United States Department of Agriculture
Rural Development

RD Apply – Application Intake

Electric Customer
User Guide

Updated May 17, 2018

Version 2.5

TABLE OF CONTENTS

WELCOME TO RD APPLY

1.0 WHAT IS RD APPLY?

RD Apply is an application intake system that allows you to apply electronically for loans and grants for Rural Utility Services (RUS) Programs. Instead of asking you to mail in a paper application, a process that can be slow and unwieldly, you can now access the system and begin work on an application in a just a few minutes. Additionally, multiple users now have the ability to work on one to multiple applications from different locations simultaneously.

RD Apply uses checkmarks and X's to display whether or not a section is complete, so you can see the status of your application at a glance. As an added bonus, RUS Program staff will be able to login to the system and review your application, at any stage in the submittal process.

WHY IS RD APPLY IMPORTANT?

Convenience - The Internet allows customers access to information 24 hours a day and 7 days a week. For example, customers can fill out and submit their application any time of the day or night from their homes or offices.

Identity Security - Information submitted to the Federal Government remains safe and secure because every customer has a unique User ID and password; only authorized USDA employees can access the information.

Reduced Paper Consumption - Over time, RD Apply will save paper, which benefits the environment.

2.0 WHAT IS EAUTHENTICATION?

USDA eAuthentication is the system used by USDA agencies to enable customers to obtain accounts that will grant them access to USDA Web applications and services via the Internet. This includes tasks such as submitting forms electronically, completing surveys online, and checking the status of your USDA accounts.

USDA will only accept eAuthentication Accounts from individuals; USDA eAuthentication does not have the mechanism to issue accounts to businesses, corporations or other entities. To apply, visit Create an Account.

3.0 WHO CAN CREATE AN APPLICATION?

Any eligible entity can create an application if they have a Level 2 eAuthentication ID and are bound to a company. Once you have obtained a Level 2 eAuthentication ID you will be able to access RD Apply.

4.0 PROGRAMS THAT USE RD APPLY

Currently, the only programs that are using RD Apply are Electric, Telecommunications, and Water & Environmental. Eventually, more programs will be added into the system, allowing a wider range of customers to submit applications via RD Apply.

5.0 RD APPLY WEBSITES

To log into RD Apply, click here, or paste the following link into your web browser:
https://rdapply.sc.egov.usda.gov

To log into RD Apply's Construction Management module, click here or paste the following link into your web browser:

https://rdapply.sc.egov.usda.gov/Construction/

GETTING STARTED

6.0 Identity, Credential and Access Management (ICAM)

A Level 2 eAuthentication account allows RUS stakeholders to gain access to USDA Web site portals and applications such as RD Apply. Historically, this process could only be completed by physically meeting with a Local Registration Authority (LRA) to have your User ID and profile verified. However, we are now offering a new service called Identity, Credential and Access Management (ICAM) that allows you to apply for a Level 2 account online through a secure web interaction.

To register for a Level 2 account using ICAM, you will click here and select "Register for Level 2 Account." You will enter in your personal information, making sure to complete all the required fields. Once finished, click "Continue." A verification email will be sent to the email address provided.

Once the email is received, click the link to activate your account. Another email will populate prompting you to verify your identity. You will verify the information you inputted into the system when registering as well as entering your Social Security Number (SSN).

Note: The Social Security Number is not saved in this process. It is solely used so the system can present you with a series of four identifying questions.

After answering all the questions, the system will automatically verify the information and either approve or deny you for a Level 2 account. If you cannot verify your identity, you will need to visit a LRA in order to continue.

If you do not have sufficient data for a level 2 request, you will need to finish filling out your information before you can continue.

Note: You will need to see an LRA if you live outside of the fifty states. If you live inside the United States, a LRA is not necessarily needed in order to successfully register for, and receive, your level 2 eAuth account.

Electing to verify online will navigate you to a web page where the system will generate a series of four questions that you will need to answer successfully before your account is allowed access to RD Apply.

7.0 LINKING YOUR EAUTH ID TO A TAX IDENTIFICATION NUMBER

Some programs require you to be am Authorized Representative before you can create an application with them.

HOW DO I BECOME AN AUTHORIZED REPRESENTATIVE?

When you log into RD Apply, you will be taken to the Landing/Home Page. At the top of the screen will be a button called "Authorized Representative Request." Clicking it will generate a form where you can send a request to Rural Utilities Services Staff, asking for your eAuth ID to be linked to your entity's Tax Identification Number (TIN).

Completing the Authorized Representative Request

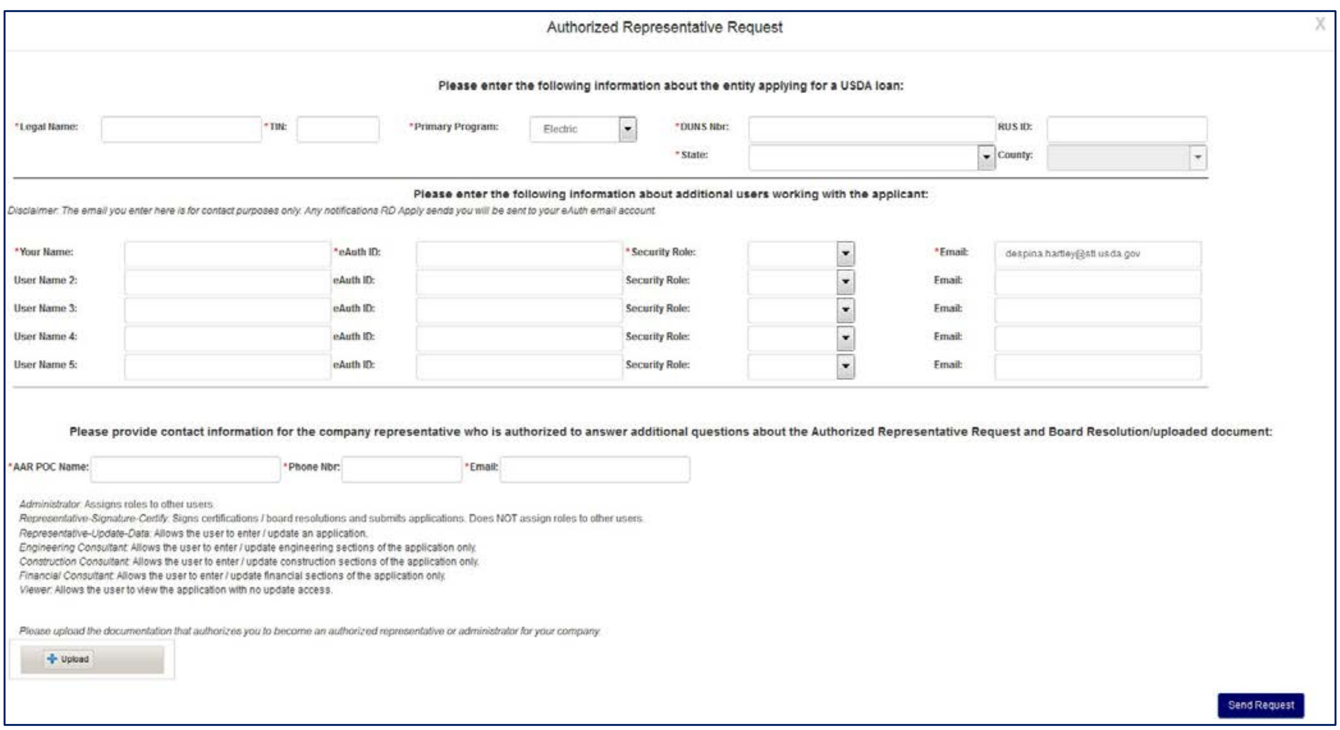
When you open the "Authorized Representative Request," you are required to fill out the legal name, TIN, and DUNS number of the entity that is applying. You will also need to select what the primary program will be, as well as the state you are primarily planning on working in.

After you enter your entity's information, you will need to enter your name, your eAuth ID, and which security role you would like to have. You can also enter up to four more users, to be associated with that same TIN.

Note: The email field will prepopulate with your eAuthentication email. You will be able to change it to a personal email, if you do not wish to be contacted at your eAuthentication email.

Once you have finished with the users section, enter your point of contact's information.

You will also need to upload any supporting documentation that grants you the authority to submit the Authorized Representative Request.



After you send in your Authorized Representative Request, Rural Utilities Services Staff will review it. Once it has been approved, they will link your eAuth ID to your Tax Identification Number and you will be able to login to RD Apply and create an application.

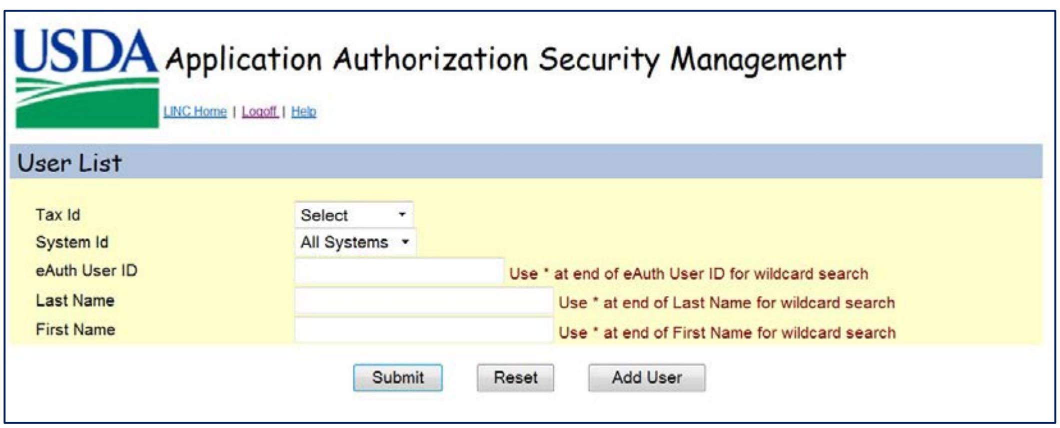
8.0 LINKING OTHER USERS TO YOUR TAX IDENTIFICATION NUMBER

After you have submitted the "Authorized Representative Request" and RUS Staff has accepted it, you will be able to log into the Application Authorization Security Management (AASM) website. Here, you will be able to search other users by their eAuthentication ID and link them to your specific Tax Identification Number.

In order to reach the AASM website, you will have to login to RD Apply. At the top of your screen, there will be a button titled "Admin." Clicking it will open the Application Authorization Security Management website in a new window.

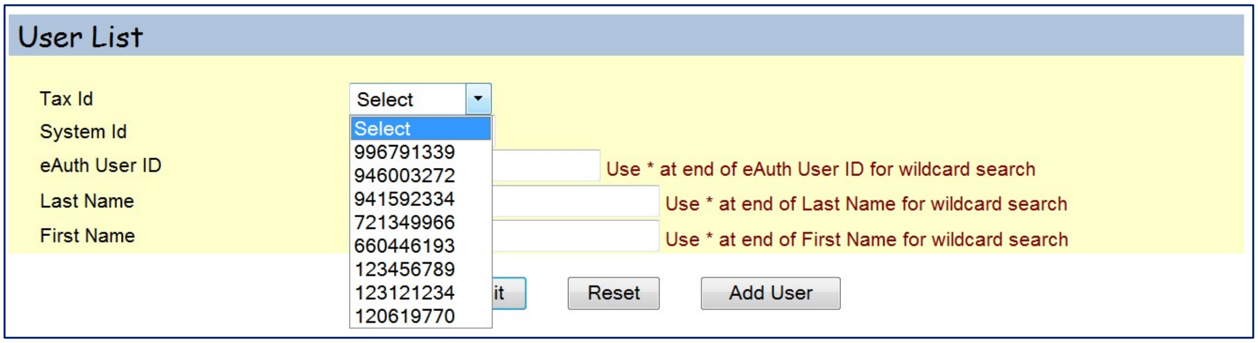
In order to access AASM, you must be assigned the **Administrator** or **Representative-Signature-Certify** role. Once you have logged in, click on the "Admin" button in the blue header bar.

Once you have clicked on the "Admin" button, AASM will open in a new window.

