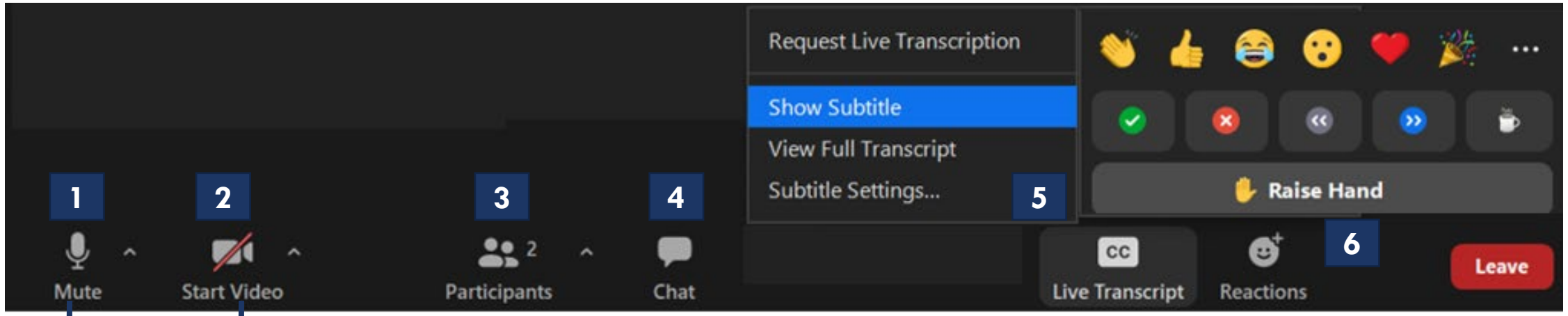
Water Finance Clearinghouse

Contributor Training

Using Zoom

The Zoom menu bar appears at the bottom of the Zoom window once the meeting begins. If you don't see the menu bar, move your mouse slightly and the bar should appear.

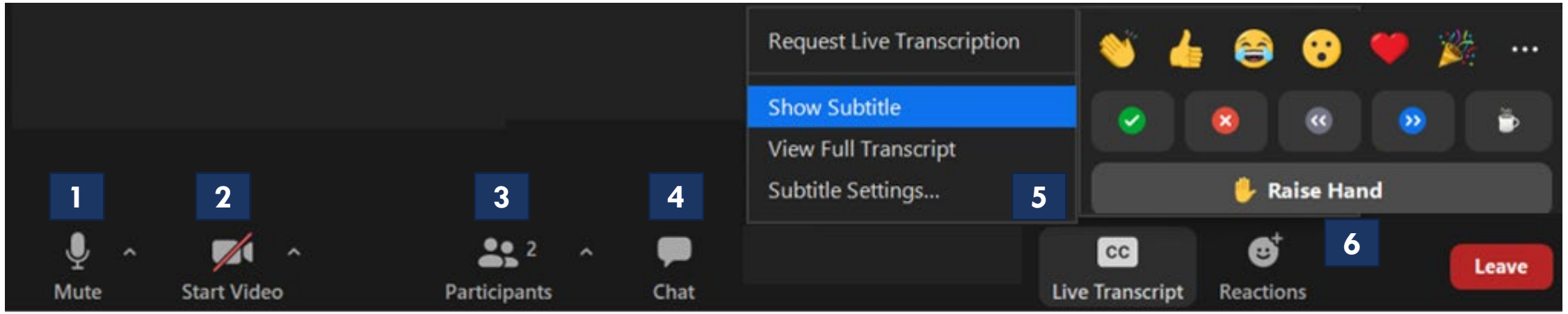


For this presentation, please keep your video 2 OFF and mic 1 MUTED until the Q&A portion

For Zoom Technical Support contact **WFCWebinarSupport@cadmusgroup.com.**

Using Zoom – Asking Questions

We will answer all questions **at the end of the presentation** during the Q&A portion.



To ask a question during this time, you can:

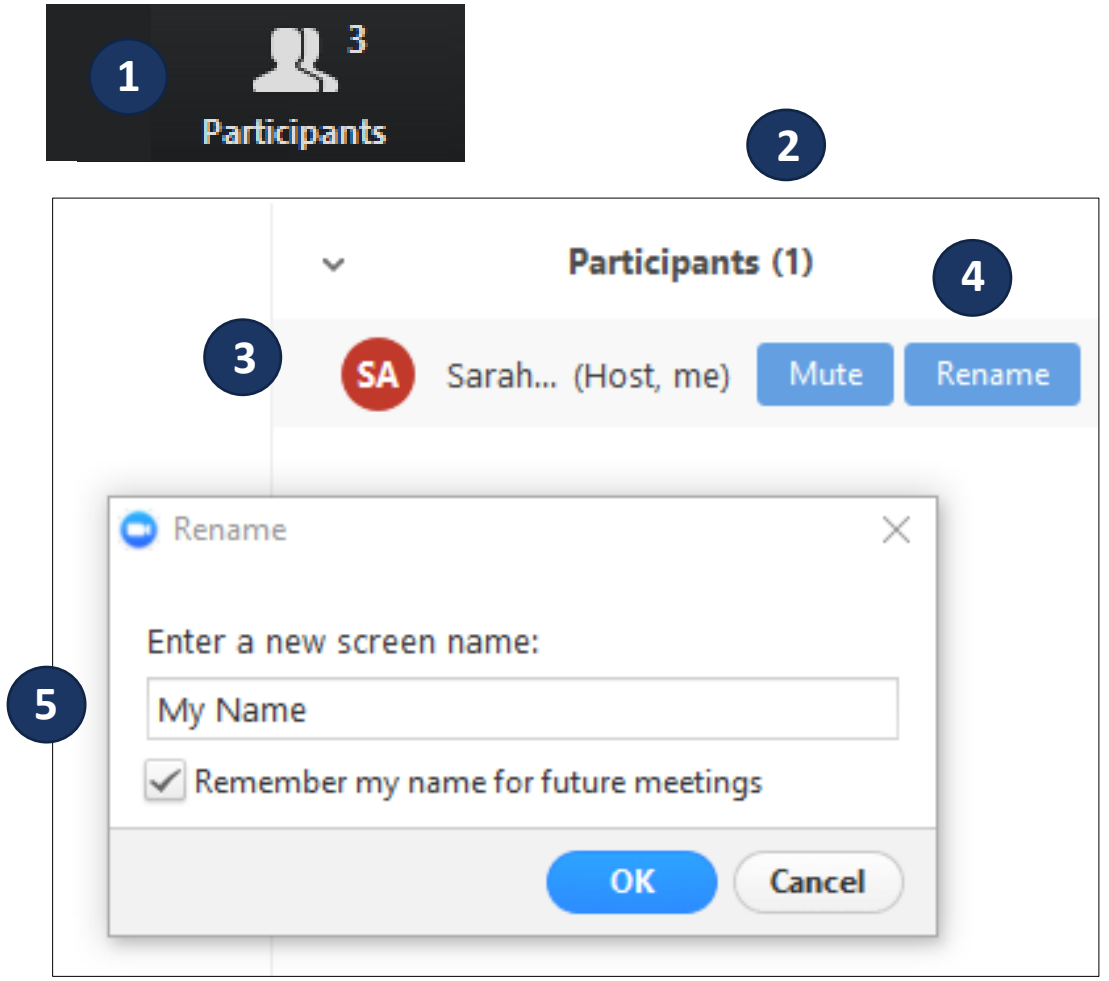
1: Type the question in the Chat 4

2: Raise your hand using the Reactions 6 button. When we call on you, make sure to unmute 1 yourself to ask the question.

For Zoom Technical Support contact **WFCWebinarSupport@cadmusgroup.com.**

Using Zoom – Renaming Yourself

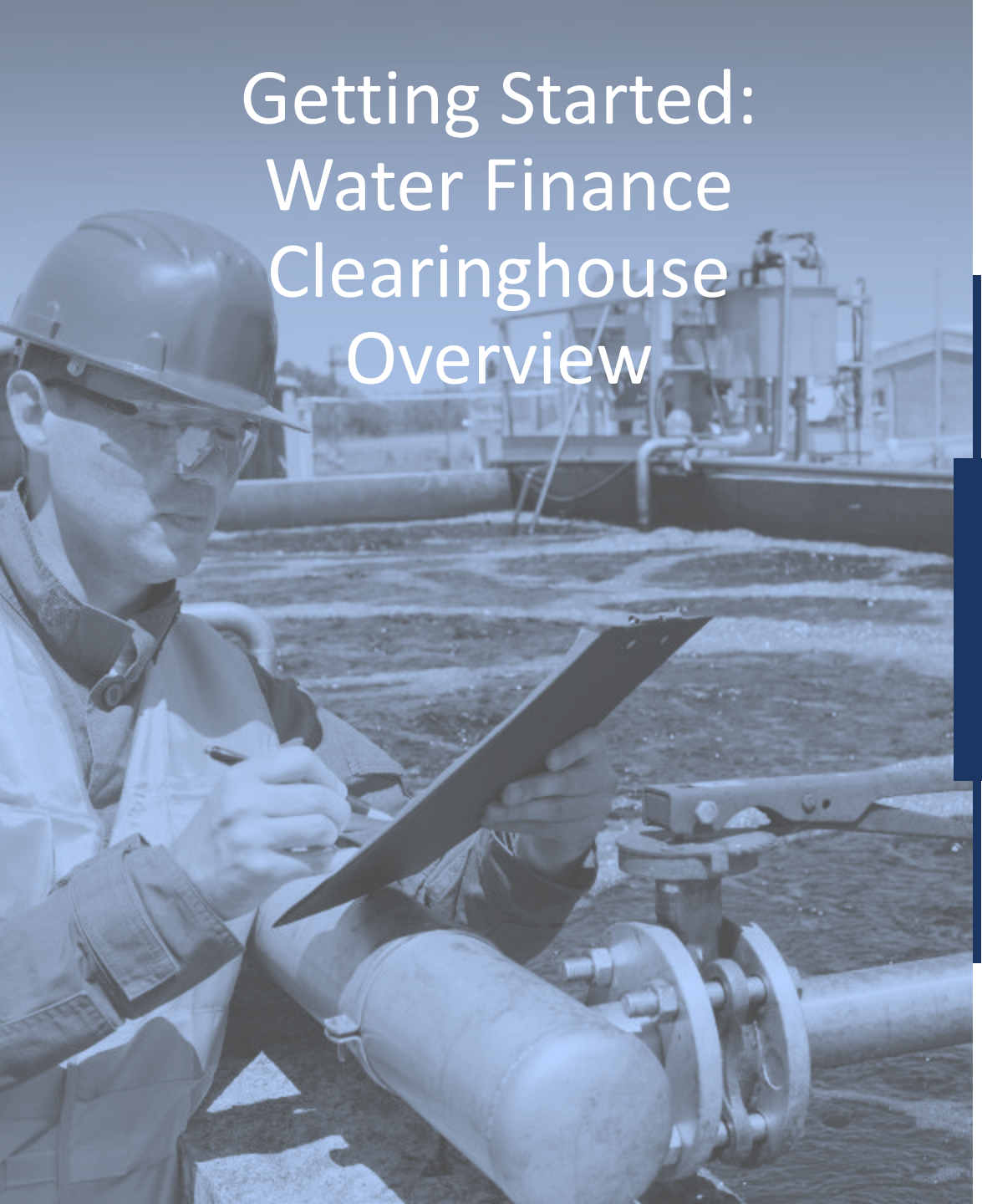
1. To change your name, click on **“Participants”.**
2. The Participants list will pop out.
3. Toggle over your name.
4. Options will appear. Select **more** and then select **rename.**
5. You will see another popup. Enter your name and click **“OK”**



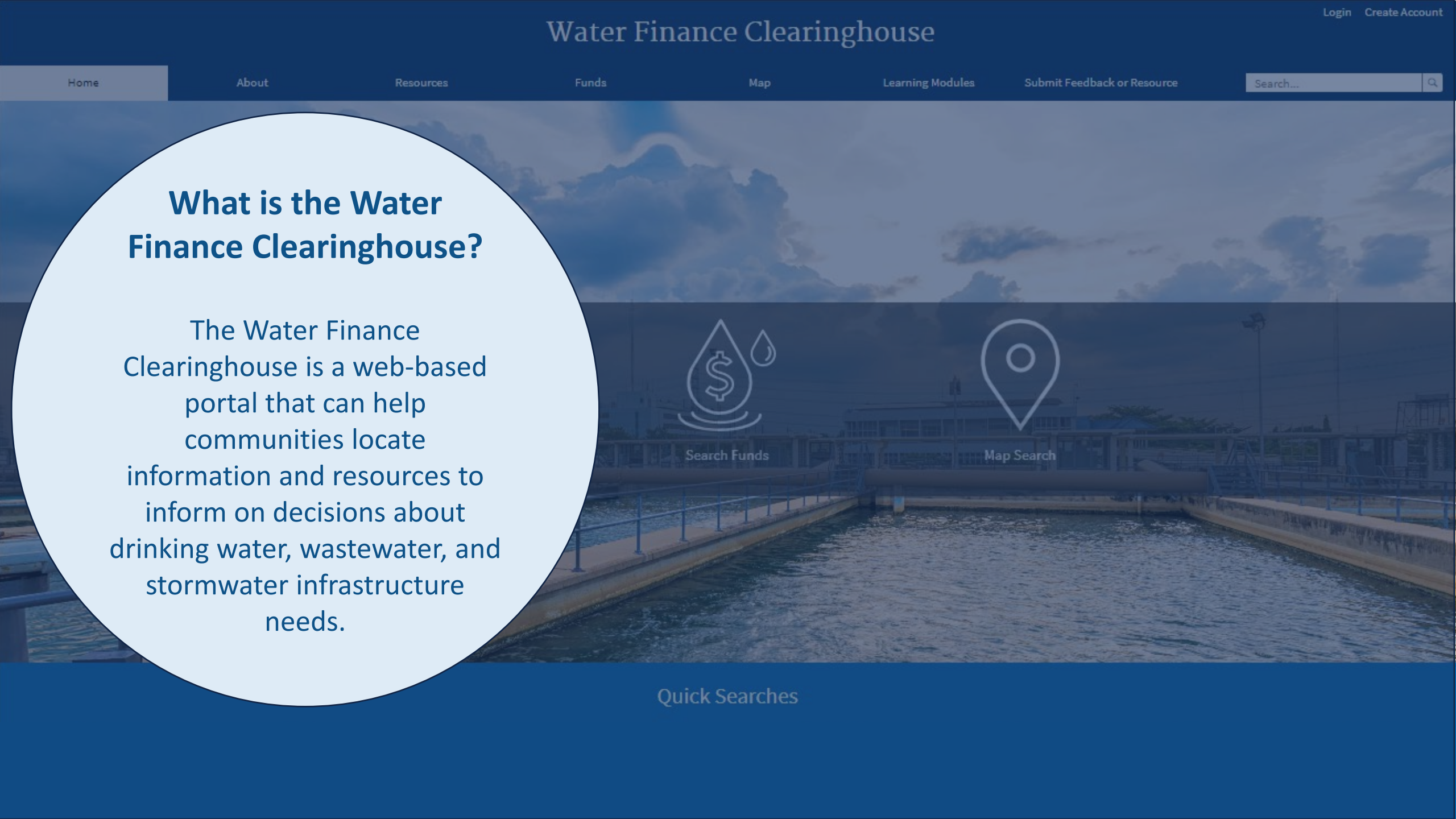
Water Finance Clearinghouse Contributor Training

This training will provide information regarding how to create a Contributor Account and walk the user through the Contributor Account-specific tools.

