrator	03/29/2012
Project Administration Agreement Executed	Completed	Andy the Administrator	04/02/2012
Engineering Agreement Executed	Completed	Andy the Administrator	04/02/2012
Local Government Agreement Executed	Completed	Andy the Administrator	04/02/2012
Bond Counsel Agreement Executed	Completed	Andy the Administrator	04/02/2012
PSC Order Approving Engineering Agreement	Completed	Andy the Administrator	04/02/2012
Plans and Specs Submitted to Applicable Agencies	Completed	Erin the Engineer	05/24/2012
PSC Schedule for Certificate of Convenience and Necessity	Completed	Erin the Engineer	04/02/2012
BPH Permit Submitted	Completed	Erin the Engineer	04/02/2012
DEP Permit Submitted	Completed	Erin the Engineer	04/02/2012
DOT Highways Permit Submitted	Completed	Erin the Engineer	04/02/2012
Corps of Engineers Permit Submitted	Completed	Erin the Engineer	04/02/2012
Public Lands Permit Submitted	Completed	Erin the Engineer	04/02/2012
Railroad Permit Submitted	Completed	Erin the Engineer	04/02/2012
NPDES Permit Submitted	Completed	Erin the Engineer	04/02/2012
Culture and History Clearance Requested	Completed	Erin the Engineer	04/02/2012
Other Submitted (Specify):	Completed	Erin the Engineer	04/02/2012
Engineering Design and Specifications Complete	Completed	Erin the Engineer	07/11/2012
Final Plans and Specs Approved	Completed	Erin the Engineer	07/11/2012
Engineering Design and Specifications	Completed	Erin the Engineer	07/11/2012
Complete Front End Bid Documents Including	Completed	Erin the Engineer	07/11/2012
Rule 42 Completed	Completed	Erin the Engineer	07/11/2012

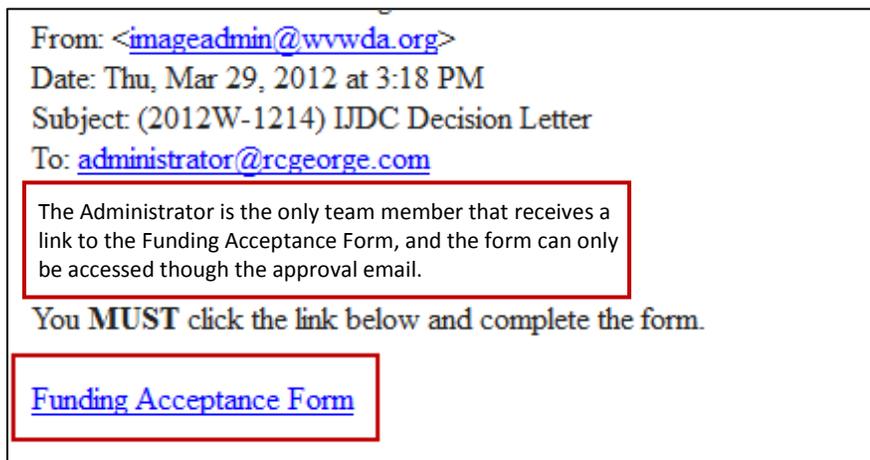
Project Planning and Funding

Funding Recommendation Decision Form (Administrator)

Included in the Administrator's copy of the Preliminary Application approval email sent by the IJDC is a Funding Recommendation letter and a link to the Funding Recommendation Decision Form.

Steps for Completing the Funding Recommendation Decision Form

1. Click on the link included with the Funding Recommendation letter to open the Funding Recommendation Decision Form.



2. Review the information on the Funding Recommendation Decision Form.
3. Before clicking Accept or Reject, go to page 2 and select the Project Attorneys from each of the drop down menus.
4. Click on Prev. Page to return to page 1 of the form.
5. Click on Accept or Reject to complete the form:

Accept – If you choose to Accept the IJDC's funding recommendation, no further action is needed and you can proceed to the next phase in the process.

Reject – If you choose to reject the IJDC's funding recommendation, you will get a pop-up asking if you are sure you want to Reject the recommendation. If you click on Yes the Project Number will be terminated. If you decide to move forward in the future, you will need to start over by submitting a new Project Initiation Form.



WEST VIRGINIA
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 180 Association Drive, Charleston, WV 25311 T 304.414.6501 F 304.414.0866

**West Virginia Infrastructure and Jobs Development
 Funding Recommendation Decision Form**

All Fields with an * are Required for Submission

I. General Project Information

Sponsor	Barrackville, Town of	Expiration Date	09/22/2012
Type	Water	Primary County	BARBOUR
Category	Line Extension	Primary Project Area	PHILIPPI
Project Number	2012W-1214	Secondary County	
Prior Project Number	2010W-0001	Secondary Project Area	
Description	Water project to serve 50 customers.		

Source	Status	Date	Committed Date	Type	Rate	Term	Amount
DWTFR SRF Non-DIS	Recommended	03/29/2012		Loan	3.00%	20	\$2,000,000.00
IJDC District1 Loan3	Recommended	03/29/2012		Loan	3.75%	40	\$832,835.00

Review information and proceed to Page 2 before clicking on Accept or Reject.

Sponsor Acceptance of Funding Recommendation

After Accepting the decision, the date of submission will be indicated.

Submission Date
3/30/2012

You must complete Page 2 before clicking on Accept or Reject.

*** Note: Rejection of the Funding Recommendation will result in Project Termination**

If you choose to Reject the Funding Recommendation, the project will be terminated.



West Virginia Infrastructure and Jobs Development Funding Recommendation Decision Form

Click on the drop down menu to choose the appropriate Counsel.

II. Project Attorneys

1. Bond Counsel Name: <input type="text" value="Bonnie the Bond Counsel"/> Organization: Law Firm B Address: 345 Executive Way Phone: 304-222-3456 Fax: Cell: Email: bcounsel@rcgeorge.com	*2. Local Counsel Name: <input type="text" value="Larry the Local Counsel"/> Organization: Law Firm L Address: 123 Document Drive Phone: 304-222-1111 Fax: Cell: Email: lcounsel@rcgeorge.com
*3. PSC Counsel Name: <input type="text" value="Pat the PSC Counsel"/> Organization: Law Firm P Address: 345 Signature Lane Phone: 304-555-1111 Fax: Cell: Email: psccounsel@rcgeorge.com	

Prev. Page

Click on Prev. Page to return to Page 1 to Accept or Reject the Recommended Funding Decision.

Page 2 of 2

Revised Application Form (Administrator)

The Revised Application is currently not available. Once it is available the User Guide and training will be updated with instructions for completing the form.

Complete Design and Finalize Funding

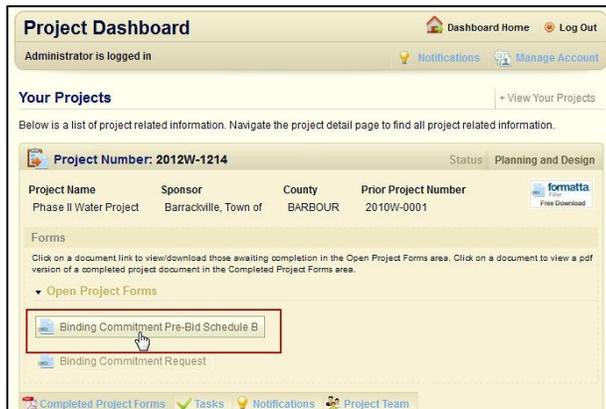
The next step in the process is to complete the Binding Commitment Pre-Bid Schedule B and the Binding Commitment Request. Both can be worked on at the same time. However, you will need to complete the Binding Commitment Pre-Bid Schedule B prior to submitting the Binding Commitment Request.

Binding Commitment Pre-Bid Schedule B (Administrator)

The Binding Commitment Pre-Bid Schedule B is what the Administrator fills out to document the budget.

Steps for Completing the Binding Commitment Pre-Bid Schedule B

1. Login to the system and go to the Project Dashboard home page.
2. Conduct a Quick Search for the appropriate project on the Project Dashboard home page or search within the Your Projects tab.
3. Click on the appropriate Project Number to open the Project page.
4. Click on the Binding Commitment Pre-Bid Schedule B.

