

# SOUTHWEST FLORIDA WATER MANAGEMENT DISTRICT



## Online Cooperative Funding Initiative Applicant Guide

Revision Chronology		Review Date	8/1/2020 - 7/30/2021
		Assigned Reviewer	
Document ID	Effective Date	Reason for Change	
V.1.0	8/1/2020	Initial Creation	
v.1.1	7/24/2020	Edits to tabs (screenshots) and minor guidance edits (Rita H.)	
v.1.1	7/28/2020	Add screenshots of Print Function on Submit tab (Rita H.)	
v.1.2	7/29/2021	Add screenshots of Application Tab (prior year applications available) and Submit tab (Electronic Signature dropdown selection) (Rita H.)	

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## GENERAL INFORMATION

The purpose of this document is to assist CFI Applicants in accessing and completing the online Cooperative Funding Initiative (CFI) application. This document is intended to not only describe how to register, but it also describes the application data entry procedures in detail. Project specific questions can be directed to the staff contacts identified in the applicable project section of the CFI Guidelines document. Applicants should contact one of the government affairs regional managers for questions relating to the CFI program. Contact information and Project specific information can be found on the CFI webpage. If you experience any issues with the online CFI application (logging in, uploading required documents, etc.) please contact the CFI System Administrator Rita Harrod at (800) 423 - 1476 x4269.

## THINGS TO KNOW BEFORE GETTING STARTED

This application(s) can be done in multiple sittings. However, Applicants must complete the entire Application tab and Save in order to generate the application. After the application tab has been completed and saved, Applicants may return to edit as many times as needed prior to final submittal before the deadline.

All fields annotated with a red asterisk are required. Applicants cannot submit application with incomplete required fields.

Applicants that create more than one application may switch between applications by using the dropdown located above the application tabs. Please see the “Submitting Multiple Applications” Section.

Returning Applicants may view prior year applications. Prior year applications cannot be edited. Applications are related by login credentials; Applicants may only view prior year applications submitted with the same credentials. Please see the “Viewing Prior Year Applications” Section.

Current browser compatibility is: Chrome, Edge, Safari

## HOW TO REGISTER

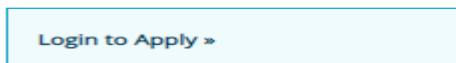
Registration will be open year-round, however, the online application submittal period will only be available 10:00am August 5, 2021 to 5:00pm October 1, 2021. Applications will

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not be accepted or considered after the deadline. Users should be aware that during non peak hours some minor interruptions may occur due to patches, server reboot, etc.

Go to the Southwest Florida Water Management District's website at:  
<https://www.swfwmd.state.fl.us/business/finance/cooperative-funding-initiative>

- Click on Login to Apply link



- Next, click the link next to "Start the registration process here".

## Welcome to the new Cooperative Funding Initiative Application

### Login and Registration

If you are already registered, click [here](#) to log in.

Have you forgotten your password? Click [Password Reminder](#) and your password will be emailed to you.

Start the registration process [here](#), where you will be required to enter your e-mail address, and choose a password.

After you are logged in, you can create a new application or edit an existing application by clicking on "**My Applications**" above.

### Need help?

The "Register" page will appear. Please take note of the password requirements. Click on Register when done.

## Register

Create a new account.

Email

rita.harrod@swfwmd.state.fl.us

Password

.....

Confirm password

.....

Register

© 2020 - CFIRectUserRegistration - [Privacy](#)

- Passwords must have at least one non alphanumeric character.
- Passwords must have at least one digit ('0'-'9').
- Passwords must have at least one uppercase ('A'-'Z').

Upon completion of the registration, applicants will be directed back to the Welcome page. Applicants should follow the instructions for Returning to the CFI Online Application seen below.

## Returning to the CFI Online Application After Registration

Returning Applicants may use the “If you have already registered” link upon re-entry into the system.

### Welcome to the new Cooperative Funding Initiative Application

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#### Login and Registration

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If you are already registered, click [here](#) to log in.

Have you forgotten your password? Click [Password Reminder](#) and your password will be emailed to you.

