

# How to Use the Online Funding Request Website

## **Using the Funding Request Website**

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## Online Processes Overview

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<p><b>How Do I Get Started?</b> Before you can begin an PENNVEST application, you must register yourself and your company.</p> <p><b>PLANNING CONSULTATION</b> A planning consultation is required before moving forward with the PENNVEST application process.</p> <p><b>APPLICATION</b> PENNVEST funding request applications must be completed on-line and include online web forms, submitting documents and getting technical components and permits prior to electronic submission.</p>	<p><b>When will I get funding approval ?</b> Applications must be received by a application cut-off date in time for review and to be scheduled for approval at one of the scheduled PENNVEST Board of Director's meetings held several times a year.</p> <p><b>PROJECT REVIEW , RECOMMENDATION AND APPROVAL</b> All PENNVEST projects are reviewed, ranked, and recommended to the PENNVEST Board of Directors for final approval. The review and ranking can affect the type and amount of funding that is given to a project.</p> <p><b>FUNDING OFFER</b> Upon approval of funding, PENNVEST will provide a Funding Offer explaining funding amounts, repayment method, collateral requirements, and terms &amp; conditions of the funding.</p>	<p><b>How do I get my funds?</b> If approved and accepted PENNVEST funding must go through a closing process. The Loan Closing process can be complex requiring 3-6 months lead time to go the settlement.</p> <p><b>SCHEDULE AND PLAN</b></p> <p><b>DOCUMENTATION</b> Settlement requires many different sets of documents.</p> <p><b>SETTLEMENT</b> PENNVEST final settlement is handled through the mail.</p>

# Understanding Roles

THE PENNVEST FUNDING REQUEST WEB SITE IS BASED ON USERS OF THE SYSTEM BEING ASSIGNED A "ROLE":

- A role defines the **responsibilities and permission** that a user has as part of a project collaboration team during the Funding Request process, PENNVEST Review process and the Settlement Process.
- Once a role has been assigned to an individual, it will be permanently saved under **My Profile** site feature for the user's system setting.
- A user **can only have ONE** role within the system.
- If a different role is required to be assigned, the user **MUST** contact PENNVEST and request by email to have that role changed.

**ROLES TYPES AND RESPONSIBILITIES ARE AS FOLLOWS:**

**BORROWER** - This role must complete sections of the Funding Request, PENNVEST Review and Settlement.

**OWNER/OPERATOR** - This role may view all portions of a Borrower's Funding Request, PENNVEST Review and Settlement but does NOT have rights to edit any part of the Application or attached documents. An individual with this role **must be assigned as a contact by the borrower** under the Project Description Form to have access to the forms and documents.

**BORROWER'S ENGINEER** - This role may assist a Borrower with selected portions of a Funding Request and Settlement, and view all documents and forms. An individual with this role **must be assigned as a contact by the borrower** under the Project Description Form to have access to the forms and documents.

**BORROWER'S FINANCIAL** - This role may assist a Borrower with selected portions of a Funding Request and Settlement, and view all documents and forms. An individual with this role **must be assigned as a contact by the borrower** under the Project Description Form to have access to the forms and documents.

**BORROWER'S LEGAL** - This role may assist a Borrower with portions of a Settlement, and view all documents and forms. An individual with this role **must be assigned as a contact by the borrower** under the Project Description Form to have access to the forms and documents.

**PENNVEST PROJECT SPECIALIST** - This role may assist a Borrower with starting a Funding Request and assist with portions of a Funding Request. This role must review and approve sections of the Funding Request, complete portions of the PENNVEST Review Project Ranking and PENNVEST Board Book Summary Sheet. An individual with this role is **automatically assigned** as a contact by region to have access to forms and documents.

**DEP PROJECT MANAGER / DEP HEADQUARTERS** - These roles may assist a Borrower with portions of a Funding Request. This role must provide the Planning Consultation Report, review and approve sections of the Funding Request, complete portions of the PENNVEST Review Project Ranking, and approve sections of the Settlement. An individual with this role may **optionally be assigned by the Borrower or is automatically assigned** as a contract by region to have access to the forms and documents.

