# **Application User Guide**



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## **Access the Dashboard**

In order to access an online application, you must have a personal account on the website. If you already have an account, enter your information in the sign-in box. If you do not have an account, sign up for one by entering your email address and password. You will then be sent a notification email to verify your email address.

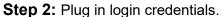
## In order to have access to a dashboard you must:

- Create an account (if you do not already have one)
- Be linked to a municipality participating in the program.

## **Steps to Access Dashboard:**

Step 1: Click "sign in" button.

Register







**Step 3:** Click "Municipal Dashboard" on left-hand side.



**Step 4:** You will go to a page that lists the municipality(ies) that you are linked to. If you are a user on more than one account, all of the profiles will be listed on the dashboard.



Sign-In

Sign in

## Sign Out of the Website

Click the same button you used to sign-in that is now "Sign Out."



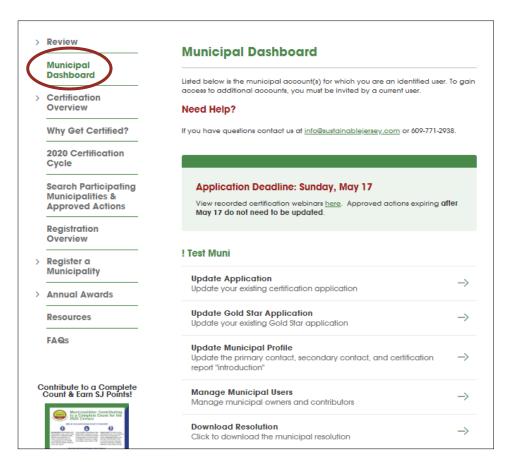


## **Municipal Dashboard**

The municipal dashboard was created to allow municipalities to easily access important information relevant to certification. It is a one-stop shop for municipalities to view their application, update the municipality profile, manage users, and download/view the municipal resolution.

#### What You Will See

- · All accounts for which you are a user will appear
- Five options allow you to perform different functions: Begin/Update Application, Begin/Update Gold Star Application, Update Municipal Profile, Manage Municipal Users, and Download Resolution
- Note: The Download Resolution section allows you to view the resolution submitted to register with the
  program. It does not need to be updated and is different than the green team resolution required for
  certification.
- Note: Municipalities currently certified/applying for certification that have completed the required certification actions contributing to a Gold Star in Energy, Health and/or Water, may also apply for a Gold Star in one or more of those dimensions. Learn more about the Gold Star Standards here.





# **Update Municipal Profile**

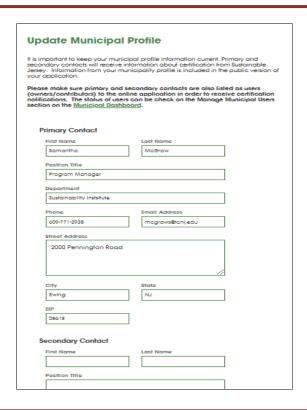
The Update Municipal Profile option allows for the update of the primary and secondary contact. This contact information is used for official Sustainable Jersey certification mailings and outreach, so please keep this information up to date.

As a participating community, the resolution registering your municipality does not need to be updated. However, if you would like to update it, you can do so at the bottom of the page.

## **Contact Update Steps**

- Enter all relevant information into the text fields for the primary and secondary contacts.
- Click **Update Profile** at the bottom of the page to save changes.

**Update Profile** 



## **Update Registration Resolution**

- Your resolution to register does not need to be updated, and is different than the green team resolution.
- If you would like to update it, click "choose file" and select the file from your computer.
- Click Update Resolution button to save changes.

#### **Upload a New Resolution**

Document Title (optional)

Municipal Resolution

Upload Resolution (required)

Choose File No file chosen

Update Resolution



# **Manage Municipal Users**

The Manage Municipal Users button allows the municipality to add "Owners" and "Contributors" to the municipal profile. Both owners and contributors can edit and submit the application, thereby streamlining the certification process and dispersing the workload.

#### **Permission Restrictions for Users**

- Owners: Maximum of 5, can add and remove other owners & contributors. Both can work on the application (edit, upload, submit for review, etc.).
- Contributors: Unlimited, can only add other contributors.