Start the registration process [here](#), where you will be required to enter your e-mail address, and choose a password.

After you are logged in, you can create a new application or edit an existing application by clicking on “**My Applications**” above.

#### Need help?

Applicants may also use the login located near the top right.

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### Welcome to the new Cooperative Funding Initiative Application

#### Log in

Use a local account to log in.

Email

rita.harrod@swfwmd.state.fl.us

Password

.....

Remember me?

[Log in](#)

[Register as a new user](#)

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## Password Reminder

Applicants that have forgotten their passwords should use the Password Reminder link.

### Welcome to the new Cooperative Funding Initiative Application

#### Login and Registration

If you are already registered, click [here](#) to log in.

Have you forgotten your password? Click [Password Reminder](#) and your password will be emailed to you.

Start the registration process [here](#), where you will be required to enter your e-mail address, and choose a password.

After you are logged in, you can create a new application or edit an existing application by clicking on **"My Applications"** above.

#### Need help?

A Reset Password email will be sent to the email entered. Use the link found in the email to reset the password.

## Forgot your password?

Enter your email.

Email

Submit

© 2020 - CFIRactUserRegistration - [Privacy](#)

The Reset Password email will be sent from the SWFWMD CFIAAdmin Email account, it is safe to use this link.

### Reset Password



CFIAAdmin@swfwmd.state.fl.us  
To Rita Harrod



9:22 AM

Please reset your password by [clicking here](#).

Please do not reply to this email, as this email address is not monitored.

If you need assistance, please call the District at (352) 796-7211 or (800) 423-1476(Florida only), or email us at [cfi@swfwd.state.fl.us](mailto:cfi@swfwd.state.fl.us).

# REGISTRATION COMPLETE – STARTING A NEW APPLICATION

Upon completion of Registration, Applicants are directed to a New Application tab. Applicants must complete the entire page in order to Save & Continue.

The application submission deadline is 10/1/2021 5:00 PM. Please ensure your application is complete and submitted prior to this deadline.

Select 'New Application' or application to View/Edit:  ▼

## Application

**\*\*Please refer to the CFI Applicant Guide for information required to be included in the application.**

Is this a new project?  Yes  No

\*Project Name

\*Indicate all counties to benefit from this project (use Shift and Ctrl keys to select multiple)

Available Programs

REDI

Springs

\*Cooperator Information

 ▼

\*Contact Name

\*Email

\*Phone

Extension

\*Address

\*City

\*State

\*Zip Code

Save & Continue

Application ID: 0

**Page Tip:** Upon completion of all fields and clicking the Save & Continue button, the remaining tabs of the application will display and become available for data entry.

**Overall Application Tip:** Upon clicking the Save & Continue button, changes are saved for the specific tab completed/edited. Users are notified that changes have been saved via message, seen below.

Changes saved successfully

Save & Continue

## APPLICATION TAB

- Using the radio button, select Yes/No if this is a “New Project”.
- Enter a Project Name. For ongoing multi-year project requests please insert the exact project name that was used in prior years.
- Using the dropdown, select applicable county. Applicants may select multiple counties. Counties selected will appear above list.
- To remove a selected county, click on the highlighted county. It will be removed from the list.
- If applicable, select the program associated with this application. Program selection will display next to 'Available Programs'.
- REDI selection will require eligibility documentation to be uploaded on the Documents tab.

Please refer to the CFI guidelines for information required to be included in the application.

Is this a new project?  Yes  No

Project Name  
FY2022 Test Project

Indicate all counties to benefit from this project

**Citrus**

Charlotte  
Citrus  
DeSoto

Available Programs **Springs, REDI**

REDI  
 Springs

Red arrows point to the 'No' radio button, the 'Project Name' field, the 'Citrus' county selection, and the 'REDI' program selection.

- Using the Cooperator Information dropdown, select the entity name. If the Cooperator name is not listed in the dropdown, please call or email the CFI Administrator.