**DCED PROJECT MANAGER** - This role must review and approve the Economic Development Impact, complete the portions of the PENNVEST Review Project Ranking. An individual with this role is **automatically assigned** as a contract to have access to the forms and documents.

**PENNVEST LEGAL, FINANCIAL and PROJECT MANAGER** - These roles are internal PENNVEST roles that participate in the evaluation and processing of Borrower's Funding Requests and Settlements. An individual with this role is **automatically assigned** to have access to the forms and documents.

# The Funding Request Process

## Step 1: Get Started

- 🔥 Register on the Funding Request Website
- 🔥 Register Your Company With PENNVEST
- 🔥 Start A New Funding Request

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### REGISTER AT THE ONLINE FUNDING REQUEST WEBSITE

Before applying for PENNVEST funding, you will need to register with the Commonwealth PA PowerPort Login to get a password and userid.

#### Steps to Register Yourself:

- **SELECT** [My Account](#) on the PENNVEST home page and the a login screen will appear.
- Click on the [Register Now](#) link and it will take you to the PA Login registration form.
- **ENTER** your basic contact information including name, address and phone on the form. A valid email address is required and you will be asked to create a personal userid and password that belongs only to you.
- **SAVE** the form and the system will automatically return you to the Online Funding Request Website to login.
- **ENTER** your userid and password and click on the [Login](#) button. If you forget your password at anytime, you can click on the [Forgot you password?](#) link.

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### REGISTER YOUR COMPANY WITH PENNVEST

If you have no previous funding requests (loans and/or grants) either started or approved with PENNVEST, then you will first need to register your company with PENNVEST. Upon login the system will automatically take you to **Start a New Funding Request** page.

#### Steps to Register Your Company:

- **VERIFY** your company is not on the list by clicking on the drop down arrow of the [Select the entity you're representing...](#) and looking for your company's legal entity name.
- **CLICK** on [Click here to request the entity to be added.](#) link on the web page to open the **Register Your Company/Legal Entity with PENNVEST** form.
- **ENTER** the required form information including company legal name, federal tax id number, and company fiscal year end date and click on the [Register](#) button at the bottom of the form.

This process will automatically send and Email request to PENNVEST with the information that you provided. It will take **approximately 2-3 business days** to process your request. PENNVEST will contract you directly with any verification of information that may be needed and confirmation once your company's information has been made available on the list for you to select to start a new Funding Request online.

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### START A NEW FUNDING REQUEST

If you have already started a funding request from a previous Internet session or have an existing funding agreement with PENNVEST or have been assigned to a funding request to assist the borrower and/or project engineer, the funding request(s) will be listed for your selection.

#### Steps to Start a Funding Request:

- **SELECT** your company from the register company list by clicking on the drop down arrow of the [Select the entity you're representing...](#) and looking for your company's legal entity name. Click on the **OK** button to select.
- **COMPLETE** the Project Description online form by entering the required form information for the following:

#### **Project Description**

Project Name - short descriptive name

Project Stage - select "Design" or "Construction"

Project Type - select "Drinking Water", "Wastewater", or "Stormwater"

Project Counties - select one or more from drop down list of PA counties

County Municipalities - select one or more from drop down list of municipalities from the selected county(s)

Service Area - describe the specific area(s) served; list the "Service Area"

Population Served - the number representing the population served

Project Problem(s) - describe the problem(s) facing the system and how the problem(s) will be alleviated by the project

Quantitative Description - describe using quantities and capacities of the proposed facilities

#### **Project Costs**

Estimated Project Costs - estimated amount of the total project

PENNVEST Costs - amount requested from PENNVEST

Other Funding Sources - list sources and amounts of other funding

**Borrower Contacts** - owner, engineer, legal, support, and other contacts required for the project

- **SUBMIT** the Project Description online form to PENNVEST for review by marking this form as "complete" under the  button.