#### **How to Add Users**

- 1. Enter the user's email address.
- 2. Designate their role as either an owner or contributor.
- 3. Click Add User.
- Those that have already created a personal account on the website can be added immediately and will receive a confirmation email.
- Those without a website account will be sent an invitation email instructing them to create a personal account in order to have access to the dashboard.

#### **Manage Municipal Users**

Multiple users may contribute to an application for certification. There are two types of municipality users: owners and contributors. Municipality owners may add and remove other owners and contributors. Contributors may add other contributors, but may not remove users from the municipality. Both owners and contributors can contribute to the municipality's application for certification by adding action submissions, uploading documentation, and submitting the application for review.

If town officials such as the business administrator, clerk, mayor, etc., wish to receive notifications about the status of your application, please add them as a user to the account.

Owners				
1. Samantha McGraw	owner			
2. Renee Haider	Owner	~	Update	Remove
3. Staff User	Owner	~	Update	Remove
4. Medgan McParland	Owner	~	Update	Remove
Contributors				
Add a user	Role:			
	Owner	~	Add	User
	6			5
(1)	(2	)		<b>5</b> )



## **Download Resolution**

This button allows you to view the document submitted to register your municipality. Please note this document does NOT need to be updated. However, if you would like to update it, please see the instructions on page 5, Update Municipal Profile.

# ! Test Muni Update Application → Update your existing certification application → Update Gold Star Application → Update your existing Gold Star application → Update Municipal Profile Update the primary contact, secondary contact, and certification report "introduction" → Manage Municipal Users → Manage municipal owners and contributors → Download Resolution → Click to download the municipal resolution →



# **Application Overview**

If you are beginning your application for the first time, the button will read "Begin Application." Afterwards, it will read "Update Application." The online application functions as a "living" document. It can be continuously updated to reflect your most recent activities and house your documentation for certification. All associated users on your account will have access and be able to edit the online application. All documentation will remain in the application until removed by municipal users.

## **General Application Information**

Click "Details and history" to see:

- 1. Current status of application.
- 2. **Application History**: Indicates when, if ever, your town was previously certified, the certification expiration date, and link(s) to the official online certification report that is viewable to the public.
- 3. **Reviewer Feedback**: Indicates if there are published or archived comments posted by reviewers for actions submitted.



#### Click "Help" to see:

- Documents to help you with your application like the Master Action Tracking Spreadsheet, Start Up Actions, and Application User Guide.
- Links to the program updates and certification cycle pages.

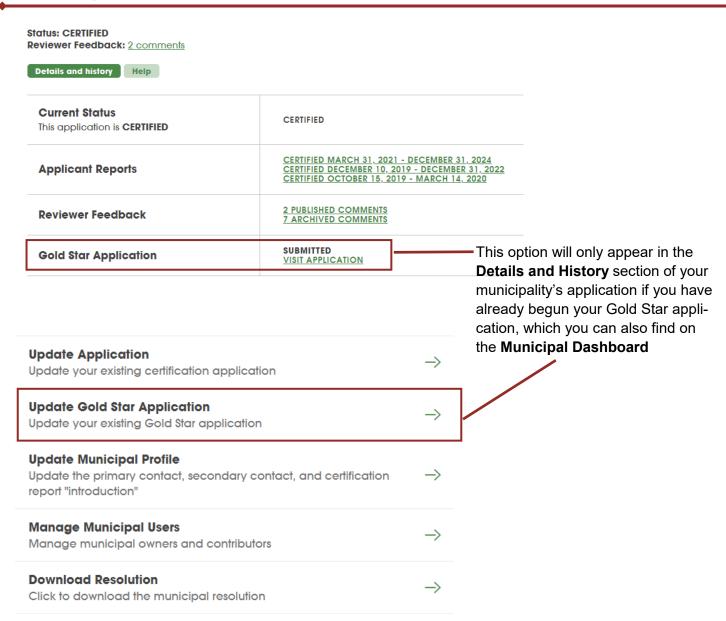


# **Gold Star Application Overview**

#### Currently, there are Gold Star Standards in Energy, Health and Water.

Municipalities currently certified/applying for certification that have completed the required certification actions contributing to a Gold Star in Energy, Health and/or Water, may also apply for a Gold Star in one or more of those dimensions. Learn more about the Gold Star Standards here.