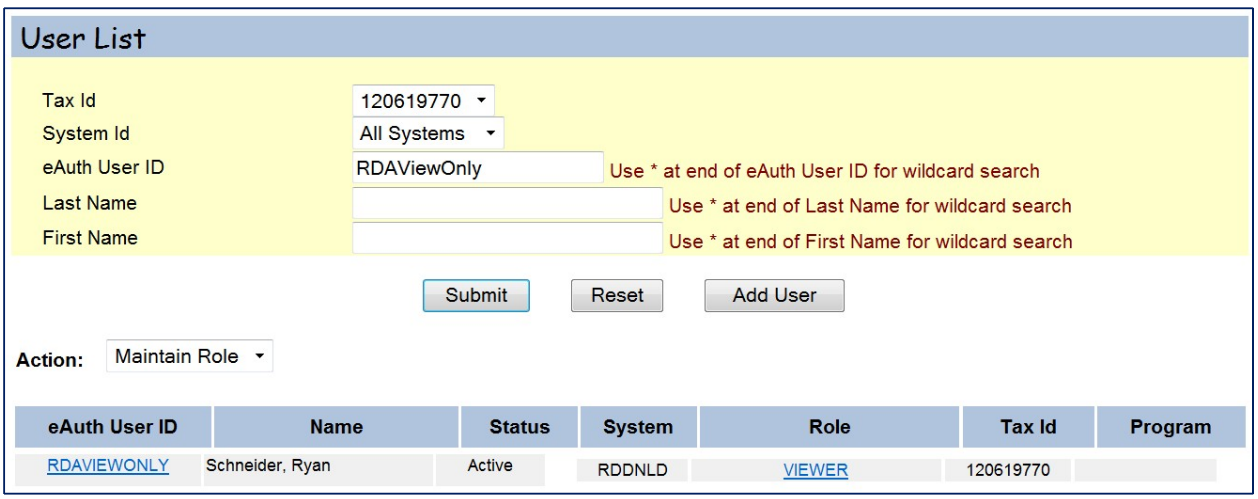


8.1 UPDATING AN EXISTING USER

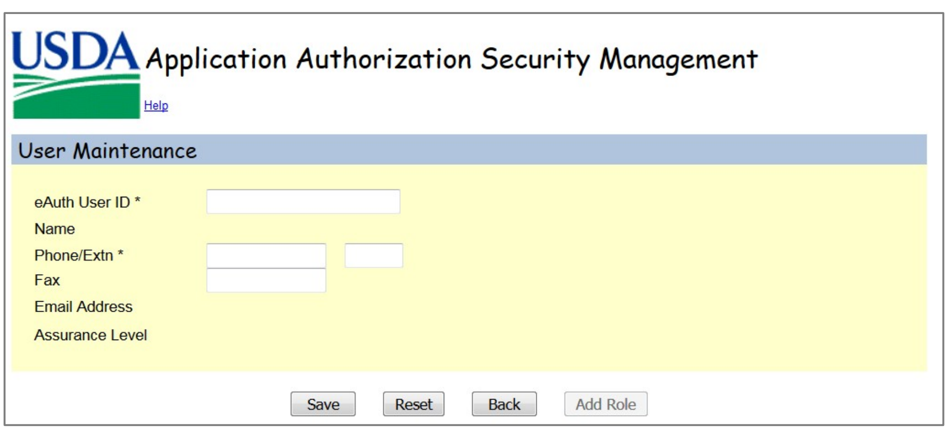
To search for a user, you must first select a Tax ID (TIN) from the dropdown box.



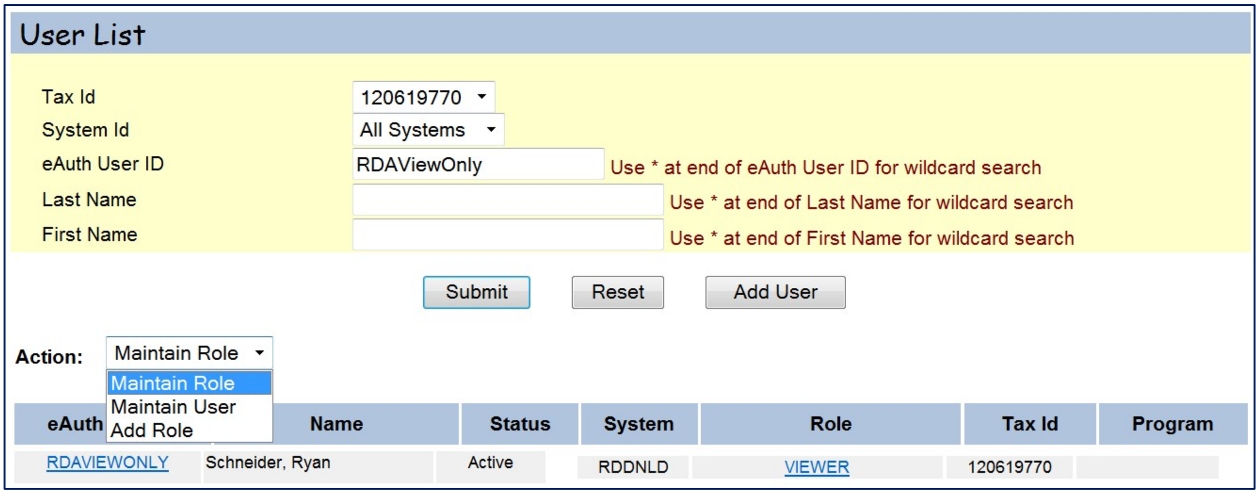
After you have selected a TIN, you can enter a user's eAuth User ID, to see if they are associated to that TIN. If they are associated, you will see what role they have been assigned.



If the user has not been added in AASM, click on the "Add User" button. You will be navigated to the following screen.



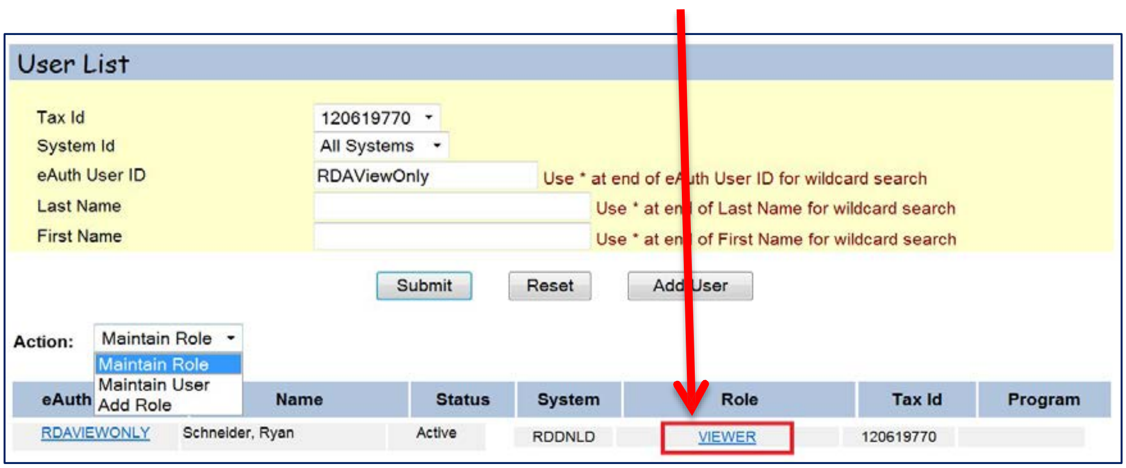
After you have successfully searched for a user, you have three options. You can either “Maintain Role,” “Maintain User,” or “Add Role.”



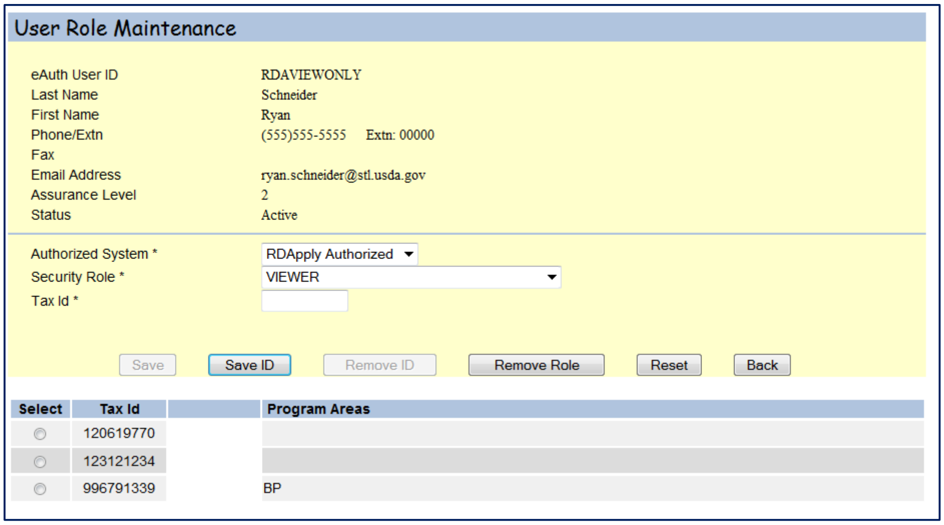
- **Maintain Role** - Allows you to maintain the role(s) assigned to a user
- **Maintain User** – Allows you to maintain the user’s contact information
- **Add Role** – Allows you to add a new security role to a customer. This is also how you add a user to a TIN

8.2 MAINTAINING A ROLE

If you select “Maintain Role,” you must click on the hyperlinked role to maintain the role.



When you click the role, you will be navigated to the following screen:

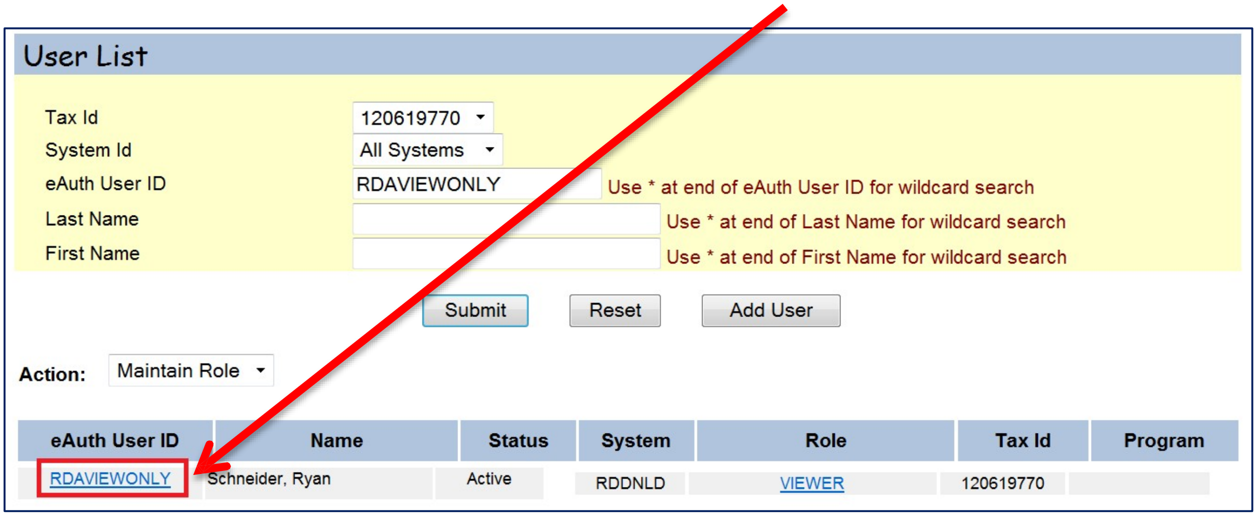


On this screen, you will see all of the TINs that the user has been assigned. In this case, these are all the TINs the user was assigned to as a "viewer."

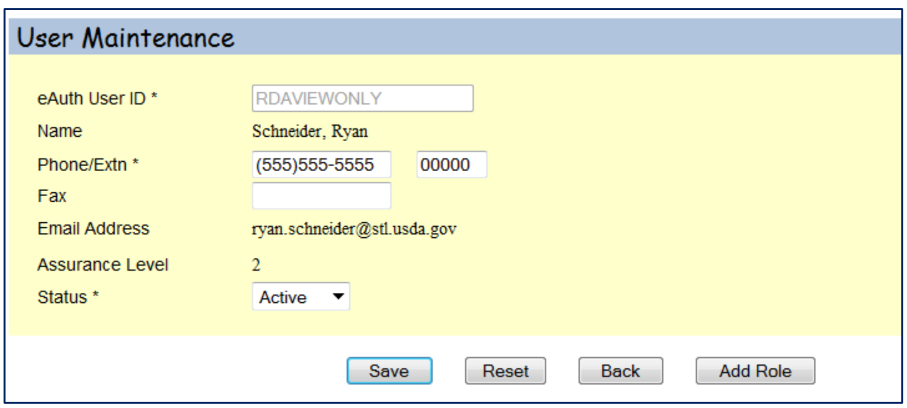
- **Save** – Enabled once you select a TINs. This lets you save any changes you make to the Authorized System, Security Role, or Tax ID.
- **Save ID** – Enabled when **no** TIN is selected, and disabled when you select a TIN. This lets you save any changes you make to the Authorized System, Security Role, or Tax ID.
- **Remove ID** – Enabled when you select a TIN. This lets you remove the user's role for a specific TIN.
- **Remove Role** - Enabled when **no** TIN is selected, and disabled when you select a TIN. This lets you completely remove the role of viewer for all TINs.
- **Reset** – Clears all your fields
- **Back** – This lets you go back to the previous screen, where you can see all the user's roles.

8.3 MAINTAINING A USER

If you select “Maintain User,” you must click on the hyperlinked eAuth User ID to maintain the user.