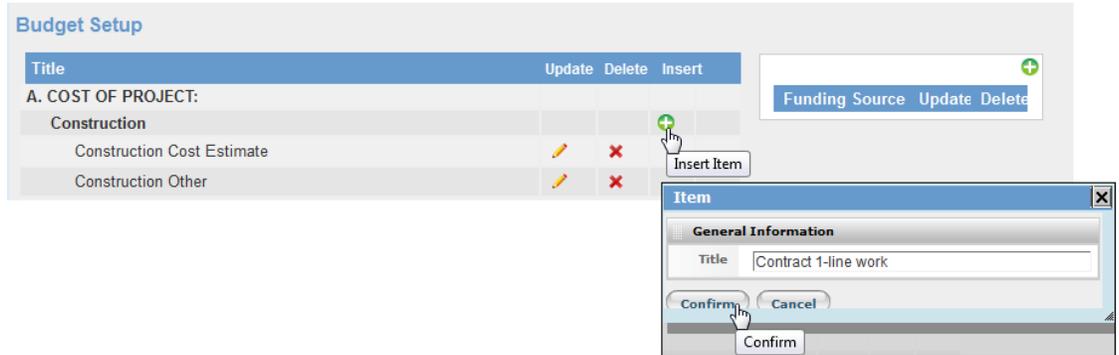


5. Revise the Budget Setup, as needed using the available icons, and add the Funding Sources. See next page for details on Editing Line Items and adding Funding Sources.

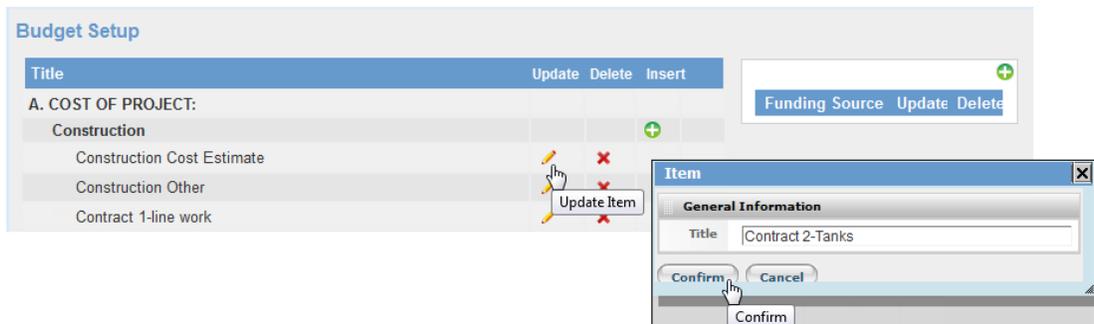


Editing Line Items in Budget Setup

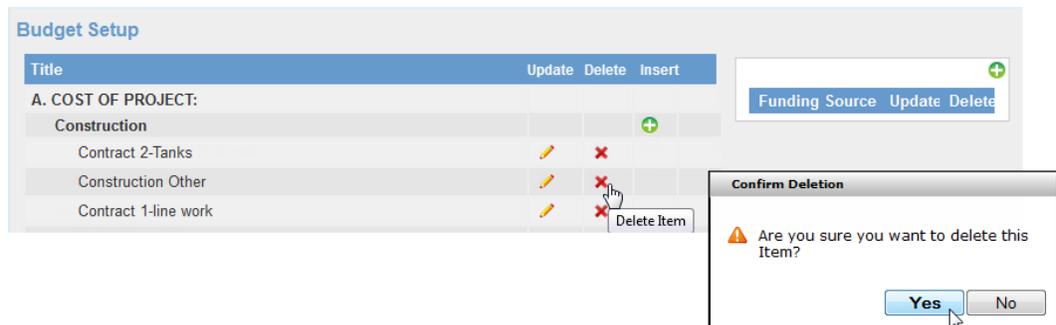
- a.) To **add a line item**, click on the Insert icon on the row of the major heading. Type in the Title of the new item and click Confirm. The new item will now appear in the budget.



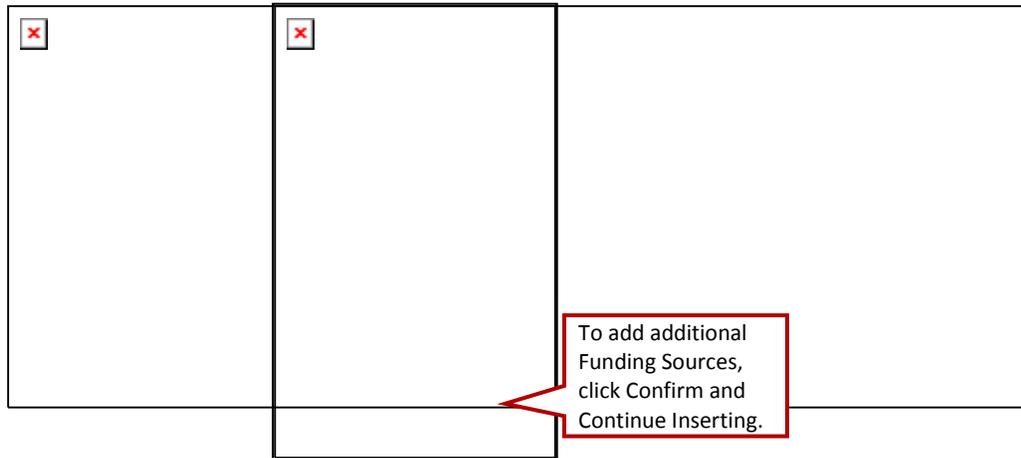
- b.) To **change the name of an item**, click on the Update icon of the line item you want to change. Type in the new Title and click Confirm.



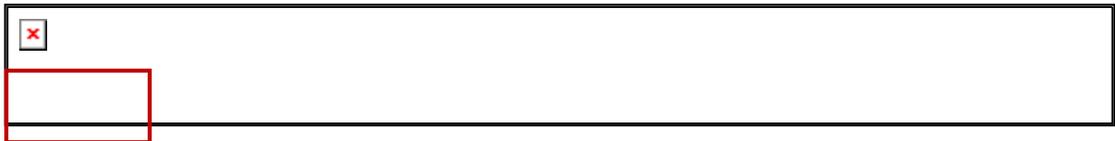
- c.) To **delete a line item**, click on the Delete icon of the line you want to remove. Click Yes to confirm.



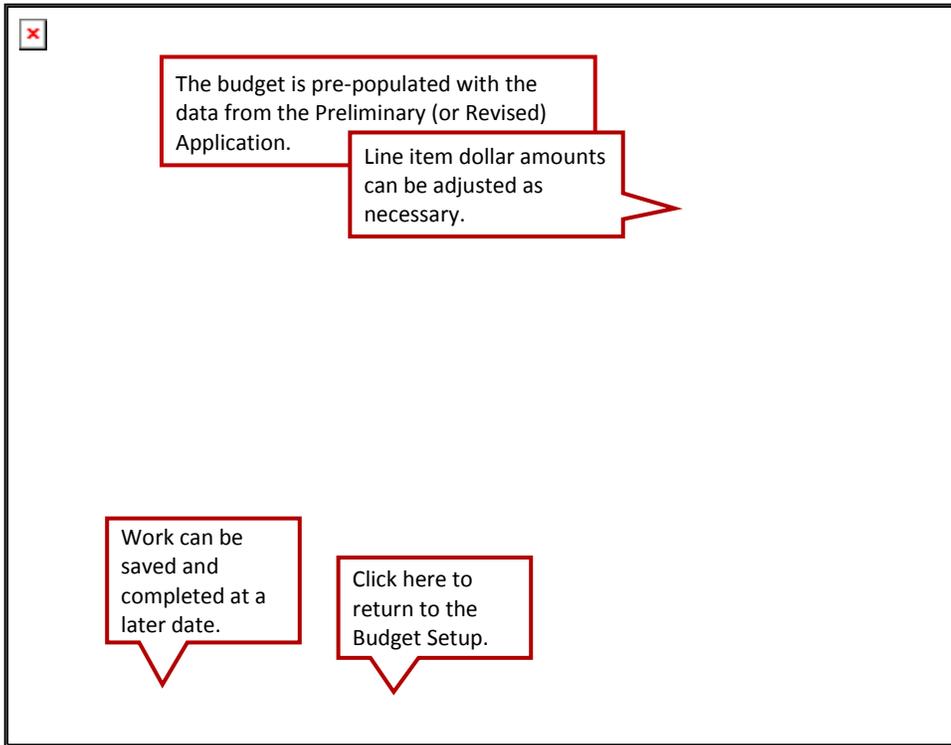
- d.) To **add Funding Sources**, click on the Insert icon within the Funding Source box. Select the funding source(s) for the project from the drop down menus. Click Confirm.