## **Accessing Your Gold Star Application**





# Gold Star Application Overview

The Gold Star Standard application requires the completion of the Gold Star Standard action(s) in one or more categories and certain municipal certification program actions. To learn more visit the <u>Gold Star Standards page</u>.

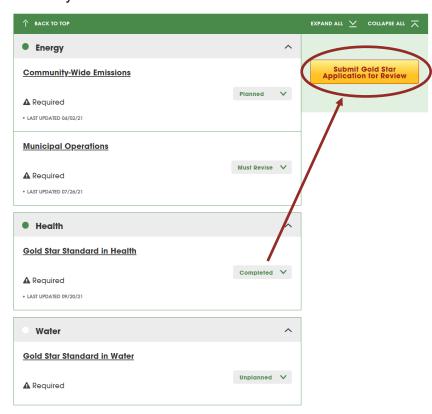
To apply for Gold Star in Energy, Health and/or Water a municipality must submit both a certification application and a Gold Star application.

## **General Application Information**

1. The submit button is always yellow and clickable. However, all of the actions within at least one category must be marked completed to submit the application. If this requirement is not met, a notification (sample below) will appear at the top of the application after clicking the submit button.

Your Gold Star application is not ready for certification. Please double check your application and try again. In order to qualify for a Gold Star in a category, all mandatory actions in that category must be marked completed.

Individual Gold Star Standard actions require the municipality to identify the Gold Star actions in its certification application that have been approved or that are anticipated to be approved by the end of the certification cycle.



It is recommended that the municipality wait until the second or final application submission deadline to submit the Gold Star application since the recognition is contingent on actions being approved in its certification application.

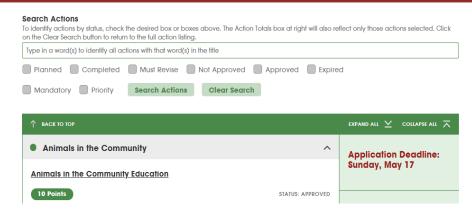


## **Search Features**

Actions can be searched in the application by action status, keyword, priority and mandatory action.

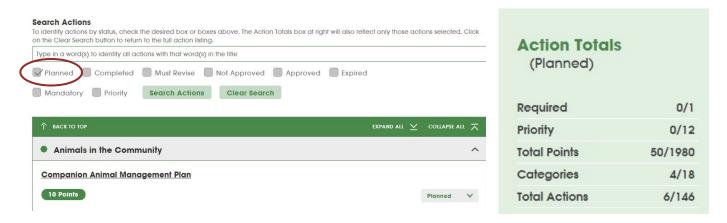
#### Search Box

- Enter key words into the Search
   Actions box. Actions that meet the
   search criteria will expand below.
- For example, type in the word "education" and all actions with "education" in the title will open below.



#### **Action Statuses**

 Check one or more of the action status boxes and the Action Totals box points will update for the those checked.



- This allows you to easily identify those actions marked as planned, work on those marked must revise
  following a review period, or identify the status of **priority actions** in the application. As a reminder, a
  minimum of two priority actions are required for bronze certification and three for silver.
- Clear Search when complete.

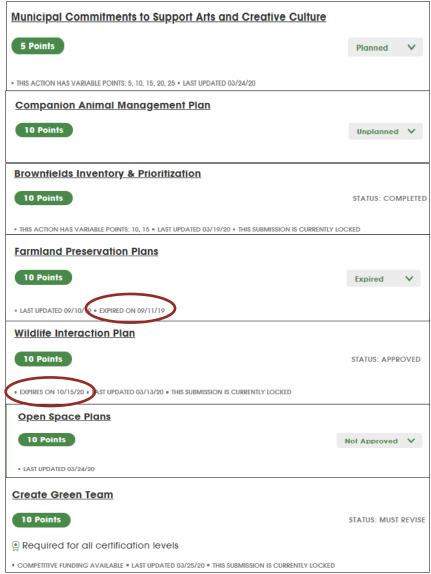


## **Action Statuses**

In a new application, an action can have 3 statuses reflecting the current state of that action (unplanned, planned, and completed). For those applications that have been submitted, an additional 4 statuses are possible.