Cooperator Information

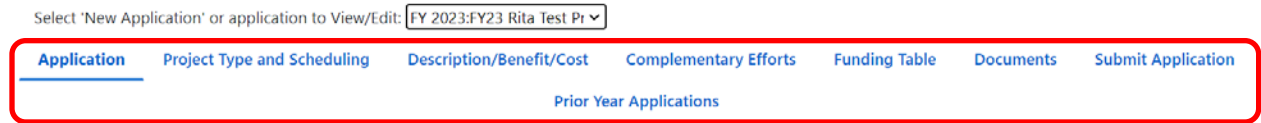
SWFWMD TESTER

- Complete all Contact information fields. All are required, except Extension.

*Contact Name	*Email	*Phone	Extension
Rita Harrod	rita.harrod@swfwmd.state.fl.us	352-796-7211	
*Address	*City	*State	*Zip Code
2379 Broad Street	Brookville	FL	34604



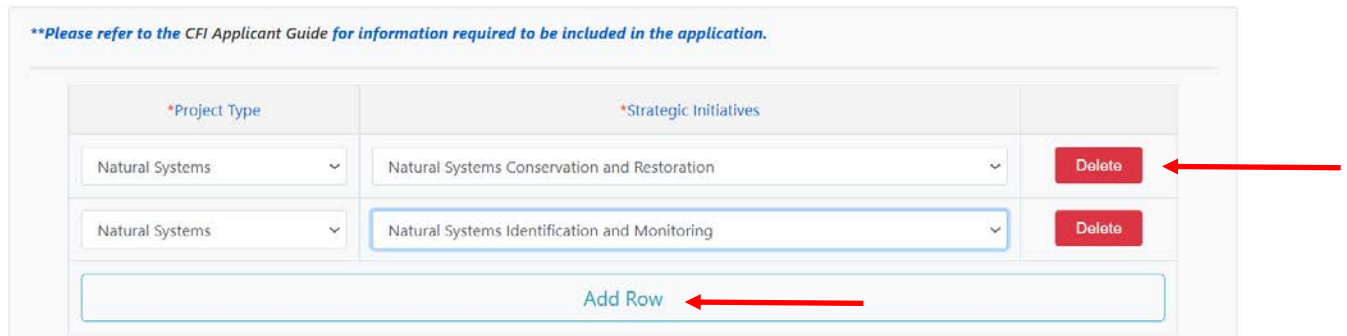
- Upon clicking the 'Save & Continue' button, the remaining tabs will display.



## PROJECT TYPE AND SCHEDULING TAB

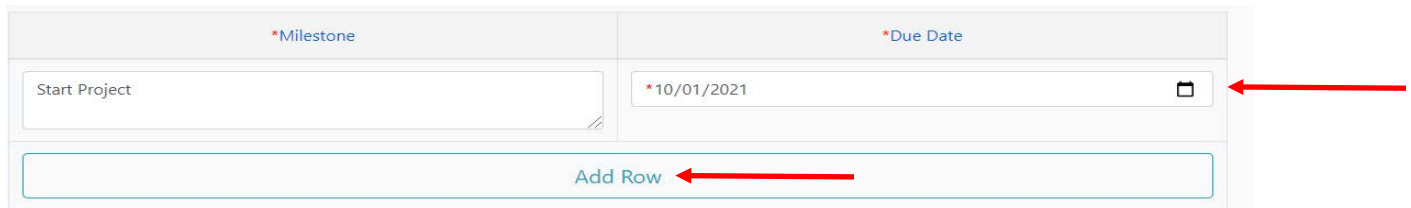
### Project Type

- Using the dropdown, select Project Type and the applicable Strategic Initiative. Each Project Type selected requires the applicable Strategic Initiative.
- Multiple rows may be added/deleted as necessary.



### Milestone and Due Date

- Click on Add Row, enter a project Milestone and Due Date
- At least one milestone must be entered. Multiple rows may be added/deleted as necessary.
- Save & Continue when done.