Getting Started: Water Finance Clearinghouse Overview



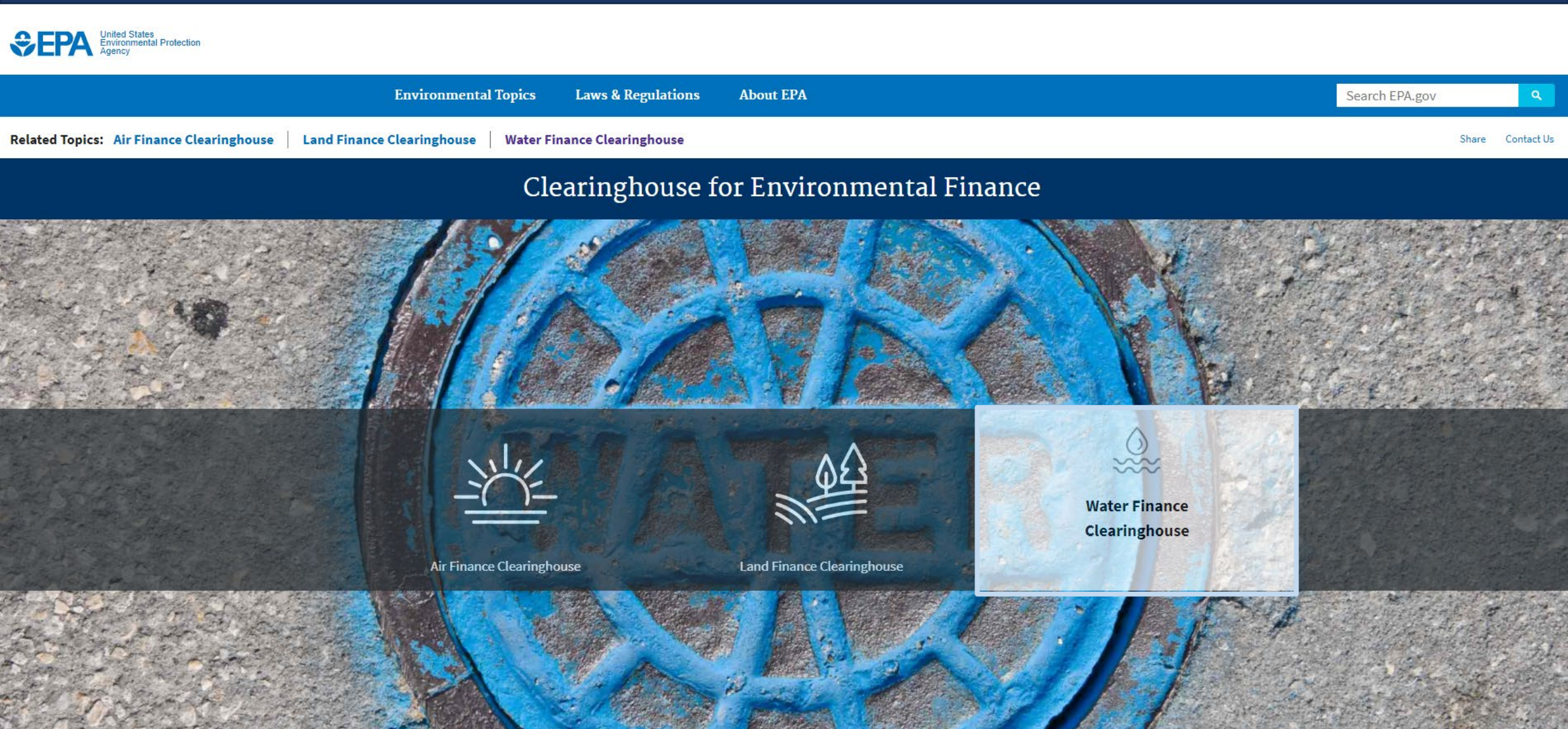
- Navigating the Water Finance Clearinghouse Homepage
- Water Finance Clearinghouse User Accounts
- Create a Contributor Account
- Logging in



What is the Water Finance Clearinghouse?

The Water Finance Clearinghouse is a web-based portal that can help communities locate information and resources to inform on decisions about drinking water, wastewater, and stormwater infrastructure needs.

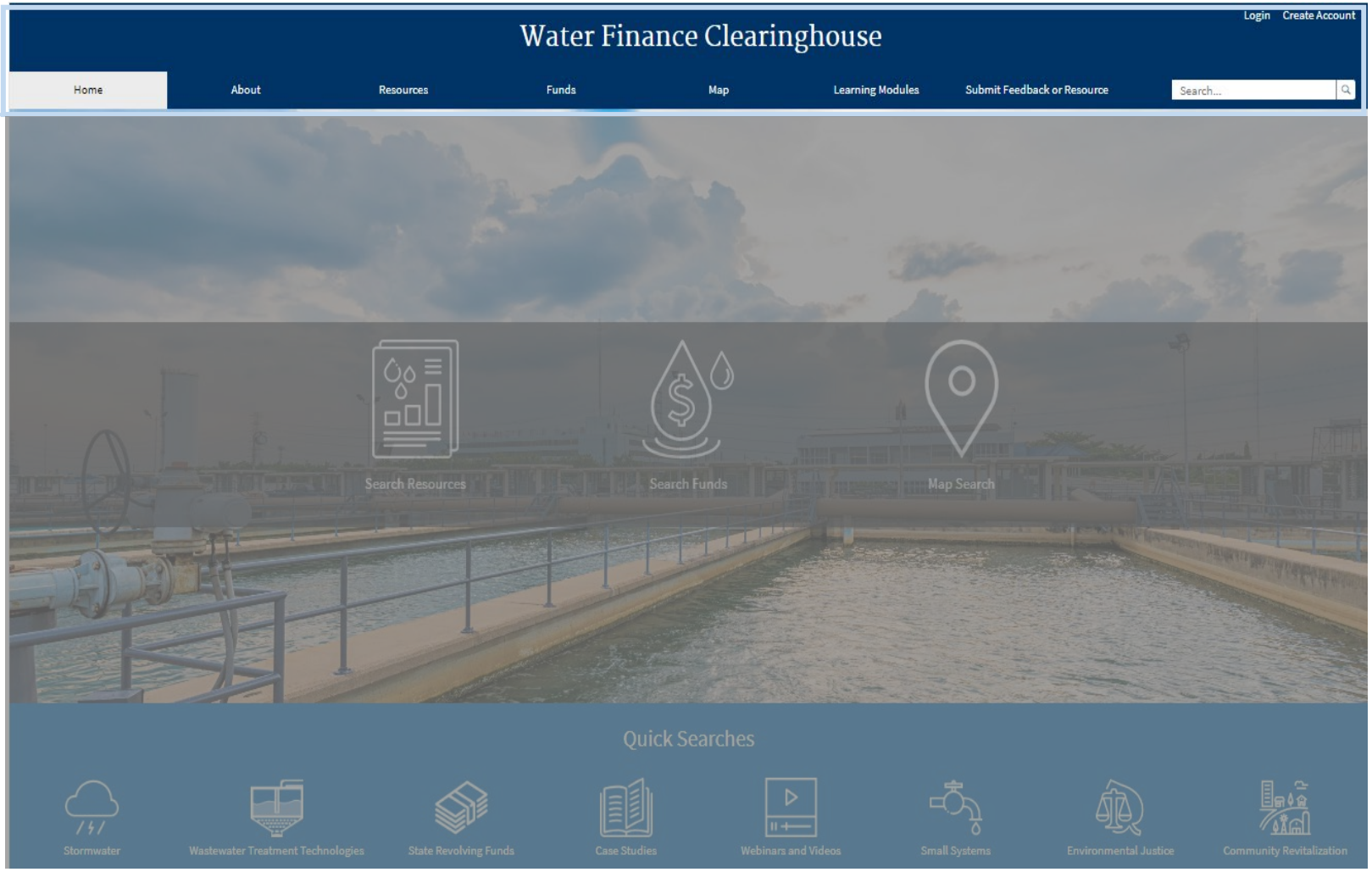
Clearinghouse for Environmental Finance



Water Finance Clearinghouse

Top navigation bar links:

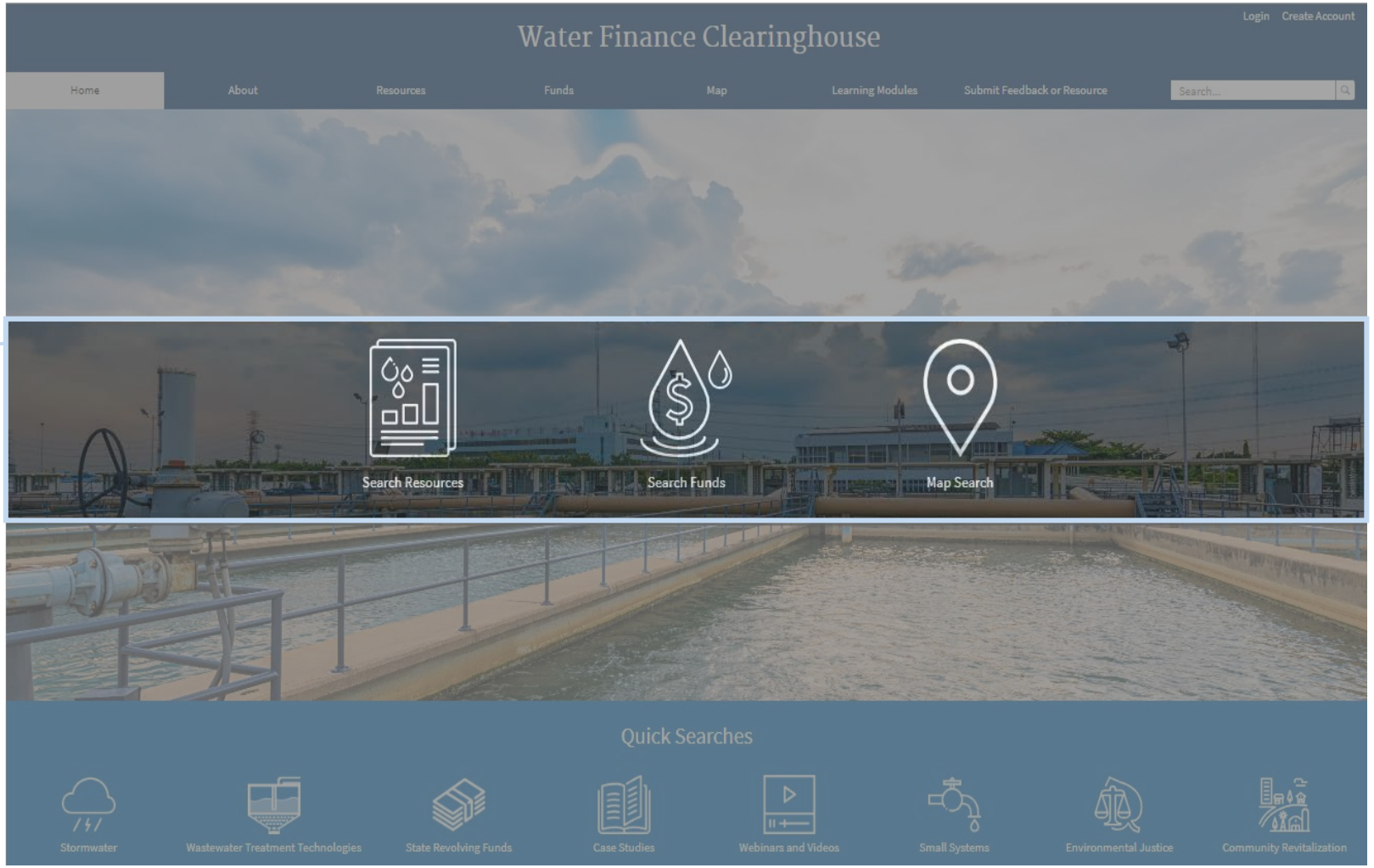
- Home
- About
- Resources
- Funds
- Map
- Learning Modules
- Submit Feedback or Resource
- Login or Create Account



Water Finance Clearinghouse

Center navigation bar links contain the 3 main search methods:

