

# CFA APPLICATION MANUAL

This manual outlines the process for applying through the CFA and a step-by-step guide to utilize the online application.

Additional CFA related documents can be found on the CFA home page at <https://apps.cio.ny.gov/apps/cfa/>.

More information on the Regional Councils can be found at [www.regionalcouncils.ny.gov](http://www.regionalcouncils.ny.gov).



# OVERVIEW

As part of New York's efforts to improve the business climate and expand economic growth, the NYS Consolidated Funding Application (CFA) was created to support the Regional Economic Development Council (REDC) Initiative. The CFA has streamlined and expedited the grant application process marking a fundamental shift in the way state resources are allocated, ensuring less bureaucracy and greater efficiency to fulfill local needs. The CFA allows applicants to access multiple state funding sources through one application, making the process quicker, easier, and more productive.

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The CFA is designed to give project applicants expedited and streamlined access to a combined pool of grant funds and tax credits from dozens of existing programs. The CFA is a modern and easy-to-use online application that allows businesses and other entities to apply for multiple agency funding sources through a single, web-based application. As statewide programs and local needs have evolved, so has the CFA which is now host to a multitude of programs and initiatives. These programs change throughout the year so be sure to check back periodically to see what programs are available.

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A photograph of a person sitting at a wooden desk, writing in a notebook with a white pen. The person is wearing a grey sleeveless top. The desk is cluttered with a laptop, a stack of papers, and a colorful notebook. The background is slightly blurred, showing another person's hand near their face.

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# GETTING STARTED

Registration

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# Registration

The Consolidated Funding Application is a web-based application accessible at <https://apps.cio.ny.gov/apps/cfa/>.

To apply for a grant, you must first register and identify the project for which funds are sought. The CFA allows applicants to be considered for multiple sources of funding for a project by filling out just one application.

On the registration page, enter an e-mail address, organization name, and project name. Prior to selecting “Register New Application,” you must answer the security question at the bottom of the page. This is a security function that protects the grant system from spam.

The next screen verifies registration for the project and provides a project-specific token or password. **Take and save a screen shot and/or Print out this page and save it for your records.** You will need the token to revise or update your application.

**Troubleshooting Tip:** Applicants seeking funding for **more than one project** must start a new application for each project and obtain an application number for each project. If you have previously registered for a CFA, you may login with your existing e-mail address and token to start a new application(s). To start a new application with existing credentials, select MY APPLICATIONS under the APPLICATION link located towards the top left corner of the screen, then select START NEW APPLICATION at the bottom of the screen.

CONSOLIDATED FUNDING APPLICATION

HELP PRINT PAGE REGIONAL ECONOMIC DEVELOPMENT COUNCILS CFA PROJECT INFO

**NYS Consolidated Funding Application Registration**

Email Address

Email Address Check

Organization Name

Project Name

Please enter the sum of the following two numbers:  
1 + 8 =

Register New Application

CONSOLIDATED FUNDING APPLICATION

HELP PRINT PAGE REGIONAL ECONOMIC DEVELOPMENT COUNCILS CFA PROJECT INFO

**NYS Consolidated Funding Application Registration**

Thank you for registering.

**Instructions**

Important - Before proceeding read the following carefully:

1. **Save your information**

Please make note of the following information. You should print this page and save it for your records now:

Organization Name: INTERNAL TEST

Project Name: INTERNAL TEST

Your login token: [REDACTED]

PLEASE DO NOT LOSE THE TOKEN SHOWN ABOVE - YOU WILL NEED IT TO ACCESS YOUR APPLICATION ONCE YOUR ACCOUNT HAS BEEN ACTIVATED.

2. **Check your email**

An email has been sent to you with information on how to get started with your application. You must follow the link contained in this email message to activate your account and to begin the application process.

You may need to check your SPAM folder for the activation email message.

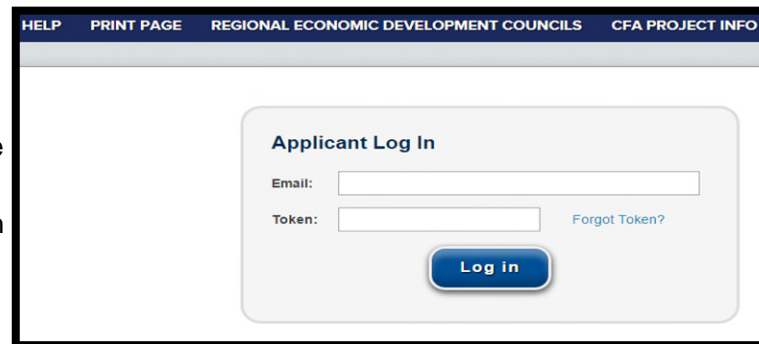
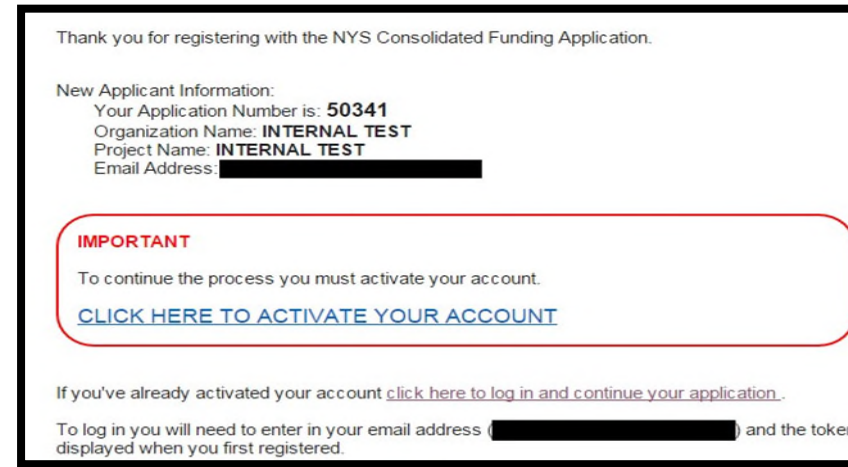
# Registration Confirmation