**Page Tip:** Milestone table will be sorted by due date. Sorting will occur after saving and moving to another tab.

## DESCRIPTION/BENEFIT/COST TAB

- This tab consists of three separate text fields with a maximum character limit of 4000 characters. All three fields are required. The CFI Guidelines should be consulted for project specific information.
  - Cut/Copy/Paste or free hand data entry is accepted.
  - Save & Continue when done.

Select 'New Application' or application to View/Edit: FY 2023:FY23 Rita Test ▼

[Application](#) [Project Type and Scheduling](#) [Description/Benefit/Cost](#) [Complementary Efforts](#) [Funding Table](#) [Documents](#) [Submit Application](#)

Prior Year Applications

**\*\*Please refer to the CFI Applicant Guide for information required to be included in the application.**

\*\*Limit 4000 characters. Insert details, not an attachment.

\*Description (Current character count: 0)

\*Benefit (Current character count: 1)

\*Cost (Current character count: 0)

Cancel Save & Continue

Application ID: 382

### Page Tip:

- Text boxes will count characters and display remaining characters available.
- Applicants should NOT insert “See Attached Document”. Information displayed here prints exactly as is on the application.
- When using the copy/cut/paste method, all HTML is stripped out when pasting into the boxes.
- Applicants should consult the CFI Guidelines for project specific information.

## COMPLEMENTARY EFFORTS TAB

- This tab consists of one text field with a maximum character limit of 4000 characters.
  - Cut/Copy/Paste or free hand data entry is accepted.
  - Applicants should consult the CFI Guidelines for project specific information.
  - Save & Continue when done.

Select 'New Application' or application to View/Edit: FY 2023:FY23 Rita Test ▼

[Application](#) [Project Type and Scheduling](#) [Description/Benefit/Cost](#) [Complementary Efforts](#) [Funding Table](#) [Documents](#) [Submit Application](#)

Prior Year Applications

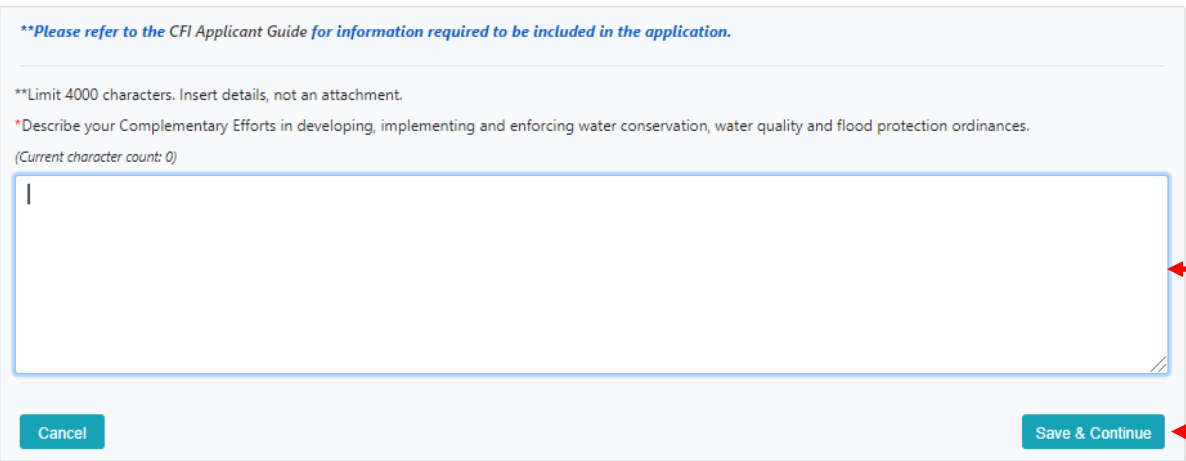
**\*\*Please refer to the CFI Applicant Guide for information required to be included in the application.**

\*\*Limit 4000 characters. Insert details, not an attachment.

\*Describe your Complementary Efforts in developing, implementing and enforcing water conservation, water quality and flood protection ordinances.

(Current character count: 0)

Application ID: 382



### Page Tip:

- Text box will count characters and display remaining characters available.
- Applicants should NOT insert "See Attached Document". Information displayed here prints exactly as is on the application.
- When using the copy/cut/paste method, all HTML is stripped out when pasting into the box.
- Applicants should consult the CFI Guidelines for project specific information.

