NEW YORK
STATE OF
OPPORTUNITY.

**Regional Economic
Development Councils**

2022

CFA Application Guide

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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.

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.

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.

Using the Application

Registering

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. **Print out this page and save it for your records**. You will need the token to revise or update your application.

When registering with a new e-mail address, you will receive an e-mail from 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.

Troubleshooting Tip: Many times 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, yahoo.com, or gmail.com e-mail address.

Registration Confirmation Email:

Thank you for registering with the NYS Consolidated Funding Application.

New Applicant Information:
    Your Application Number is: **50341**
    Organization Name: **INTERNAL TEST**
    Project Name: **INTERNAL TEST**
    Email Address: ███████████

IMPORTANT

To continue the process you must activate your account.

CLICK HERE TO ACTIVATE YOUR ACCOUNT

If you've already activated your account click here to log in and continue your application.

To log in you will need to enter in your email address (████████████) and the token displayed when you first registered.

After you select "CLICK HERE TO ACTIVATE YOUR ACCOUNT," a page will open that confirms project registration.
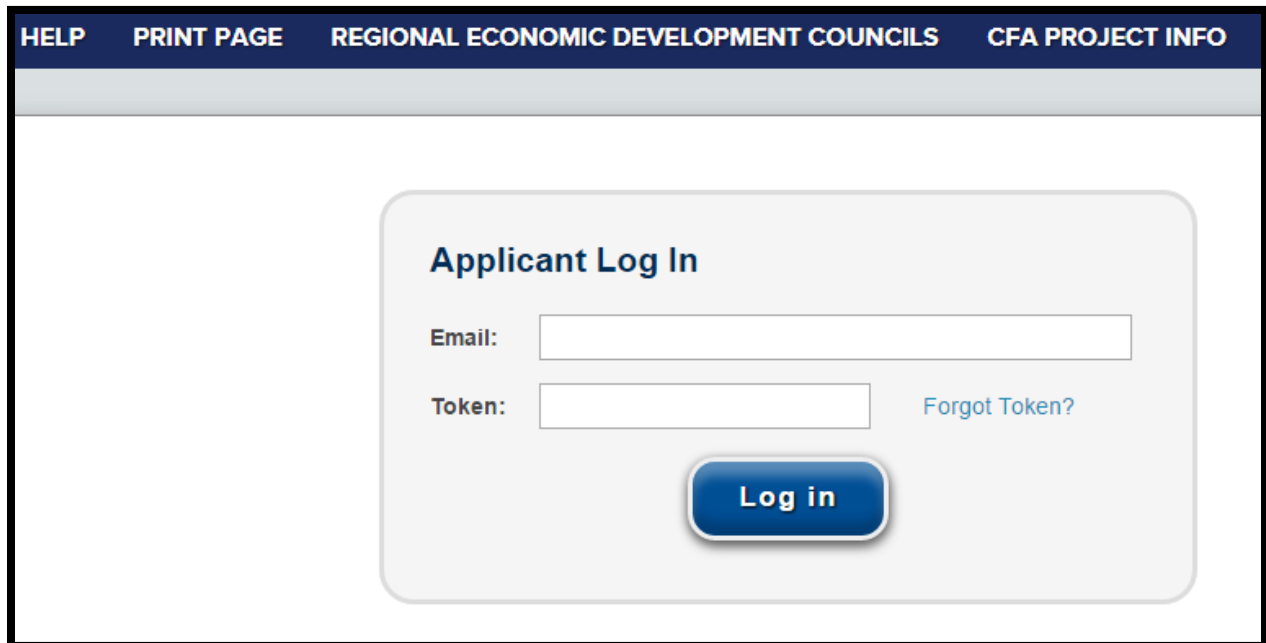
Select "Proceed to Log In."

| HELP | PRINT PAGE | REGIONAL ECONOMIC DEVELOPMENT COUNCILS | CFA PROJECT INFO |

Activation Confirmation

✔ Your account is now active and you may log in.

Proceed to Log In

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 more than one project, it is important to use the proper token number, so you don't start or revise the wrong application.

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.

Multiple Projects:

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.
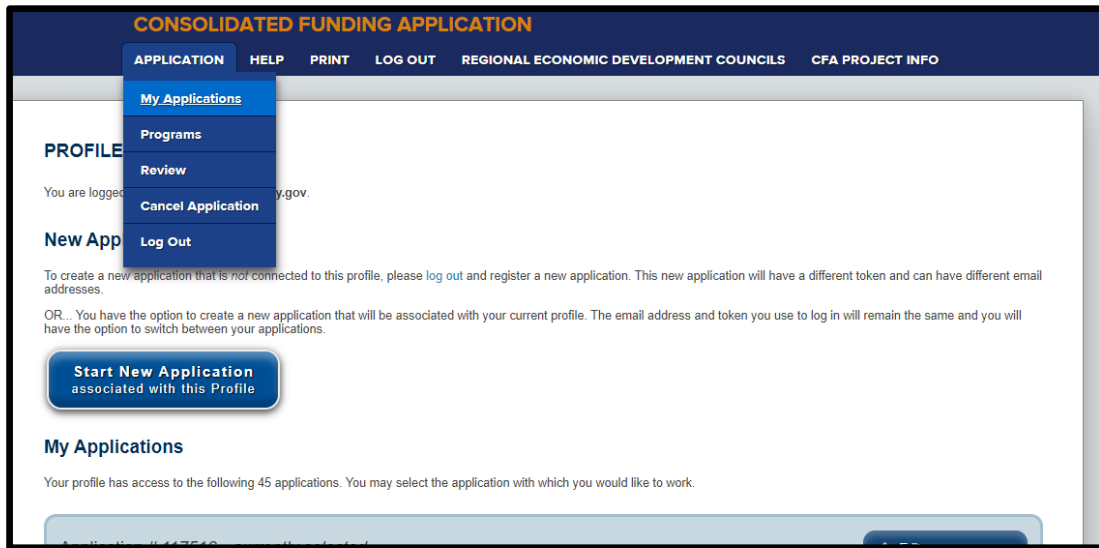
Alternately, you can create a whole new applicant profile by registering a new e-mail address and you will receive a new token. Please follow the same steps from above to confirm and activate your new token for the new applicant profile.

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:

- JavaScript
  You need to have JavaScript enabled in your browser. JavaScript allows the site to provide a more advanced, interactive experience.

- A modern, standards-compliant browser
  Some functionality may not work in older browsers, such as Internet Explorer 7 (IE7) or earlier. Please use the latest version of Chrome, Firefox, or Internet Explorer.

- 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.

The preferred way to upload CFA documents is using Flash. Flash is free software that is usually already installed on most computers. You can determine if Flash is installed on your computer here http://www.adobe.com/software/flash/about/. Flash can be downloaded for free at http://get.adobe.com/flashplayer/. Flash is not supported on many mobile operating systems.

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 to the "Starting Your Application" section. 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
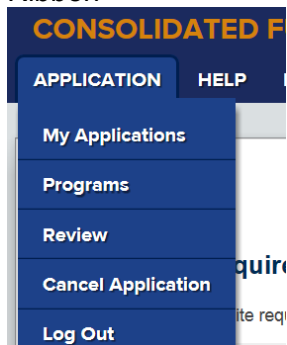
Locate the application you wish to clone from your list of applications and select "Clone"

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

New Application, Clone of Application # 76015

Project Name

Creative Coalitions 2018   ×

Business Name

My Business Name

Save   or Cancel

Your cloned application will now appear in your list of applications. Select "Proceed to Application" to start working on your newly cloned application

Application # 79787 - *currently selected*   ✏ Edit

Project Name   ⬇ Download

Creative Coalitions 2018
                                                             ✗ Cancel
Business Name

My Business Name   ⬀ Clone

Finalization Status

In Progress
                                          Proceed to Application

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.

Starting your application

The CFA allows potential applicants options for beginning an application. The "Program Wizard" option is the traditional CFA process, where applicants that may not be aware of all the resources can choose categories and project types that align with the scope of their project. Returning applicants may know exactly which programs they want to apply for and can use the "Program List" button to easily choose the programs they want. At times additional initiative options will be available to select through to your desired program, as well.

Program Wizard: Select Project Category

Select one or more categories from the list that best represents your project.

Program Wizard: Select Type of Project

Once you have selected a Project Category, you must choose your Project Type. Multiple Project Types can be selected.

You may click "Show Associated Programs" to see programs that are associated with the Type of Projects listed.

Program List: Select by Program Name

For returning applicants and those familiar with the CFA system, choosing the Program List option will bring applicants directly to the program selection page where a list of all programs is available.

Programs for which you may Potentially Qualify

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.

Additionally, you may add programs that did not result from your Project Category and Type selections by selecting the program name from the list at the bottom of this screen under All Other Programs.

Navigating through the Application

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. 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.

Threshold Questions

You must answer one or more Threshold Questions to determine if you meet the minimum qualifications for the programs you have selected. A "Scoring Tips" button appears under many of the Threshold Questions. Selecting "Scoring Tips" will provide a detailed explanation or instructions relating to the question.

Region

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.

Required & Optional 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.

REQUIRED & OPTIONAL DOCUMENTS

Turn Off Flash

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.

Show only questions below that are incomplete and required

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.

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. The Consolidated Funding Application has been updated to allow 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. ***You will not be able to submit your application until all required questions have been answered.***

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.

Certification

Q_1038

🚫

Shared Question

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.

max characters: 400

Jobs

The application contains a section where you indicate the net new jobs to be created and answer investment questions. Depending on your application, you may not be required to answer these questions.

