Washington Loan Tracking (WALT) External User Guide

Drinking Water State Revolving Fund (DWSRF)

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1.0 INTRODUCTION
Washington Loan Tracking (WALT) is the Washington State Department of Health Office of Drinking Water’s online loan and grant management tool. You may submit applications for funding opportunities, check the status of your application, and submit applicable documentation through WALT.

It is important to review the loan or grant guidelines before you start the application process.

This WALT user’s guide is for all loan and/or grant applicants. It includes step-by-step directions for registering and applying, as well as supporting information to help with the process.

Contact for WALT user help.
Sara J Herrera
360-236-3089
sara.herrera@doh.wa.gov
2.0 GETTING STARTED
This section describes what WALT can do, how to log in, move through WALT, and what you can expect to see while using WALT.

2.1 Secure Access of Washington (SAW)
Secure Access Washington (SAW) allows you to access multiple online government services with a single user ID and password. Your SAW account allows you to interact with many government agencies like L&I, Ecology, DSHS, and more. You must have a SAW account to access WALT. If you already have a SAW account, you may notice the SAW screen is different this year (green instead of blue). **If you need help during this process, please contact SAW Help at 1-888-241-7597.**
2.1.1 New to SAW
Follow these steps to create a SAW account (Get Help is on the right side of the screen above the Washington state map).

1. Open your Internet browser.
2. Type or copy and paste the website address https://secureaccess.wa.gov into the browser window and press Enter or click the “go to” arrow in the browser.
3. The Sign Up! button is on right, just above the Washington state map.
4. Create your SAW account by following these steps.
   a. Enter your name, email, and a username you create.
b. Choose a password ten characters in length and containing at least one special character, lower case or uppercase letter, or a number. Check the box for I'm not a robot and click the Submit button.

c. You will receive a SAW email to confirm your account.

d. Check your email for further instructions.
2.1.2 Log into SAW
Log into SAW by following the steps below.

1. Enter your Username and Password on the SAW Log in page.
2. Click the Submit button.
2.1.3 Add WALT to my services in SAW

Follow these steps to add WALT to your SAW services.

1. Click on Add a New Service.
2. In the right column, click on **I would like to browse a list of services.**
3. In the column under **Add a New Service**, click on **Department of Health**.
4. In the column under Services from DOH, scroll down until you see WALT and click Apply.
2.1.4 Register for WALT
Follow the steps below.

1. On the SAW page, click on WALT.
2. You will see this page, click **Continue** to get to the WALT registration page.
3. WALT Registration page instructions.

**IMPORTANT:** In order to access WALT you must use the same email address you used with your Secure Access Washington account in the 'Contact Information' below.

**Organization Information Instructions:**
- Fields marked with an * are required fields
- Please enter the applicant Organization Information

**Contact Information Instructions:**
- Please enter your Contact Information, if the Contact Address is the same as the Organization Address select Copy Address
- Once complete, please submit
4. Your Organization and Contact Information.
   a. Enter your Name, Address, City, State, County, Zip Code +4, County, Phone Number, and Email address.

* Applicant Organization

* Address

Address 2

* City

* State


* Zip Code +4

* County
  Please Select

Phone Number

* Email
b. Enter your Federal Tax ID#, and website address (if available).
Enter your Contact Information. Use **Copy Address**, to autofill the Address, City, State and Zip+4 from above. **Important:** In order to access WALT you must use the same email address you used with your Secure Access Washington account.
5. Click on **Submit**.

NOTE: You may receive a message that your organization already exists in WALT. If you do, please reach out for assistance to DWSRF@doh.wa.gov. DWSRF staff will ensure you are able to access WALT.

**Consultants** can access more than one organization. Please reach out to DWSRF@doh.wa.gov.
2.2 Supported Browsers
This table shows supported browsers that can be used to access the features available in WALT (however for optimal performance, please use Google Chrome).

<table>
<thead>
<tr>
<th>Browser</th>
<th>Version</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet Explorer*</td>
<td>9.0 and above (11.0 is recommended)</td>
</tr>
<tr>
<td>Firefox</td>
<td>3.6 and above</td>
</tr>
<tr>
<td>Safari</td>
<td>5.1 and above</td>
</tr>
<tr>
<td>Chrome</td>
<td>20.0 and above</td>
</tr>
</tbody>
</table>

*PLEASE NOTE: Internet Explorer 10.0 is not supported.

2.3 System Navigation
As with many online systems, use your keyboard and mouse to enter data. Most WALT pages support keyboard navigation.