6. Click on Go to Budget to make the necessary adjustments to the budget line items.



7. Update the budget items as needed and click on Submit.



- After the budget has been successfully submitted a new icon will appear at the bottom of the screen allowing you to view and save a copy of the budget report. A copy is also placed under your Completed Project Forms tab within the system.

Funded Reserves	0.00
Registrar Fees	0.00
Bond Counsel	
Capitalized Interest	
Printing/Registrar	

Project Budget For 2012W-1214 04/02/12 11:09 AM

Sponsor: Barrackville, Town of Project Administrator: Andy the Administrator

Project #: 2012W-1214 Phone #: 304-555-5555

Item	Total
A. COST OF PROJECT:	\$ 2,812,000.00
construction	\$ 2,000,000.00
contract 1-time	\$ 1,200,000.00
contract 1-time work	\$ 700,000.00
technical services	\$ 277,700.00
design fees (01)	\$ 80,000.00
preliminary design (01)	\$ 80,000.00
plans design (01)	\$ 80,000.00
study and report	\$ 8,000.00
blading and vegetation	\$ 8,000.00
construction (01)	\$ 80,000.00
assistant project representative (01)	\$ 80,000.00
engineering during construction (01)	\$ 20,000.00
operation	\$ 12,000.00
special services (02)	\$ 82,700.00
mechanical engineering (02)	\$ 8,000.00
estimate/construction design critter	\$ 4,000.00
lane surveys and assessment rep (02)	\$ 8,000.00
engineering and topo surveys (02)	\$ 8,000.00
materials and equip inspections (02)	\$ 8,000.00
Asphalt/curb or sig. documents	\$ 7,000.00
extra travel and assistance (02)	\$ 4,000.00
civil engineering (02)	\$ 8,000.00
design requests or approvals w/ c	\$ 2,000.00
expert witness secure agencies (02)	\$ 2,000.00
plans investigations (02)	\$ 7,000.00

Page 1

Binding Commitment Request (Administrator)

The Binding Commitment Request allows the Administrator to quickly and easily attach necessary documents as they are received.

Steps for Completing the Binding Commitment Request (Checklist)

1. Login to the system and go to the Project Dashboard home page.
2. Conduct a Quick Search for the appropriate project on the Project Dashboard home page or search within the Your Projects tab.
3. Click on the appropriate Project Number to open the project page.
4. Click on the Binding Commitment Request.



5. Attach each of the required documents. Choose Yes from the drop down menu. (If a document is not applicable for this project, choose NA from the drop down menu.) Click Browse to select the document for uploading. Click Save.

You must click Save after uploading each document or marking it NA.

A screenshot of the 'Binding Commitment Request Form' for Project Number 2012W-1214. The form is divided into sections for different agreements. A red box highlights a 'Yes' dropdown menu and a 'Legal Agreement' field with a 'Browse' button. Another red box highlights a 'Save' button. A callout box points to the 'view attachment' links, stating: 'Documents that have been uploaded will have the Submission Date and a link to a PDF file, which will allow you to view the attachment at any time in the future.' The form includes sections for Project Identification, Section 1: Professional Agreements (Project Administration Agreement, PSC Attorney Agreement, Accountant Agreement, Bond Counsel Agreement), and Local Counsel Agreement. Each section shows the submission date and a 'view attachment' link.

- After uploading and saving the document, the Task gets marked as completed under the Tasks tab and is removed from your Monthly Reporting.



- The final step in completing the Binding Commitment Request is to click Submit. The Submit button will only be enabled after all of the required documents have been uploaded.

The Binding Commitment Pre-Bid Schedule B must be submitted prior to submitting this checklist.

The screenshot shows the 'Binding Commitment Request Form' interface. At the top, it says 'Complete and save each area in the form independently. Unsaved changes in a specific area will be lost if a different area is saved. To see the task description of an unsaved task, click the blue icon, and click the red icon when done reading.' Below this, the 'Project Number' is 2012W-1214. A message states: 'The Submit button will not become active on this form until all areas are completed.' The form is divided into sections: 'Project Identification' with fields for Project Number, Local Project Name, Sponsor, and Primary County; 'Section 1: Professional Agreements' with sub-sections for Project Administration Agreement, Engineering Agreement Executed, PSC Attorney Agreement Executed, and Local Counsel Agreement Executed, each with a submission date and a 'view attachment' link; and 'Latest Cost Estimate (Showing Date of Estimate)' with a submission date and 'Not Applicable' status. At the bottom right, a 'Submit' button is highlighted with a red box and a callout box containing the text: 'The Submit button will only be enabled after all the required documents have been uploaded.'

Bid Job and Execute Project

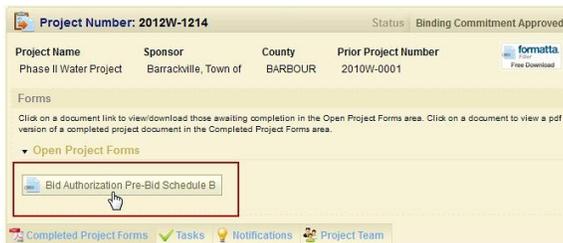
The next step in the process is to complete the necessary forms to request authorization to bid.

Bid Authorization Pre-Bid Schedule B (Administrator)

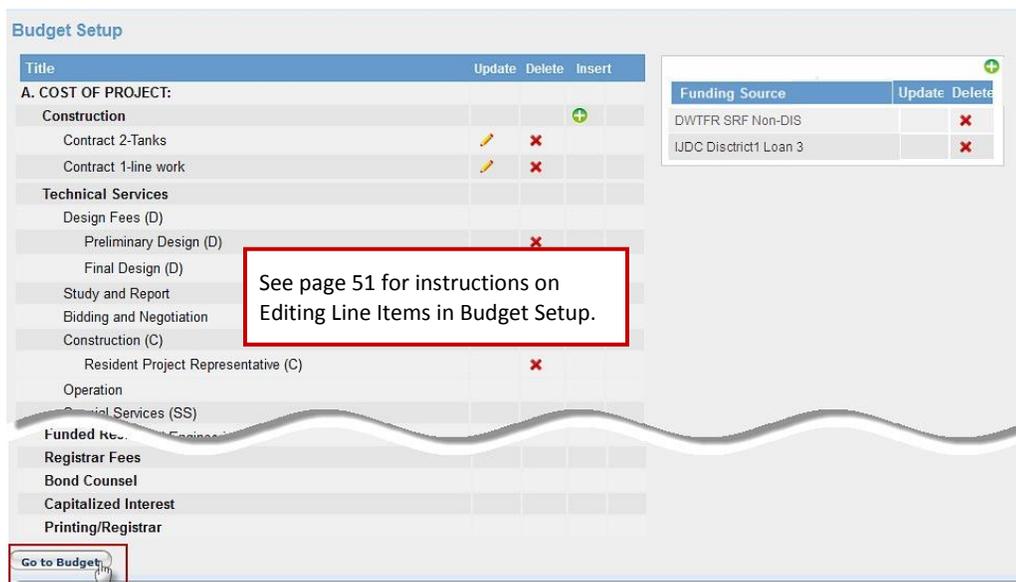
The Bid Authorization Pre-Bid Schedule B must be completed prior to the Engineer submitting the Bid Authorization Request.

Steps for Completing the Bid Authorization Pre-Bid Schedule B

1. Login to the system and go to the Project Dashboard home page.
2. Conduct a Quick Search for the appropriate project on the Project Dashboard home page or search within the Your Projects tab.
3. Click on the appropriate Project Number to open the project page.
4. Click on the Bid Authorization Pre-Bid Schedule B.