## **Step 2: Have a Planning Consultation**

### **🔥 Have A Planning Consultation Meeting**

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#### **HAVE A PLANNING CONSULTATION MEETING**

The Planning Consultation meeting includes the project sponsor/applicant and engineer, PENNVEST and DEP regional staff as well as local planning representatives. For the meeting, you should complete, the "**Project Description**" web form on the PENNVEST Online Funding Website and be prepared to describe any existing system and problems in reasonable detail. Your engineer should accompany you during the consultation, if one has been selected at this time to provide engineering services.

- **USE** the provided meeting checklist from the website under [Planning Consultation](#) to plan your meeting and bring it to the Planning Consultation (the checklist documents explain project requirements).
- **PLAN** the date that you would like to have your application completed and be submitted to PENNVEST in time for the next schedule application cut-off date. Dates can be referenced by viewing the application cut-off schedule found on the PENNVEST home page right-hand navigation bar. **You must plan accordingly to allow for an adequate amount of time to complete the necessary forms, collect important documents, get approvals and permits to meet your target date.** Incomplete funding requests will not be processed but will be held until completed or ready for the next application cycle.

Upon completion of the meeting, PENNVEST will mark the Project Description and Planning Consultation as

"Approved" under the  button.

### Step 3: Complete and Submit an Application

- 🔥 Complete the Online Application Forms
- 🔥 Collect PENNVEST Required Documents
- 🔥 Get DEP Required Technical Components and Permits
- 🔥 Electronically Submit Application to PENNVEST

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#### COMPLETE THE ONLINE APPLICATION FORMS

On the Online Funding Request website under the **Funding Request tab**, you will see a list of all forms that you will need to complete for the PENNVEST application process.

##### How to complete PENNVEST Application Forms:

- **CLICK** on **Application Forms** link found on the left-hand navigation bar of the website to expand the list of all forms that you will need to complete for your project **OR** click on the  button found at the top of the left-hand navigation bar to expand the full list of items you will need to complete to submit your application in its entirety.
- **CLICK** on each item from the list to open the form. **COMPLETE** the PENNVEST application forms online by entering the required form information for the following forms:

**Benefits**

**Rates & Schedule**

**Budget**

**Financial**

**Income & Expenses**

**Debt**

**Economic Development Impact**

**Other Forms** - additional forms may be listed depending on the type of project

- **MARK** each online form as "complete" under the  button. PENNVEST may review and mark as "Approved" some of your completed form prior to your complete application submittal to determine if your application has provided adequate information for the Review process.

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#### COLLECT PENNVEST REQUIRED DOCUMENTS

On the Online Funding Request website under the **Funding Request tab**, you will see a list of all documents that you will need to complete for the PENNVEST application process.

##### How to collect Documents:

- **CLICK** on **Documents** link found on the left-hand navigation bar of the website to expand the list of all documents that you will need to complete for your project **OR** click on the  button found at the top of the left-hand navigation bar to expand the full list of items you will need to complete to submit your application in its entirety.
- **CLICK** on each item from the list to read the how and where to the document and submittal requirements. Documents can include, but not limited to:

**Letter of No Prejudice (LNOP)**

**Resolution to Apply**

**Letter of Responsibility  
Concurrence of Agricultural Land Preservation Entity  
Concurrence of Land Use Planning Entity  
Financial Statements**

- **SUBMIT** on each document from the list as required to PENNVEST.
- **MARK** each document as "complete" under the  button. PENNVEST may review and mark as "Approved" some submitted prior to your complete application submittal to determine if your application has provided adequate documentation for the Review process.

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## **GET DEP REQUIRED TECHNICAL COMPONENTS AND PERMITS**

On the Online Funding Request website under the **Funding Request tab**, you will see a list of all Technical Components that you will need to complete for the PENNVEST application process.