Application Number 62997

| PROGRAMS ✓ | LOCATION | DOCUMENTS | QUESTIONNAIRE | JOBS | FUNDING | REVIEW | Application is NOT FINALIZED |

JOBS

Show only questions below that are incomplete and required

Workforce

I. Assessment of Skilled Worker Shortfall

The following questions will collect details about the workforce needs of the project so that we can determine whether they are met in the current labor market. If there are occupations which you anticipate a shortage of skilled workers, then check an Occupation Group below. For each Occupation Group selected, enter in the titles and the number of workers needed, i.e., the estimated number of positions that you believe are at risk of remaining unfulfilled due to the current labor market.

If the project has no anticpated shortfall of workers, you may proceed to the next question without making a selection.

Scoring Tips

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: $ 0

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	$	
NYSERDA Energy Efficiency Projects	$	Answer Not Required
Total Amount Requested	$	0

Save

Program Budget

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 and 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 ▼	$		Remove
Total - Excelsior Jobs Program:		$ 0		Add Row

Save & Proceed with Application

Review

Once you answer all the questions on your application, select the Save and Proceed button at the bottom of the screen. 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.

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 you application to edit it, you must e-mail 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.

Review Process for Consolidated Funding Applications (CFAs)

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 12. 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 not awarded by the program to which they applied. Questions about status of applications can be sent to CFA-Programs@ny.gov where they will be routed to the appropriate program contact.

Frequently Asked Questions

Q: What is the NYS Consolidated Funding Application (CFA)?

A:The CFA is a modern and easy-to-use online application for accessing state resources currently available from multiple New York State agencies and authorities. The CFA typically allows applicants to access multiple State funding sources through one application.

Q: Why should a grant applicant apply for funding through the CFA process?

A: The CFA is a more efficient and effective process for applicants to access economic and community development funding. Prior to the CFA, applicants had to navigate multiple agencies and applications without any mechanism for coordination. Under this process, the CFA serves as the single entry point for access to funding. A CFA can be submitted for single or multiple sources of funding through one application, making it quicker and easier for projects to receive funding.

Q: What programs are included in the CFA?

A: A list of programs that are included in the CFA can be found by selecting Available CFA Resources, which can be accessed from the CFA homepage at https://apps.cio.ny.gov/apps/cfa/.

Q: Who submits a CFA?

A: An applicant can submit the CFA via a secure, web-based application for programs included in Available CFA Resources, which can be accessed from the CFA homepage at https://apps.cio.ny.gov/apps/cfa/.

Q: Where can an applicant find guidance on applying for specific funding programs?

A: On the CFA home page, several documents are posted, detailing how to use the CFA and outlining the available CFA resources. These documents provide applicants with information about the application as well as programmatic detail for each resource that is a part of the CFA process. There are also recorded webinars on the CFA website describing the programs and their eligibility requirements.

Q: If applicants have additional questions about the CFA or would like to request assistance with the application who do they contact?

A: These applicants should reach out directly to their Empire State Development Regional Office. A complete list of the ESD Regional Offices can be found at https://esd.ny.gov/regions

Q: What is the CFA timeline?

A: The CFA timeline depends on the program(s) for which you are applying. For example, the CFA Round 12 deadline is July 29, at 4pm EST for programs subject to the deadline. There are also open enrollment programs, not subject to the deadline, which typically allow applications to be submitted on a rolling basis with periodic downtimes as needed. In addition, other programs have their own deadlines at other times during the year. The most important thing to do is verify the program deadline by reading the specific program guidelines. Available CFA Resources and information can

be found on the CFA homepage https://apps.cio.ny.gov/apps/cfa. Final attachments related to program specific requirements need to be uploaded on the system; where supporting documents are specifically required by a funding agency.

Q: What if I am applying to two programs with different deadlines?

A: You should submit the application before the earliest deadline. Once a deadline has passed, the application is no longer eligible to be review since the program is no longer active and will show up as expired.

Q: What happens to the application once it is submitted?

A: Once the CFA is submitted by the applicant, it is reviewed and scored by the appropriate agencies and if applicable, the Regional Council.

Q: How will the agencies score the CFAs?

A: Scoring criteria for each program included in the CFA is explained in the Available CFA Resources. Agencies have their own method of assigning points to eligible projects.

Q: Can applicants reapply for funding of projects that were not successful in previous CFA Rounds?

A: Yes, applicants can reapply for funding for projects not funded in the past if the program is still available.

Q: Do you need a new CFA number if you applied last year?

A: Yes, you need to reapply through the CFA and obtain a new CFA number.

Q: Can I register more than one project on the same profile and token?

A: Yes. You have the option to create a new application that will be associated to an already registered profile. The e-mail address and token you use to log in will remain the same and you will have the option to start a new application or you can start a new profile by registering a new e-mail address.

Q: Will there be a size limit for uploaded documents to the CFA process?

A: Yes. 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.

Q: How to I print my application?

A. Select PRINT from the ribbon towards the top of your screen. From there you will be able to download and print a PDF copy of your application.