5. Make any necessary changes to the Budget Setup. Click Go To Budget.



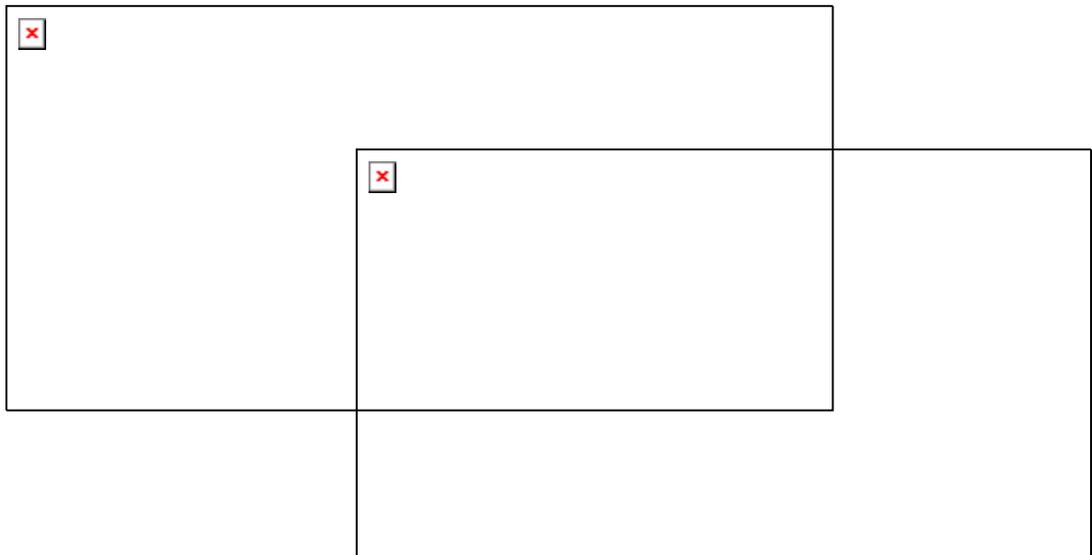
6. Update the budget items, as needed, and click on Submit.

Budget Maintenance

Task	Total
	\$0.00
A. COST OF PROJECT:	2,832,835.00
Construction	2,000,000.00
Contract 2-Tanks	1,250,000.00
Contract 1-line work	750,000.00
Technical Services	277,700.00
Design Fees (D)	80,000.00
Preliminary Design (D)	40,000.00
Final Design (D)	40,000.00
Study and Report	8,000.00
Bidding and Negotiation	5,000.00
Construction (C)	80,000.00
Resident Project Representative (C)	60,000.00
Engineering During Construction (C)	20,000.00
Project Contingency	30,135.00
Construction Contingency	200,000.00
B. COST OF FINANCING	0.00
Funded Reserves	0.00
Registrar Fees	0.00
Bond Counsel	0.00
Capitalized Interest	0.00
Printing/Registrar	0.00

Submit Save Save and Modify Budget Setup

7. After the budget has been successfully submitted a new icon will appear at the bottom of the screen allowing you to View Report. Once opened, you can also save a copy of the report for your files. A copy is also placed under your Completed Project Forms tab within the system.

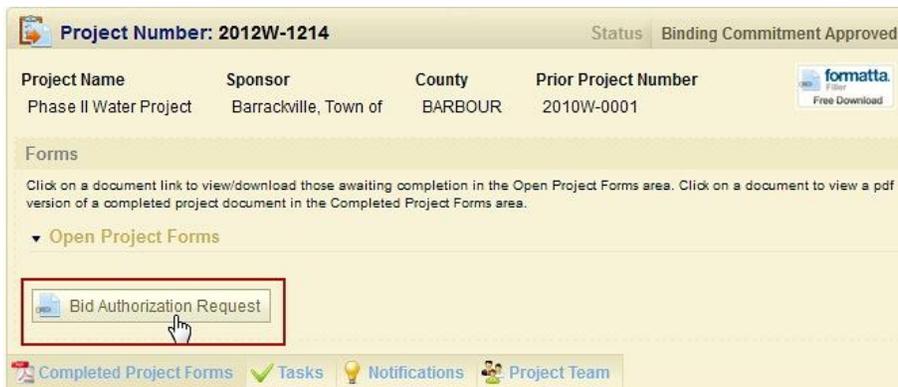


Bid Authorization Request (Engineer)

The Bid Authorization Request allows the Engineer to quickly and easily attach necessary documents as they are received.

Steps for Completing the Bid Authorization Request (Checklist)

1. Login to the system and go to the Project Dashboard home page.
2. Conduct a Quick Search for the appropriate project on the Project Dashboard home page or search within the Your Projects tab.
3. Click on the appropriate Project Number to open the Project page.
4. Click on Bid Authorization Request.



Project Number: 2012W-1214 Status: Binding Commitment Approved

Project Name	Sponsor	County	Prior Project Number
Phase II Water Project	Barrackville, Town of	BARBOUR	2010W-0001

Forms

Click on a document link to view/download those awaiting completion in the Open Project Forms area. Click on a document to view a pdf version of a completed project document in the Completed Project Forms area.

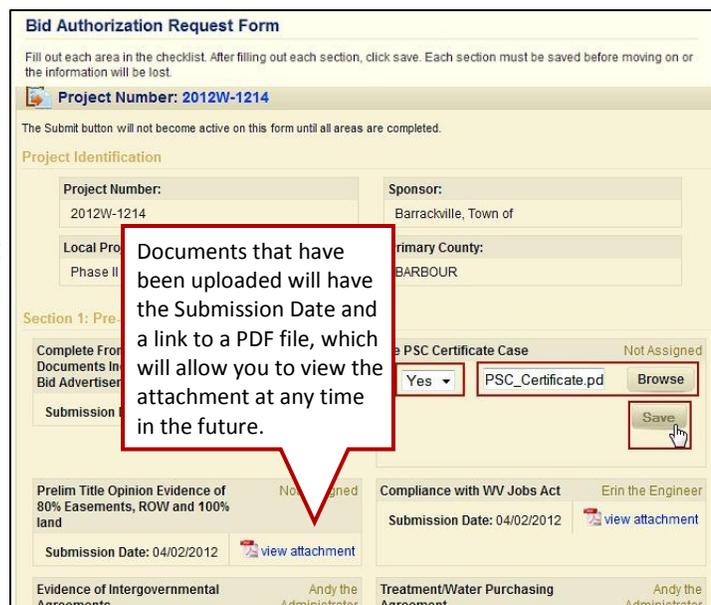
▼ Open Project Forms

[Bid Authorization Request](#)

Completed Project Forms Tasks Notifications Project Team

5. Attach each of the required documents. Choose Yes from the drop down menu. (If a document is not applicable for this project, choose NA from the drop down menu.) Click Browse to select the document for uploading. Click Save.

You must click Save after uploading each document or marking it NA.



Bid Authorization Request Form

Fill out each area in the checklist. After filling out each section, click save. Each section must be saved before moving on or the information will be lost.

Project Number: 2012W-1214

The Submit button will not become active on this form until all areas are completed.

Project Identification

Project Number: 2012W-1214	Sponsor: Barrackville, Town of
Local Project: Phase II	Primary County: BARBOUR

Section 1: Pre-

Complete From Documents In Bid Advertiser	Submission	PSC Certificate Case Yes	Not Assigned PSC_Certificate.pdf	Browse	Save
---	------------	-----------------------------	-------------------------------------	--------	------

Prelim Title Opinion Evidence of 80% Easements, ROW and 100% land
Not Assigned
Submission Date: 04/02/2012 view attachment

Compliance with WV Jobs Act
Erin the Engineer
Submission Date: 04/02/2012 view attachment

Evidence of Intergovernmental Agreements
Andy the Administrator

Treatment/Water Purchasing Agreement
Andy the Administrator

6. After uploading and saving the document, the Task gets marked as completed under the Tasks tab and is removed from your Monthly Reporting.



7. The final step in completing the Bid Authorization Request is to click Submit. The Submit button will only be enabled after all of the required documents have been uploaded.

The diagram consists of a large white rectangular area with a black border. In the top-left corner of this area is a small square icon with a red 'X'. On the left side, there is a blue rectangular box containing the text: "The Bid Authorization Pre-Bid Schedule B must be submitted prior to submitting this checklist." On the right side, there is a red callout box containing the text: "The Submit button will only be enabled after all the required documents have been uploaded."