# FUNDING TAB

- The funding table tab, at a minimum must include Applicant and the District's request for funding for the current funding year application request, ex. FY2023.
- To edit amounts, click in the column grid/field on the Funding Source row.
- Applicants can enter additional Funding Sources by clicking on Add Row. Please consult the current CFI Guidelines for additional information regarding funding sources (including State or federal appropriations or grant monies).
- Select Save & Continue when done.

Select 'New Application' or application to View/Edit:

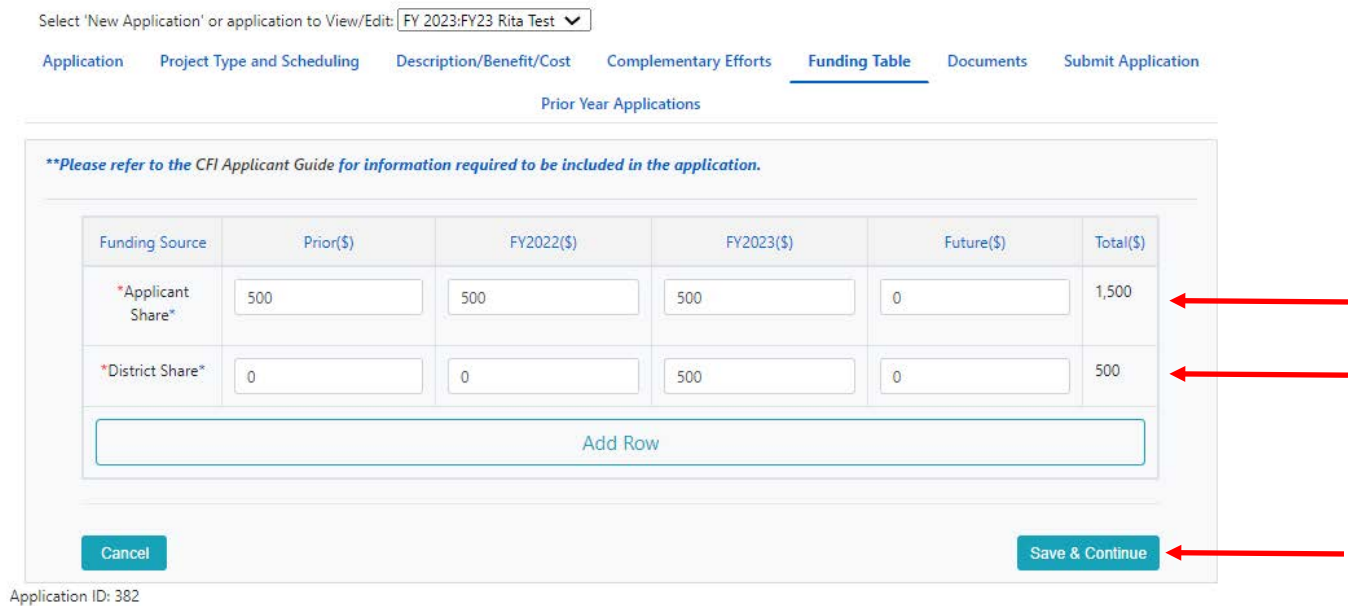
[Application](#) [Project Type and Scheduling](#) [Description/Benefit/Cost](#) [Complementary Efforts](#) [Funding Table](#) [Documents](#) [Submit Application](#)

Prior Year Applications

**\*\*Please refer to the CFI Applicant Guide for information required to be included in the application.**

Funding Source	Prior(\$)	FY2022(\$)	FY2023(\$)	Future(\$)	Total(\$)
*Applicant Share*	<input type="text" value="500"/>	<input type="text" value="500"/>	<input type="text" value="500"/>	<input type="text" value="0"/>	1,500
*District Share*	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="500"/>	<input type="text" value="0"/>	500
<input type="button" value="Add Row"/>					

Application ID: 382



## Page Tip:

- **ENTER** whole dollar amounts only.
- **DO NOT** enter, commas, \$ signs or special characters.
- Upon data entry of amounts, all rows and amounts will calculate the total and display in the last column.