When registering with a new e-mail address, you will receive an e-mail from [cfa@ny.gov](mailto:cfa@ny.gov) with information on how to continue the application process. **Please be sure to check your spam filter if you registered and did not receive an email for activating your account.** This e-mail will contain a link that you must follow to activate your account and begin the application. After you select “CLICK HERE TO ACTIVATE YOUR ACCOUNT,” a page will open that confirms project registration. Select “Proceed to Log In” and the CFA system will take you right to setting up your first application.

**Troubleshooting Tip:** Oftentimes applicant register using a company or organization email. If you have checked your spam / junk inbox and the registration email is not there, it is possible it is being blocked by your organization before it reaches your inbox. Please try registering using an [outlook.com](mailto:outlook.com), [yahoo.com](mailto:yahoo.com), or [gmail.com](mailto:gmail.com) e-mail address.

To sign in, an applicant must use the same email address they used when registering. Type the token provided at registration into the box.

If you have forgotten your token, please click the “Forgot Token?” link. A message will appear instructing you to submit your e-mail address and application number. Once you submit your e-mail address and application number, you will receive an email that contains a link to reset your token. If you require further assistance a phone number is included in the e-mail to call for help with your token. This number can only be used for assistance with a forgotten token.



# Technical Requirements

The Welcome screen explains the technical requirements for using the CFA website, including the type of browser that can be used, the ability to create PDFs, and the ability to select and upload files. Use of the CFA website requires the following:

## 1. A modern, standards-compliant browser

Some functionality may not work in older browsers, such as Internet Explorer 10 (IE10) or earlier. Please use the latest version of Chrome, Firefox, or Edge.

## 1. Ability to create PDF and ZIP documents

PDFs are static documents that can be created using various software. Information is available on how to create PDFs from other documents by [following this link](#).

PDF, JPG (photo) and ZIP (compressed) files are the only formats accepted by this system. Information is also available on how to create ZIP files.

## 1. Ability to select and upload files


You may not be able to upload documents using certain operating systems including iOS (iPhone, iPad), Android (before v2.2), and other mobile operating systems.

### WELCOME

#### Technical Requirements

Use of the CFA website requires the following:


##### A modern, standards-compliant browser



Some functionality may not work in older browsers, such as Internet Explorer 10 (IE10) or earlier. Please use **the latest version** of Chrome, Firefox, or Edge.

✔ Your browser is up to date.

##### Ability to create PDF and ZIP documents



PDFs are static documents that can be created using various software. Information is available on [how to create PDFs from other documents](#). PDF, JPG (photo) and ZIP (compressed) files are the only formats accepted by this system. Information is also available on [how to create ZIP files](#).

##### Ability to select and upload files

You may not be able to upload documents using certain operating systems including iOS (iPhone, iPad), Android (before v2.2), and other mobile operating systems.

[Proceed to Next Page](#)

# Starting a New Application

The CFA allows potential applicants options for beginning an application.

1. Newly Registered Applicants will be taken directly to Program Selection. If you are a newly registered applicant you may skip to the Program Selection page.
2. Returning applicants may log into the portal using their existing credentials and create a new application by clicking “Applications”, then “My Applications” from the blue Ribbon. Then you would select START A NEW APPLICATION WITH THIS PROFILE. You will then enter a project name, business name and email then click create.
3. Returning applicants may also clone an existing application. Skip to next page for instructions on how to clone an application.
4. If you are a returning applicant who knows exactly which programs you want to apply for, you can use the “Program List” button to easily choose the programs you want.
5. At times additional initiative options will be available to select through to add to your application if desired.

**PROFILE**

You are logged in as [redacted]

**New Application**

To create a new application that is *not* connected to this profile, please [log out](#) and register a new application. This new application will have a different token and can have different email addresses.

OR... You have the option to create a new application that will be associated with your current profile. The email address and token you use to log in will remain the same and you will have the option to switch between your applications.

**Start New Application**  
associated with this Profile

**My Applications**

Your profile has access to the following 45 applications. You may select the application with which you would like to work.

Application # 126272 - *currently selected*

Project Name  
[redacted]

Business Name  
[redacted]

Email  
[redacted]

Finalization Status  
In Progress

Edit  
Download  
Cancel  
Clone

**Proceed to Application**



# Cloning an Application

If you registered for an application within the last two years, and you would like to apply to one or more programs again this year, you can “clone” last year’s application into a new application for this year. This can be a time saver by copying most (**but not all**) of your answers from last year’s application to this year’s cloned application. You will have the ability to add new programs to your application after the cloning is complete.

If you are **not** looking to clone an application from last year, you may skip down to the “Program Selection” section page. If you are looking to clone last year’s application, please use the following steps:

Log into the CFA portal with the email address and token you used to complete last year’s application. After you log into the portal, click “Applications”, then “My Applications” from the blue Ribbon.

Locate the application you wish to clone from your list of applications and select “Clone”.