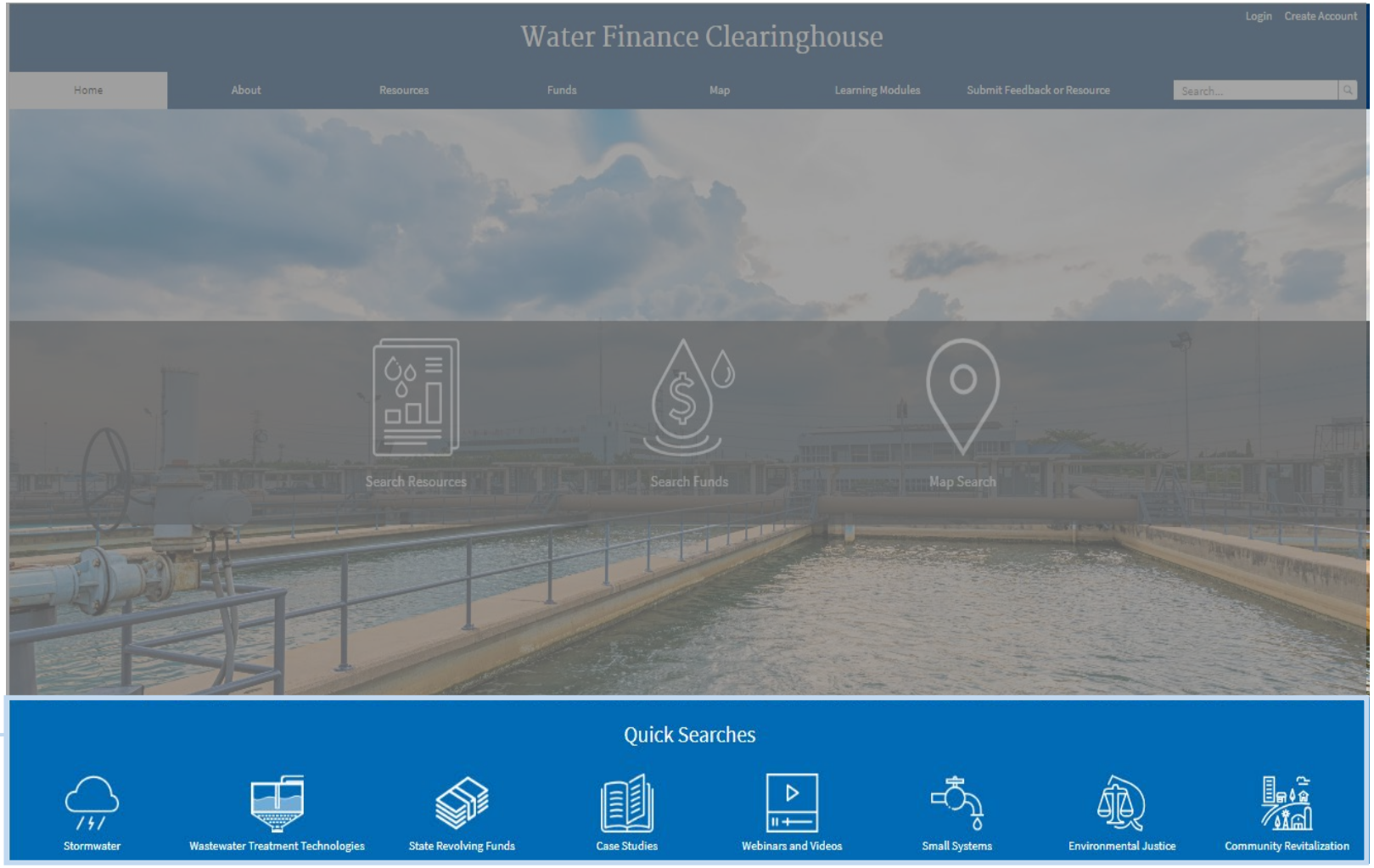
- Search Resources
- Search Funds
- Map Search



Water Finance Clearinghouse

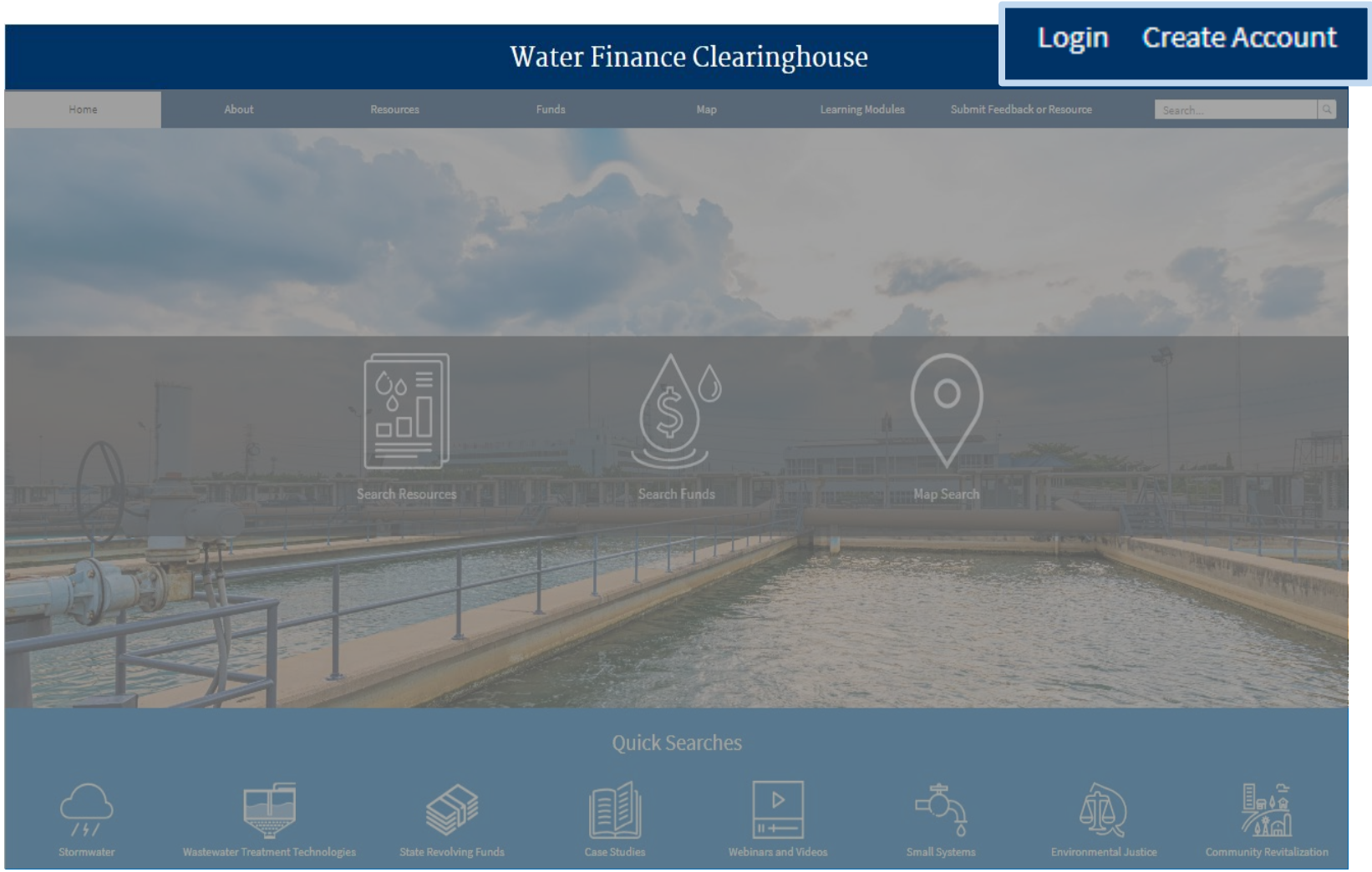
Bottom navigation bar links:

Contain Quick Searches for popular resources and funding sources.



Water Finance Clearinghouse

New users should begin by creating an account using the Create Account link.

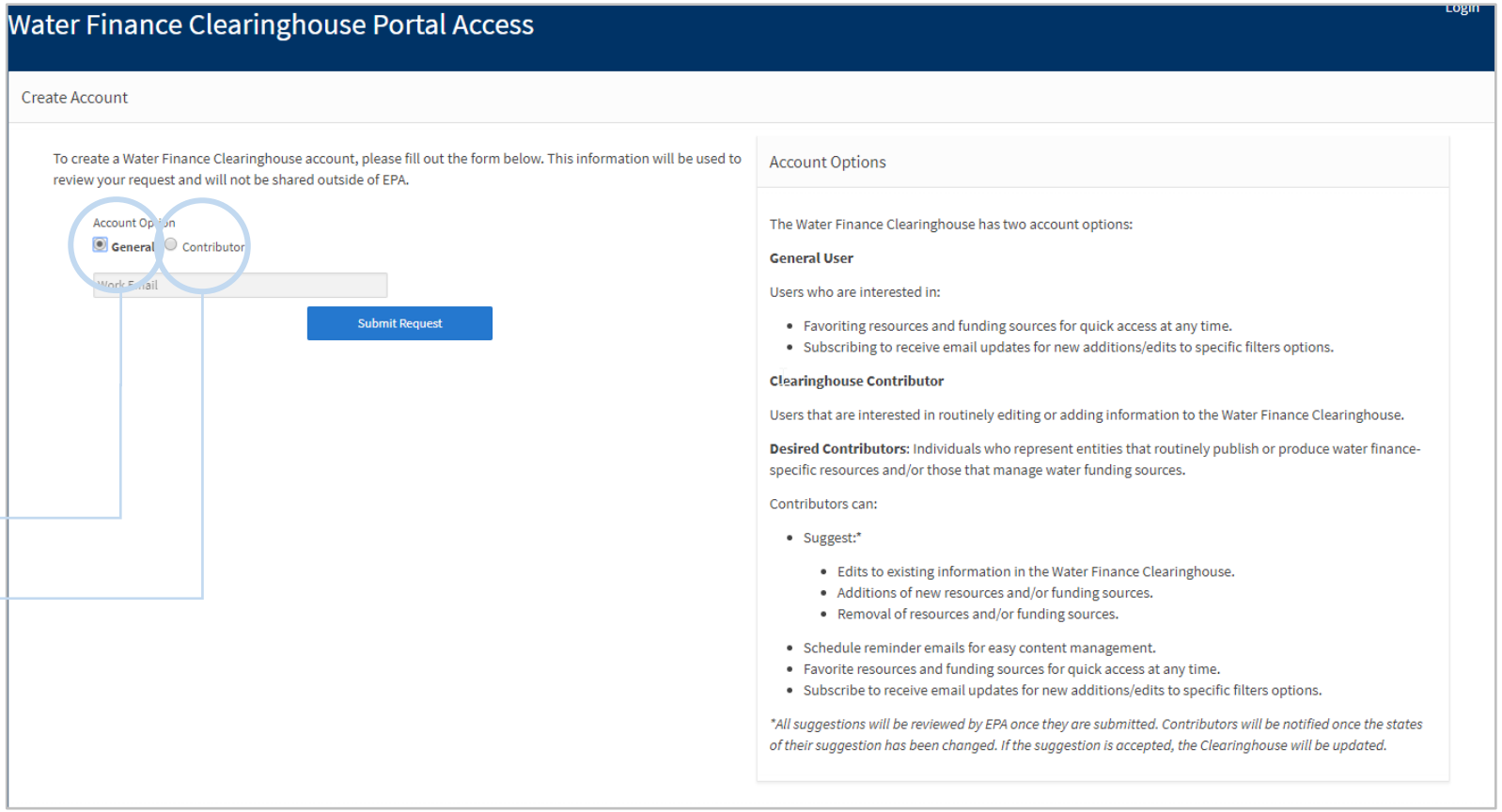


Water Finance Clearinghouse User Accounts

After clicking Create Account, users will be directed to the Create Account Page.

There are two types of user accounts

- General
- Contributor



Water Finance Clearinghouse User Accounts

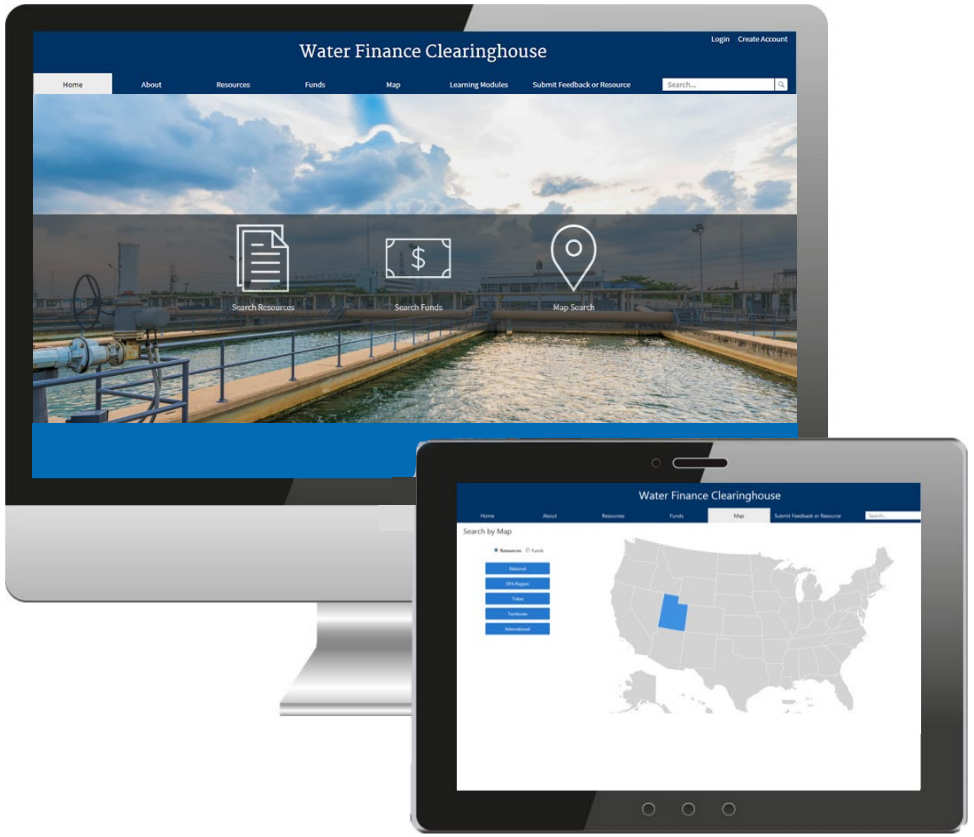
General Users

- View and Favorite Resources and Funding Sources
- Subscribe to receive email updates for new additions/edits to specific filters options

Contributors

- Suggest edits to existing information
- Suggest new content
- Suggest removal of content
- Schedule reminder emails for easy content management
- Favorite Resources and Funding sources
- Subscribe to email updates

Contributor Account Benefits



General User resource suggestions are limited to providing a URL and comments.

Contributors are individuals who represent entities that routinely publish or produce water finance-specific resources and/or those that manage water funding sources.