### **How to getting Technical Components:**

- **CLICK** on **Technical Components** link found on the left-hand navigation bar of the website to expand the list of all documents that you will need to complete for your project **OR** click on the  button found at the top of the left-hand navigation bar to expand the full list of items you will need to complete to submit your application in it's entirety.
- **CLICK** on each item from the list to read how to get the technical component and submittal requirements. Technical Componets can include, but not limited to:

**Planning Consultation Report from DEP  
Plans and Specs  
537 Plan Approval  
Permits**

- **SUBMIT** on each technical component from the list as required to DEP.
- **MARK** each document as "complete" under the  button. DEP may review and mark as "Approved" some submitted technical components prior to your complete application submittal. **Please note, you will NOT be able to electronically submit your application in it's entirety until ALL technical components including permits has been approved by DEP.**

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## **ELECTRONICALLY SUBMIT APPLICATION TO PENNVEST**

On the Online Funding Request website under the **Funding Request tab**, you will see a list of all requirements that you will need to complete for the PENNVEST application process.

### **How to Submitting Your Application:**

- **CLICK** on  button found at the top of the left-hand navigation bar to expand the full list of items you will need to complete to submit your application in it's entirety.
- **MARK** each item as "complete" under the Funding Request Checklist. Note: some items must be marked by PENNVEST or DEP to be completed. If all items are "completed", the application will lock and status of the application will change to "Under Review". PENNVEST will start the **PENNVEST Review process**.

# The PENNVEST Review Process

## Step 1: Review Project Ranking And Recommendation

- 📌 **Check the Status of Your Project**
- 📌 **Review Project Ranking and Recommendation**

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### CHECK THE STATUS OF YOUR PROJECT

Once your application has been submitted to PENNVEST, the review and approval process will begin. PENNVEST review and approval requires evaluation by the Department of Economic Development (DCED), the Department of Environmental Protection (DEP), PENNVEST and a final approval by the PENNVEST Board. To verify where your application is at in the process, you should periodically check the status of the project. If your Funding Request displays any other status than those listed below, you have moved beyond the PENNVEST Review and Approval process. On the Online Funding Request website under the **PENNVEST Review tab**, you will see a list of links that you will need to complete the PENNVEST Review process.

#### If the status of your project is:

- **Under Review** - Your Funding Request is still under review and evaluation by PENNVEST. When the status of your request changes from "Under Review" to either "Pending" or "Approved", you will be notified by email to return to the site for further action.
- **Pending** - Your Funding Request is currently pending approval by the PENNVEST Board at this time. Check your project ranking results and reasons for your pending status.
- **Approved** - Your Funding Request is approved by the PENNVEST Board at this time and requires your agreement to the PENNVEST Funding Offer to initiate the Loan Closing process. Review your project ranking results for your approved status.

#### How to check the status of your project:

- **CLICK** on **Ranking and Recommendation** link on the right-hand navigation bar of under the PENNVEST Review tab and then click on **PENNVEST Project Ranking** link.
- **VIEW** the blue project description bar at the top of the page and look at the **Status** value in the far-left top column. A sample is provided below.

<b>Contact:</b> John Smith	<b>Project Number:</b> 00000000000-CW	<b>Status:</b> Under Review
<b>Company:</b> Any Town Municipal Authority	<b>Project Title:</b> Any Town Water Systems Improvements	

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### REVIEW PROJECT RANKING AND RECOMMENDATION

DCED, DEP and PENNVEST will review your project to determine funding priority, and various factors and impacts of the project. Once the ranking has been completed, a recommendation will be made to either hold the application from approval due to ranking consideration, or recommend the project to the PENNVEST Board for final review and approval. On the Online Funding Request website under the **PENNVEST Review tab**, you will see a list of links that you will need to complete the PENNVEST Review process.

#### How to review your project ranking and recommendation:

- **CLICK** on **Ranking and Recommendation** link on the right-hand navigation bar of under the PENNVEST Review tab and then click on **PENNVEST Project Ranking** link.

- **VIEW** the **PENNVEST Project Ranking Summary** found on the page. The summary will provide DCED economic development, health and safety, environmental impacts, social, compliance and other important factors ranking results of your project. Comments and your project specialist contact information will also be provided.

If your project has been recommended as **Pending**, you should contact your PENNVEST project specialist for additional information. If your project has been recommended as **Approved**, then you should review the Board Summary Sheet to view the recommended project terms and conditions, and proposed funding.