Enter a new Project Name and (optionally) a new Business name for the cloned application and click “Save”. By default, last year’s Project and Business names will be displayed

The screenshot displays the CFA portal interface. On the left is a blue navigation ribbon with the following menu items: APPLICATION, HELP, My Applications, Programs, Review, Cancel Application, and Log Out. The main content area shows a list of applications. One application is highlighted with a blue border, showing details for 'Application # 79787 - currently selected'. The details include: Project Name (Creative Coalitions 2018), Business Name (My Business Name), and Finalization Status (In Progress). To the right of these details are buttons for Edit, Download, Cancel, and Clone. Below the details is a large blue button labeled 'Proceed to Application'. Above the highlighted application, another application 'Application # 76015' is visible with buttons for Select and Clone.

## Notes on Cloned Applications:

- You will still have to answer the Threshold Questions associated with the cloned programs to ensure that you are still eligible to apply for the cloned programs.
- Certain answers from your “old” application will **not** be cloned including Location, Attachment, Budget, and Certification questions.
- Once you complete the Threshold questions from cloned programs, you can select the “Programs” tab from the blue ribbon to add new programs to your application.

# Program Selection and Program Wizard

The Program Selection page is setup so all programs are visible on one page and multiple programs can be selected to add to the application by simply the check box next to the program name. By hovering over one of the four category cards the card will be highlighted in grey. By selecting that card you will be brought down to the section of the list where those programs are.

By selecting the program wizard you will be brought to another page where you will be guided through program selection with a series of questions and/or data to select which applies to your potential project or organization.

This screenshot shows the 'Economic Development Programs' section. At the top right is a blue button labeled 'Proceed with Application'. Below the title are three program cards, each with a checkbox and a 'Show program description' link:

- Brownfield Opportunity Areas
- Carbon Neutral Community Economic Development
- Commercial & Industrial Carbon Challenge

This screenshot shows the main application page titled 'CONSOLIDATED FUNDING APPLICATION'. The navigation bar includes 'APPLICATION', 'HELP', 'PRINT', 'LOG OUT', 'REGIONAL ECONOMIC DEVELOPMENT COUNCILS', and 'CFA PROJECT INFO'. The main content area features four category cards:

- Economic Development Programs**: Funding opportunities are available from multiple programs from a variety of state agencies to support economic development and community development projects through a combination of grant funds and tax credits for eligible projects. These include programs specific to the Regional Economic Development Council (REDC) Initiative. For more information on the REDC initiative, please visit: <https://regionalcouncils.ny.gov/>.
- Workforce Programs**: Funding is available to support wide-reaching investments in workforce development programs across multiple state agencies through multi-year funding to support employer-driven, high skilled workforce training programs.
- Other NYS Programs**: Other NYS Programs which include funding and other opportunities from various state agencies.
- Program Wizard**: The Program Wizard allows you to select multiple project categories and project types to assist you in determining which program(s) you may be eligible for.

This screenshot shows the 'Other NYS Programs' section. It contains two program cards, each with a checkbox and a 'Show program description' link:

- 2023 Climate Smart Communities Grants
- Body Armor Professions Requests

This screenshot shows the 'Workforce Programs' section. It contains two program cards, each with a checkbox and a 'Show program description' link:

- DOL - Existing Employee Training Program (EET)
- DOL Unemployed/Underemployed Worker Training Program (UWT)

# Program Selection Options



## Economic Development Programs

For returning applicants and those familiar with the CFA system, choosing the Economic Development Programs will bring applicants directly to the section of the Program List containing a list of all Economic Development programs available.

## Workforce Programs

For returning applicants and those familiar with the CFA system, choosing the Workforce Programs will bring applicants directly to the section of the Program List containing a list of all Workforce programs available.

## Other NYS Programs

For returning applicants and those familiar with the CFA system, choosing the Other NYS Programs will bring applicants directly to the section of the Program List containing a list of other NYS programs which include funding and other opportunities from various state agencies.

## Program Wizard

Select one or more categories from the list that best represents your project. Once you have selected a Project Category, you must choose your Project Type. Multiple Project Types can be selected.

A list of programs based on your Project Category and Project Type selections will appear. You may remove a program from consideration before proceeding with the application by clicking on the Remove Program button.

# Program Selection Threshold Questions

You must answer one or more Threshold Questions to determine if you meet the minimum qualifications for the program(s) you have selected. A “Click Here for Question Requirements” button appears under many of the Threshold Questions. Selecting “Click Here for Question Requirements” will provide a detailed explanation or instructions relating to the question.

**Troubleshooting Tip:** Threshold questions are to help determine if your project may be eligible for each program you are applying to.

**\*\*\*Please note\*\*\***

If you fail to answer the threshold question(s) correctly, you will not be allowed to apply for that program under the current application. If you believe you answered one of the threshold questions wrong you must start a new application.

**Threshold**  
**Excelsior Jobs Program**

Q\_41  
⊖

Does this project predominantly involve any of the following activities at the project location, and will it meet the minimum job creation requirements OR the minimum job retention requirements in NYS? Please click on "Scoring Tips" for project activity definitions.

- (1) Manufacturing: minimum job creation = 5 net new jobs, OR minimum job retention = 5.
- (2) Scientific research and development: minimum job creation = 5 net new jobs, OR minimum job retention = 25.
- (3) Software development: minimum job creation = 5 net new jobs, OR minimum job retention = 25.
- (4) Agricultural production or support; minimum job creation = 5 net new jobs, OR minimum job retention = 25.
- (5) Back office operation: minimum job creation = 25 net new jobs, OR minimum job retention = 25.
- (6) Financial Services: minimum job creation = 25 net new jobs, OR minimum job retention = 25.
- (7) Distribution center: minimum job creation = 50 net new jobs, OR minimum job retention = 25.
- (8) Life Sciences: minimum job creation = 5 net new jobs, OR minimum job retention = 25.
- (9) Music production: minimum job creation = 5 net new jobs, OR minimum job retention = 25.
- (10) Entertainment company: minimum job creation = 100 net new jobs, OR minimum job retention = 25.