#### **Application Action Statuses**

- Planned: Changed by user to indicate it sill or has been worked on.
- Unplanned: Default unless changed by user
- Completed: Changed by user to indicate the action submission is completed including the uploading of supporting documentation.
- Expired: Previously received credit, but due to shelf life (how long an action is good for) of the action, points are no longer counted in application.
- Approved: Points currently included in your application. Expiration dates may be applicable.
- Not Approved: Credit not awarded last time action submitted. Archived comments available.
- Must Revise: After review, revision needed to be awarded points. Comments provided for required update.





## **Retired Actions**

Due to program changes, actions may be retired from the program. Retired actions will have a one year grace period for the year that they are being retired so that a municipality may apply for that action OR its replacement (if one exists).

## **Retired Actions with Unplanned Status**

• If prior to an action's retirement it was listed as UNPLANNED in your application, you will not see the retired action appear in the list of available actions. Only the replacement actions will be visible.

#### **Retired Actions with Status Other than Unplanned**

- If prior to an action's retirement it was listed as Approved, Expired, Planned, Must Revise, Not Approved in your application, the action will be visible in read-only mode. You will be able to download and save the documentation to move to another action for points.
- The points in Approved actions are still calculated in your Action Totals, until the expiration date is reached.
- On the main application page you will notice the text in the actions indicating that the action is retired and can no longer be modified.

Innovation Projects

**Green Roofs** 

10 Points

• THIS ACTION IS RETIRED AND CAN NO LONGER BE MODIFIED • LAST UPDATED 09/10/19 • EXPIRED ON 09/11/19

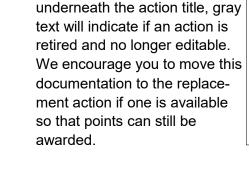
#### **Action Submission: Green Roofs**

This action has been retired. Modifications are no longer permitted.

#### **Directions**

Please complete this form to submit this action as part of your application by following these steps:

- Mark the status as planned.
- · Indicate the requested points for variable point actions.
- · Enter description of implementation, no more than 300 words.
- · Upload supporting documentation.
- Click save action submission button.
- Once updates are finished, mark the action completed so points are calculated in your point tot certification.
- Save the submission.



On the action submission page

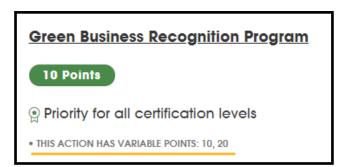


## Variable Point Actions

Variable point actions allow credit to be received based on the scope of work completed. The user indicates a requested point value, which is then confirmed or revised by the reviewer.

## **Variable Points on Main Application Page**

- All variable point actions will have the possible points listed on the main application page below the title of the action.
- Points awarded are based on the scope of work completed. For example, Green Business Recognition Program is based on implementing a program, adopting NJSBR criteria, and promoting/ encouraging participation in sector-specific green business recognition programs. "Tiers" of possible points are clearly stated in the full action description.
- Application view defaults to lowest point value until changed by user.



## **Selecting Points**

- On the action submission page, the user selects the point value that supports the documentation as part of the submission from the drop down menu.
- Make sure to **save action submission** at the bottom of the page.
- The reviewer then confirms the point value selected or changes it based on review of the documentation.