## Step 2: Review Board Approval

### Review Board Approval

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#### REVIEW BOARD APPROVAL

If your project has been recommended by PENNVEST, then it will go to the PENNVEST Board of Directors for final review and approval. PENNVEST provides the Board with a Board Book Summary Sheet that provides a project summary that includes the project contacts, ranking, project costs, funding sources, PENNVEST funding offer and collateral.

On the Online Funding Request website under the **PENNVEST Review tab**, you will see a list of links that you will need to complete the PENNVEST Review process.

#### How to review the Board Book Summary Sheet:

- **CLICK** on **Board Review and Approval** link on the right-hand navigation bar of under the PENNVEST Review tab and then click on **Board Book Summary Sheet** link.
- **VIEW** the Board Book Summary Sheet the recommended funding.

Upon approval by the Board of Directors, a Funding Offer will be generated with the recommended project summary information from the Board Book Summary Sheet.

## Step 3: Accept the Funding Offer

- **Review the Terms and Conditions of the Funding Offer**
- **Electronically Accept the Funding Offer Online**

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#### REVIEW THE TERMS AND CONDITIONS OF THE FUNDING OFFER

Upon approval of your project by the PENNVEST Board of Directors, a funding offer based upon the information submitted to the board for consideration will be generated on the website. This offer includes the amount of PENNVEST funding, interest rate, repayment term, as well as the standard terms and conditions that accompany the offer. It is critical that you carefully review the funding offer with your attorney, guarantor (if applicable) and other parties that have a vested interest in the commitment of the funding for the project.

On the Online Funding Request website under the **PENNVEST Review tab**, you will see a list of links that you will need to complete the PENNVEST Review process.

### How to view the Funding Offer terms and conditions:

- ② **CLICK** on **Initiate Loan** link on the right-hand navigation bar of under the PENNVEST Review tab and then click on **Funding Offer** link.
- ② **PRINT** the Funding Offer by clicking on the **Print Version** link found at the top of page.
- ② **REVIEW** the Funding Offer will all parties that have a vested interest in the commitment of the funding for the project.

PENNVEST recognizes that there may be aspects of the offer that the you may need to discuss during the loan closing process. In particular, you may wish to request modifications to some of the terms and conditions contained in the offer. By signing the offer, the you are not precluded from raising such issues and making such requests during the loan closing process. PENNVEST will consider the merits of any such issues that you raise during this process.

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### ELECTRONICALLY ACCEPT THE FUNDING OFFER

Once you have decided to accept PENNVEST funding, you must electronically accept the Funding Offer on the website. You must **accept** the offer in order to continue on to the loan closing process. A Funding Offer that is not electronically accepted in a timely manner may be withdrawn by PENNVEST. You may decline the Funding Offer; HOWEVER, this will automatically withdraw the offer and PENNVEST funding for the specific project will no longer be available.

On the Online Funding Request website under the **PENNVEST Review tab**, you will see a list of links that you will need to complete the PENNVEST Review process.

#### How to electronically accept the PENNVEST Funding Offer:

- ② **CLICK** on **Initiate Loan** link on the right-hand navigation bar of under the PENNVEST Review tab and then click on **Funding Offer** link.
- ② **CLICK** on the "**I Accept**" button found at the bottom of the Funding Offer.
- ② **VERIFY** that a certification with your name and date/time stamp have been posted to the web page at the bottom of the document. Upon acceptance of the Funding Offer, this page will be locked.

Electronic acceptance of the Funding Offer will open the Loan Closing tab of the website for you to begin the settlement process.

# The Settlement Process

## Step 1: Plan Your Settlement Closing

- 🔗 **Schedule Your Settlement Date**
- 🔗 **Print and Review Your Settlement Plan**
- 🔗 **Meet with Your Attorney and Engineer**

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### SCHEDULE YOUR SETTLEMENT DATE

Upon accepting your PENNVEST Funding Offer, you may start the Loan Closing process. The first thing that you should do is schedule a Settlement date with PENNVEST to ensure that you will reach settlement in a timely manner in order to start your project.