<https://esd.ny.gov/sites/default/files/Excelsior-Regs-2818.pdf>

[Click here for Question Requirements](#)

Yes    No

# FAILED Threshold Questions

Since applicants are able to apply to multiple programs on one application, often times there may be a program(s) which you are not eligible to apply for as determined by failed threshold questions. Threshold questions are meant to save you the time of applying to a program which you are not eligible for.

When an applicant fails one or more threshold questions and **IS APPLYING FOR ONLY ONE PROGRAM** the following messages appear:

Application Number 126559

PROGAMS LOCATION QUESTIONNAIRE FUNDING REVIEW Application is NOT FINALIZED

### PROGRAMS

**Your application must have at least one associated program! You may restart program selection, or cancel your application and start a new one.**

Based on your answers to the threshold questions, the programs associated with your application may have changed. There are **no programs** that you may potentially qualify for and **1 ineligible program**:

- Empire State Development Grant Funds

This program cannot be added back to this application. To apply for this specific program you must start a new application. Please review your programs below.

#### Your Application's Programs

You potentially qualify for the following programs:

↓ Add more programs below

### Ineligible Programs

Your application is *not eligible* for the following programs:

Empire State Development Grant Funds Open Enrollment

Show program description

Ineligible - Due to your answers to threshold questions you may not apply for this program on this application

### All Other Programs

Climate Smart Communities Grants ADD

Show program description

Body Armor Professions Requests Open Enrollment ADD

Show program description

Since only one program was on the application and the applicant was ineligible for that program because of a failed threshold question, the system will tell the applicant they need to add a new program and list 'All Other Programs' for the applicant to select from. **\*\*Please note you CANNOT change your threshold answers once they are submitted. If you believe you are truly eligible for a program you will need to start a new application and redo the threshold questions.\*\***

# FAILED Threshold Questions

Since applicants are able to apply to multiple programs on one application, often times there may be a program(s) which you are not eligible to apply for as determined by failed threshold questions. Threshold questions are meant to save you the time of applying to a program which you are not eligible for.

When an applicant fails one or more threshold questions and **IS APPLYING TO MULTIPLE PROGRAMS** the following messages appear:

Application Number 126559

PROGRESS: PROGRAMS (checked), LOCATION, DOCUMENTS, QUESTIONNAIRE, FUNDING, REVIEW. Application is NOT FINALIZED.

### PROGRAMS

Based on your answers to the threshold questions, the programs associated with your application may have changed. There are 1 program that you may potentially qualify for and 2 ineligible programs:

- Brownfield Opportunity Areas
- Empire State Development Grant Funds

These programs cannot be added back to this application. To apply for these programs you must start a new application. Please review your programs below.

You will be applying for the program listed below. Please click the "Proceed to Next Page" button at the bottom of the page to proceed.

Due to the programs you've selected, your application is currently due on July 29, 2022.

#### Your Application's Programs

You potentially qualify for the following programs:

Climate Smart Communities Grants	Deadline: July 29, 2022
----------------------------------	-------------------------

↓ Add more programs below

Proceed to Next Page

### Ineligible Programs

Your application is *not eligible* for the following programs:

Brownfield Opportunity Areas	Deadline: July 29, 2022
Empire State Development Grant Funds	Open Enrollment

Ineligible - Due to your answers to threshold questions you may not apply for this program on this application

### All Other Programs

Body Armor Professions Requests	Open Enrollment	ADD
Carbon Neutral Community Economic Development		ADD

Since multiple programs were on the application and the applicant was deemed ineligible for some but not all programs due to failed threshold questions, the system will tell the applicant how many programs the applicant may still apply to (may potentially qualify for) and how many programs they are ineligible for. A list of programs that are still on the application to apply to and a list of ineligible programs will be provided. Additionally, the system will show a list 'All Other Programs' for the applicant to select from if the applicant wishes to add more programs to their application. If additional programs are added, the applicant will now need to answer the threshold questions for that program. **\*\*Please note you CANNOT change your threshold answers once they are submitted. If you believe you are truly eligible for a program you will need to start a new application and redo the threshold questions.\*\***