Bid Underrun or Overrun Request (Administrator)

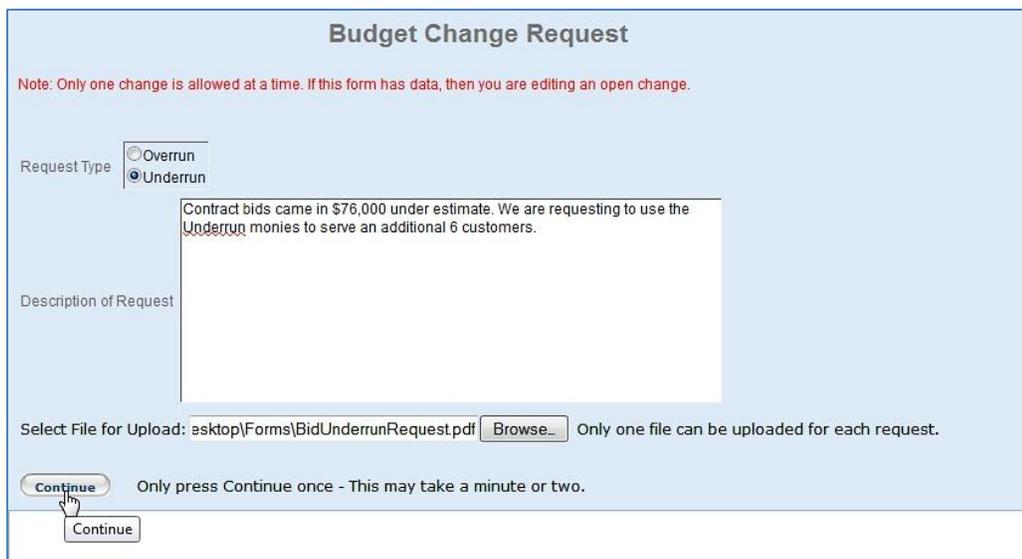
This is an optional step in the process and only required if the lowest bidder comes in either under or over what was budgeted. This form must be approved by the IJDC Council before a contract can be awarded to the lowest bidder.

Steps for Completing the Bid Underrun or Overrun Request (Optional)

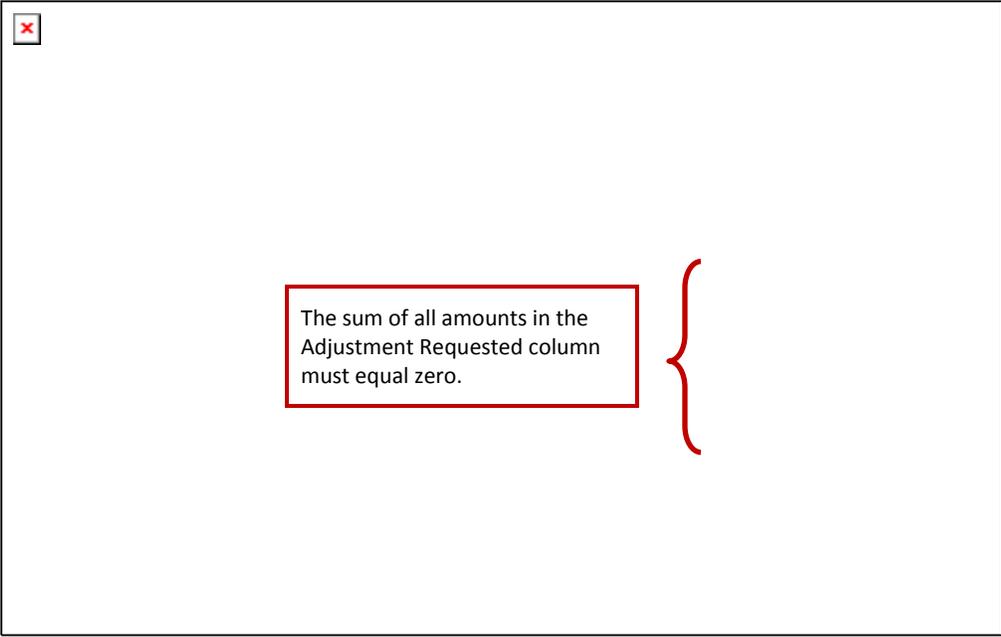
1. Login to the system and go to the Project Dashboard home page.
2. Conduct a Quick Search for the appropriate project on the Project Dashboard home page or within the Your Projects tab.
3. Click on the appropriate Project Number to open the Project page.
4. Click on Bid Underrun or Overrun Request.



5. Complete the Budget Change Request form by selecting whether it is an Underrun or Overrun. Provide a description and attach documentation related to the request. Click Continue.



- 6. Make adjustments to the Budget Change Processing page that reflect the pending request.



- 7. After all the necessary changes have been made, click Submit at the bottom of the Budget Maintenance screen.



Closing Post-Bid Schedule B (Administrator)

The next step in the process is to complete the Closing Post-Bid Schedule B.

Steps for Completing the Closing Post-Bid Schedule B

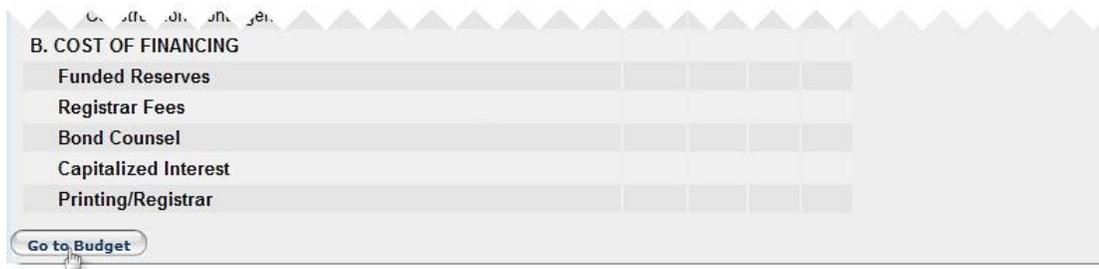
1. Login to the system and go to the Project Dashboard home page.
2. Conduct a Quick Search for the appropriate project on the Project Dashboard home page or search within the Your Projects tab.
3. Click on the appropriate Project Number to open the Project page.
4. Click on the Closing Post-Bid Schedule B.



5. Make adjustments to the Budget Setup Page that reflect the final budget requested..



6. Click on Go To Budget at the bottom of the screen.



7. Make any necessary changes to the Budget Maintenance, then click Submit.

Budget Maintenance

Task	Total	DWTFR SRF Non-DIS	JJDC District Loan3
A. COST OF PROJECT:	2,832,835.00	2,000,000.00	873,335.00
Construction	2,000,000.00	2,000,000.00	0.00
Contract 2-Tanks	1,250,000.00	1,250,000.00	0.00
Contract 1-line work	674,000.00	674,000.00	0.00
Bid Underrun-additional 6 customers	76,000.00	0.00	76,000.00
Technical Services	277,700.00	0.00	310,200.00
Design Fees (D)	80,000.00	0.00	80,000.00
Preliminary Design (D)	40,000.00	0.00	40,000.00
Final Design (D)	40,000.00	0.00	40,000.00
Study and Report	8,000.00	0.00	8,000.00
Bidding and Negotiation	5,000.00	0.00	5,000.00
Construction (C)	80,000.00	0.00	80,000.00
Resident Project Representative (C)	60,000.00	0.00	60,000.00
Engineering During Construction (C)	20,000.00	0.00	20,000.00
Operation	12,000.00	0.00	12,000.00
Special Services (SS)	92,700.00	0.00	133,200.00
Geotechnical Engineering (SS)	5,000.00	0.00	5,000.00
Establish/Demonstrate Design Criteria (SS)	4,500.00	0.00	4,500.00
Land Surveys and Easement Prep (SS)	6,000.00	0.00	6,000.00
Engineering and Topo Surveys (SS)	6,000.00	0.00	6,000.00
Materials and Equip Inspections (SS)	8,000.00	0.00	8,000.00
Additional Copies of Eng. Documents (SS)	7,000.00	0.00	7,000.00
Extra Travel and Subsistence (SS)	4,000.00	0.00	4,000.00
Value Engineering (SS)	5,000.00	0.00	5,000.00
Redesign Requested or Approved by Client (SS)	5,500.00	0.00	5,500.00
Expert Witness Before Agencies (SS)	5,400.00	0.00	5,400.00
Final Investigations (SS)	7,600.00	0.00	7,600.00
Preparation of Funding Applications (SS)	4,000.00	0.00	4,000.00
Land Planning and Partitioning Activities (SS)	6,300.00	0.00	6,300.00
Environmental Assessment Impact Statement (SS)	5,800.00	0.00	5,800.00
Additional Studies and Design Const. Special Conditions (SS)	0.00	0.00	0.00
Project Development Assistance (SS)	7,000.00	0.00	7,000.00
Assessment of Completed Project (SS)	5,600.00	0.00	5,600.00
Legal & Fiscal	117,000.00	0.00	117,000.00
Local Project Attorney	45,000.00	0.00	45,000.00
PSC Attorney	23,000.00	0.00	23,000.00
Lands and ROW Attorney	37,000.00	0.00	37,000.00
Project Accountant (CPA)	12,000.00	0.00	12,000.00
Loan Repayment	0.00	0.00	0.00
Cost During Construction	0.00	0.00	0.00
Special Services	0.00	0.00	108,000.00
Capitalized Inc.	0.00	0.00	0.00
Printing/Registrar	0.00	0.00	0.00