When you click the User ID, you will be navigated to the following screen:

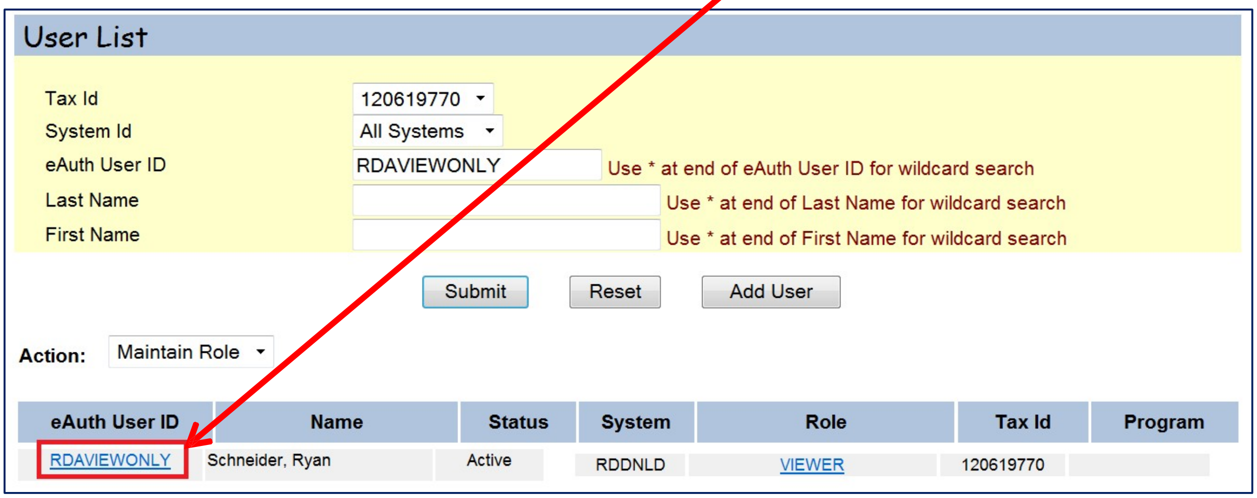


You can update the user’s phone number, fax number, and status. If the email address is incorrect, the user **must** login into their eAuthentication account and update their email there.

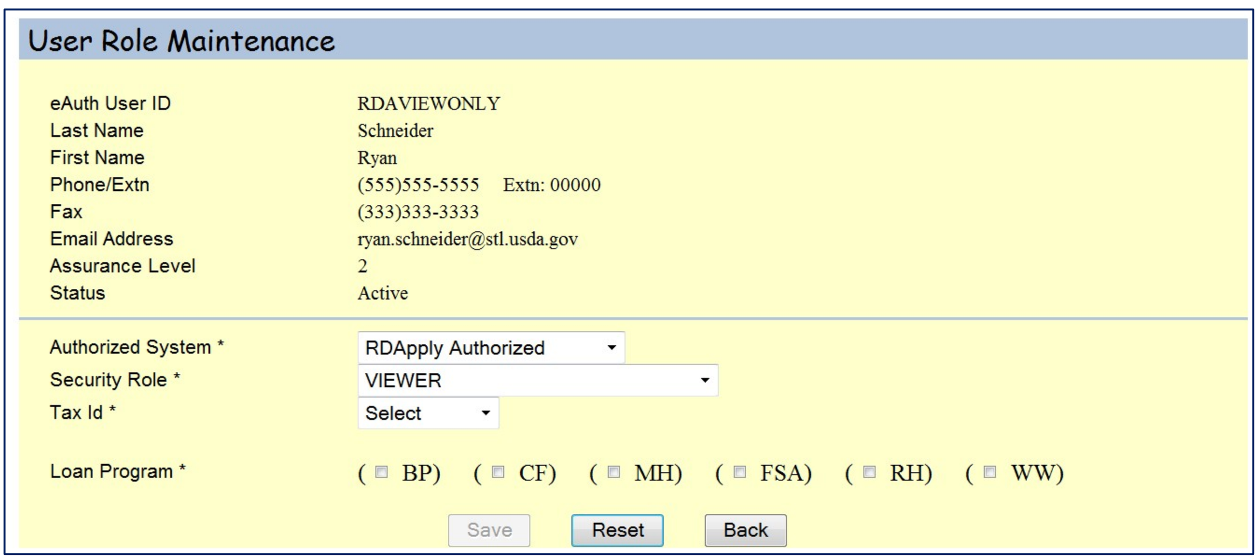
- **Save** – This lets you save your changes and return to the screen with all of the user’s roles
- **Reset** – Clears all your fields
- **Back** – This lets you go back to the previous screen, where you can see all the user’s roles.
- **Add Role** – This allows you to add a role and TIN to the user, the same way you would when maintain a role

8.4 ADDING A ROLE

If you select “Add Role,” you must click on the hyperlinked eAuth User ID to maintain the user.

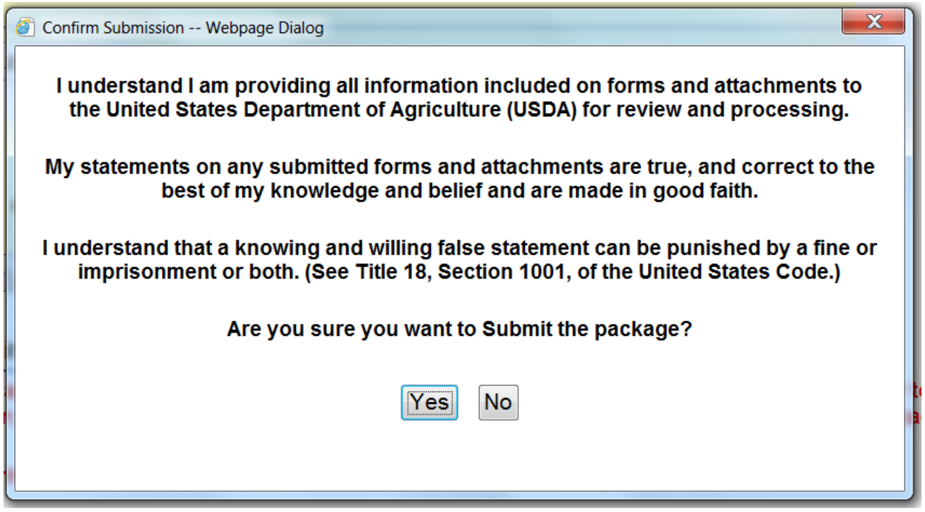


When you click the User ID, you will be navigated to the following screen:

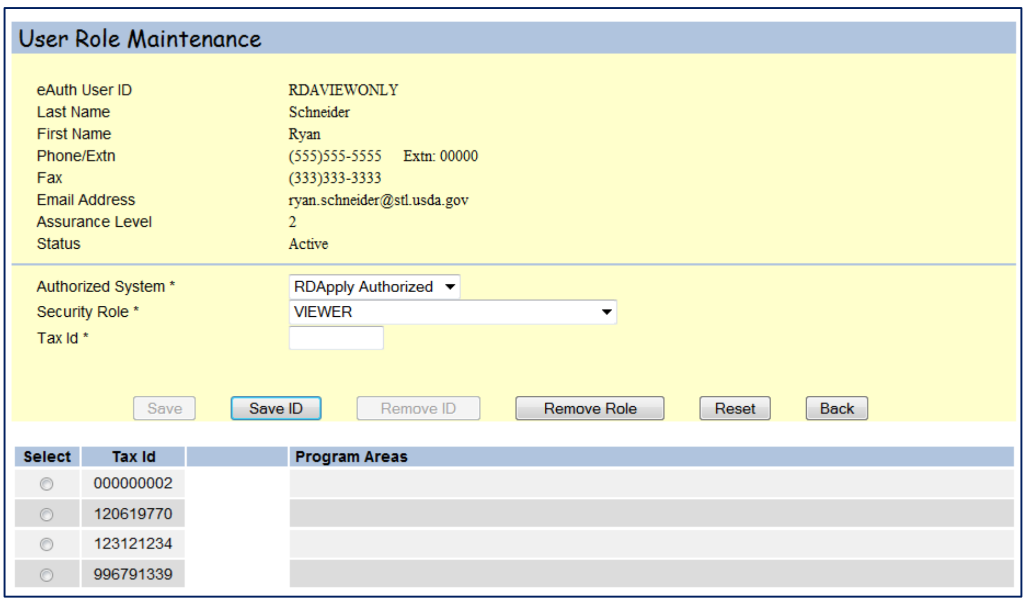


You will be able to select an Authorized System, a Security Role, and a TIN for this user. The Loan Program is not required to save a role for a user.

When you select the “Save” button, you will be asked the following statement:



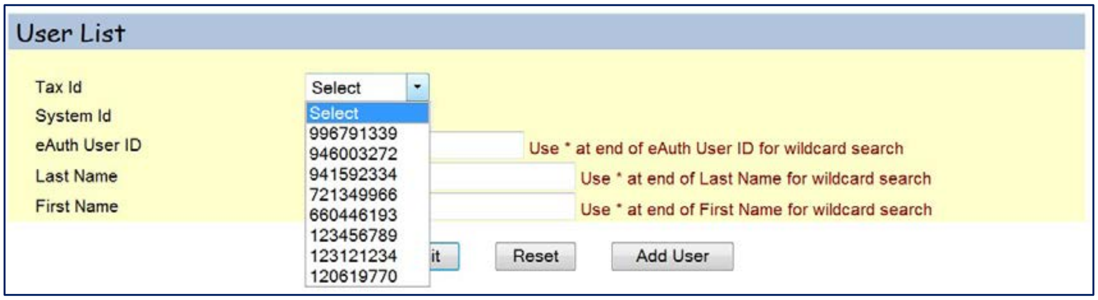
Once you click the “Yes” button, and successfully add a role, you will be directed to the following screen:



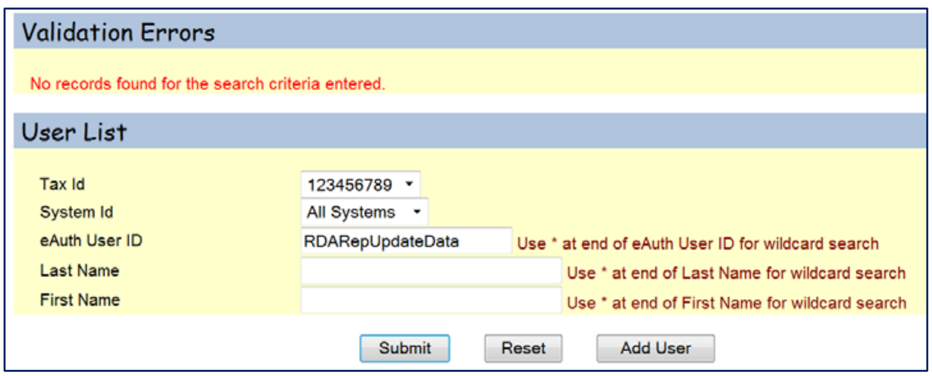
Here you will be able to maintain the user’s role. If you do not need to update any of the roles, click the “Back” button to return to the main page.

8.5 ADDING A NEW USER

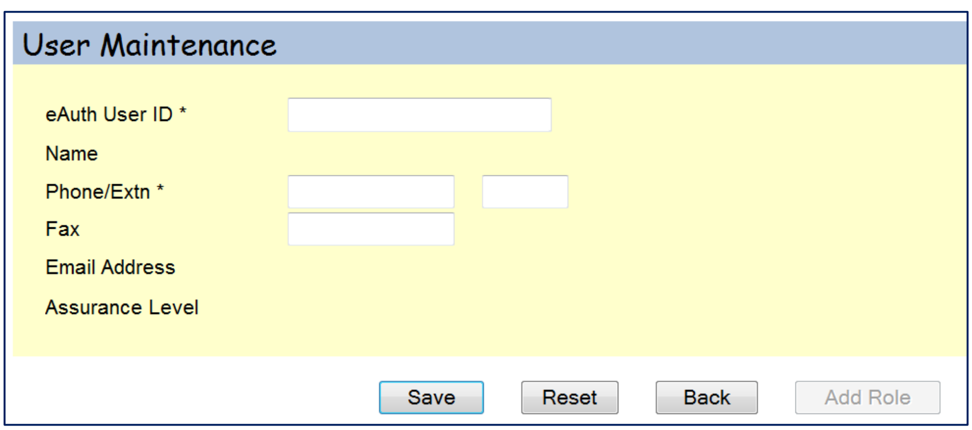
To search for a user, you must first select a Tax ID (TIN) from the dropdown box.