# WORKING THROUGH AN APPLICATION

Navigating the Application

Location

Documents

Questionnaire

Jobs

Funding

Reviewing the Application

Finalizing/Submitting the Application

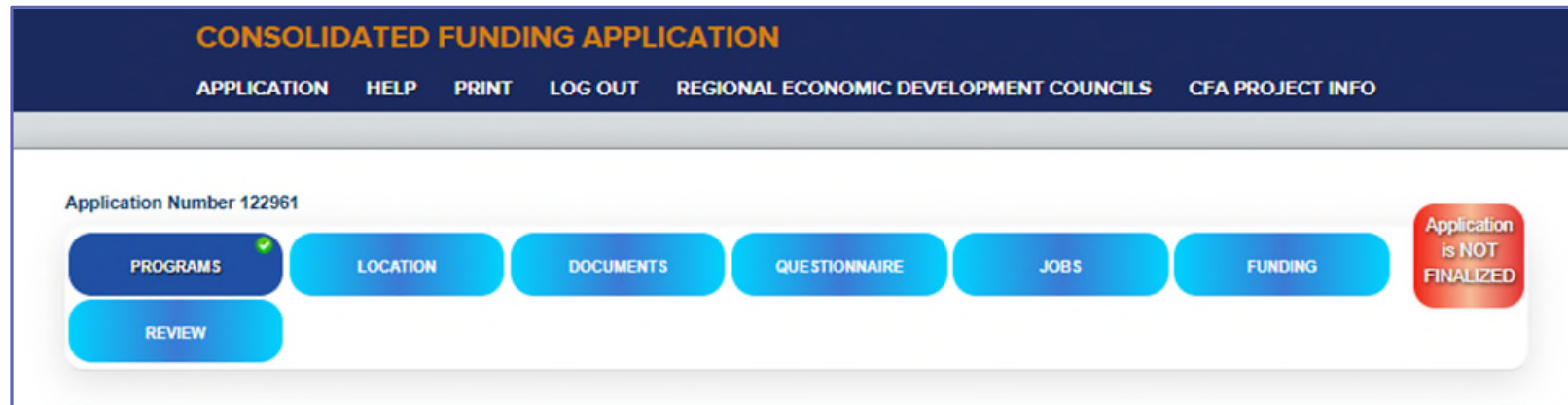


# Navigating the Application

Once you answer correctly and submit the threshold questions to at least one program you have selected for your application you can then begin navigating through the application itself and completing the various information needed.

**Troubleshooting tip:** if your application is in progress, you are able to add on new programs, but once you fail the threshold questions for a program it cannot be added back on. If you have answered the threshold questions incorrectly you must go back to the MY APPLICATIONS page and start a new application in order to apply to that program.

You have the ability to navigate forward and backward through the application using the navigator at the top of every screen. To go to a specific section of the application, you hover over a section. The topics associated with the section will appear as well as information on how many questions in that section remain unanswered, but are required. By selecting the blue box that corresponds to the topic of interest, you will be redirected to that section of the application. As you progress through the application, completed sections are indicated by a green check mark.





# Location

All applicants must select the region within which your project is located. If your project is located within multiple regions, please select the region in which the majority of the project will take place.

Additionally, this section will gather project location data like address, city, state, and zip code.

Application Number 122961


PROGRAMS ✓ LOCATION DOCUMENTS QUESTIONNAIRE JOBS FUNDING REVIEW

Application is NOT FINALIZED

### PROJECT LOCATION

Show only questions below that are incomplete and required

Select the region(s) within which your project is located

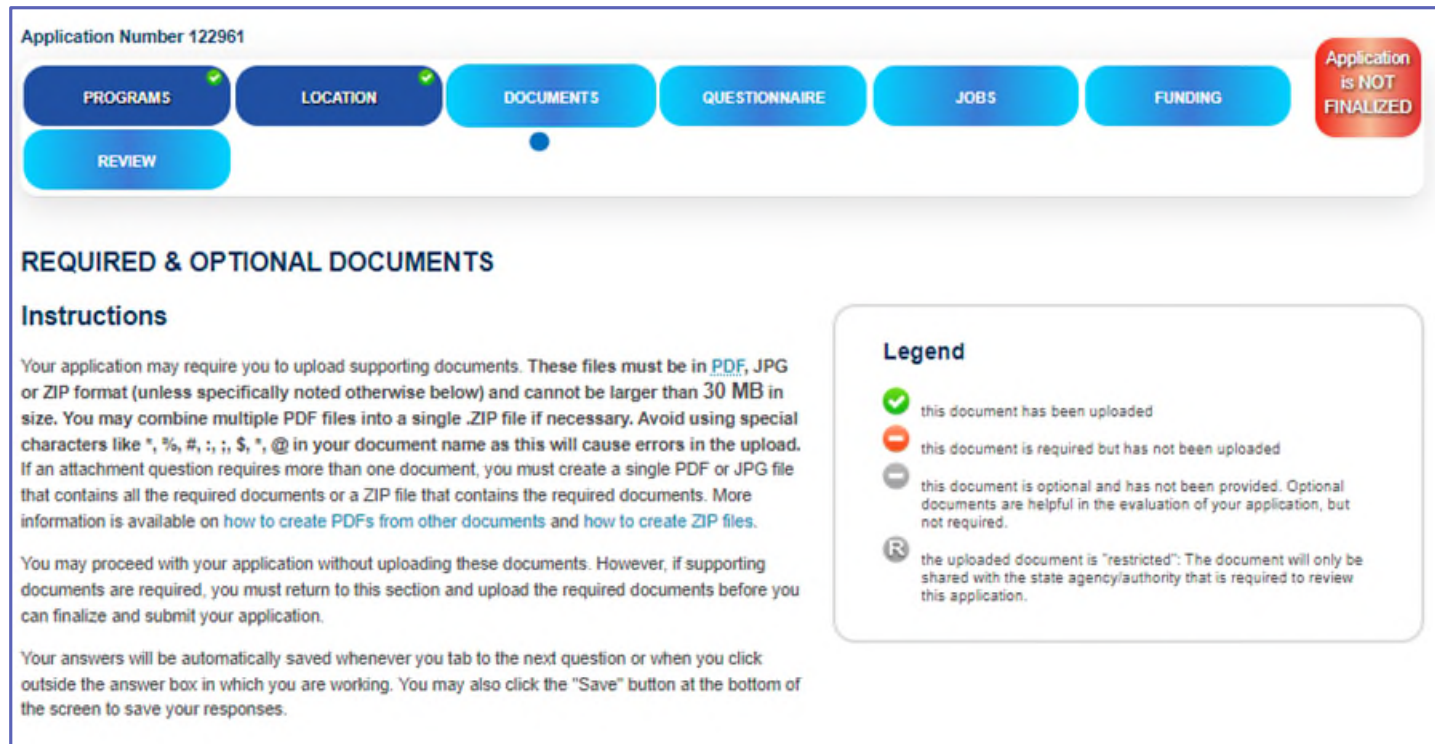


- Capital District
- Central New York
- Finger Lakes
- Long Island
- Mid-Hudson
- Mohawk Valley
- New York City
- North Country
- Southern Tier
- Western New York