Contributor Benefits:

- Resource Suggestions options are more detailed (See Suggesting a Resource or Funding Source section)
- Can be saved as draft and return to suggestions later
- Contributors can monitor the status of their suggestion

Create a Contributor Account

Select *Contributor*

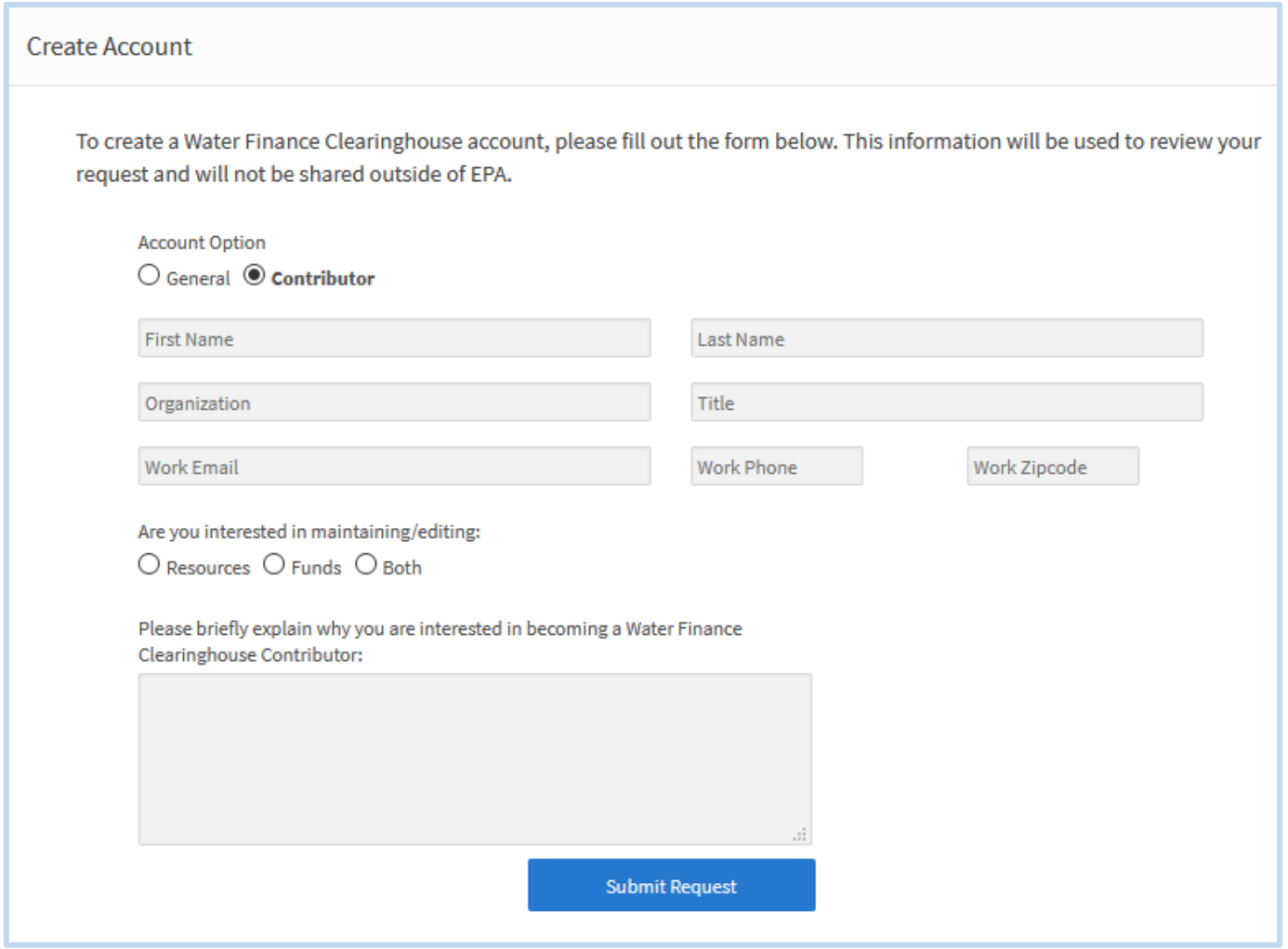
Enter your Work Email, Organization, and Title

Select the type of material you are interested in maintaining/editing

Briefly explain why you are interested in becoming a Contributor

Submit

Once approved you will receive an email from EPA with login information

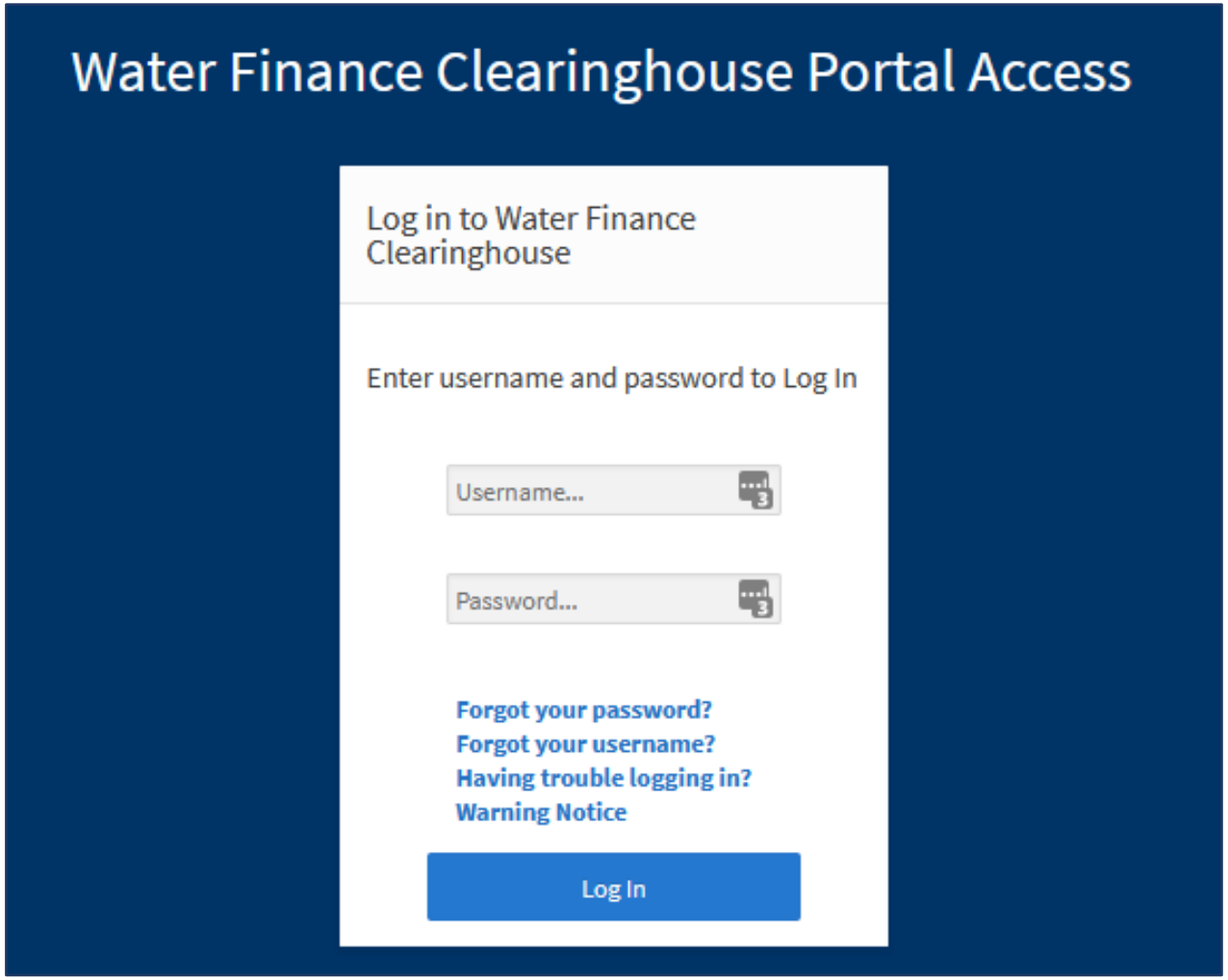


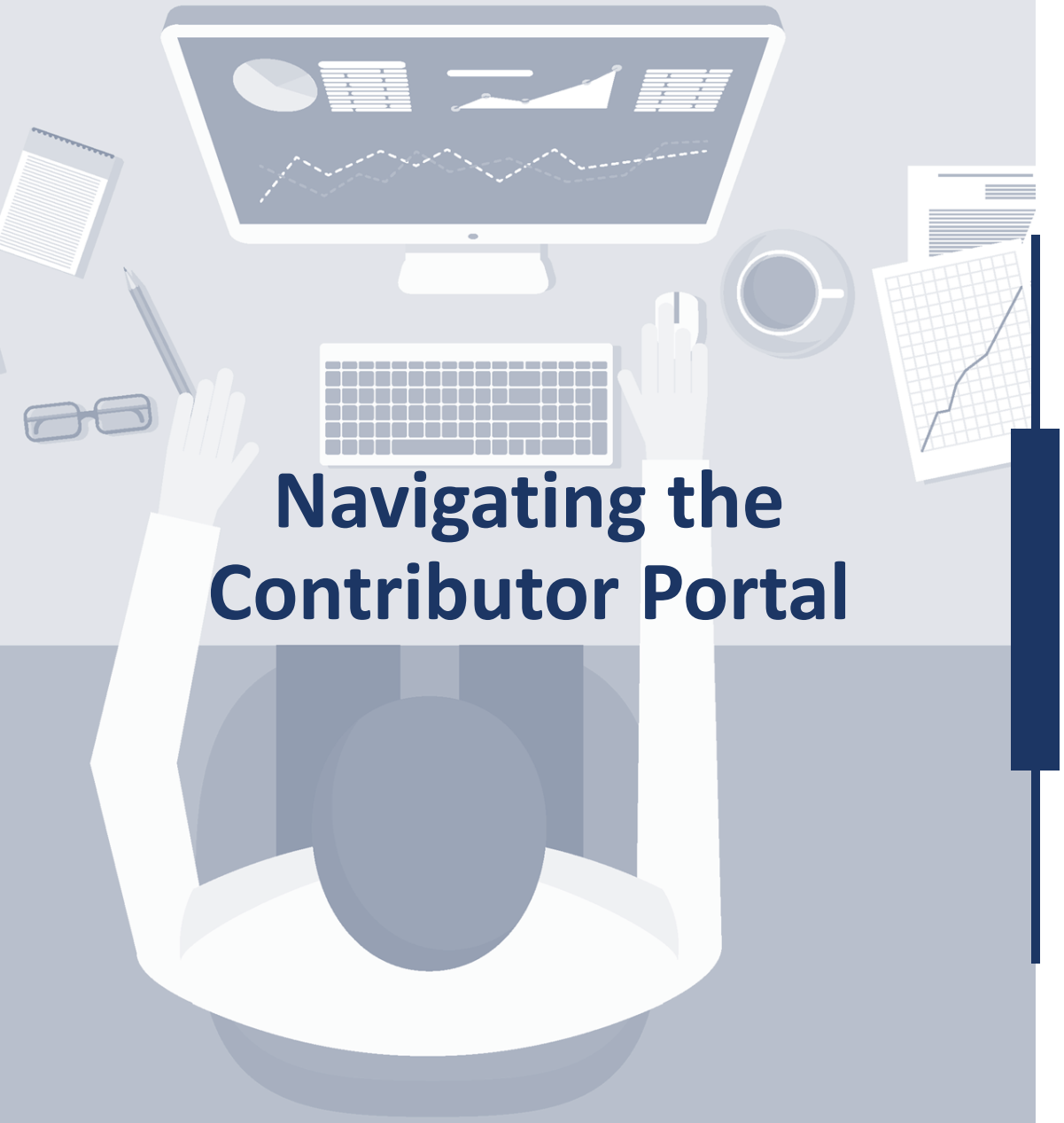
Create a Contributor Account

Select *Log in* link on upper right side of Water Finance Clearinghouse homepage

Enter email address and password

Log In



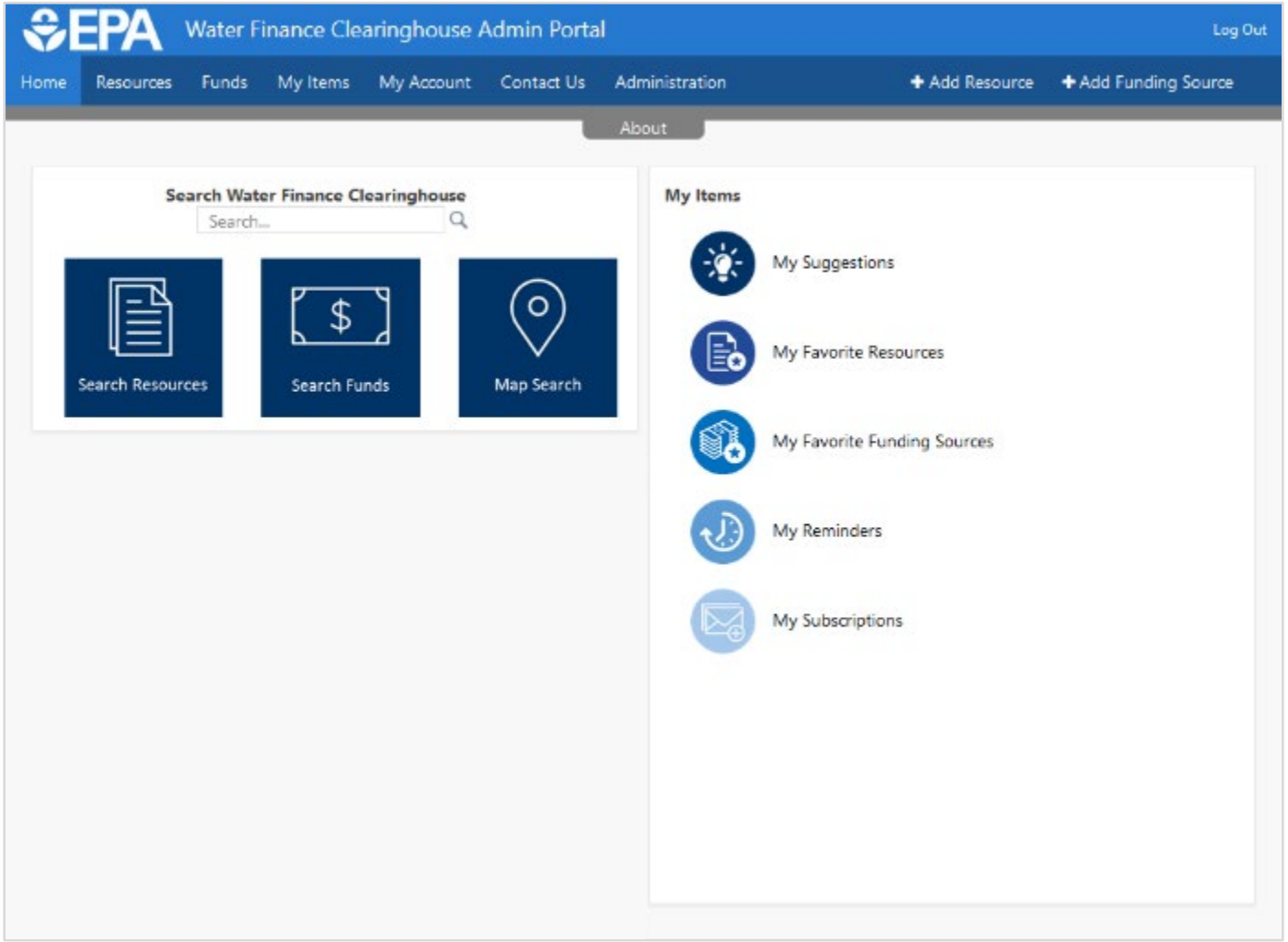


Navigating the Contributor Portal

- Contributor Account Portal
- Resources and Funds
- Suggest a Resource or Funding Source
- My Items
- Contributor Portal Exports
- Additional Contributor Portal Functions