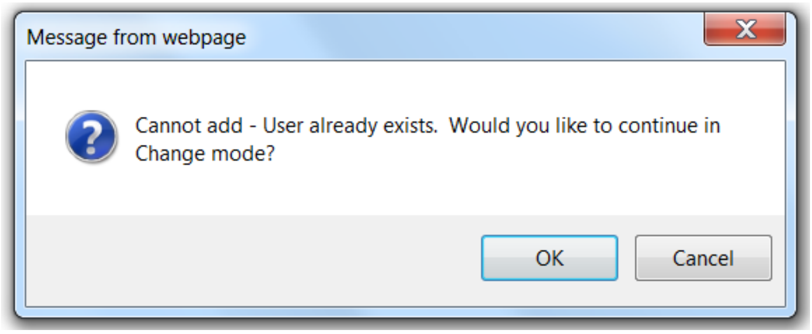
After you have selected a TIN, you can enter a user's eAuth User ID, to see if they are associated to that TIN. If they are not associated to that TIN, you will see this error message:



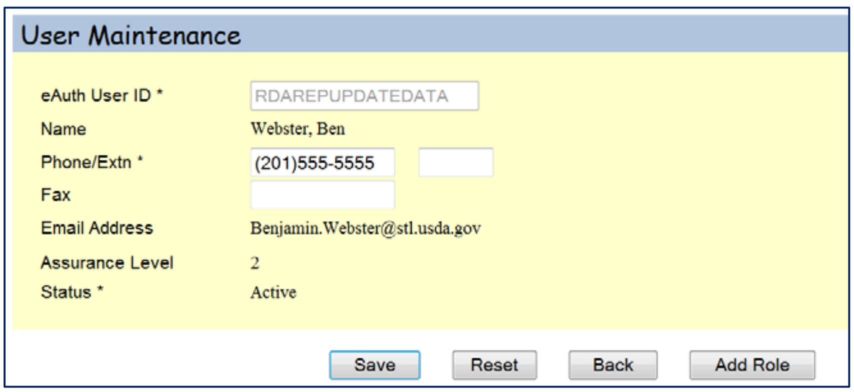
Since the user is not associated to that TIN, you will need to manually add them. To do that, you will need to click on the "Add User" button. You will be taken to the following screen:



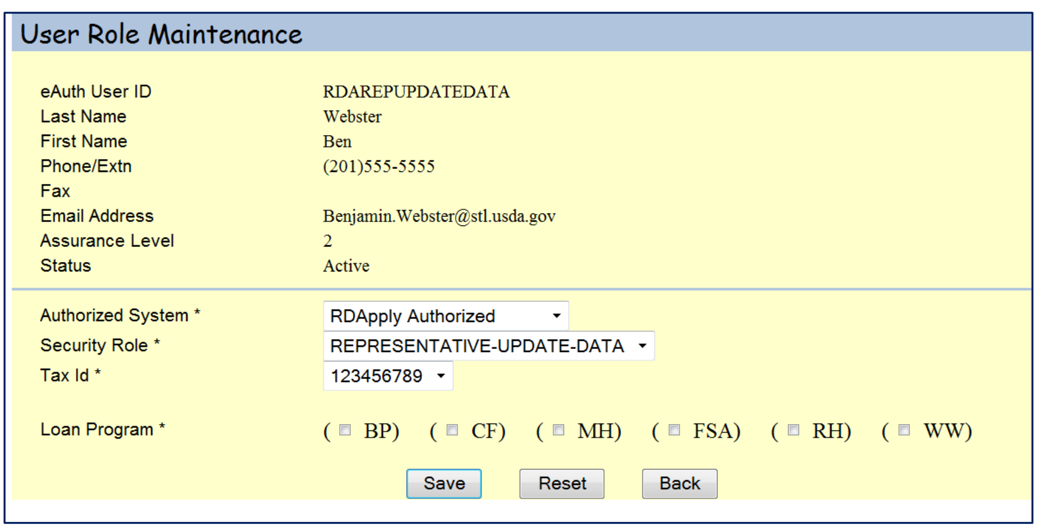
Type in the user's eAuth ID. When you tab away, the system will automatically search, and retrieve, any data about that user. If the user is already in the system, you will see this pop-up:



Clicking the "OK" button will take you to the User Maintenance screen.



Click the "Add Role" button to be taken to the User Role Maintenance screen. Once there, you can add the user to one of your existing TINs.



If the user was not in the system, you would still be taken to the "User Maintenance" screen, where you would need to enter the user's contact information and then click the "Save" button. Once you have saved, you may click the "Add Role" button to start adding the user to one of your TINs.

9.0 SECURITY ROLES

When you link other users to your Tax Identification Number, you will also be able to assign them a security role. These roles are what allow users to access your application. Unless you assign other users to your application as Administrators or Representative-Signature-Certify, you will be the only person able to assign other users access to your application.

Note: For more help on security roles please see: *Miscellaneous – Security Roles*

10.0 WHO CAN I CONTACT FOR HELP?

If you are experiencing problems with RD Apply, please contact the Help Desk.

E-mail: RD.HD@STL.USDA.GOV

Phone: **(**800)-457-3642; Select USDA Applications (Press 2); then select Rural Development (Press 2)

Hours: Monday through Friday – 7 a.m. to 5 p.m. (Central Standard Time)

Please be prepared to provide the following information:

- Legal Name of Organization
- eAuthentication ID
- Application ID Number
- Contact Person
- Phone Number
- Description of the specific problem
- Program you are applying for: Electric, Telecommunications, or Water & Environmental

CREATING AN APPLICATION

11.0 HOME PAGE

When you login into RD Apply, you will be taken to the Home Page. Before you can get started, you must first choose an account that you would like to work on. If you accidentally click on the wrong account, you can click “Switch Account” in the Header to bring up the Customer Select box again.

Select Customer Affiliation

TIN	Organization
999999999	Skurtu App
888888888	Test Application
	Other

Now that you have selected an account to work in, you can create a new application, submit an Authorized Representative Request, or access an existing application

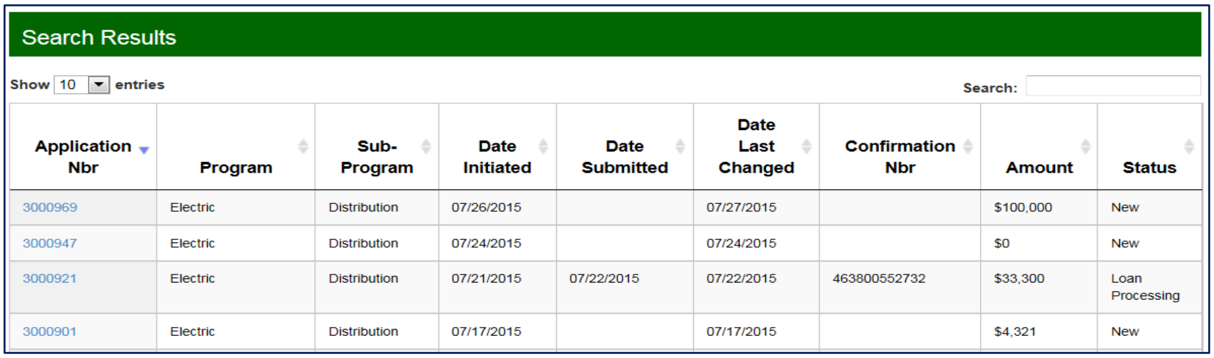
Clicking “+ Add New Application” will cause a pop-up window to appear. This is the beginning of the Interview Process.

Note: For more help on Interview Process, please see: *Interview Process*

Clicking “+ Authorized Representative Request” will allow you to request Authorized Representation for your application.

Note: For more help on Authorized Representation Request, please see: *Welcome to RD Apply - Linking your eAuth ID to a Tax Identification Number*

If you have already created an application, you can find it in the Search Results section.



Search Results

Show 10 entries Search:

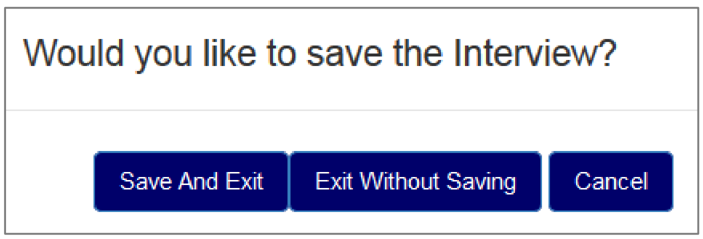
Application Nbr	Program	Sub-Program	Date Initiated	Date Submitted	Date Last Changed	Confirmation Nbr	Amount	Status
3000969	Electric	Distribution	07/26/2015		07/27/2015		$100,000	New
3000947	Electric	Distribution	07/24/2015		07/24/2015		$0	New
3000921	Electric	Distribution	07/21/2015	07/22/2015	07/22/2015	463800552732	$33,300	Loan Processing
3000901	Electric	Distribution	07/17/2015		07/17/2015		$4,321	New

To open your application, click the hyperlinked *Application Nbr*. You will be redirected to your application’s Customer screen.

12.0 INTERVIEW PROCESS

After you have clicked, "+ Add New Application" a series of Interview Question pop-ups will appear. Each answer to an interview question will determine what additional questions you will need to answer. Your answers to all of the interview questions will drive which screens will appear in the system and what documents will become required in order for you to submit a complete application.

If you are unable to complete the interview, click the "X" button in the upper right hand corner. This will create a new pop-up with three options. You can save and exit, exit your interview without saving, or cancel the exit process and return to your current interview.



If you are in the middle of an interview, and a different user tries to start a new interview, they will not be able to. Instead, they will see a pop-up, stating who is currently in an interview and to try again in a few moments.

If there is a saved interview, then the user will have the option to either start a new interview or continue the existing interview.

Note: For more help on required documents, please see: Electric Application Documents

13.0 INTERVIEW RECAP

Interview Recap is where you can see your interview answers. This is also where you can modify your answers if you need to change a previously submitted response.

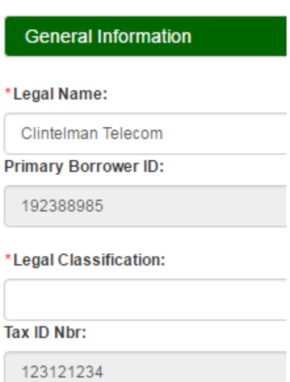
For example:

> John Smith originally said that he needed funds for a reimbursement. But a few months later, he realizes that he doesn't need reimbursements. John Smith would then need to go under the Interview tab, click the "Modify" button, and remove Reimbursements as part of his funds request.

Interview Recap

Question	Answer	Actions
Which Rural Utilities Service (RUS), Rural Development (RD) Program Area are you requesting funds from?	Electric	
Please validate the Legal Name is correct for the application you are creating.	User Guide Upd	Modify
Is this your entity's first application with Rural Utilities Service (RUS), Rural Development (RD)?	Yes	Modify
Will your organization use lenders other than Rural Utilities Service (RUS), Rural Development to provide funding for the work being planned?	Yes	Modify
Which type of electric loan program are you applying for?	Hardship Loan	Modify
Does your organization have more than 100 people?	No	Modify
How will you be entering your entity's financial data?	Upload a compl	Modify
Will this loan application include a financing request for Headquarters Facilities?	No	Modify
Do you have any subsidiaries?	Yes	Modify

14.0 CUSTOMER

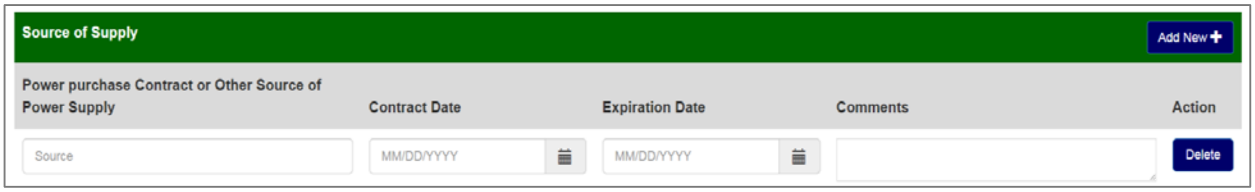


The customer screen is where you can enter all your organizational data, as well as contact information. This is where you tell RUS what kind of organization you are. This is also where you supply your RUS ID, DUNS Nbr, CAGE Code, and key contacts information, as well as any other required demographic data. The system will automatically pull down the Primary Borrow ID as well as the Tax ID Nbr (TIN) into un-editable fields.

Note: In order to submit your application, you must supply at least one key contact and one valid address.

15.0 POWER SUPPLY CONTRACTS

This screen is where you can enter all your power supply contracts. To add a new power supply, click the "Add New +" button to create a new row.



16.0 FINANCIAL FORECAST

Note: This section will only be available if you answered, "Enter financial data into the system's RD Financial Model" to the following interview question:

How will you be entering your entity's financial data?

If you answered, "Upload a completed and approved Form 325 or equivalent" then this section will not be displayed and you will have to upload your financial forecast in order to submit your application.

The Financial Forecast tab is made of fifteen sub-tabs that are really split into two groups: Entering Data and Viewing Data. You will use these sub-tabs to complete all the prior year and forecast year financial information for the financial forecast 325c.

Note: You can hover your mouse over a label to find tooltips that explain how certain values are calculated/populated.

16.1 FORECAST INPUT

When you first access the Financial Forecast tab, you will only see the Forecast Input sub-tab. You will have to enter the forecast name and complete all the key dates, in order to save the screen and for all the other sub-tabs to display. After you save the Forecast Input screen at least once, all of your financial screens will always be visible.

Once you have saved the Forecast Input screen, it will become the second sub-tab in the row, after Versions (LRFF).