# Documents

After you select your project's location, a screen will appear that lists the documents you must upload to complete the application (if any). These files must be in [PDF](#), JPG or ZIP format and cannot be larger than 30 MB in size. You may combine multiple PDF files into a single .ZIP file if necessary. Avoid using special characters like \*, %, #, :, ;, \$, \*, @ in your document name as this will cause errors in the upload. If an attachment question requires more than one document, you must create a single PDF or JPG file that contains all the required documents or a ZIP file that contains the required documents. More information is available on [how to create PDFs from other documents](#) and [how to create ZIP files](#).

You may proceed with your application without uploading the required documents, but you will not be able to finalize your application until all requirements have been completed. All required attachments must be submitted through the CFA, mailed hardcopies of attachments will not be accepted.



The screenshot displays the application progress bar with the following steps: PROGRAMS (completed), LOCATION (completed), DOCUMENTS (current step), QUESTIONNAIRE, JOBS, and FUNDING. A 'REVIEW' button is located below the progress bar. A red badge on the right indicates 'Application is NOT FINALIZED'. The main content area is titled 'REQUIRED & OPTIONAL DOCUMENTS' and includes 'Instructions' and a 'Legend'.

Application Number 122961

PROGRAMS LOCATION DOCUMENTS QUESTIONNAIRE JOBS FUNDING

Application is NOT FINALIZED

REVIEW

### REQUIRED & OPTIONAL DOCUMENTS





#### Instructions

Your application may require you to upload supporting documents. These files must be in [PDF](#), JPG or ZIP format (unless specifically noted otherwise below) and cannot be larger than 30 MB in size. You may combine multiple PDF files into a single .ZIP file if necessary. Avoid using special characters like \*, %, #, :, ;, \$, \*, @ in your document name as this will cause errors in the upload. If an attachment question requires more than one document, you must create a single PDF or JPG file that contains all the required documents or a ZIP file that contains the required documents. More information is available on [how to create PDFs from other documents](#) and [how to create ZIP files](#).

You may proceed with your application without uploading these documents. However, if supporting documents are required, you must return to this section and upload the required documents before you can finalize and submit your application.

Your answers will be automatically saved whenever you tab to the next question or when you click outside the answer box in which you are working. You may also click the "Save" button at the bottom of the screen to save your responses.

#### Legend

-  this document has been uploaded
-  this document is required but has not been uploaded
-  this document is optional and has not been provided. Optional documents are helpful in the evaluation of your application, but not required.
-  the uploaded document is "restricted": The document will only be shared with the state agency/authority that is required to review this application.

# Questionnaire

The application will save your answers each time you tab or click out of a question box. The time the answer is saved is listed to the right of the answer box. A red circle is displayed next to the required questions and a grey circle next to optional questions. **You will not be able to submit your application until all required questions have been answered.**

Application Number 122961

PROGRAMS LOCATION DOCUMENTS QUESTIONNAIRE JOBS FUNDING

Application is NOT FINALIZED

REVIEW

## QUESTIONNAIRE






### Instructions

To proceed with your application, please answer the following questions.

If your answers are lengthy, we recommend you type your answers into a word processor and paste them into the application so you will always have a copy of your answers. (Note: By design, most of the formatting you create with your word processor will be lost when you paste answers into the application.)

Your answers will be automatically saved whenever you tab to the next question or when you click outside the answer box in which you are working. You may also click the "Save" button at the bottom of the screen to save your responses.

#### Legend

-  the question has been answered
-  an answer is required but has not been provided
-  an answer is not required and has not been provided
-  the answer is "restricted": The answer will only be shared with the state agency/authority that is required to review this application.
-  the question and its answers are shared among multiple programs on this application

► Disclaimer

# Questionnaire

The Questionnaire is where applicants will find a majority of the program specific questions. This section is set up so that applicants may roll-up or roll-down the questions within each question category by selecting the '+' next to the question category name. The screenshot below shows an example of how the questions look all rolled up. To expand all questions, simply click on 'Toggle Expansion' in the upper left or bottom left corner. Clicking 'Toggle Expansion' again will roll them all back up.

A reminder that all questions are saved as you enter them in this section. If an applicant wishes to only see questions that are incomplete and required, they may select the option at the top right hand side of the screen labeled 'Show only questions below that are incomplete and required'.

The screenshot displays a questionnaire interface with the following elements:

- Toggle Expansion** (top left and bottom left, circled in red)
- Show only questions below that are incomplete and required** (top right, circled in red)
- + Basic Questions**: Questions in this section refer to general applicant and project information.
- + REDC Questions**: Questions in this section are specifically related to the Regional Economic Development Council (REDC) Initiative and to the regional strategic plans and priorities as indicated in the program guidelines and/or questions.
- + Workforce Initiative Questions**: Questions in this section are specific to the related Workforce Initiative as indicated in the program guidelines and/or questions.
- + Standard Questions**: Questions in this section are specific to program(s) for which funding is being applied to.
- + Certification Questions**: Questions in this section include attestations of accurate information and knowledge of various rules, regulations, and information being submitted.

# Questionnaire

**Conditional Questions:** The Consolidated Funding Application allows for the use of conditional questions. This allows for multiple questions (child question) to be shown or hidden based on an applicant's answer selection made on a prior question (parent question). A red circle is displayed next to the required questions and a grey circle next to optional questions.