Draw Schedule Maintenance (Administrator)

The Administrator completes the Draw Schedule Maintenance Form to notify the IJDC of the expected draw amounts over time per funding source. This link will remain available on the Project Detail page so you can update the draw schedule monthly. A reminder will appear on the Project Dashboard when it is time to update and submit this form.

Steps for Completing the Draw Schedule Maintenance

1. Login to the system and go to the Project Dashboard home page.
2. Conduct a Quick Search for the appropriate project on the Project Dashboard home page or search within the Your Projects tab.
3. Click on the appropriate Project Number to open the Project page.
4. Click on Draw Schedule Maintenance to open.



5. Input the expected draw amounts for each of the Funding Sources and dates. Click Submit.

Funding Source	Total Amount	Drawn Amount	In Process	Remaining	Amt Entered	07/13	08/13	09/13
DWTFR SRF Non-DIS	2000000.00	0.00	0.00	2000000.00	2000000.00	300000.00	250000.00	275000.00
IJDC District1 Loan 3	832835.00	0.00	0.00	832835.00	832835.00	350000.00	82000.00	46000.00
	2,832,835.00	0.00	0.00	2,832,835.00	2,832,835.00	650,000.00	332,000.00	321,000.00

The 'Submit' button is highlighted with a red box.

Wiring Instructions Form (Administrator)

The Administrator completes the Wiring Instructions Form to ensure that the IJDC has all the relevant bank information for sending payments. This link will remain available on the Project Detail page should you need to make changes at a later date.

Steps for Completing the Wiring Instructions Form

1. Login to the system and go to the Project Dashboard home page.
2. Conduct a Quick Search for the appropriate project on the Project Dashboard home page or search within the Your Projects tab.
3. Click on the appropriate Project Number to open the Project page.
4. Click on the Wiring Instructions.



Project Number: 2012W-1214 Status: Bid Authorization Approved

Project Name	Sponsor	County	Prior Project Number
Phase II Water Project	Barrackville, Town of	BARBOUR	2010W-0001

Forms

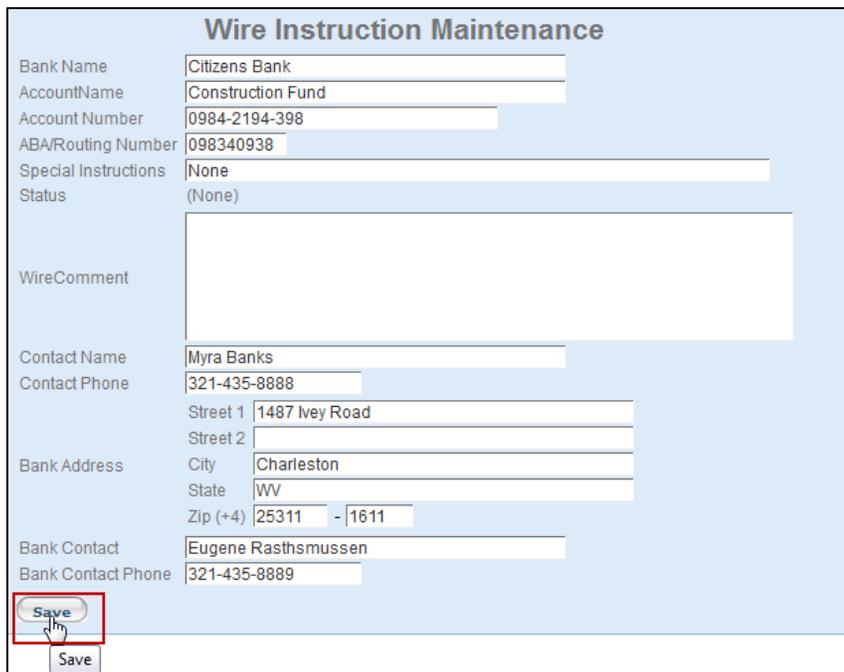
Click on a document link to view/download those awaiting completion in the Open Project Forms area. Click on a document to view a pdf version of a completed project document in the Completed Project Forms area.

▼ Open Project Forms

- Wiring Instructions Draw Schedule Maintenance
- Close wiring instructions

Completed Project Forms Tasks Notifications Project Team

5. Complete the form and click Save.



Wire Instruction Maintenance

Bank Name	Citizens Bank
AccountName	Construction Fund
Account Number	0984-2194-398
ABA/Routing Number	098340938
Special Instructions	None
Status	(None)
WireComment	
Contact Name	Myra Banks
Contact Phone	321-435-8888
Street 1	1487 Ivey Road
Street 2	
Bank Address	City Charleston
	State WV
	Zip (+4) 25311 - 1611
Bank Contact	Eugene Rasthsmussen
Bank Contact Phone	321-435-8889

Save

Closing Request (Administrator)

The Administrator will need to complete the Closing Request checklist to ensure all documents are submitted prior to closing. The Closing Post-Bid Schedule B, Draw Schedule Maintenance, and the Wiring Instructions Form must be completed prior to submitting the Closing Request.

Steps for Completing the Closing Request (Checklist)

1. Login to the system and go to the Project Dashboard home page.
2. Conduct a Quick Search for the appropriate project on the Project Dashboard home page or within the Your Projects tab.
3. Click on the appropriate Project Number to open the Project page.
4. Click on Closing Request.



5. Attach each of the required documents. Choose Yes from the drop down menu. (If a document is not applicable for this project, choose NA from the drop down menu.) Click Browse to select the document for uploading. Click Save.

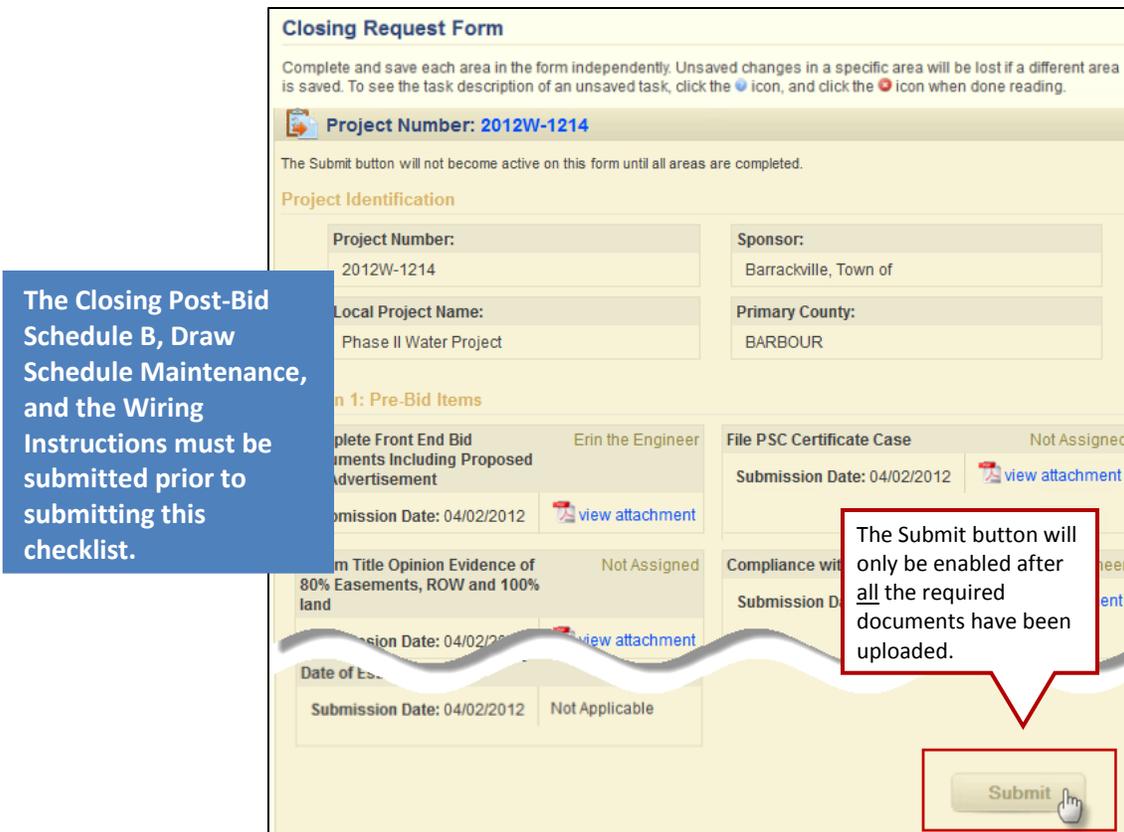
You must click Save after uploading each document or marking it NA.