16.2 VERSIONS (LRFF)

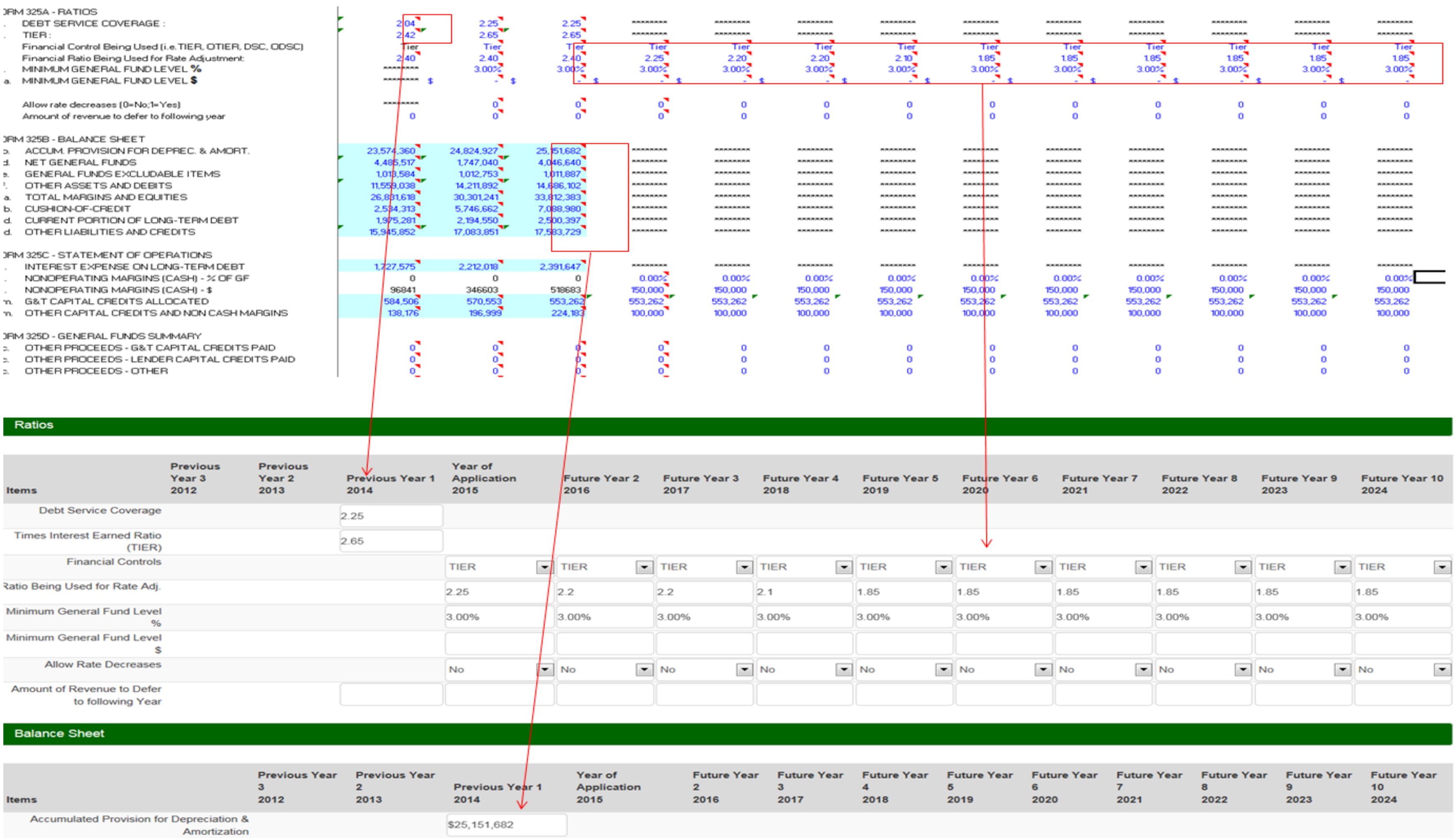
The Versions (LRFF) Tab is where you can download a copy of the financial spreadsheet, also known as the 325c. To download RUS Form 325c, click on the blue hyperlink underneath the "Copy" button.

If you want to keep the integrity of your initial financials intact, but still review scenarios, you can create a "copy" of your original financials by clicking the "Copy" button.

16.3 ENTERING DATA

This section includes the following sub-tabs: Sales, Revenue, Plant, Debt, Debt Service, and Est. Power Cost. While these are all separate screens, there are certain fields that are populated by pulling data from other screens; the screen will calculate all your totals as you enter data.

For example, an existing Financial 325c would translate to the RD Apply Financial Forecast like this:



16.4 VIEWING DATA

This section includes the following sub-tabs: Debt Summary, Expenses, Balance Sheet, General Funds, Statement of Operations, and Ratios. These are also all separate screens; they are all read-only screens as well. These screens will collect the data entered on all the Financial Forecasts screens and display them for you in a spreadsheet format.

Existing-RUS Show/Hide

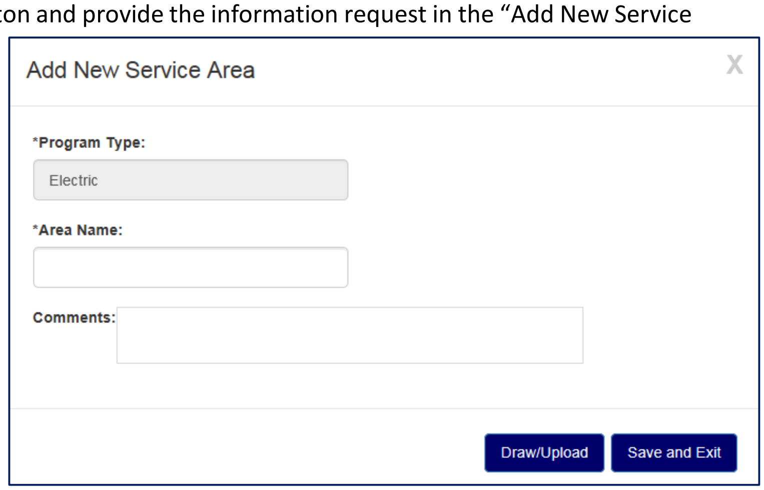
Items	Year of Application 2015	Future Year 2 2016	Future Year 3 2017	Future Year 4 2018	Future Year 5 2019
Begining of Year Balance	$10,000	$9,718	$9,437	$9,155	$8,873
Interest	$296	$287	$279	$270	$262
Principle	$0	$0	$0	$0	$0
Annual Debt Service	$577	$569	$561	$552	$544
Additional Principle Paid	$0	$0	$0	$0	$0
End of Year Balance	$9,718	$9,437	$9,155	$8,873	$8,592

17.0 SERVICE AREA MAPPING

This screen is where you can draw your Service Area(s). You will have the option to either draw your Service Area(s) or upload an existing Shapefile of your Service Area(s). After creating a Service Area, all the latest census data will be shown on the main screen.

17.1 CREATING A SERVICE AREA

To create a Service Area Map, click on "Add New" button and provide the information request in the "Add New Service Area" pop-up.



After entering your data, if you select "Save and Exit," you will be re-directed back to the Service Area screen.

If you click on "Draw/Upload," the initial drawing page will load and several tools will appear across the top of the screen: Draw, Upload, Layers, Legend, Instructions, Save, Save and Exit, and Exit.

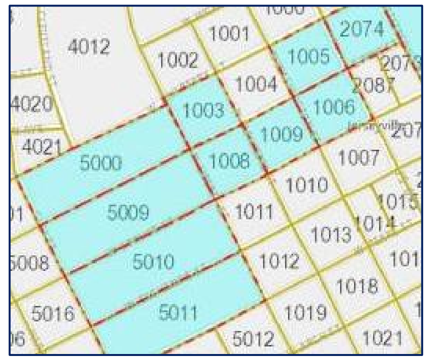
You are now ready to create your Service Area.

17.2 DRAWING A SERVICE AREA

To draw your service area, select the Draw feature in the upper left-hand corner of the screen. Once you have a done so, the following Editing Tools will be displayed: Polygon, FreeHand, Select, Cut, Delete, and Edit.

You will also see three Select Tools options: Select City, Select Blocks, and Create Polygon.

The Polygon tool allows you to draw a point-by-point polygon by clicking the left mouse button to create polygon points on the map. To begin, click the Polygon button under Editing Tools. Use the mouse to select your desired polygon points on the map. When you are finished, double-click the left mouse button to close the shape.



Note: It is important to click slowly so that the application properly registers each point/vortex that is clicked on the map.

The Polygon tool also has a Census Block precision feature. Once you are zoomed in enough to see the Census Blocks, you can hold down the Control Button. This will allow the Map pointers to connect to a Census Block. You will see a Cross-hairs pointer appear that indicates the functionality is enabled.

The FreeHand allows you to draw a Service Area by clicking and holding the left mouse button while dragging the mouse. To begin, click the FreeHand button under Editing Tools. Use the mouse to draw your proposed service area. Once you are finished free-hand drawing your Service Area shape, release the left mouse button.

When drawing a Map, please do not cross/overlap lines or try to connect the start and end points. This may result in your map not drawing or loading properly, which may yield an error message. The map will auto-connect the start and end points for you.

The Select Blocks tool allows you to include specific census blocks in a polygon. The feature only works when zoomed in enough to see the Census Blocks appear on the map. To begin, zoom in on the area you wish to include. Once the census blocks appear, the Select Blocks Button will become enabled. Click the Select Blocks button under Select Tools. Use the left mouse button to click on the census blocks that you want to include in your polygon. Once you are finished, click the "Create Polygon" button Select Tools.

After you are finished drawing your Service Area, a "Loading" Page will appear as the Map is rendered. Please wait, as rendering maps may take some time.

17.3 EDITING A SERVICE AREA

If you need to edit your map, click on the "Select" button under the Editing Tools and then left click on the Service Area you wish to edit. Once you have the Service Area selected, click on the "Edit" button under the Editing Tools. To edit the polygon, simply move the mapping pointers as needed. When you are finished editing your map, you will need to click the "Stop Edit" button under the Editing Tools.

If you need to cut a shape out of your polygon, click on the "Select" button under the Editing Tools and then left click on the service area you wish to edit. Once you have the Service Area selected, click on the “Cut” button under the Editing Tools. The Cut function works similar to the Free-hand function, in that you must click and hold the left mouse button while dragging the mouse to select the area you wish to cut from the polygon.

Note: If you intend to make edits to the Base layer of your Service Area, you must make those edits prior to drawing/editing any Unserved layers.

17.4 UPLOADING A MAP

To upload a Shapefile, click on the “Upload” button at the top of the screen, select the Area Type (Base or Unserved) and then browse for the .zip file you want to upload. Select the file to upload and click on the “Upload” Button. The “Loading” page will appear while the Shapefile is being uploaded. If the Shapefile loads successfully, the Map will render the Service Area(s), which can then be edited by using the Draw feature.

Below are the file specifications for zipped Shapefiles:

1. All map areas must be closed, non-overlapping polygons with a single, unique identifier.

2. The Shapefile must have an assigned projection with an accompanying .prj file.

3. The Shapefile must use an unprojected (geographic) WGS84 geographic coordinate system.

4. The Shapefile must be submitted as a *.zip file. This can be done with a WinZip or in Windows by selecting the files associated with a Shapefile, right-clicking the files, then clicking “Send” to Compressed (zipped) fold. Be sure that your *.zip file contains only one Shapefile.

5. *.zip file size must not exceed 2GB

17.5 TOOLBAR ITEMS

Layers: Allow users to access the display layers.

Note: As more layers are activated, more data must be collected, causing the system to take longer to display your drawn Service Areas. Sometimes, you may need to zoom in closer to the map in order to see the Layers appear on the screen.

Legend: Holds the colors the users will see on the map as Layers are applied.

Instructions: This shows the Instructions for using the Service Area Mapping Tool.

Save, Save and Exit, Exit: Once you are finished drawing, you may click “Save,” “Save and Exit,” or “Exit.” Save will save your progress without exiting. Save and Exit will save your progress and return you to the Service Area(s) Tab. Exit will return you to the Service Area(s) tab without saving your progress.

Edit/View Data: Allows you to review the data you entered on the Add New Screen and enter Alternate Data for the Census provided information. If you provide any alternative information, you will be required to enter a Justification.

Hide: Allows you to minimize the toolbar.

17.6 VIEWING CENSUS DATA

RD Apply allows you to view the census data for each Service Area that you draw/upload.

Service Area(s) — Add New + | View All

Service Area Name	Population	Housing Units	Households	Businesses	Square Miles	% of Rural vs. Urban	Actions
Service Area #1	263	171	104	130	433	100.00%	Edit / View Map, Delete, Edit / View Data
Service Area #1 - Alternate	0	0	0	0	0	0.00%	

Edit/View Data: Allows you to review the data you entered on the Add New Screen and enter Alternate Data for the Census provided information. If you provide any alternative information, you will be required to enter a justification.