The image shows two screenshots of a questionnaire interface. The top screenshot displays two questions: Q\_12606, a required question (indicated by a red circle) asking "Does this project require State and/or Federal Environmental Review?" with "Yes" selected, and Q\_2364, an optional question (indicated by a grey circle) asking "What is the status of State and/or Federal Environmental Review?". A text box below Q\_2364 contains "in-progress" and "max characters: 400". Yellow arrows indicate the dependency: one from Q\_12606 to Q\_2364, and another from Q\_2364 back to Q\_12606. The bottom screenshot shows Q\_12606 with "No" selected, and Q\_2364 is no longer visible.

**Certification:** The application includes a certification section where you verify your information by entering your name in the box. An example is a commitment to the Minority and Women's Business Enterprise Equal Employment Opportunity requirements. Another is verification that the person filling out the application is authorized to submit the application, and that the information provided is true to the best of their knowledge.

The image shows a certification section titled "Certification". It contains a required question (red circle) Q\_1038. The text of the question reads: "By entering your name in the box below, you certify that you are authorized on behalf of the applicant and its governing body to submit this application. You further certify that all of the information contained in this Application and in all statements, data and supporting documents which have been made or furnished for the purpose of receiving assistance for the project described in this application, are true, correct and complete to the best of your knowledge and belief. You acknowledge that offering a written instrument knowing that the written instrument contains a false statement or false information, with the intent to defraud the State or any political subdivision, public authority or public benefit corporation of the State, with the knowledge or belief that it will be filed with or recorded by the State or any political subdivision, public authority or public benefit corporation of the State, constitutes a crime under New York State Law." Below the text is a text input box with "max characters: 400" below it.

# Jobs

The application contains a section where you indicate the net new jobs to be created and/or retained. Depending on your application, you may not be required to answer these questions. Definitions for different job types and other information about job requirements can be found at the top of the page for this tab as well as within the questions or by reviewing the 'Click here for question requirements' option. If there are specific questions related to jobs, please reach out to [cfa-programs@ny.gov](mailto:cfa-programs@ny.gov) or reach out to your local regional office in the region for which your project is located. You can find a list of regional offices here: <https://esd.ny.gov/regions>.

Application Number 126345

PROGRAMS LOCATION DOCUMENTS QUESTIONNAIRE **JOBS** FUNDING Application is NOT FINALIZED

REVIEW

## JOBS

### Definitions

**Full-time Permanent Employee / Job**

- (i) a full-time, permanent, private-sector employee on the Recipient's payroll, who has worked at the Project Location for a minimum of 35 hours per week for not less than four consecutive weeks and who is entitled to receive the usual and customary fringe benefits extended by Recipient to other employees with comparable rank and duties; or
- (ii) two part-time, permanent, private-sector employees on Recipient's payroll, who have worked at the Project Location for a combined minimum of 35 hours per week for not less than four consecutive weeks and who are entitled to receive the usual and customary fringe benefits extended by Recipient to other employees with comparable rank and duties.

**\*\*For the Excelsior Jobs Program:**

- (i) a full-time permanent employee must be on the payroll for more than six months of a year in order to qualify for benefits. Jobs transferred from employment with another business located in the State including from a related person in this State are not net new jobs for purposes of the employment commitment.
- (ii) The base employment for Excelsior is calculated using the prior 4 quarters from when you are accepted into the program.

**Full-time Contract Employee / Job**

A Full-time Contract Employee is a full-time private sector employee (or self-employed person) who is not on the applicant's payroll but who works for the applicant for a minimum of 35 hours per week providing services that would otherwise be provided by a Full-time Permanent Employee. The position held by a Full-time Contract Employee is a year-round position.

**Jobs "At Risk"**

Shall mean a permanent Full-time employee position currently located in New York State that is at risk of being lost or moved out of state based on compelling information provided by the applicant.

Show only questions below that are incomplete and required

# Funding/Budget

## Project Funding

If your application(s) requires you to indicate the amount of funding you are requesting, boxes will appear that require you to enter funding amounts and details for each program on your application.

### PROJECT FUNDING

#### Instructions

The following section will collect information regarding your project's cost and funding. Please follow the instructions associated with each section below.

#### Total Project Cost

The TOTAL cost of the project for which funds are being requested via this CFA. Projects that have multiple phases should be careful to include ONLY the phase covered by this CFA round. Please use only numbers; no commas (,), dollar signs (\$), or special characters.

Total project cost: \$

[Save](#)

#### Funding Requested from Program

The amount you are requesting from each program on your application. Please use only numbers; no commas (,), dollar signs (\$), or special characters.

Program	Amount Requested
Excelsior Jobs Program	\$ <input type="text"/>
NYSERDA Energy Efficiency Projects	\$ <input type="text" value="Answer Not Required"/>
Total Amount Requested	\$ <input type="text" value="0"/>

[Save](#)

## Program Funding

A detailed budget breakdown is also required for many CFA programs. Applicants should provide as much detailed information regarding sources and uses of funds and should closely read program guidance documents to make sure the funding they are requesting is going towards an eligible use. Help text is generally available for further information on how to properly fill out the Program Budget section for each resource.

### Program Budget

For each program, indicate the sources and uses of funds required to complete the project for which funds are being requested. If you are requesting funds from multiple programs, the sum of all program requests should equal the total CFA funding requested. The Program Budget should be consistent with any program match requirements or funding limits, as detailed in the program's HELP section. Include all non-CFA sources such as private funding, funds from lending institutions, and in-kind, as allowed by the program. If a funding source supports multiple uses, each source should be accompanied by a separate use and amount. Please use only numbers for the amount; no commas (,), dollar signs (\$), or special characters.