# DOCUMENTS TAB

- Click on Select, when the popup window appears, select the applicable document, click open and the window will close. Applicants may select multiple documents at one time. No more than 10 documents can be uploaded per application.
- The document selected will now appear in the Document name grid; Click on “Click to Upload”

Select 'New Application' or application to View/Edit: FY 2023:FY23 Rita Test

[Application](#) [Project Type and Scheduling](#) [Description/Benefit/Cost](#) [Complementary Efforts](#) [Funding Table](#) [Documents](#) [Submit Application](#)

Prior Year Applications

**\*\*Please refer to the CFI Applicant Guide for information required to be included in the application.**

\*\*File upload size limit: 10 MB each  
\*\*Allowed file types extensions: .txt,.rtf,.pdf,.doc,.docx,.xls,.xlsx,.jpg,.jpeg,.png,.tif,.gif,.bmp

Document Name	Document Size (MB)	
DemoDocs.docx	0.28	Delete

Click to Upload

Document Name	Document Type (*A Map, Funding Letter, and Ranking Letter are required when submitting application)

Save & Continue

Application ID: 382

- The selected document will now move to the lower grid. Use the dropdown to select document type. Upon selecting the Document type in the bottom grid, applicants may use the clear button to remove the documents seen to the right.

**\*\*Please refer to the CFI Applicant Guide for information required to be included in the application.**

\*\*File upload size limit: 10 MB each  
\*\*Allowed file types extensions: .txt,.rtf,.pdf,.doc,.docx,.xls,.xlsx,.jpg,.jpeg,.png,.tif,.gif,.bmp

Document Name	Document Size
Submit to District CFI.docx	0.41806 MB

Clear

Document Name	Document Type (*A Map, Funding Letter, and Ranking Letter are required when saving application)	
<u>Submit to District CFI.docx</u>	Select Document Type	Delete

Save & Continue

- At a minimum, a funding and ranking letter and a project location map is required.
- Applicants selecting REDI as a Program, located on the Application tab, must upload the applicable REDI eligibility documentation.
- Applicants should consult the CFI Guidelines for project specific information.
- Multiple documents may be selected/uploaded at one time.
- Select Save & Continue when done.


To delete a document, click on the Delete button next to the document.


Application    Project Type and Scheduling    Description/Benefit/Cost    Complementary Efforts    Funding Table    Documents    Submit Application







Prior Year Applications


**\*\*Please refer to the CFI Applicant Guide for information required to be included in the application.**

\*\*File upload size limit: 10 MB each  
 \*\*Allowed file types extensions: .txt,.rtf,.pdf,.doc,.docx,.xls,.xlsx,.jpg,.jpeg,.png,.tif,.gif,.bmp

 Select

 Clear

Document Name	Document Type (*A Map, Funding Letter, and Ranking Letter are required when submitting application)	
<a href="#">DemoDocs.docx</a>	Funding Letter	 
<a href="#">User Issue Form.docx</a>	Select Document Type	 
<a href="#">REDIGuidelines 6-26-17.pdf</a>	Select Document Type	 

 Save & Continue

Application ID: 382

### Required Documents Additional Information:

- Funding and Ranking letter must be signed by a Senior Administrator.
- Applicants may combine the funding and ranking information into a single document, however, the document will need to be uploaded twice; once as the funding letter and once as the ranking letter.
- Acceptable file formats: .txt, .rtf, .pdf, .doc, .docx, .xls, .xlsx, .jpg, .jpeg, .png, .tif, .gif, .bmp
- File size is limited to 10MB.

# PRINT APPLICATION

Applicants may print the application prior to or after final submission of the application. The print function is located on the Submit Application tab.