- Use the **Tab** key to move the cursor to the next data-entry field or link
- Use the **Enter** key to open a link
- Use **Shift+Tab** to move in reverse order through fields and links.
2.5 Attach a File
WALT enables you to attach one or more document files from your personal computer or network. With some questions, attaching a file is optional; with other questions attaching a file is a requirement. Files should be named so they are easily identified without opening. Example for the EZ1 form requirement the filed could be named 'EZ1_Good Water Dept. Also once a file has been uploaded it is not necessary to upload again in another spot.

The following steps explain how to attach a document file.

1. Click on Upload.
2. Attach a file by “drag and drop” or click on Browse to navigate to the file.
3. Click on the file you want to upload to highlight it, then click **Open**.
4. File will appear automatically in the application.

5. Once your file(s) appears, you can select and delete your document(s) by selecting the file and/or clicking the delete button.
6. Click on the \( \times \) in the upper right corner to close the screen and take you back to the question.
3.0 ENTERING AN APPLICATION IN WALT SCREEN-BY-SCREEN, AND HELPFUL TIPS

When you select WALT from within SAW, you will see this landing page.

To return to this screen at anytime; select...
There are three sections on the landing page.

- **Welcome to Washington State Department of Health**
  You’ll find contact information, current guidelines link, and the best browser to use.

- **Funding Opportunities**
  This section contains different types of funding opportunities and deadlines for each.

- **My Applications**
  Overall view of applications you have submitted and/or are working on. Using the five tabs you can choose to see: In Progress, Under Review, Action Needed, Active or Inactive.

**To start and submit an application in WALT.**

Select **Apply Now** in the **Funding Opportunities** section.

IMPORTANT: To enable certain features you will first need to **Save Draft** upon entering application.
Once saved, an **Application ID** and **Application Type** are assigned, and the **Federal Tax ID** field is populated from your registration page information.
Select the binoculars 🕵️‍♂️ to the right of the Water System Name field.
A popup window will open. Enter your water system number and select the search icon.

Enter Water System # first

Then Select
This brings up the required Water System Name. Select the Water System Name and ID.

Now the Water System Name is displayed
Select **Save Draft** again; the Water System ID is displayed.

Enter the information from your completed application worksheet into the online application.
1. There are four tabs in the application process, **Applicant Organization Information, Project Information, Financial Information, and Document Attachments**. The first tab is automatically selected; click on another tab to navigate to it.

There are four tabs for entering information for your application in WALT. With your application worksheet in hand, enter the required information on each of the four tabs. We have made the worksheet follow the online screens for easy data entry.

**To start and submit an application in WALT.**

Select **Apply Now** in the Funding Opportunities section.

**IMPORTANT:** To enable certain features you will first need to **Save Draft** upon entering application.

1. Once information is complete, click **Save Draft** at the bottom of the page.
2. For each tab you will need to upload documents as part of the application process. For help with this process please refer to Section 2.5 **Attach a File in WALT**. Once your files are uploaded they automatically appear.
3. Once each tab is completed click on **Submit** at the bottom of the page.

**NOTE:** Once you click Submit at the bottom of the page the Save Draft, Withdrawal, and Submit buttons will disappear.
3.1 View My Application Status
Once submitted, your application(s) appears on the WALT home page in the **My Applications** after you log-in or click the **Home** link at the upper right corner. You will find your application(s) under one of the following five tabs: In Progress, Under Review, Action Needed, Active, and Inactive.

<table>
<thead>
<tr>
<th>#</th>
<th>Application ID</th>
<th>Applicant Organization</th>
<th>Project Name</th>
<th>Application Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2018-3480</td>
<td>Bobby Ann's Boathouse</td>
<td></td>
<td>Construction Loan</td>
</tr>
<tr>
<td>2</td>
<td>2018-3477</td>
<td>Bobby Ann's Boathouse</td>
<td></td>
<td>Construction Loan</td>
</tr>
</tbody>
</table>
3.2 Print My Application
Once you save your application, you can print a paper copy at any time. The following steps explain how to print out the Application Summary.

1. Click on Application Summary above the Applicant Organization Information tab.
2. The Application Summary will load in PDF format, print the document for your files.
3.3 Withdraw my Application
At the bottom of each tab you will see three buttons, click on Withdraw.

WALT will ask “Are you sure? Your application will be withdrawn.” Click Yes and your application will be withdrawn. **Important:** Once deleted it cannot be restored.