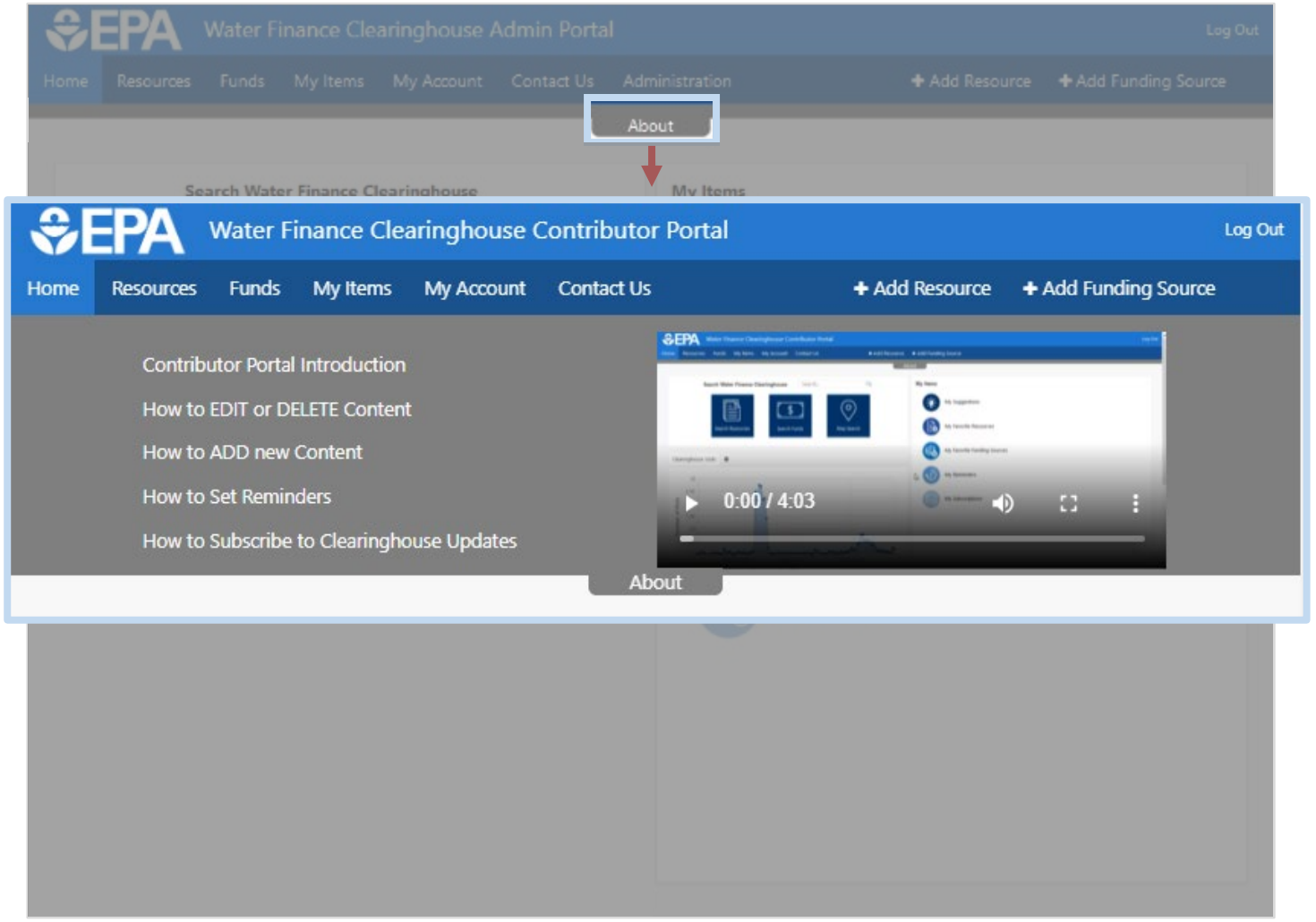
Contributor Account Portal

Once a user is granted a Contributor Account, they have access to the Contributor Account Portal