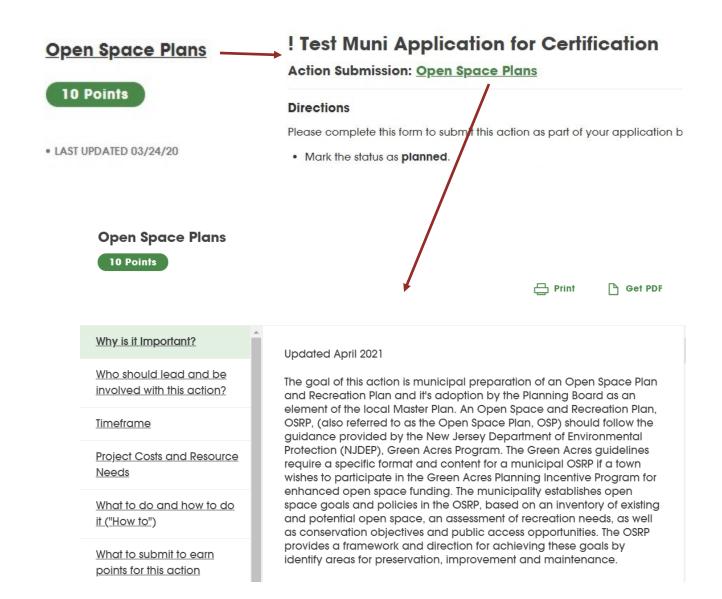


## **Action Listing & Description**

All categories are listed alphabetically. Within each category (and subcategory), actions are listed with priority actions first, then prerequisite actions, and then alphabetically. There are two different ways to view the full action description from within your application to make it easy to view the details of what you need to submit.

#### View Full Action Description

Click on action title to go to Action Submission Page and click on the link after "Action Submission:"





# **Action Submission Page**

The action submission page is where documentation is uploaded to support the submission requirements for the action. The action status, points, and reviewer feedback are also on submission page.

## **Top of Action Submission Page**

- 1. **Status**: Current status of the action. Make sure to select "completed" if finished making updates and ready to submit for review.
- 2. **Points**: Lists the number of points the action is worth. If variable point, select the number of points requested.
- 3. **Description of Implementation**: Enter a short narrative about what you did and the impact it had on the municipality and community.
- 4. **Save Action Submission:** Any time you make a status or description of implementation update, make sure to save your work at the bottom of the page.

## Action Submission: Municipal Commitments to Support Arts and Creative Culture Directions Please complete this form to submit this action as part of your application by following these steps: Mark the status as planned. · Indicate the requested points for variable point actions. Enter description of implementation, no more than 300 words. Upload supporting documentation. Click save action submission button. Once updates are finished, mark the action completed so points are calculated in your point totals to submit the application for certification Save the submission. Status Planned Current action submission status: Planned Requested Points Point level requested for this submission Description of Implementation In the text box below, please provide a short summary (300 word maximum) of what was accomplished and the impact it had or will have on the community. Include relevant references to the uploaded materials. If updating a previous submission, please remove any outdated or unnecessary information. 3



Save Action Submission

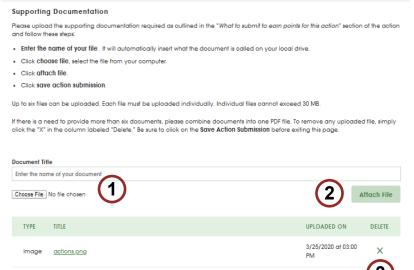
# **Action Submission Page**

The action submission page is where documentation is uploaded to support the submission requirements for the action. The action status, points, and reviewer feedback are also on submission page.

#### **Upload Supporting Documentation**

- Choose file from your computer to upload. Many file types are accepted, and each file can be up to 30MB. Website URLs should be entered into the Description of Implementation or uploaded in a Word document.
- 2. **Attach File**. Once successfully uploaded it will appear in the box below.
- 3. Remove files by clicking "x" under **Delete**.
- Save Action Submission after uploading files. Remember to modify the action status at the top of the page if applicable.





#### **Reviewer Feedback**

- Following all review periods feedback will be available for the submitted actions.
- If currently in cycle, comments will be visible at the bottom of an actions' submission page.
- After the end of the cycle, all comments will be archived and can be viewed by clicking "show archived comments."



# Calculating Points

Easily track the progress on the application using the Action Totals box on the right hand side. Along with the submit button, it will indicate when the application qualifies for certification.