The screenshot shows the 'Closing Request Form' for Project Number 2012W-1214. The form includes sections for Project Identification, Wiring Instructions, and Approvals. A red box highlights the 'Wiring Instructions' link, and another red box highlights the 'Save' button. A callout box points to the 'view attachment' link for the 'Approved DEP Permit' section, stating: 'Documents that have been uploaded will have the Submission Date and a link to a PDF file, which will allow you to view the attachment at any time in the future.'

- After uploading and saving the document, the Task gets marked as completed under the Tasks tab and is removed from your Monthly Reporting.



- The final step in completing the Closing Request is to click Submit. The Submit button will only be enabled after all of the required documents have been uploaded.



Project Draws

Draw Request (Administrator)

The process for submitting draw requests is quick and easy.

Steps for Completing the Draw Request

1. Login to the system and go to the Project Dashboard home page.
2. Conduct a Quick Search for the appropriate project on the Project Dashboard home page or within the Your Projects tab.
3. Click on the appropriate Project Number to open the Project page.
4. Click on Draw Request to open the form.
5. Insert the appropriate date range, percentage of construction complete, draw resolution documentation, and related invoices.
6. Enter the request amounts in the appropriate fields
7. Click Submit.



Draw Request Form

Project Number: 2012W-1214 Requisition Number: 1

Date Range: From 03/01/12 To 03/31/12

Construction % Complete: 0.05

Select File to Attach Resolution:

Select File to Attach Invoices:

Title	Approved Budget	Previously Approved	Remaining Balance	Amount Requested	Revised Balance
IJDC District1 Loan 3 - \$832,835.00					
A. COST OF PROJECT:	\$ 832,835.00	0.00	832,835.00	338,000.00	494,835.00
Construction	\$ 0.00	0.00	0.00	0.00	0.00
Contract 2-Tanks	\$ 0.00	0.00	0.00	0.00	0.00
Contract 1-line work	\$ 0.00	0.00	0.00	0.00	0.00
Bid Underrun-additional 6 customers	\$ 0.00	0.00	0.00	0.00	0.00
Technical Services	\$ 277,700.00	0.00	277,700.00	93,000.00	184,700.00
Design Fees (D)	\$ 80,000.00	0.00	80,000.00	60,000.00	20,000.00
Preliminary Design (D)	\$ 40,000.00	0.00	40,000.00	<input type="text" value="40,000.00"/>	80,000.00
Final Design (D)	\$ 40,000.00	0.00	40,000.00	<input type="text" value="20,000.00"/>	60,000.00
Study and Report	\$ 8,000.00	0.00	8,000.00	<input type="text" value="8,000.00"/>	0.00
Bidding and Negotiation	\$ 5,000.00	0.00	5,000.00	<input type="text" value="5,000.00"/>	0.00
Construction (C)	\$ 80,000.00	0.00	80,000.00		80,000.00
Bond Counsel	\$ 0.00	0.00	0.00	0.00	0.00
Capitalized Interest	\$ 0.00	0.00	0.00	0.00	0.00
Printing/Registrar	\$ 0.00	0.00	0.00	0.00	0.00

Budget Revision (Administrator)

To make any changes to the finalized budget, you will need to complete the Budget Revision Form.

Steps for Completing the Budget Revision

1. Login to the system and go to the Project Dashboard home page.
2. Conduct a Quick Search for the appropriate project on the Project Dashboard home page or within the Your Projects tab.
3. Click on the appropriate Project Number to open the Project page.
4. Click on Budget Revision to open the form.
5. Complete the form by clicking on all of the reasons for the change that are applicable, entering your Change Order/Number and the Engineering Addendum/Number, providing a Description of the Request, and uploading the related documentation.
6. Click Confirm and wait for the Budget Change Processing screen to appear.



Budget Change Request

Note: Only one change is allowed at a time. If this form has data, then you are editing an open change.

Revision(check all that apply):

<input checked="" type="checkbox"/>	Change Order/Number	<input type="text" value="Change order 1-1"/>
<input checked="" type="checkbox"/>	Engineering Addendum/Number	<input type="text" value="Addendum 1"/>
<input type="checkbox"/>	Budget Revision	
<input type="checkbox"/>	Use of Contingency	

Description of Request

Contractor encountered less rock than anticipated. Engineering during construction has been updated to reflect change.

Select File for Upload: Only one file can be uploaded for each request.

Only press Continue once - This may take a minute or two.

7. Update the Budget to reflect the changes you are requesting. Click on Submit.

Budget Change Processing

To process a change, enter appropriate positive and negative amounts to move funds from one line to another. The sum of all amounts for each Adjustment Requested column must equal zero.

Title	IJDC District1 Loan 3 - \$832,835.00		
	Current Balance	Requested Adjustment	Revised Balance
A. COST OF PROJECT:	832,835.00	0.00	832,835.00
Construction	0.00	0.00	0.00
Contract 2-Tanks	0.00	<input type="text" value="0.00"/>	0.00
Contract 1-line work	0.00	<input type="text" value="0.00"/>	0.00
Bid Underrun-additional 6 customers	0.00	<input type="text" value="0.00"/>	0.00
Technical Services	277,700.00	-7500.00	270,200.00
Design Fees (D)	80,000.00	0.00	80,000.00
..... Preliminary Design (D)	40,000.00	<input type="text" value="0.00"/>	40,000.00
..... Final Design (D)	40,000.00	<input type="text" value="0.00"/>	40,000.00
Study and Report	8,000.00	<input type="text" value="0.00"/>	8,000.00
Bidding and Negotiation	5,000.00	<input type="text" value="0.00"/>	5,000.00
Construction (C)	80,000.00	-7500.00	72,500.00
..... Resident Project Representative (C)	60,000.00	<input type="text" value="0.00"/>	60,000.00
..... Engineering During Construction (C)	20,000.00	<input type="text" value="-7500.00"/>	12,500.00
Operation	0.00	<input type="text" value="0.00"/>	0.00
Easement	0.00	<input type="text" value="0.00"/>	0.00
Fee Takes	0.00	<input type="text" value="0.00"/>	0.00
Contingency	230,135.00	7500.00	237,635.00
Project Contingency	30,135.00	<input type="text" value="7500.00"/>	37,635.00
Construction Contingency	200,000.00	<input type="text" value="0.00"/>	200,000.00
B. COST OF FINANCING	0.00	0.00	0.00
Funded Reserves	0.00	<input type="text" value="0.00"/>	0.00
Registrar Fees	0.00	<input type="text" value="0.00"/>	0.00
Bond Counsel	0.00	<input type="text" value="0.00"/>	0.00
Capitalized Interest	0.00	<input type="text" value="0.00"/>	0.00
Printing/Registrar	0.00	<input type="text" value="0.00"/>	0.00

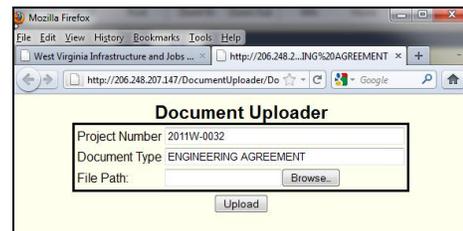
The sum of all amounts in the Adjustment Requested column must equal zero.