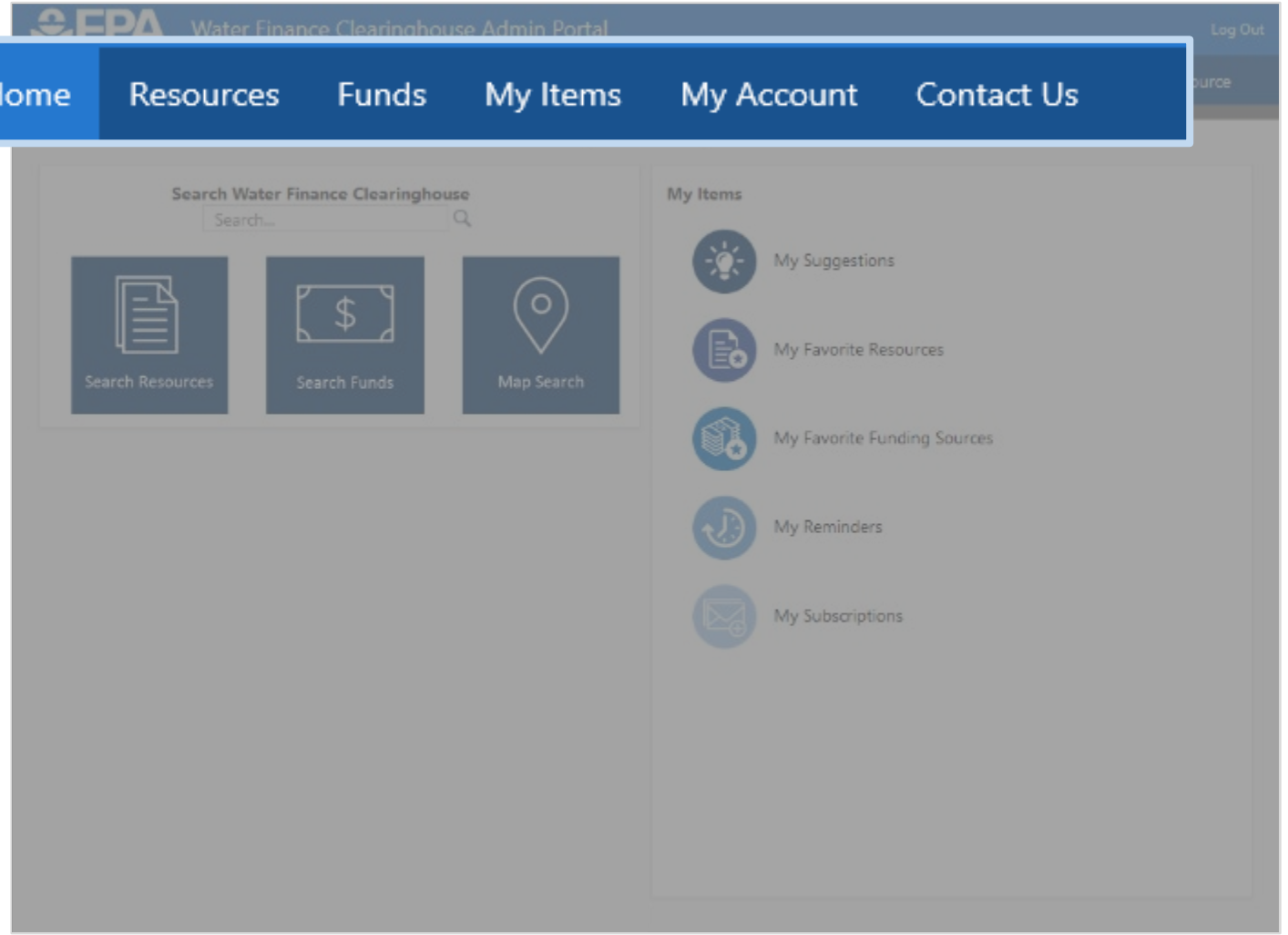
Contributor Account Portal

The About tab lets the user access Contributor Portal tutorial videos



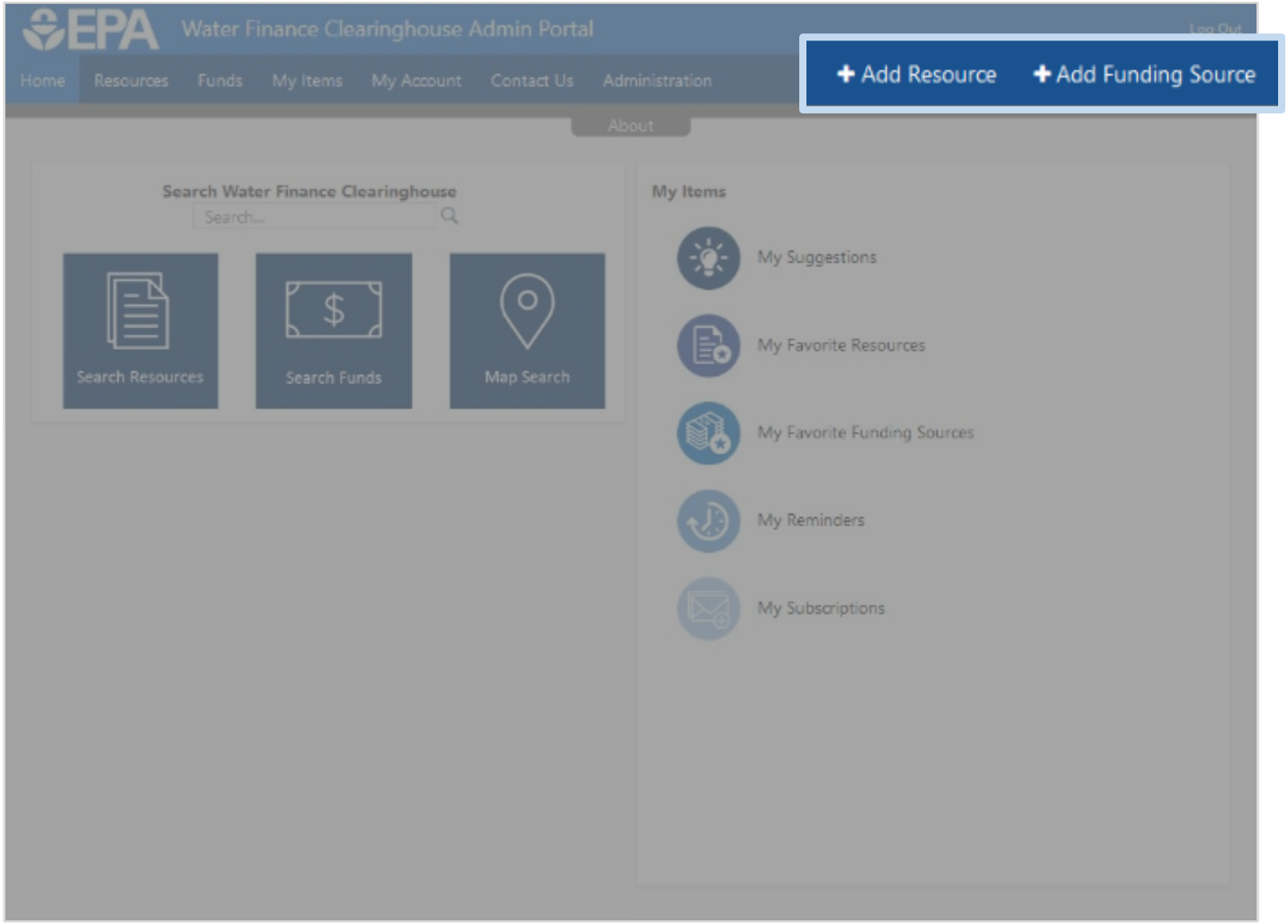
Contributor Account Portal

Top navigation bar links



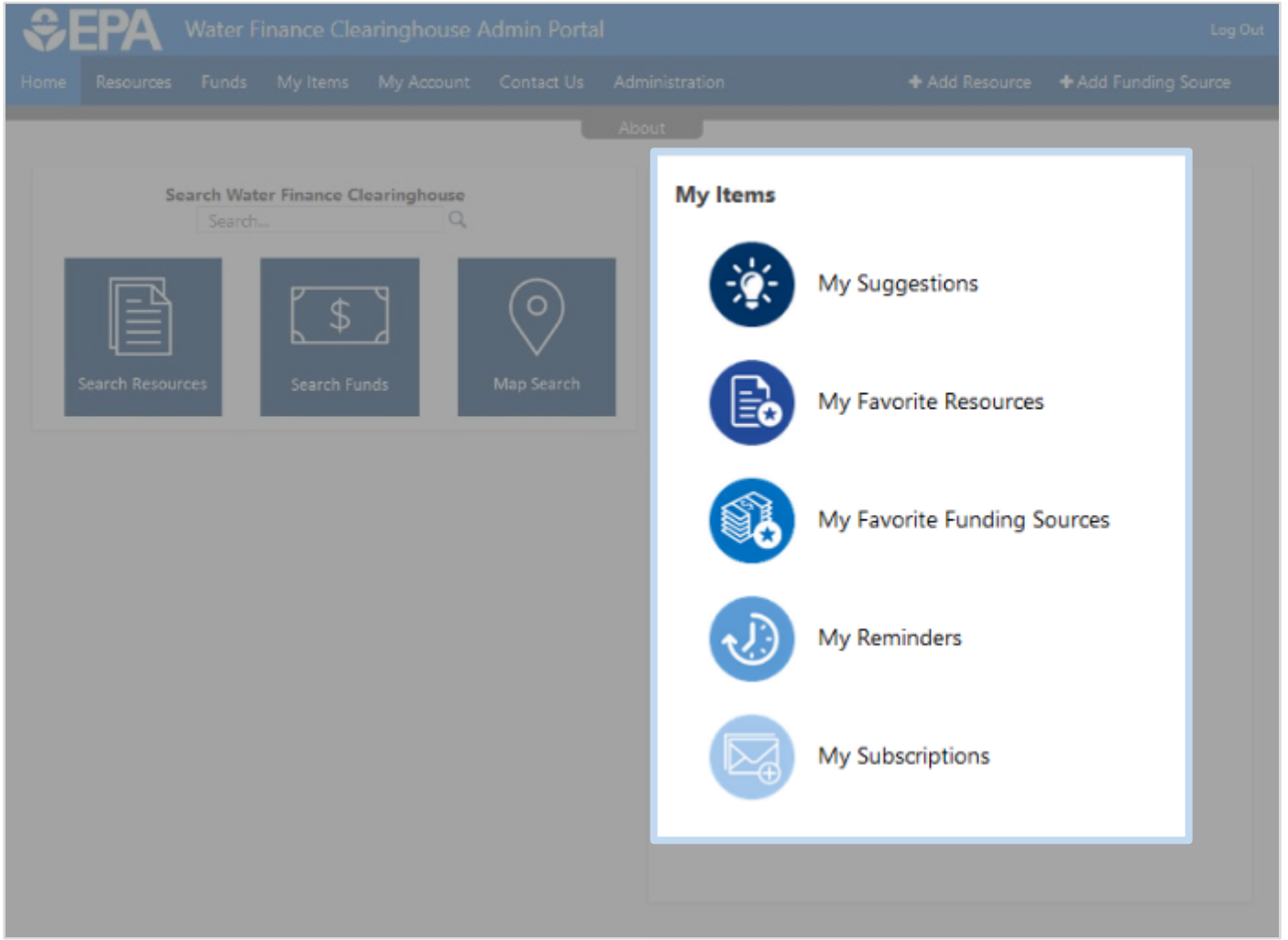
Contributor Account Portal

Propose new entries using “+Add Resource” and “+Add Funding Source” buttons



Contributor Account Portal

Quickly access your content from the *My Items* links



Resources and Funds

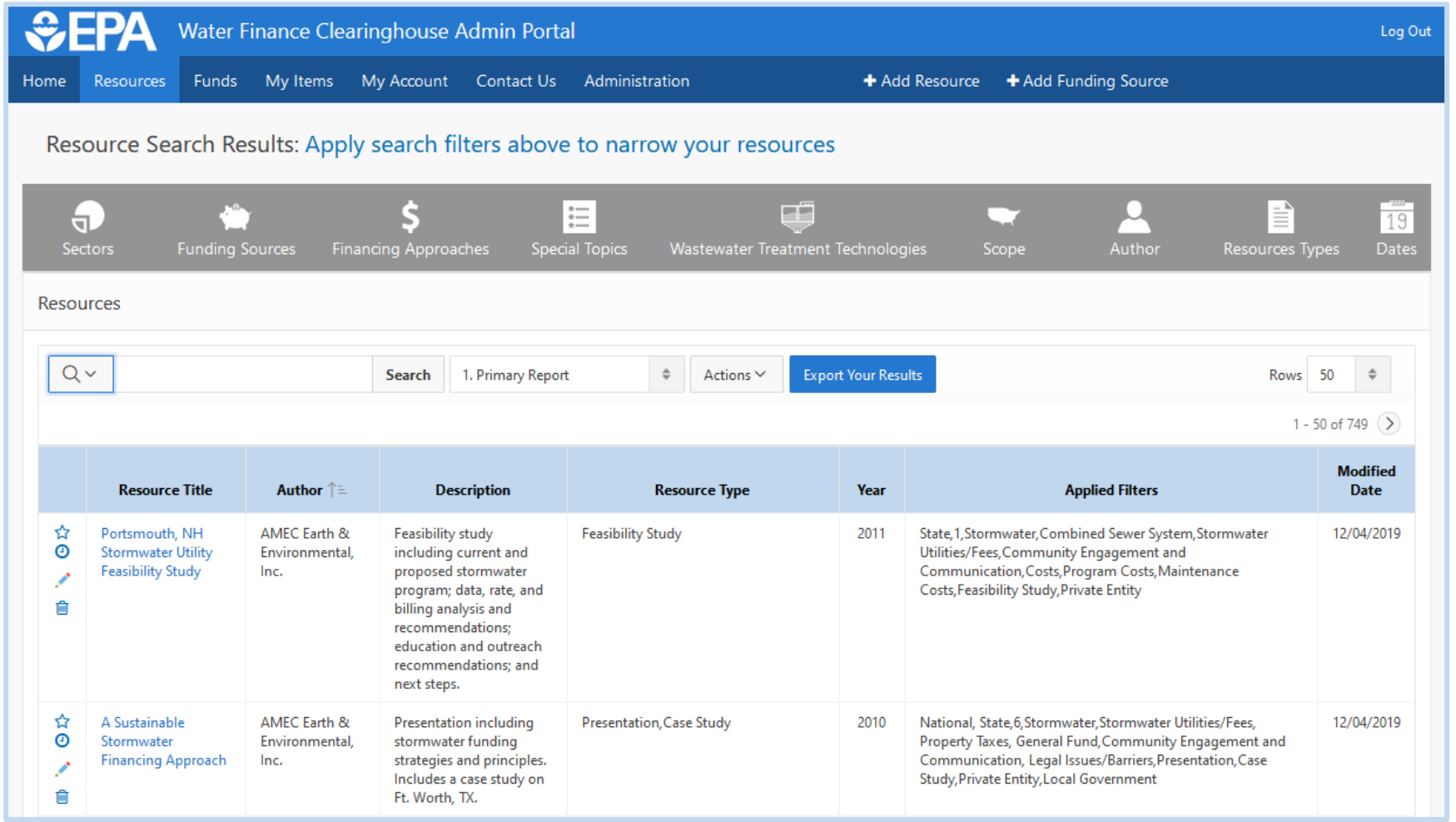
Search Resources and Funds using keywords, filters, or map search. Favorite Resources and Funds and set up email subscriptions and/or reminders based on preferences.

Search Resources and Funds

Search Resources

Search Funds

Contributors have access to the Resource and Funds Databases and search tools.

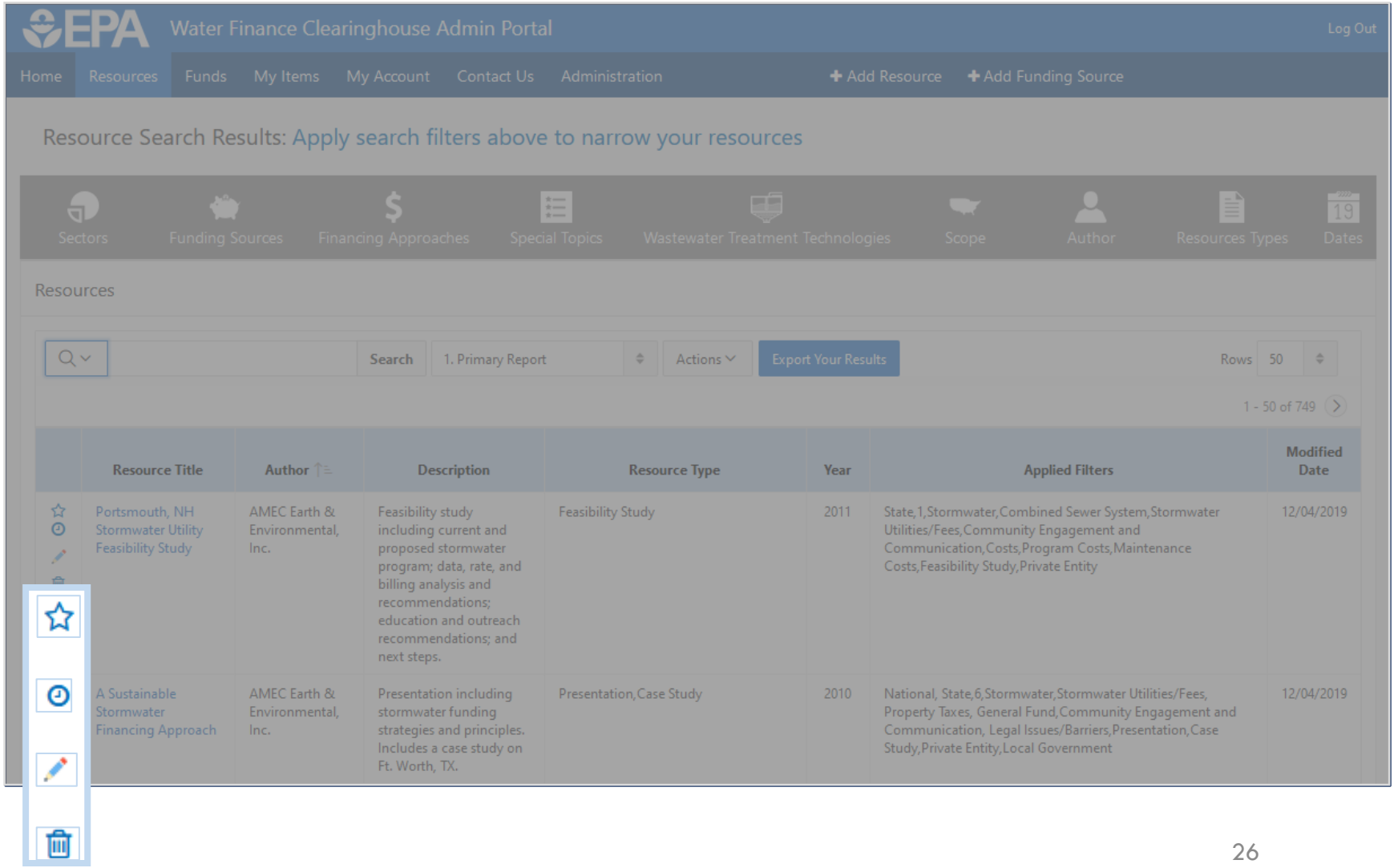


Search Resources and Funds

Search Resources

Search Funds

Favorite, Set a Reminder, Suggest Edits, and *Suggest Removal* for a specific Resource or Fund.