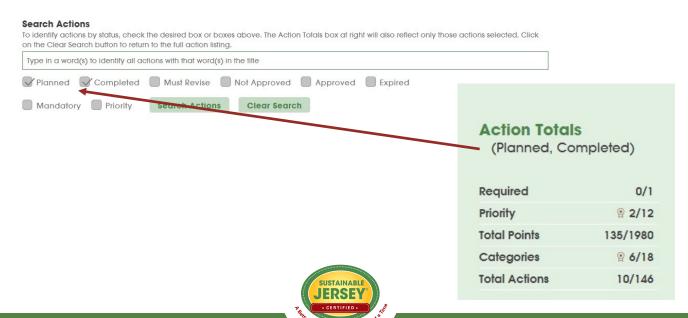
#### **Default View**

The Action Totals box defaults to show completed and approved points. This is because completed and approved action statuses are what's needed to meet the submission requirements for bronze certification, and receive the yellow submit button to submit the application.



#### **Custom View**

- View different action status combinations by checking the desired boxes under Search Actions.
- Remember to change all planned actions to completed if you need additional points to submit the application.
- Remember to **clear search** when complete.

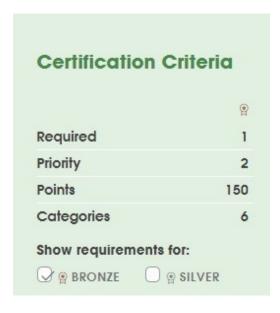


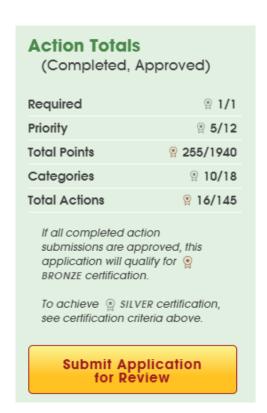
## **Submit Application**

To submit the application, click the yellow submit button found on the right hand side of the main application page. NOTE: Depending on the size of your computer screen, you may need to scroll down a little bit to see the submit button.

#### **Steps to Submit**

- When finished working on an action mark it as "Completed."
  - Remember: Follow this procedure even if an action is not fully finished and you do not have all the
    documentation uploaded because the submit button only turns yellow when all completed and approved actions total to the minimum requirements for bronze certification.
  - **Tip:** Check to make sure the completed and approved totals meet the minimum requirements for bronze. Requirements are listed in the **Certification Criteria** section above Action Totals.
- Press the yellow submit button, confirm submission, and you will receive a notification in green at the top
  of the page that the application has been submitted.
- All users on the account will receive an automatic email that the application has been submitted for review. If the business administrator, clerk, mayor or other municipal official wishes to receive these notifications but is not on the account, please add them as an owner or contributor. Guidance is available on page 6.





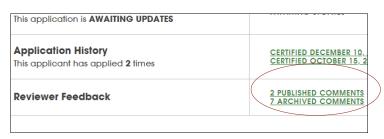


# Reviewer Feedback & Application Updates

After submitting the application, project area specialists review the submissions to see if they meet the requirements for each action. During the review process, the status of the actions submitted will change, but comments are not viewable until the review is complete. At that time updates can be made to actions based on the reviewer feedback.

#### Reviewer Feedback

- All users associated with an account will receive an automatic email notifying them when the application
  has been turned to "Awaiting Updates".
  - The email will list the actions marked "Must Revise" that need attention in the application.
- Reviewer feedback may be available for any action status, and can be found in one of two places:
  - 1. By clicking "**Published Comments**" in the Reviewer Feedback area at the top of the application. It will return a list of the actions with comments associated with them in the order they appear in the application.
  - 2. By clicking on the **action name** and scrolling to the bottom of the page to the "Reviewer Feedback" area.
- Reviewer feedback will provide information on the updates needed for action approval.
- Once all of your updates have been made, mark those actions updated as "Completed" and resubmit the
  application for review.
- At the end of the review cycle, all comments will be archived and accessible either at the top of the application, or at the bottom of each action's submission page.











# Questions? Sustainable Jersey is here to help!

Contact info@sustainablejersey.com or call 609-771-2938