Service Area #1	Existing	Alternate
Total Population	263	0
Total Housing Units	171	0
Total Households	104	0
Total Businesses in Zip Codes	130	0
Total Square Miles	433	0
Percent of Rural vs. Urban	100.00%	0.00%

For example:

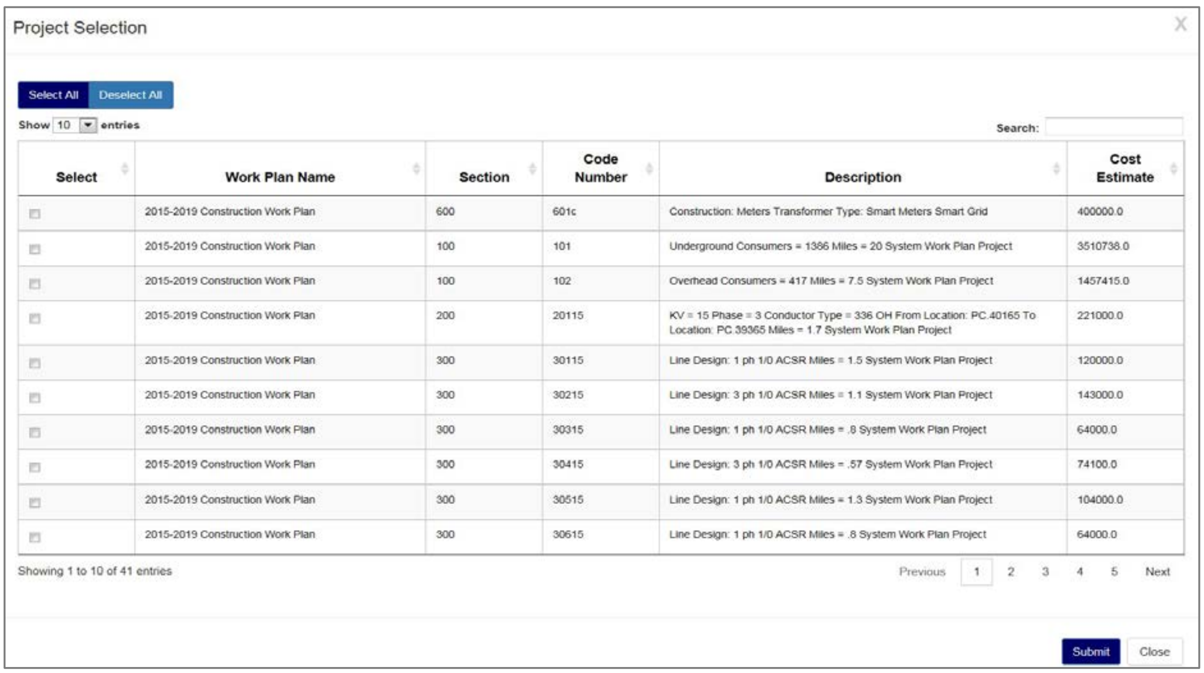
If the census data says that the Median Household Income is $54,307 but you know that it is really $54,650, you can type that into the “Alternate” text field.

18.0 LOAN APPLICATION

18.1 LOAN DETAILS

The Loan Details sub-tab is found under the Loan Application Tab. This screen is a read-only screen that displays the Construction Work Plan Projects that you are requesting funds for, in your current application. The Loan Details screen also shows the total funding amount requested.

In order for the Loan Details screen to be populated, you must select a Construction Work Plan Project. Click the "+ Select Projects" to open a pop-up that has all the Construction Work Plans created for that TIN.


Project Selection

Select All Deselect All

Show 10 entries Search:

Select	Work Plan Name	Section	Code Number	Description	Cost Estimate
	2015-2019 Construction Work Plan	600	601c	Construction: Meters Transformer Type: Smart Meters Smart Grid	400000.0
	2015-2019 Construction Work Plan	100	101	Underground Consumers = 1386 Miles = 20 System Work Plan Project	3510738.0
	2015-2019 Construction Work Plan	100	102	Overhead Consumers = 417 Miles = 7.5 System Work Plan Project	1457415.0
	2015-2019 Construction Work Plan	200	20115	KV = 15 Phase = 3 Conductor Type = 336 OH From Location: PC.40165 To Location: PC.39365 Miles = 1.7 System Work Plan Project	221000.0
	2015-2019 Construction Work Plan	300	30115	Line Design: 1 ph 1/0 ACSR Miles = 1.5 System Work Plan Project	120000.0
	2015-2019 Construction Work Plan	300	30215	Line Design: 3 ph 1/0 ACSR Miles = 1.1 System Work Plan Project	143000.0
	2015-2019 Construction Work Plan	300	30315	Line Design: 1 ph 1/0 ACSR Miles = .8 System Work Plan Project	64000.0
	2015-2019 Construction Work Plan	300	30415	Line Design: 3 ph 1/0 ACSR Miles = .57 System Work Plan Project	74100.0
	2015-2019 Construction Work Plan	300	30515	Line Design: 1 ph 1/0 ACSR Miles = 1.3 System Work Plan Project	104000.0
	2015-2019 Construction Work Plan	300	30615	Line Design: 1 ph 1/0 ACSR Miles = .8 System Work Plan Project	64000.0

Showing 1 to 10 of 41 entries Previous 1 2 3 4 5 Next

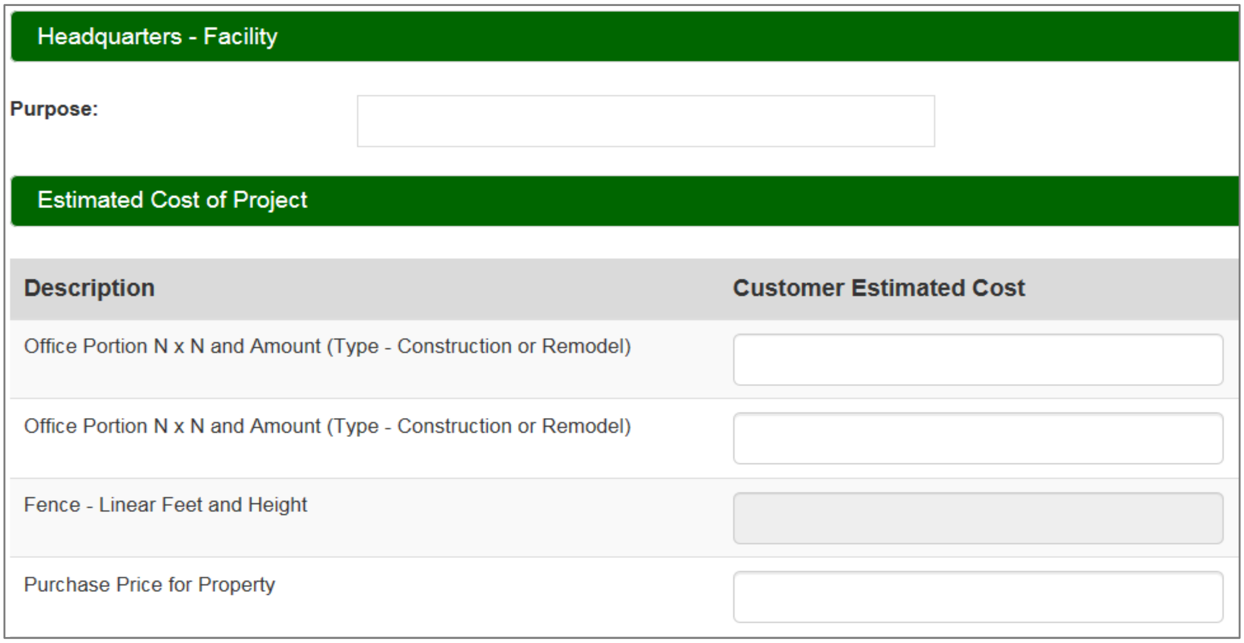
Submit Close

Once you have selected a project(s) and clicked the "Submit" button, your Loan Details screen will be populated with all the project(s) information.

If you don't have a CWP, click the "Launch Construction Work Plan" button to launch the Construction Module in a new window.

Completing Code 1300 – Headquarters

If you entered a Code 1300 – Headquarters on your Construction Work Plan, and answered "Yes" to "Will this loan application include a financing request for Headquarters Facilities?" during the interview, then you will need to fill out the "Headquarters – Facility" and the "Estimated Cost of Project" sections on the Loan Details.


Headquarters - Facility

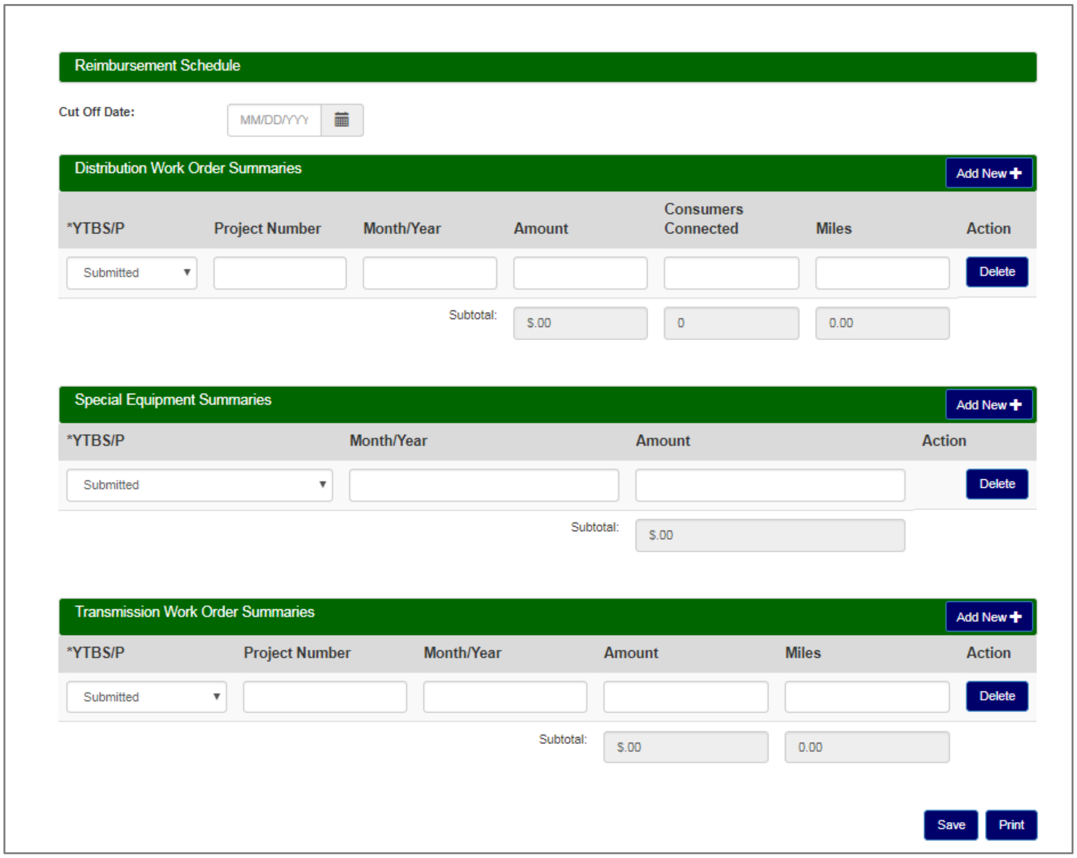
Purpose:

Estimated Cost of Project

Description	Customer Estimated Cost
Office Portion N x N and Amount (Type - Construction or Remodel)	
Office Portion N x N and Amount (Type - Construction or Remodel)	
Fence - Linear Feet and Height	
Purchase Price for Property	

18.2 REIMBURSEMENTS

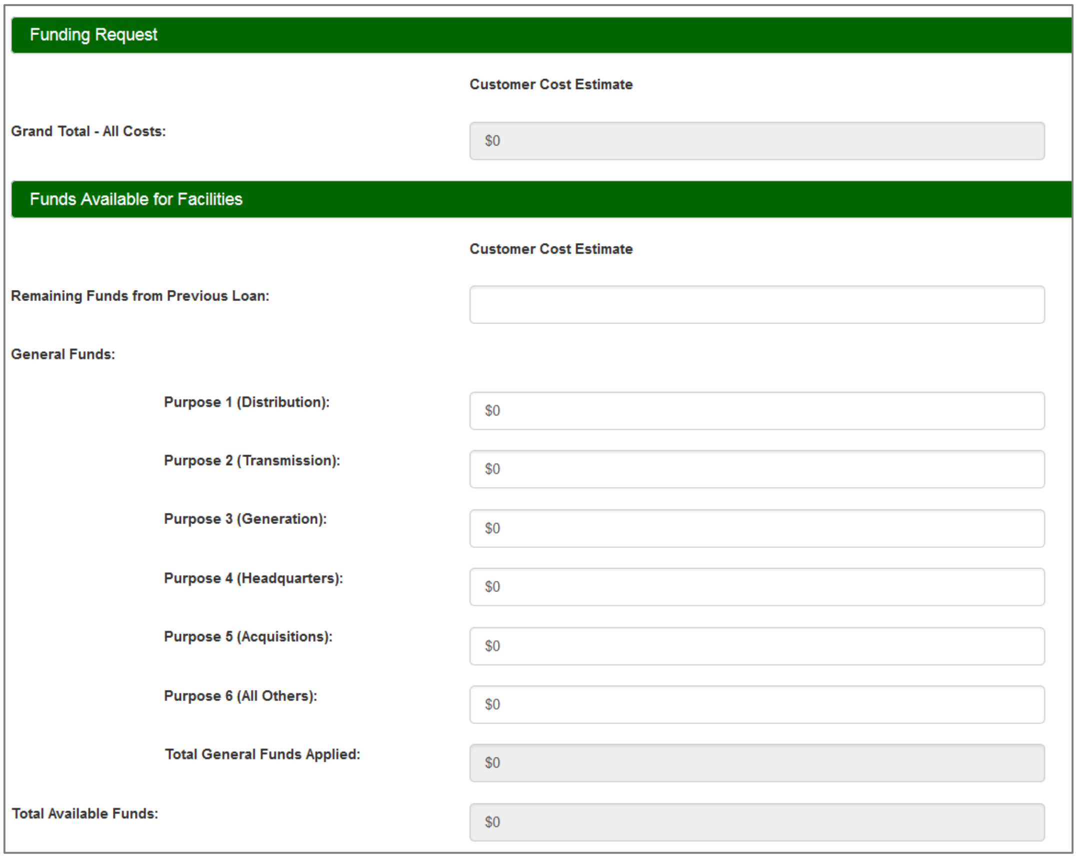
If you answered "Yes" to "Do you want reimbursement for projects completed 24 months prior to the cutoff date?" during the interview, then you will find the Reimbursements sub-tab under the Loan Application Tab.