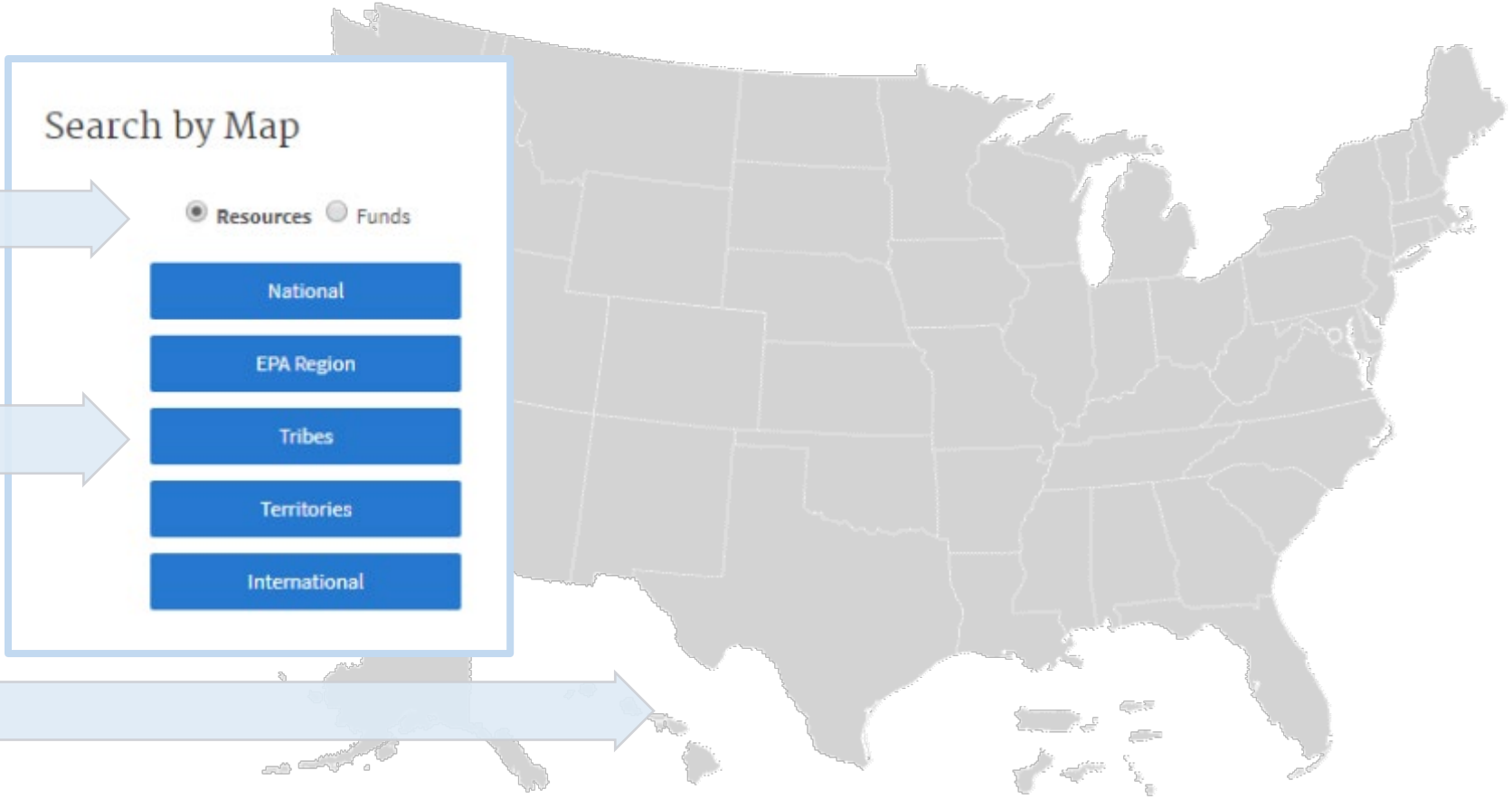


Map Search

Search Resources or Funds

Filter Resources/Funds by geographic scale

Select a state on the map to see its Resources/Funds

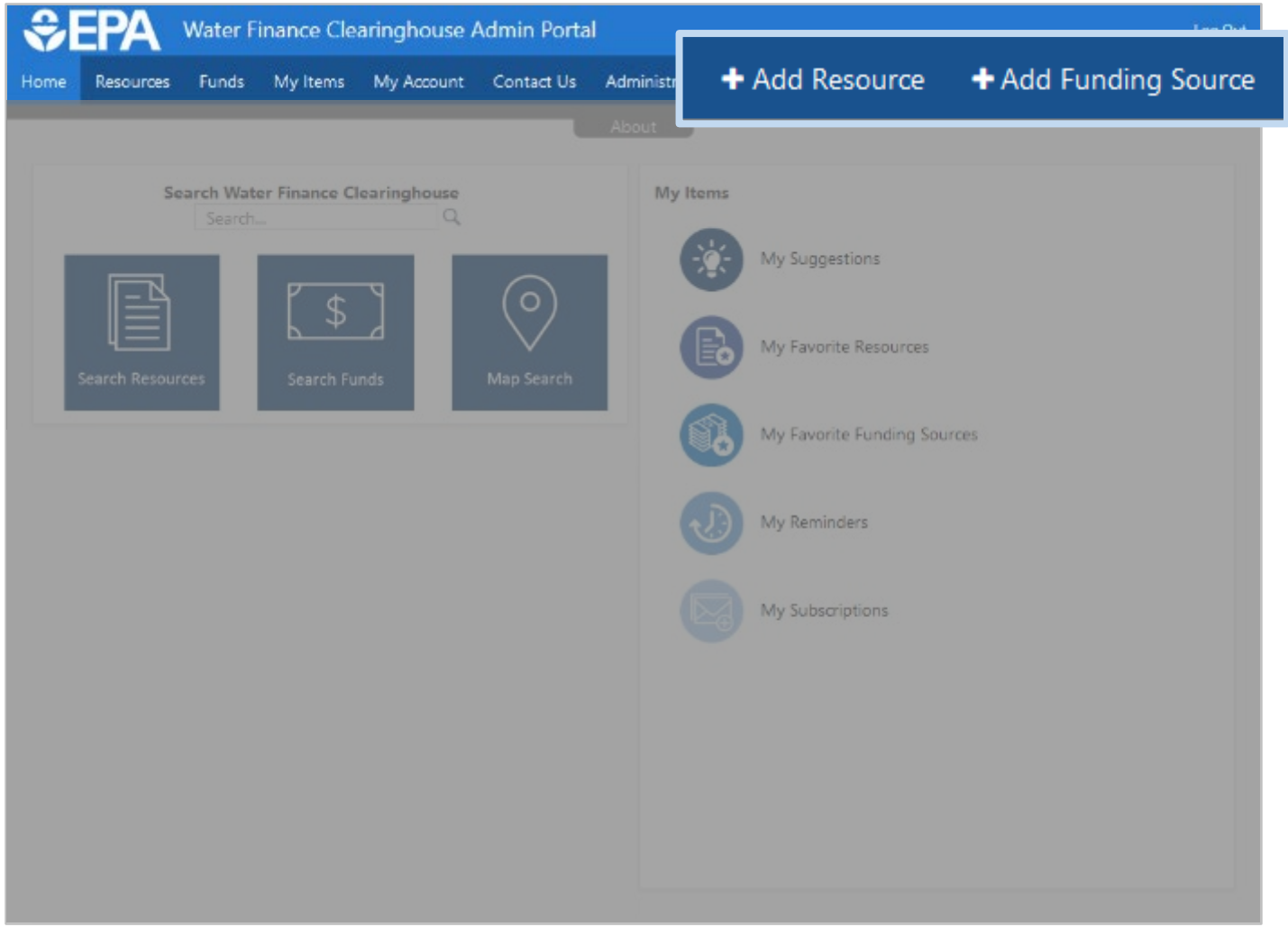


Suggest a Resource or Funding Source

Suggest new Clearinghouse Resource or Funding Source entries through the Contributor Portal.

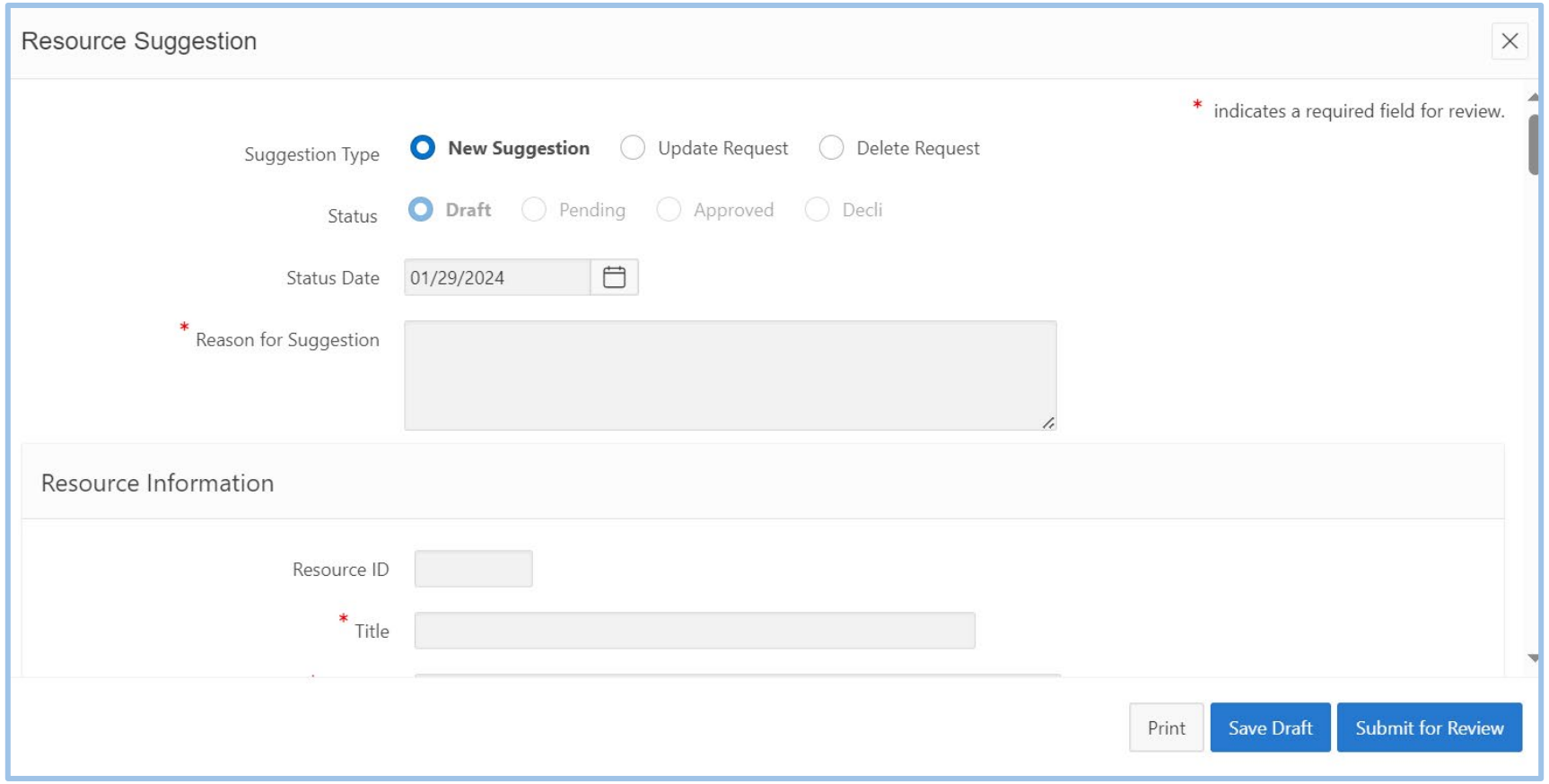
Suggesting a Resource or Funding Source

Contributor Account users can suggest additions to the Clearinghouse that will be reviewed by Clearinghouse Administrators.



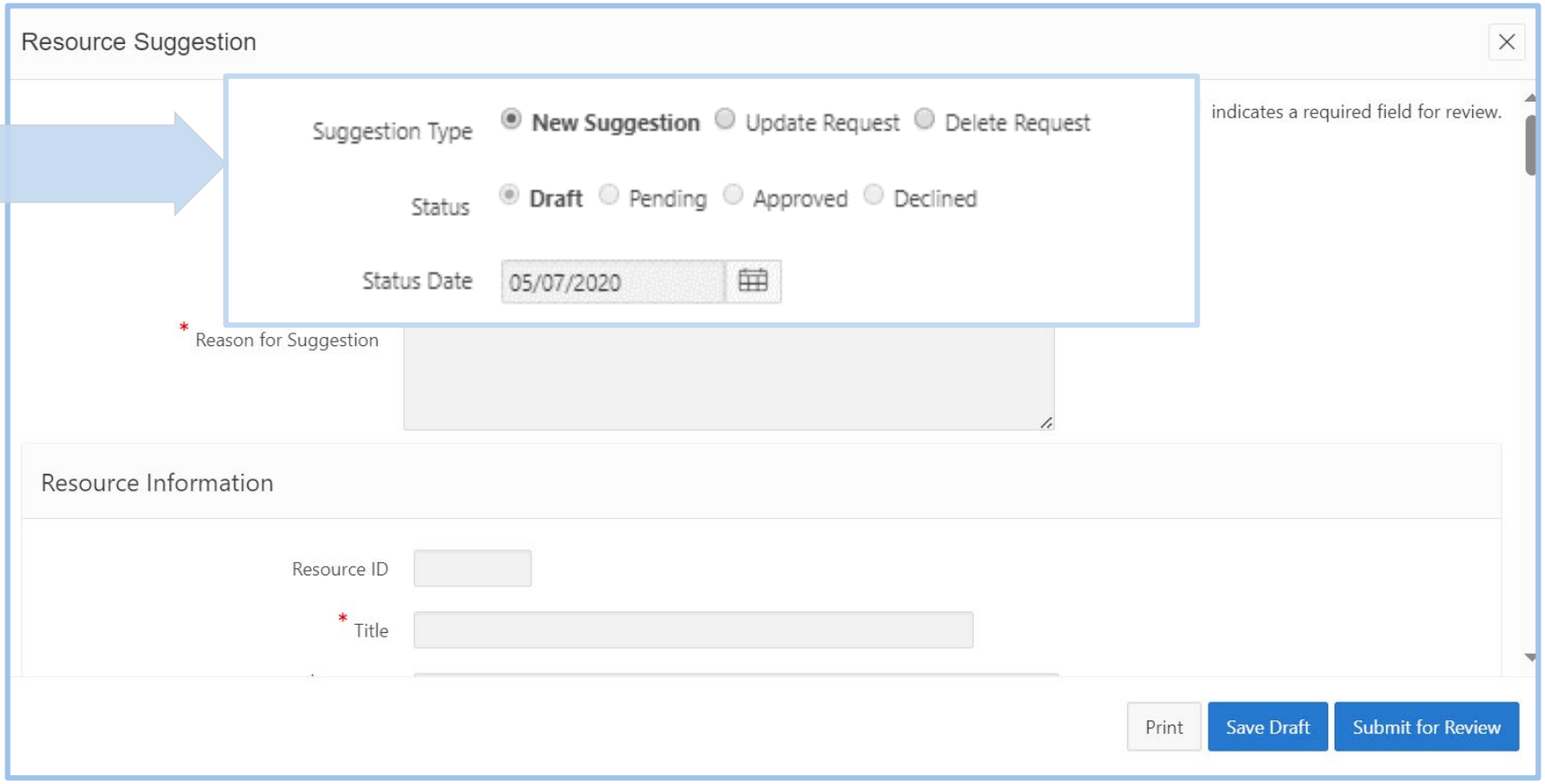
Suggesting a Resource

The Resource Suggestion pop up allows users to draft, save, print, and submit new Resource entries.