#### Excelsior Jobs Program

[Show Help](#)

Use ?	Source ?	Amount	Indicate Source / Comments	Add / Remove
Use	Source	\$ <input type="text"/>	<input type="text"/>	<a href="#">Remove</a>
Total - Excelsior Jobs Program:		\$ <input type="text" value="0"/>		<a href="#">Add Row</a>

[Save & Proceed with Application](#)

# Application Review

Once you answer all the questions on your application, select the Save and Proceed button at the bottom of the screen. This will take you to a map to confirm the location of your project. If you did not enter a valid address on the location tab, you will be asked to pin point where your project will take place and confirm the coordinates. If you feel you get that message in error, please go back to the location tab and verify the correct information was entered.

Once the address is confirmed on the map a review screen will be displayed. If you did not answer required questions, a red circle will display next to the questions section.


**You must go back and complete the required questions before you can finalize and submit your application.**

### REVIEW

#### Select Location

We are unable to find the latitude and longitude for . Please use the map below to pinpoint the correct location or return to the Location tab and update the address you have entered.

Use the mouse scroll wheel, or the + and - buttons, to zoom in and out. A SINGLE mouse click will choose a pin point.  
If you have already pin pointed a location you may finalize at the bottom of the page or you may choose a new pin point and then click the "Click Here to Accept These Coordinates" button to update your new location.



Application Number 62997

PROGRAMS ✓ LOCATION ✓ DOCUMENTS ✓ QUESTIONNAIRE QUESTIONNAIRE JOBS ✓ FUNDING ✓ REVIEW

Application is NOT FINALIZED

### REVIEW

#### Finalization Checklist

✓	Programs	Complete! • NYSEDA Energy Efficiency Projects
✓	Not-For-Profit	Complete!
✓	Location	Complete!
✓	Documents	Complete!
⊘	Questionnaire	There are 42 remaining required questions that need to be completed.
✓	Jobs	Complete!
✓	Funding & Budget	Complete!

#### Application Finalization

ⓘ You have not completed 1 area. Please use the links above to return to the incomplete area.



# Finalize and Submit Application

To finalize and submit your application, you need to click the dark blue button labeled “By Clicking here....” at the bottom of the screen. After you finalize and submit your application, it cannot be modified or amended. If you would like to un-finalize your application to edit it, you must e-mail [CFA-Tech@ny.gov](mailto:CFA-Tech@ny.gov) prior to the closing date. Once your application is un-finalized, it will be marked as in progress as opposed to finalized. In order to be considered for funding your application must be **re-finalized** by the deadline for the program(s) you are applying. **If the application is not re-finalized by the deadline, it will not be reviewed or considered for funding.**

After you submit your application, you will receive a thank you message as well as an e-mail message that acknowledges receipt of your application.

You will still be able to login using your registered e-mail address and token to review your finalized application, print, or start a new application for a new project.

The screenshot shows a web interface for finalizing an application. At the top, it says "Application Number 62997". Below this is a navigation bar with tabs for PROGRAMS, LOCATION, DOCUMENTS, QUESTIONNAIRE, JOBS, FUNDING, and REVIEW. The REVIEW tab is currently selected. A red badge in the top right corner says "Application is NOT FINALIZED".

The main content area is titled "REVIEW" and contains a "Finalization Checklist". The checklist items are:

Item	Status
Programs	Completed ◦ NYSERDA Energy Efficiency Projects
Not-For-Profit	Completed
Location	Completed
Documents	Completed
Questionnaire	Completed
Jobs	Completed
Funding & Budget	Completed

Below the checklist is a section titled "Please Acknowledge" with a red "Please Note" message: "By clicking the button below you will no longer be able to modify or amend your application." At the bottom, there is a large dark blue button with white text that reads: "BY CLICKING HERE, I ACKNOWLEDGE THAT MY APPLICATION IS COMPLETE AND READY FOR FINALIZATION".

# REVIEW PROCESS FOR CONSOLIDATED FUNDING APPLICATIONS

## Submission of Applications

CFAs must be submitted/finalized online for programs that are subject to a deadline as outlined in the program's guidelines. For more information on guidelines for programs currently available in the CFA please visit [the NYS consolidated funding application](#) home page and navigate to the resources available. Supporting documents must be uploaded before applicants can finalize and submit their applications. It is strongly recommended that applicants submit proposals well in advance of the close date to avoid any submission issues. Applications will not be accepted after program deadlines.

Applicants will answer threshold questions to determine whether their project/application may be eligible for CFA funding programs and from what source(s). Because some funding sources are only available to certain categories of project applicants – such as municipalities, nonprofits, or businesses – these threshold questions will help determine eligibility.

Most projects can apply to multiple programs under one application, as is the case with the REDC initiative programs and this year's CFA round. With the expansion of programs available in the CFA, sometimes there are programs which can only be applied to alone. In that case you may need to apply to another program by starting a new application.

## Review of CFAs

Each program will review applications based on a set of standards as outlined in their program guidelines. For programs that are part of the REDC initiative, regional councils will assign a score based on merit, which will account for 20% of the total review. Applicants will be notified of awarded or not awarded by the program to which they applied. Questions about status of applications can be sent to [cfa-programs@ny.gov](mailto:cfa-programs@ny.gov) where they will be routed to the appropriate program contact.



# CONTACT

[CFA-PROGRAMS@NY.GOV](mailto:CFA-PROGRAMS@NY.GOV)

[CFA-TECH@NY.GOV](mailto:CFA-TECH@NY.GOV)