You will enter the "Cut Off Date" for the reimbursement schedule, along with details about any applicable Distribution Work Order Summaries, Special Equipment Summaries and Transmission Work Order Summaries that are part of your application.

18.3 FUNDING REQUEST

The Funding Request sub-tab is found under the Loan Application Tab. This screen pulls in the Grand Total at the bottom of the Loan Details screen.

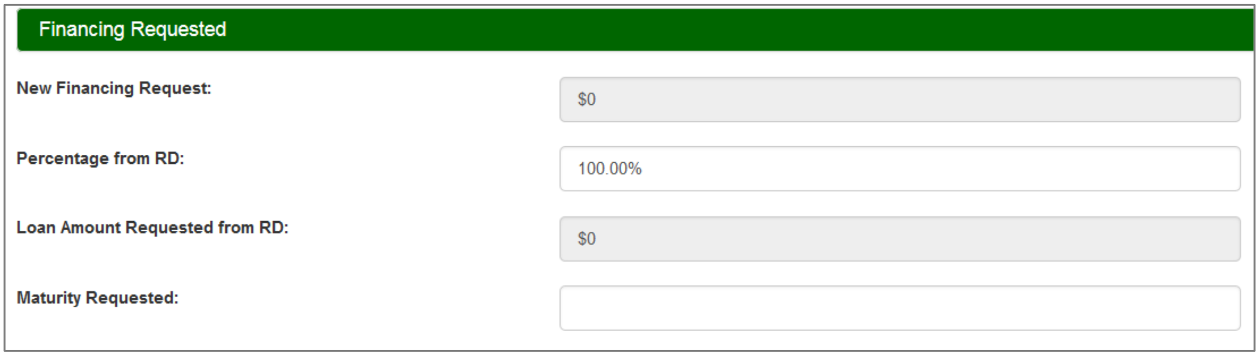


If you have any remaining funds from a previous loan, this is where you can enter that data. As you enter in remaining funds, they will be subtracted from the Grand Total and the system will recalculate how much money you really need to apply for.

For example:

> You have projects with a total cost of $100,000 but you have $10,000 in remaining funds from a previous loan. The $10,000 will be subtracted from the $100,000 and you will actually be requesting $90,000 from RD Apply.

At the bottom of the screen will be your "New Financing Request."


Financing Requested

New Financing Request:	$0
Percentage from RD:	100.00%
Loan Amount Requested from RD:	$0
Maturity Requested:	

Note: If you have no remaining funds, then this amount will be the same as your Grand Total.

You will be able to choose what percentage of the Financing Request you would like to request from RD Apply. After entering in your percent, the system will automatically calculate the loan amount.

If you are also planning on borrowing money from other lenders, you can submit that information in the "Supplemental Loan Section."

19.0 ATTACHMENTS

The Attachments Tab is where you can upload any required attachments as well as upload any additional attachments that you may have.

Uploading a Required Attachment

To upload an attachment, click on the "Upload" button to open a dialog box to search for your file. Once you have selected your file, the dialog box will close and your file will be uploaded.

Note: If you want to add a description to your attachment, you must enter it before uploading your document. Once you have uploaded the document, the field will be locked down and you must delete your attachment to enter a description.


Required Attachments

Below is a list of Attachments required to complete this Application. Please upload the Attachment requested for each row marked with an ✖. Upon successful completion of the upload, the row is marked with a ✔.
If more than one upload is required by a Category/DocumentType, please select the Blue "Upload" Button on the right of the "Additional Attachments" Section at the bottom of this screen.

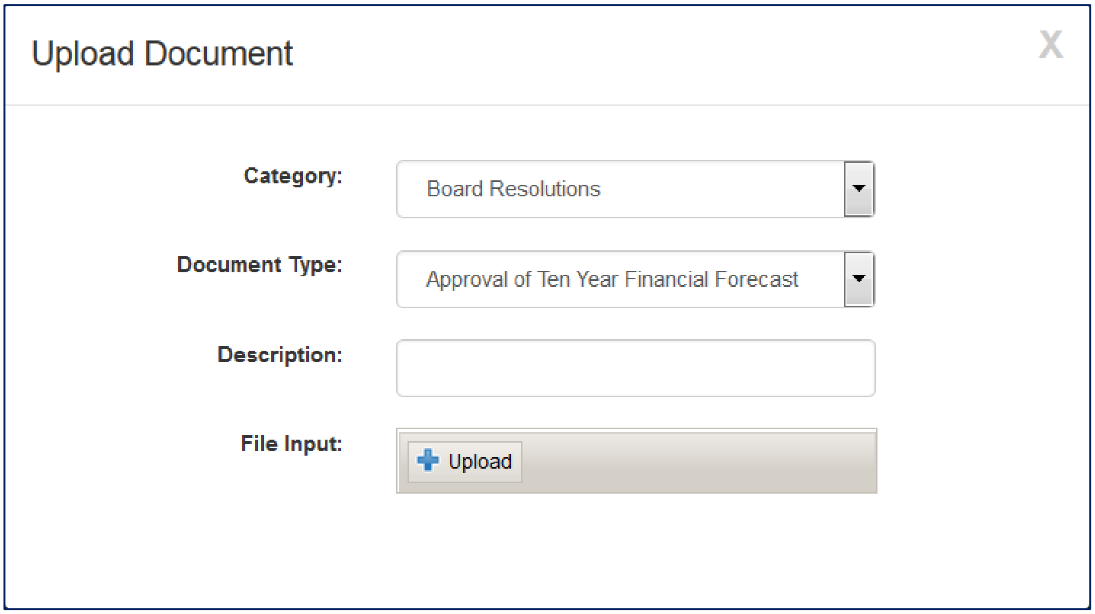
Upload Status	Category	Document Type	Description	File Name	Date	Uploaded By	Action
✖	Form 740c	Location of Consumers (RUS 740c-c)				NA	Upload

To delete an attachment, you must click the "Delete" button next to that attachment. A message will appear, asking if you are certain that you wish to delete this attachment. You must confirm that you are certain in order to delete your attachment.

Uploading Multiple Attachments

After you have uploaded your initial attachment, you will have the optional to upload multiple attachments for that same Category and Document Type. Click the "Add" button next to the initial document you uploaded.

A pop-up will appear, with the same Category and Document Type as the initial attachment.



If you want to add a description, do so before you upload your attachment. Click the "Upload" button to browse for your file. Once you have selected it, the modal will close and you will see your uploaded attachment.

Uploading an Additional Attachment

To upload an Additional Attachment you must click on the "Upload" Button in the Additional Attachments header. Clicking it will open a modal that lets you select the Category, the Document Type, and then browse for the attachment.

The Document Type dropdown box is dependent on the Category dropdown. If you change your choice in the Category dropdown then it will changes the choices available in the Document Type dropdown.

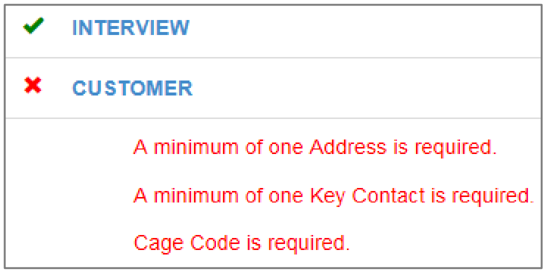
After uploading your attachment it will appear under the Additional Attachments with a green checkmark. If you want to delete this attachment, you must click the "Delete" button next to it.

The only accepted file types are:

.doc, .docx, .pdf, .xls, .xlsx, .ppt, .pptx, .vsd, .vsdx, .bmp, .gif, .jpeg, .jpg, .png, .tiff, .tif, .txt, .zip, .dot, .dotx, .xlt, .xltx, .pot, .potx, .pps, .ppsx, .dxf, .dwg

20.0 SUMMARY/SUBMIT

The Summary/Submit screen will show you a list of all your Tabs and Sub-tabs, along with their status. This is where you can track your application to see what is needed to submit. When a Tab or Sub-tab has a green checkmark, you know that that screen is complete. If it has a red "X" instead, you know that it still needs some work.



The Summary/Submit screen is also where you can see error messages next to any screen marked with a red "X." These error messages tell you specifically what is needed in order to submit your application. You can click on a hyperlinked Tab or Sub-tab name to be taken back to that screen.

20.1 SUBMITTING AN APPLICATION

Before you can submit an Electric application you must first complete the Financial Forecast stage and have it approved by RUS Staff.

You can complete the Financial Forecast stage at any time in your application. To complete it, you need to go to the Summary/Screen. Next to Financial Forecast there will be a button called "Complete." If Financial Forecast has a red "X" next to it the button will be disabled. If Financial Forecast has a green checkmark next to it, the button will be enabled.

Once the button is enabled, you can click it to mark Financial Forecast as "Complete." Once you have completed your Financial Forecast, all the fields will be locked down. You will not be able to go back in and modify any data unless Rural Utilities Services Staff returns your Financial Forecast.

20.2 WHAT DOES "RETURNED FINANCIAL FORECAST" MEAN?

Once you have completed your Financial Forecast, Rural Utilities Services Staff will receive a notification, letting them know your Financial Forecast is ready for review. Once that happens, the Rural Utilities Services Staff will log in and review your Financial Forecast. If your Financial Forecast does not need any correction, the Rural Utilities Services Staff will mark it as Approved. Otherwise, the Rural Utilities Services Staff will Return it.

A "Returned Financial Forecast" means Rural Utilities Services Staff looked over your Financial Forecast and noticed that something was either incorrect or missing. Whenever a Financial Forecast is returned, you will receive a notification telling you why your Financial Forecast was returned. You will have to recomplete your Financial Forecast and have Rural Utilities Services Staff approve it.

After your Financial Forecast has been approved, and you have received all green checkmarks on the "Summary/Submit" screen, the "Submit" Button will become enabled. You will be asked to confirm that you are certain you want to submit your application. After you say "Yes," your application will be submitted. All of the fields and screens inside your application will be greyed out; you will no longer be able to edit them unless Rural Utilities Services Staff returns your application.

What does "Returned Application" mean?

A "Returned Application" means Rural Utilities Services Staff looked over your submitted application and noticed that something was either incorrect or missing something. Whenever an application is returned, you will receive a notification telling you why it was returned. After you update your application, you will have to resubmit your application.

MISCELLANEOUS

21.0 PRINT SCREENS

At the bottom of some screens there is a "Print" button that will let you open a print-friendly PDF of that screen.

Some screens, such as Certifications and Board Resolutions, do not have "Print" buttons at the bottom of the screen. Instead, you have to click to open the individual certification or Board Resolution to access the print button.

22.0 EXPORT TO EXCEL

At the bottom of some screens there is an "Export to Excel" Button that will let you download an Excel copy of that screen.

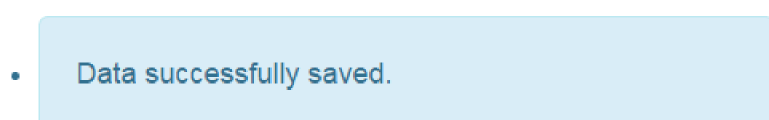
Note: If you export the Excel sheet and make changes in the workbook, it will not affect the screen. If you export the Excel sheet and then make changes in the screen, you have to re-download the Excel sheet for it to show the changes.

23.0 INFORMATIONAL MESSAGES

While completing your application, you might see several different informational messages. These messages are to help notify you if you are missing any required data. Some messages just let you know whether or not your screen saved successfully or not. The messages are color-coordinated to help you quickly determine their meaning.