Select 'New Application' or application to View/Edit: FY 2023:FY23 Rita Test ▼

[Application](#) [Project Type and Scheduling](#) [Description/Benefit/Cost](#) [Complementary Efforts](#) [Funding Table](#) [Documents](#) [Submit Application](#)

[Prior Year Applications](#)

**Contract Terms**

In an effort to efficiently process Cooperative Funding Agreements and ensure fairness to all cooperators, the District has developed a contract template that includes standard terms and conditions (Exhibit A) to be used for all projects, and special terms and conditions (Exhibit B) to be used for all similar type projects. By submitting an application, you acknowledge you have read and understand the terms contained in the contract template. Be advised the template is significantly different in format and verbiage than previous templates. The District reserves the right to revise the template as needed. Certain project types, such as septic conversion projects in springsheds and indirect potable reuse projects will require special contract terms which are currently in development by the District. The District recommends you provide the template to your legal counsel for review. Contact the District government affairs regional manager for your region with any questions.

**REQUIRED: I have read and understand the terms contained in the contract template.**

**Digital Signatures**

The use of electronic signature will reduce the time in which you receive the contract for signature. Please select your preference using the dropdown.

Yes ▼ (SELECTION REQUIRED): Digital Signature is preferred, but selecting 'No' will not negatively impact your project's evaluation.

**\*\*Please ensure that all information is correct and that you have saved all of your data on each of the sections before submitting your application. You may continue to edit and submit your application up until the application submission deadline.**

[Print Application](#) [Submit Completed Application](#)

Application ID: 382

Click on the Print Application function, the application is located in the Download Manager. Click to view and/or print.

[Print Application](#)

Application ID: 112

CFIAApplication (1).pdf

# READY TO SUBMIT APPLICATION

Applicants should carefully review the Contract Terms prior to checking the Required field and submitting to the District.

Applicants are also required to make a selection for the use of electronic signature when receiving the contract.

Select 'New Application' or application to View/Edit: FY 2023:FY23 Rita Test

[Application](#) [Project Type and Scheduling](#) [Description/Benefit/Cost](#) [Complementary Efforts](#) [Funding Table](#) [Documents](#) [Submit Application](#)

[Prior Year Applications](#)

### Contract Terms

In an effort to efficiently process Cooperative Funding Agreements and ensure fairness to all cooperators, the District has developed a contract template that includes standard terms and conditions (Exhibit A) to be used for all projects, and special terms and conditions (Exhibit B) to be used for all similar type projects. By submitting an application, you acknowledge you have read and understand the terms contained in the contract template. Be advised the template is significantly different in format and verbiage than previous templates. The District reserves the right to revise the template as needed. Certain project types, such as septic conversion projects in springsheds and indirect potable reuse projects will require special contract terms which are currently in development by the District. The District recommends you provide the template to your legal counsel for review. Contact the District government affairs regional manager for your region with any questions.

**REQUIRED:** I have read and understand the terms contained in the contract template.

### Digital Signatures

The use of electronic signature will reduce the time in which you receive the contract for signature. Please select your preference using the dropdown.

Yes (SELECTION REQUIRED): Digital Signature is preferred, but selecting 'No' will not negatively impact your project's evaluation.

**\*\*Please ensure that all information is correct and that you have saved all of your data on each of the sections before submitting your application. You may continue to edit and submit your application up until the application submission deadline.**

[Print Application](#)

[Submit Completed Application](#)

Application ID: 382

Applicants should review all tabs to make certain all required fields are completed and all documents have been uploaded.

Errors/Omissions will display on the Submit Application tab above the Submit Completed Application tab.

**\*\*Please ensure that all information is correct and that you have saved all of your data on each of the sections before submitting your application. You may continue to edit and submit your application up until the application submission deadline.**

- The following documents are missing from the Documents Tab: Funding Document

[Print Application](#)

[Submit Completed Application](#)

Application ID: 382

Upon successfully submitting, Applicants will receive a confirmation email. The confirmation will be sent to the email address entered on the Application tab.

Your Application Id 382 for Project FY23 Rita Test Project 1 has been successfully submitted to the Southwest Florida Water Management District on 7/29/2021 3:11:18 PM. A confirmation email will be sent to rita.harrod@swfwmd.state.fl.us.