ENSURING SUCCESS

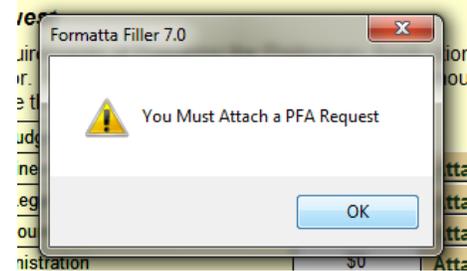
Using Formatta Filler

- **Attachments**

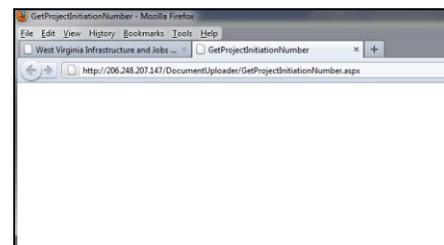
- **PDFs only** – All attachments must be saved as PDF files for uploading. See the Saving Files section of the User Guide for instructions on saving documents as PDF files.
- **Uploading** – After clicking on Attach, a Document Uploader pop-up will appear. The Document Type will be indicated. Click **Browse** to select the appropriate file from your computer then click on **Upload** to complete the process.



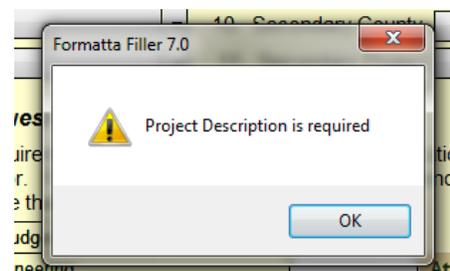
- **Missing attachments** – After clicking Save & Submit, Formatta Filler will notify you via a pop-up of any missing attachments. The attachment name will be shown and you will be brought to the appropriate page on the form to correct the error. The process will be repeated each time you click Save & Submit until all required attachments are included.



- **Get Project Initiation Number** – After clicking on the Project Initiation Form, a blank window may appear with the title of GetProjectInitiationNumber. This window is used by the system to generate a Project Number and does not require any action on your part. Simply close out of the window to remove it from your screen.



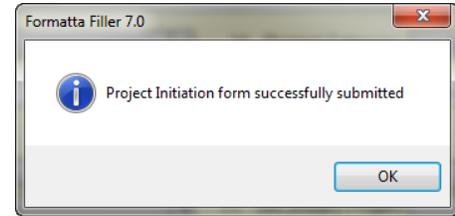
- **Missing information** – After clicking Save & Submit, Formatta Filler will notify you via a pop-up of any missing information. The information required will be indicated and you will be brought to the appropriate page on the form to correct the error. The process will be repeated each time you click Save & Submit until all required information is included.



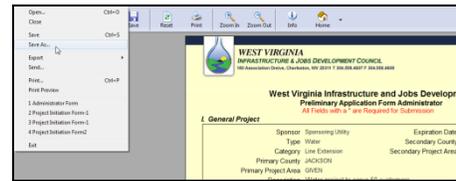
- **Required fields** – On each of the forms, required fields are marked with an asterisks (*) and with a pop-up bubble. The pop-up bubble can be turned off by going to view and un-checking Bubble Tips.



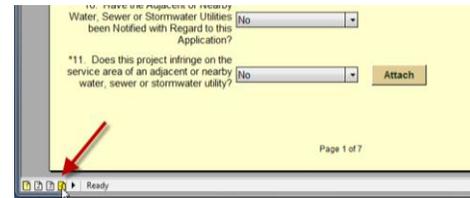
- **Saving and submitting forms** – After clicking on Save & Submit, Formatta Filler will send the completed form to the IJDC and open a window that will allow you to save the form to your computer. Another pop-up window will confirm that your form was submitted.



- **Saving partially completed forms** – Partially completed forms can be saved for completion at a later date by going to File and choosing Save As from the drop down menu.

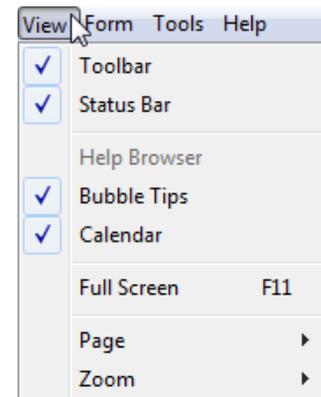


- **Skipping pages** – Use the Status Bar in the lower left hand corner of the window to skip over pages. This feature is especially helpful when you have to go back to fill-in a piece of information or add an attachment and don't want to advance through every single page.



- **Tab between fields** – The most efficient way to use Formatta Filler is to tab between the fields. Formatta Filler will automatically place your cursor in the next required field based on your prior answer. If a field is not required, Formatta Filler will skip over it.
- **View features** – Under the View tab you can customize various features within Formatta Filler:

- **Tool Bar** – To create more room on your screen un-check the Tool Bar feature.
- **Status Bar** – The Status Bar can also be removed by un-checking Status Bar, but this is a helpful feature for skipping over pages.
- **Calendar** – If you prefer to enter dates manually, you can turn off the calendar feature by going to View and un-checking Calendar from the drop down menu.
- **Bubble Tip** – Uncheck the Bubble Tips to turn off pop-up notifications such as “Required” fields.



Resources

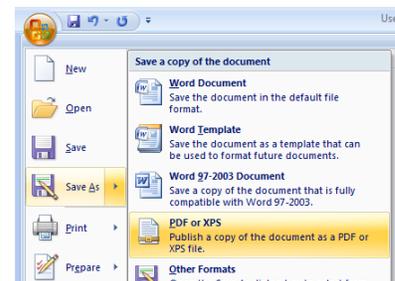
- **User Guide** – This User Guide contains step-by-step instructions for completing the on-line application process.
- **Project Dashboard** – The Project Dashboard contains all the information and resources you need to complete the online application process including helpful links to external resources.
- **Help Desk** – Contact the IJDC Help Desk for additional support:
 - Phone: 304.414.6501
 - Fax: 304.558.4609
 - Email: HelpDesk@wwwda.org

Saving files

- **Naming** – Your file names do not have to match what they are called within the IJDC system, however, it is recommended when saving your files that you give them a name that provides insight into what is contained within the file and contains reference to your project to help you locate the file when needed. All files are renamed to match IJDC's standard naming once they are uploaded.

To rename a document in Windows, right click on the file and choose Rename on the menu list. The file's label will be temporarily changed to editable text. Type the new file name and click enter.

- **PDFs** – **All documents must be saved as PDFs** before being attached to any of the forms. Microsoft Office documents can be saved as PDFs by clicking on the Office Button in the upper left hand corner of the screen, then Save As, then PDF or XPS. Give the file a name and click Publish.



- **Scanning** – Tips for minimizing the size of files being uploaded include:
 - High DPI and color scanning should be avoided unless absolutely necessary.
 - Whenever possible 8 ½ x11 documents should be scanned black and white at 200 DPI.
 - If items need to be scanned for clarity, a grey scale option at 150 DPI should be tested for quality. High contrast color documents and high detail plans/drawings may require the scanning changes to be tweaked.

Technology issues

- **Browser** – It is recommended that you use Internet Explorer 8 or greater to ensure that you have access to all of the features and functions of the online application.
- **Bandwidth** – Please contact the Help Desk immediately if you are experiencing any technical or bandwidth issues after implementing the tips listed above in the Saving Files section.
- **Uploads** – It is helpful to store all project documents in one folder to help with quick uploads. If you are having trouble uploading a document, please check to see if it has been saved as a PDF file. Only PDF files will be accepted for uploads. If you are still having difficulty, please contact the IJDC Help Desk at HelpDesk@wwwda.org.
- **Email Notifications** – To ensure you receive the emails sent by the IJDC related to your project status, add imageadmin@wwwda.org to your safe sender list or address book within email to prevent it from potentially being filtered as junk mail or spam.

Training

- **Notifications on future training** – Periodic training updates may be required at the discretion of the IJDC. You will be notified via email if re-certification or training updates are available and required.
- **Online Training** – Contact the Help Desk or check the website for training updates and a link to the online self-paced training.