The different statuses are as follows:

Blue Status



If you receive a blue status, it means you have saved your data successfully and that there are no issues for you to look at. A blue status is the equivalent of a green checkmark.

Yellow Status

If you receive a yellow status, it means that there are errors or data is missing from the screen. While you can save your screen, you will not be able to submit your application.

Red Status

If you have received a yellow status, you will also receive red statuses. Red statuses tell you what is needed in order to save your screen and submit your application. A red status is the equivalent of a red "X."

24.0 CONNECTION TIME-OUT

If you have been inactive for thirty minutes, the system will prompt you to select either "Stay Active" or "Log Out." If you do not respond, the system will automatically log you out. You will need to log back into RD Apply, to continue your application.

25.0 APPLICATION STATUS

The application will go through several statuses on its way to being accepted.

- **New** – This application is being worked on by the applicant.
- **Submitted** – The applicant has submitted the application and it is ready to be reviewed by the GFR. The application is now locked down to the applicant.
- **Returned** – The application has been returned by the GFR. The application is unlocked and the applicant must go back in, address the GFR comments, and resubmit the application.
- **Accepted** – The application has been accepted by the GFR. The application is still locked down to the applicant. The application many now be assigned to a Loan Specialist for review.
- **Loan Processing** – The application has been pushed to CPAP. The application can no longer be returned and is locked down. On hold - do not Push to CPAP at this time.

26.0 NOTIFICATIONS

You will receive notifications for any applications that you are assigned to.

For example:

> "Sarah Jane submitted Application Nbr: 1234 for Alpha Electric on May 1, 2015. The confirmation number is 1234567890."

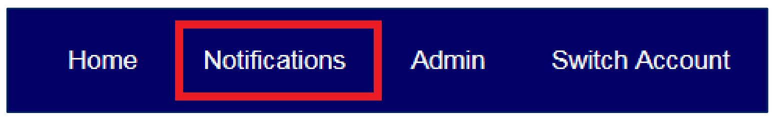
Note: You will automatically receive an email when you create an event, such as creating an application. Other users on your application will not receive that email notification, unless they actively subscribe to the event.

WHERE TO FIND NOTIFICATIONS

Notifications are sent to two locations. The first location is inside the RD Apply system. The second location is your eAuthentication email.

RD Apply

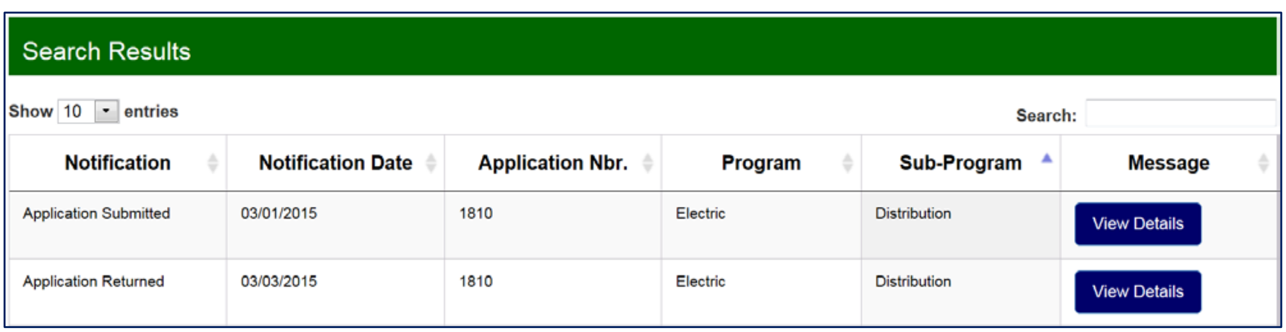
To access Notifications inside the RD Apply system, you will need to login and click the "Notifications" Tab in the header bar. This



will open a screen called, "View Your Notifications" that will list out all your notifications.

You will be able to filter the notifications by Notification Type, Notification Date, Application Number, Program, Sub-Program, and State. You will also be able to search for notifications either by "Application Nbr" or by typing search criteria into the "Search" box under "Search Results."

To see the full notification text, you will need to click on the "View Details" button next to the specific notification. Clicking it will cause a pop-up to appear with the notification text.



Search Results

Show 10 entries Search:

Notification	Notification Date	Application Nbr.	Program	Sub-Program	Message
Application Submitted	03/01/2015	1810	Electric	Distribution	View Details
Application Returned	03/03/2015	1810	Electric	Distribution	View Details

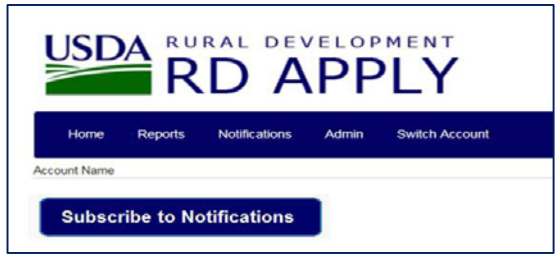
Email

Notification emails will always be sent to your eAuthentication email. Other than location, there is no difference between the email notification and the RD Apply system notification.

27.0 NOTIFICATIONS - SUBSCRIBE AND UNSUBSCRIBE

27.1 ACCESSING THE NOTIFICATION SYSTEM

After logging into RD Apply, click the “Notifications” Tab in the header bar. This will open a screen called, “View Your Notifications.” You will then be able to see a button called, “Subscribe to Notifications.”



Clicking this button will open a new window called, “Manage Your Subscriptions” where you can subscribe to different notifications. This is also where you can delete any subscriptions you no longer want.

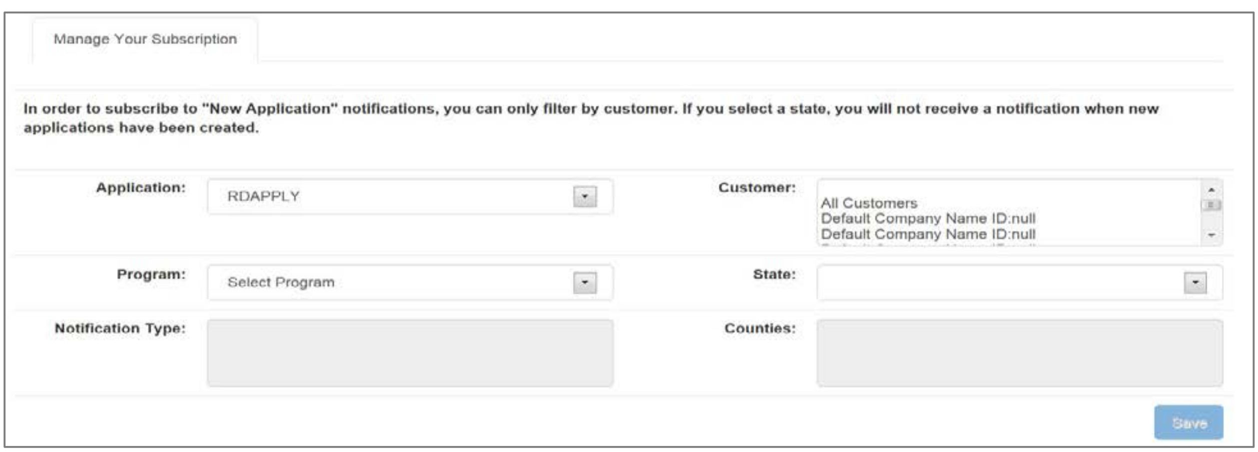
27.2 CREATING A SUBSCRIPTION

In order to create a subscription, you will have to filter via dropdown lists.
The dropdowns are:

1. Application
2. Program
3. Notification Type
4. State
5. County
6. Customer

Since the Notifications Module will be used across multiple Applications, with different programs and notifications, the Program and Notification Type Dropdowns are dependent on each other. The Customer and Counties Dropdowns will be multi-select dropdowns.

You must first pick a value for Program to pick a value for Notification Type.



Note: The State Dropdown is optional and is not dependent on any other dropdown.

The State dropdown pulls in the state from the Headquarters or Mailing Address supplied on the Customer Screen in your application. The County dropdown will only be populated after you select a state. You will be able to select multiple counties.

After you have selected which filters you want, click the "Save" Button. The system will save the chosen filters and display it below under, "Subscribed Notifications."

Subscribed Notifications

Show 10 entries   Search:

Notification Type	Program	Sub-Program	Customer	State	Action
Application Submitted	Telecommunications	Telecommunications	*All Customers	AK	Delete
Environmental Document Approved	Electric	Distribution	*All Customers	AK	Delete

After saving, the dropdowns will be cleared and you will be able to add another subscription. Once a subscription has been saved, you will start getting notifications for that specific subscription.

After saving, the dropdowns will be cleared and you will be able to add another subscription. Once a subscription has been saved, you will start getting notifications for that specific subscription.

DROPDOWN VALUES

The dropdowns are filtered based on the values you pick. For example:

1. Application
    a. RD Apply
2. Program
    a. Based off of what Application was chosen
        i. If RD Apply then…
            1. Electric
            2. Telecommunications
            3. Water and Environmental
3. Sub-Program
    a. Based off of what Program was chosen
4. Notification Type
    a. New Application Created
    b. Electric Financial Forecast Stage Completed
    c. Electric Financial Forecast Stage Approved
    d. Electric Financial Forecast Stage Returned
    e. Application Submitted
    f. Application Returned
    g. Application Accepted
    h. Application Pushed to Processing System
5. State
    a. All USA States plus US Territories

27.3 DELETING A SUBSCRIPTION

To delete a subscription, you will need to find a specific subscription and click the "Delete" Button next to it. This will delete the subscription and you will no longer receive email notifications.

28.0 SECURITY ROLES

28.1 WHAT DO THE DIFFERENT ROLES MEAN?

Each role has different security permissions attached to it. When you assign a user a security role, you are effectively limiting what the user can and cannot do while using your Tax Identification Number.

28.2 HOW MANY ROLES CAN ONE PERSON HAVE?

Each person can only have **one** security role for a Tax Identification Number.

For example:

> Your Administrator cannot have both the Administrator security role and the Viewer Security Role for Tax Identification Number 123456789. However, they can have the Viewer security role for Tax Identification Number 123456789 and the Administrator security role for Tax Identification Number 987654321.

28.3 WHAT TYPES OF SECURITY ROLES ARE AVAILABLE?

There are several security roles that range in the amount of access a user can have in an application.

Available security roles:

- **Administrator**: Allows the user to grant representative roles to other users assigned to the same Tax ID and create / update an application.
- **Representative-Signature-Certify**: Allows the user to create / update an application, complete electronic stages and submit applications to the USDA. Also allows the user to provide for the application. Allows the user to grant representative roles to other users assigned to the same Tax ID and create / update an application.
  You can only receive this role by submitting an Authorized Representative Request, and having RUS Staff assign you the role.
- **Representative-Update Data**: Allows the user to create / update an application.
- **Engineering Consultant**: Allows the user to only create / update the Power Supply Contract and Attachments sections of the application.
- **Construction Consultant**: Allows the user to only create / update the Construction Work Plan and Attachments sections of the application.
- **Financial Consultant**: Allows the user to only create / update the Financial Forecast sections of the application.
- **Viewer**: Allows the user to view the application with no update access.

28.4 WHO CAN ASSIGN SECURITY ROLES?

Only the Administrator or Representative-Signature-Certify can assign security roles to a user. To become an Administrator, you either have to fill out an Authorized Representative Request or ask your current application Administrator to add you as an Administrator. You can only become a Representative-Signature-Certify by filling out an Authorized Representative Request.

APPENDIX

29.0 ELECTRIC APPLICATION DOCUMENTS

These are the attachments required to submit an Electric application.

Attachments:

- Borrower Environmental Report
- Attorney's Opinion
- Load Forecast Approval
- Long Range Financial Forecast (Base) Form 325 Series
  - ***(This is not required if you are completing Financial Forecast in RD Apply)***
- Long Range Financial Forecast Assumptions
- Long Range Financial Forecast Sensitivity Runs
- Construction Work Plan
- Useful Life Statement
- Annual ERP Exercise Certification
- Assurances Required by 49 CFR Section 24
- Debarment
- Emergency Restoration Plan
- Federal Debt Delinquency Certification
- Interconnection of Distributed Resource Policy
- Lobbying Certification
- Master Certification for the Loan Application
- VRA and ERP Certification
- Representation Regarding Felony Conviction (AD 3030)
- Board Resolution Approving the Load Forecast
- Approval of Ten Year Financial Forecast
- Requesting Hardship Rate Loan
  - ***Required if you are applying for a Hardship Rate Loan***
- Lien Accommodation
  - ***Required if you are applying for a Lien Accommodation Loan***
- Requesting Guaranteed Federal Financing Bank Loan
  - ***Required if you are applying for a FFB Loan***

If this is your first application with RD Apply:

- Bylaws or equivalent
- Articles of Incorporation
- Line Extension Policy
- Rate Schedule

If your organization has more than 100 people:

- Standard Form 100 / EE0-01