[Print Application](#)

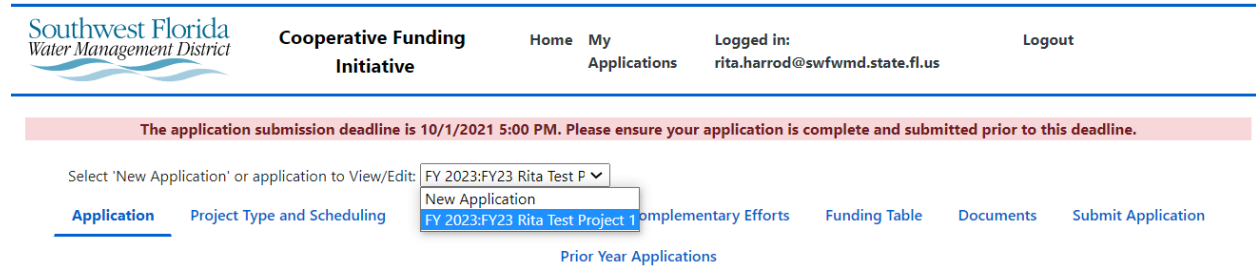
[Submit Completed Application](#)

Application ID: 382



# SUBMITTING MULTIPLE APPLICATIONS

To submit multiple applications, use the “New Application” dropdown, select New Application. A new application form will display. Follow the same instructions seen in “Starting a New Application” Section. As a reminder, Applicants must complete the entire page, with a new project name, in order to Save & Continue. Applicants may switch between applications by using this dropdown.

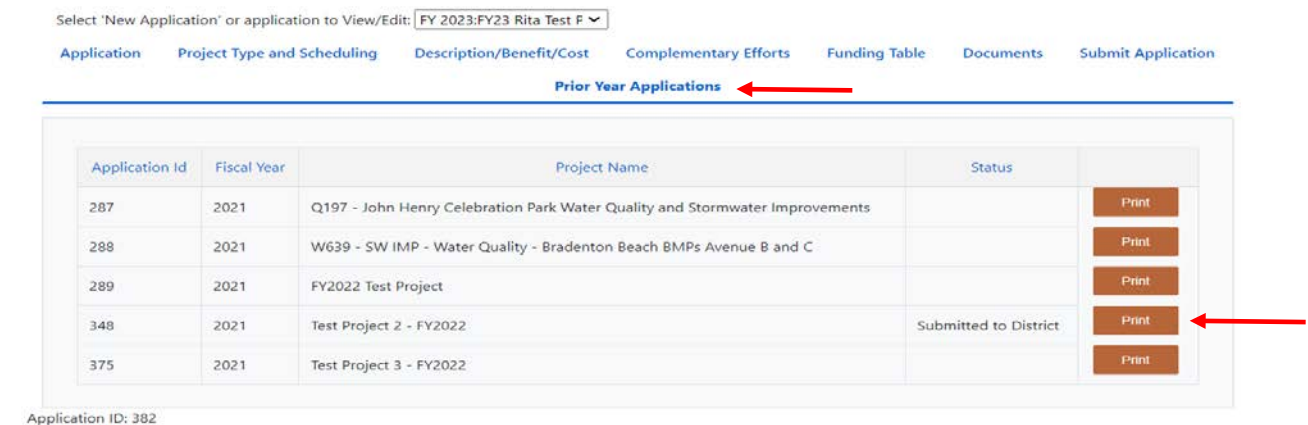


## Page Tip:

- Save all changes before switching to a different application or starting a new application.
- Each application stands alone and must be submitted individually. Applications cannot be submitted to the District in aggregate.

# VIEWING PRIOR YEAR APPLICATIONS

The current system contains FY2022 CFI applications only. Applicants may view/print these applications for reference. Click on Prior Year Applications; application grid will appear. Click on the Print Application function, the application is located in the Download Manager. Click to view and/or print.



	348	2021	Test Project 2 - FY2022
	375	2021	Test Project 3 - FY2022



CFIApplication (3).pdf

