

# Document Upload Screen & Instructions

Learn about the Environmental Loans programs and find guidance at [dnr.wi.gov/aid/eif.html](http://dnr.wi.gov/aid/eif.html).

If you have a Financial Assistance Application in progress, your DNR loan project manager will notify you once the [Online Application/Document Upload System](#) loan stage is set-up for you to attach the “post-application” documents needed to prepare the loan/Financial Assistance Agreement (FAA). The document upload screen shows **all** the loan project’s required documentation and status. Learn more about the [online system](#) for submittals and uploads.

## About the Loan Documents Screen

In the online system, click the “Edit” icon next to the application for which you intend to upload documents. Scroll to the bottom of the screen and click the “Upload Documents” button. The application’s loan summary and status will be displayed, including: any projects of this loan; documents due dates; municipal bond meeting date (*at which the resolution(s) approving the loan/FAA is signed*); and loan closing date. The loan’s DNR project manager enters these dates. Below the application’s loan summary, there is a field to enter any comments related to the documents.

Loan Documents					
Action	Project No	Documents Due Date	Municipal Meeting Date	Closing Date	Status
<a href="#">Upload Documents</a>	3239-01	04-10-2019	05-29-2019	06-12-2019	STARTED

## Status of loan documents screen

- Started = required documents need to be uploaded.
- Submitted = all required documents have been uploaded in all categories.
- Complete = all required documents have been “Accepted” by the DNR loan project manager.

## Loan documents table

- The loan documents table can be sorted by clicking on a column’s heading.
- **Required documents have an asterisk (\*) after the name.**
- Documents previously uploaded with the application submittal are indicated with “Yes” in “From App” column.
- A document can be deleted before the DNR loan project manager “Accepts” it but not after.

Document Name	File / Link	Upload Date	User ID	From App	Delete
Authorized Representative Resolution (*)	Reimbursement Resolution Moreland Blvd.pdf	01-17-2019 12:19 PM	marcumr	Yes	

## Documents are categorized as follows:

- Admin/Financial
- Professional Services
- Environmental Review (SDWLP only)
- Bidding/Construction
- Federal Requirements
- Correspondence
- Municipal



## Status of each document category:

- Documents Required = not all required documents have been uploaded.
- Required Documents Submitted = all required documents have been uploaded.
- Complete = all required documents have been "Accepted" by the DNR loan project manager.

## Missing documents

Checking the box "Display List of Outstanding Documents" will show at the top of each category in red lettering what documents are missing.

Display List of Outstanding Documents

**✘ One Or More Required Documents Are Missing.**

## Instructions for Uploading Documents

Applicants can view all outstanding loan documents and upload those documents within the online application system's document upload feature. Your DNR loan project manager will notify you once the loan stage is set-up, then you can begin loading additional documents. Note: Only PDFs can be uploaded, and the file size must be 50MB or less.

- 1) In the online system, click the "Edit" icon next to the application for which you intend to upload documents.
- 2) Scroll to the bottom of the screen and click the "Upload Documents" button.

Loan Documents					
Action	Project No	Documents Due Date	Municipal Meeting Date	Closing Date	Status
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- 3) Below the application's loan summary, enter any comments related to the documents, then click the "Save" button.
- 4) To upload a new document, you must select the correct document type from the drop-down menu in the appropriate category; save or print the [Document Upload Categories and Types \(PUB-CF-067\)](#) prior to this step.
  - a) Select a reason for your upload from the listed categories (e.g., Bidding/Construction).
  - b) Select the document type from that category's list (e.g., Construction Contract Documents).
  - c) Browse to and select the document file you saved on your computer. Reminder: Only PDFs can be uploaded, and the file size must be 50MB or less.
  - d) Click the "Upload File" button to add it.
  - e) The document then will be listed on the loan documents table.

After a successful upload, please give your DNR loan project manager time to process and review the documents. The document will be "Accepted" after they determine that it meets the requirements of the Clean Water Fund Program (CWFP) / Safe Drinking Water Loan Program (SDWLP).

## To change the category or type, ...

Delete the document before the DNR loan project manager "Accepts" it, then resubmit the document under the correct category and type.

## Log out button

When you are ready to leave the Online Application/Document Upload System, use the "Log Out" button to logout instead of leaving or closing the internet browser window.

# Construction contract documents

Under the Bidding/Construction category, the Construction Contract Documents type is unique in that it can contain any number of sub-documents (e.g., bid ad, executed contracts, engineer's recommendation, etc.) in the PDF.

Document:	<input type="text" value="Construction Contract Documents (*)"/>	
Contract Name/Number:	<input type="text"/>	<b>Required.</b>
<p>Select the documents included within the PDF and enter the page number of the document. Note that documents can be loaded individually, if not included within a larger PDF, and entered with a page #1 (i.e. Bid ad, Engineer's recommendation, Bid tabs, etc.)</p>		
<input checked="" type="checkbox"/> Executed Construction Contract (*)	<input type="text" value="Page"/>	<b>Required.</b>
<input checked="" type="checkbox"/> Federal wage rates (*)	<input type="text" value="Page"/>	<b>Required.</b>
<input checked="" type="checkbox"/> Bid ad with proof of publication (*)	<input type="text" value="Page"/>	<b>Required.</b>
<input checked="" type="checkbox"/> Bid Tabulation (*)	<input type="text" value="Page"/>	<b>Required.</b>
<input checked="" type="checkbox"/> Engineer's recommendation based on bid evaluation (*)	<input type="text" value="Page"/>	<b>Required.</b>

## Directions for uploading construction contract documents

Follow steps 1) through 4b) in the Document Upload Instructions above, then:

- a. To upload an individual document:
  - i. Enter the Contract Name/Number associated with the document.
  - ii. Select the sub-document type of the PDF (e.g., bid advertisement).
  - iii. Enter one (1) for the page number.
- b. To upload a document containing sub-documents:
  - iv. Enter the Contract Name/Number associated with the document.
  - v. Select the sub-document types included in the PDF (e.g., bid ad, executed contracts, and engineer's recommendation).
  - vi. Enter the corresponding page number for each selected sub-document type.

To continue, follow steps 4c) through 4e) in the Document Upload Instructions above.