On the Online Funding Request website under the **Loan Closing tab**, you will see a list of all forms that you will need to complete the settlement process.

#### How to schedule your Settlement Date:

- **CLICK** on the  button found at the top of the left-hand navigation bar under the Loan Closing tab to expand the full list of items and tools you will need to complete the settlement process.
- **CLICK** on the  [Schedule Settlement Date](#) found on the **Settlement Toolbar** located at the top of the **Settlement Checklist**.
- **VIEW** on the Settlement Date form to see if you have a date scheduled.
- **CLICK** on the Edit Information to request a date, if no date is listed. An email will be automatically sent to the PENNVEST Legal Office when you request a date.
- **CHECK** your email to verify that your requested date has been confirmed.

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### PRINT AND REVIEW YOUR SETTLEMENT PLAN

On the Online Funding Request website under the **Loan Closing tab**, you will see a list of all forms that you will need to complete the settlement process.

#### How to print your Settlement Plan:

- **CLICK** on the  button found at the top of the left-hand navigation bar under the Loan Closing tab to expand the full list of items and tools you will need to complete the settlement process.
- **CLICK** on the  [Plan](#) found on the **Settlement Toolbar** located at the top of the **Settlement Checklist**.
- **PRINT** the plan by using your web browser print function.
- **REVIEW** the plan action items, responsibilities and due dates. A thorough review at the start of your settlement will provide a good understanding of the lead time and parties necessary to complete all of the requirements for your settlement.

As you move through the settlement process, the plan will automatically update itself. You should periodically review this plan during the settlement process to help you understand what has been completed and what must be completed in time for your scheduled settlement date.

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## MEET WITH YOUR ATTORNEY AND ENGINEER

PENNVEST strongly advises that you arrange to have an initial meeting with the attorney and the engineer that will be handling settlement processes and documents for your PENNVEST project. It is recommended that you arrange this meeting within thirty (30) days from the date that the funding offer was accepted for this project. Failure to adequately understanding the time requirements and/or properly coordinate responsibilities during the settlement process often result in unnecessary delays and could jeopardize the ability for you to meet your scheduled settlement date.

### What you should do with at your meeting:

- **REVIEW** these PENNVEST Settlement process to get a understanding of what is provided online and who will need to accomplish what. This will better coordinate and assist you in a timely completion of all of the required online information and documents necessary for your settlement.
- **PEFORM** a complete review of all forms and documents required for your settlement. Use the  button to get the **Settlement Checklist** that will automatically generate online at the time of accepting your PENNVEST Funding Offer. This checklist will provide a list of all required documents and procedures that you will need to complete specific to your project. The review with your attorney and engineer should include a review of all of the listed documents, identification of assigned responsibilities, signature requirements and authorizations, review of timelines and due dates. You can review the requirements for each form and document by simply clicking on each checklist item on the list.

## Step 2: Complete and Submit Documentation

- **Complete the Exhibits & Certifications Forms Online**
- **Print and Review Your Settlement Plan**
- **View Approvals**

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## Complete the Documents and Certifications

Once you have scheduled your settlement closing date and review all of the closing requirements, you can begin completing the documentation and certifications required for closing.

On the Online Funding Request website under the Loan Closing tab, you will see a list of all forms that you will need to complete the settlement process.

### How view the requirements for each document:

- **CLICK** on the  button found at the top of the left-hand navigation bar under the Loan Closing tab to expand the full list of items and tools you will need to complete the settlement process.
- **CLICK** [Schedule Settlement Date](#) found on the Settlement Toolbar located at the top of the Settlement Checklist.
- **VIEW** on the Settlement Date form to see if you have a date scheduled.
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## PRINT AND REVIEW YOUR SETTLEMENT PLAN

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### How to print your Settlement Plan:

- CLICK on the  button found at the top of the left-hand navigation bar under the Loan Closing tab to expand the full list of items and tools you will need to complete the settlement process.
- CLICK on the  [Plan](#) found on the Settlement Toolbar located at the top of the Settlement Checklist.
- PRINT the plan by using your web browser print function.
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## Step 3: Go to Settlement