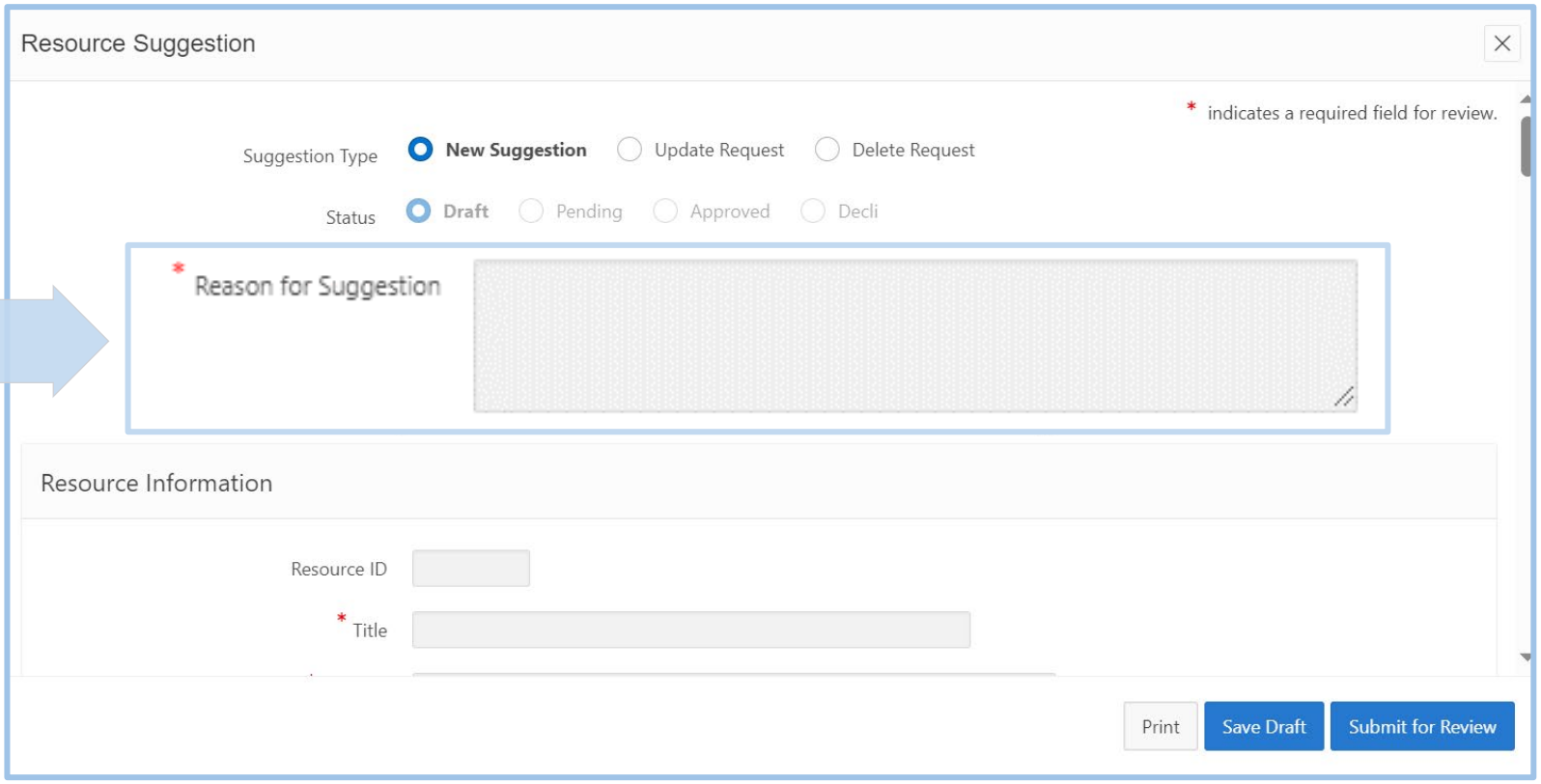
Suggesting a Resource

Suggestion Type and Status details update automatically



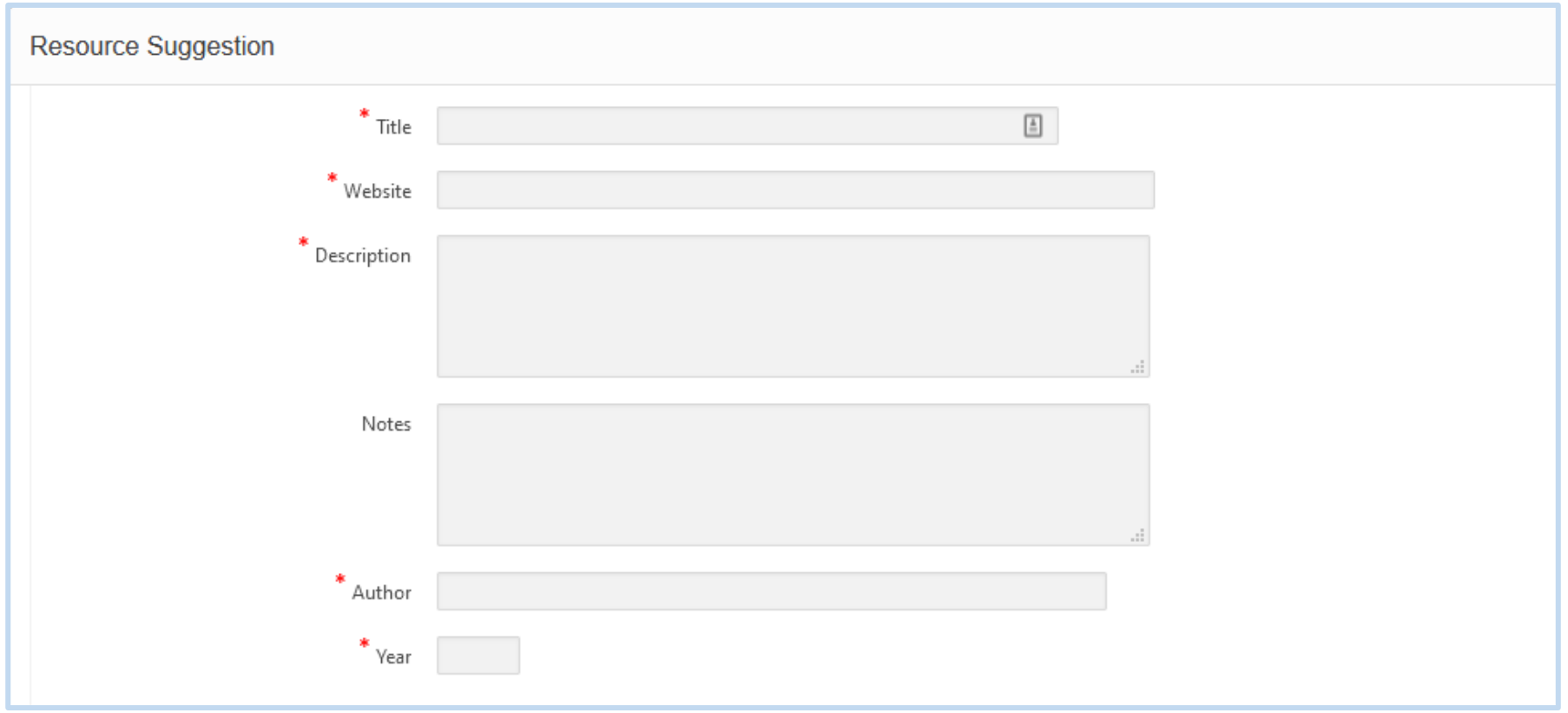
Suggesting a Resource

Enter the reason for the suggestion



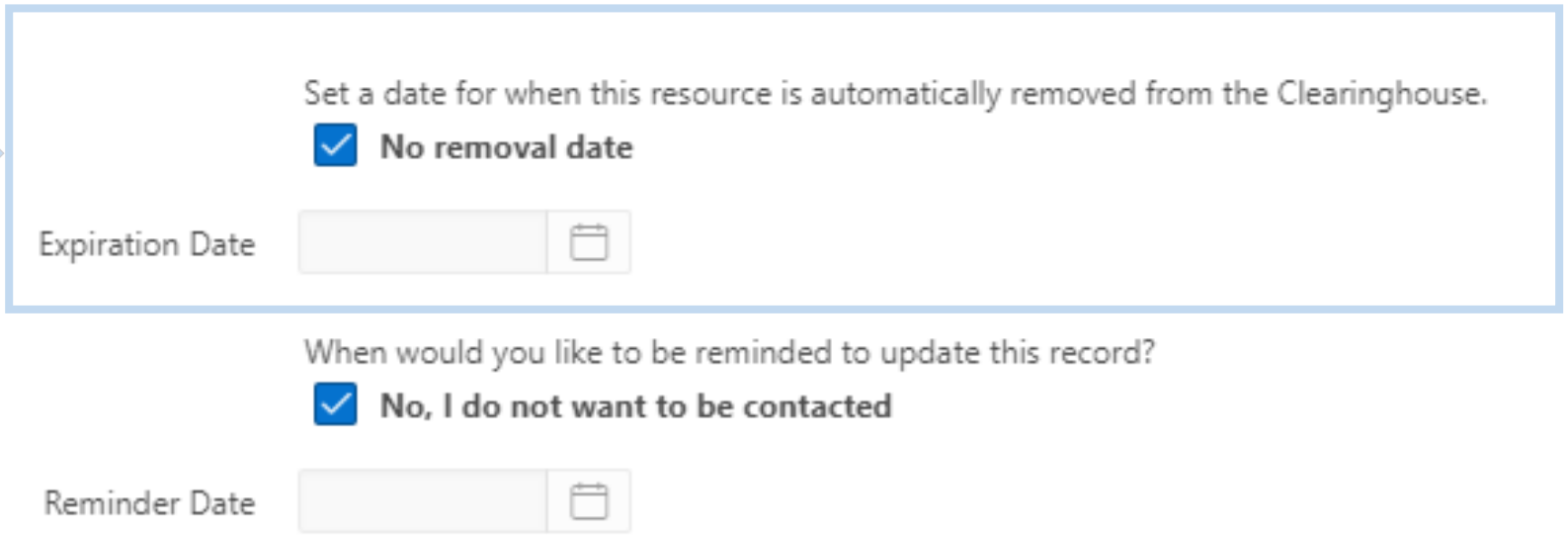
Suggesting a Resource

Enter Resource Information



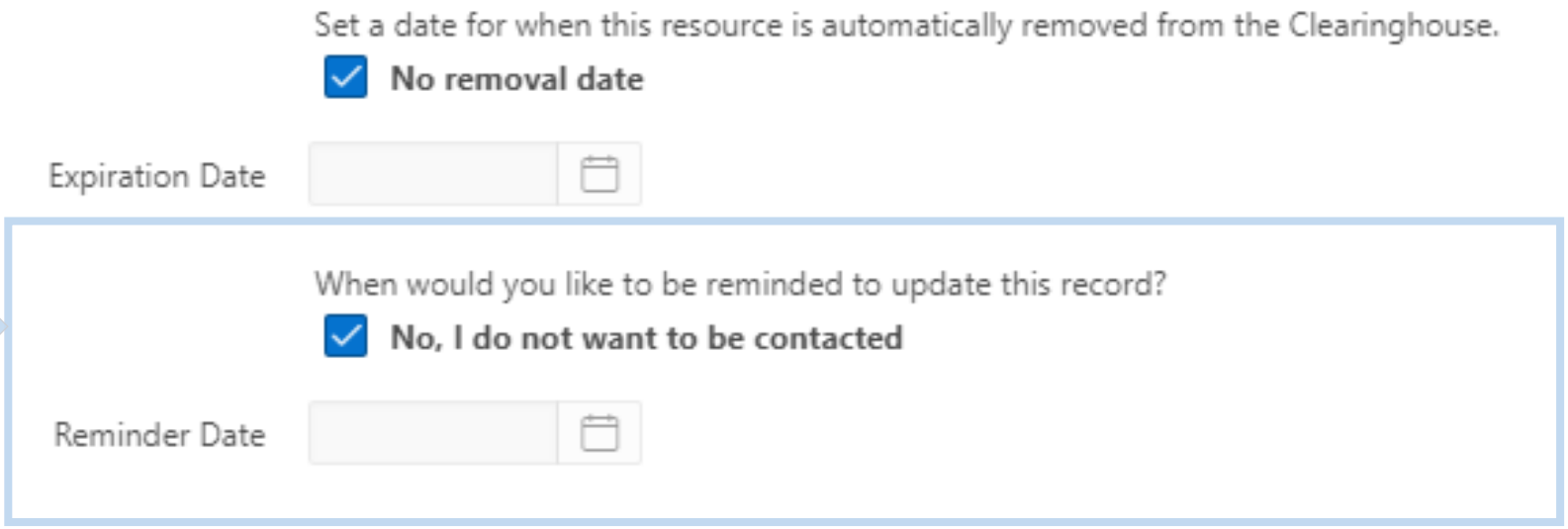
Reminder and Expiration Date

Set a date for the removal of the Resource.



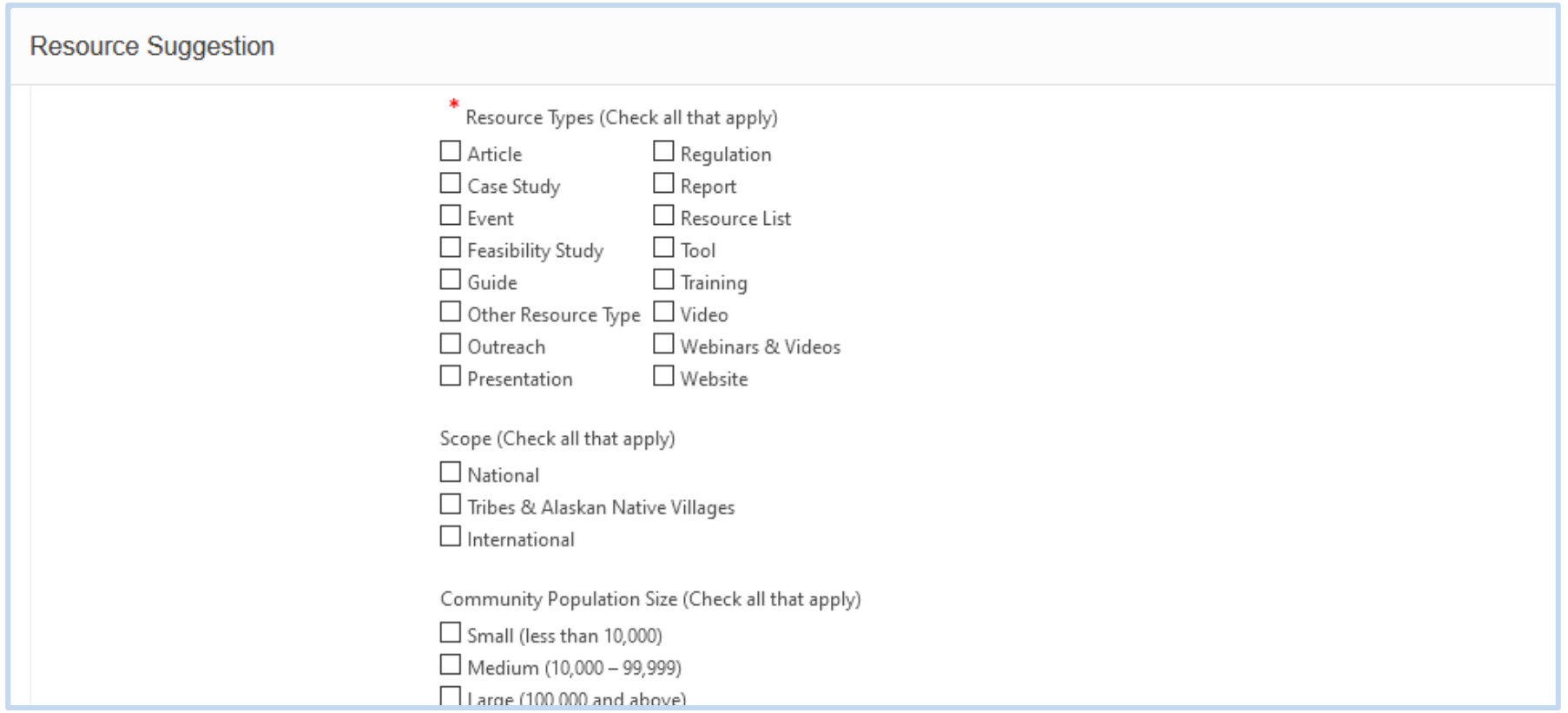
Reminder and Expiration Date

Set a date to be reminded to update the record.



Suggesting a Resource

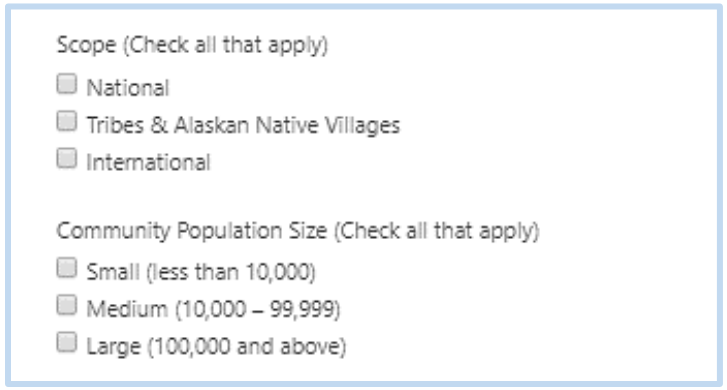
Select Resource Type tags

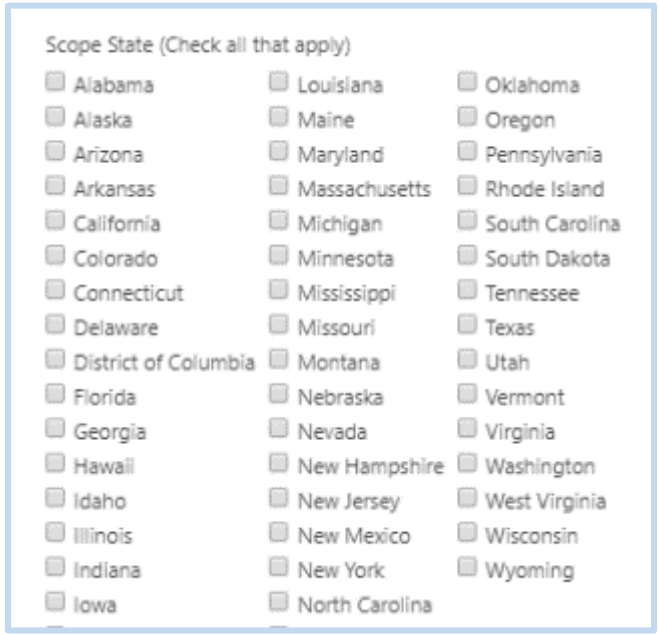


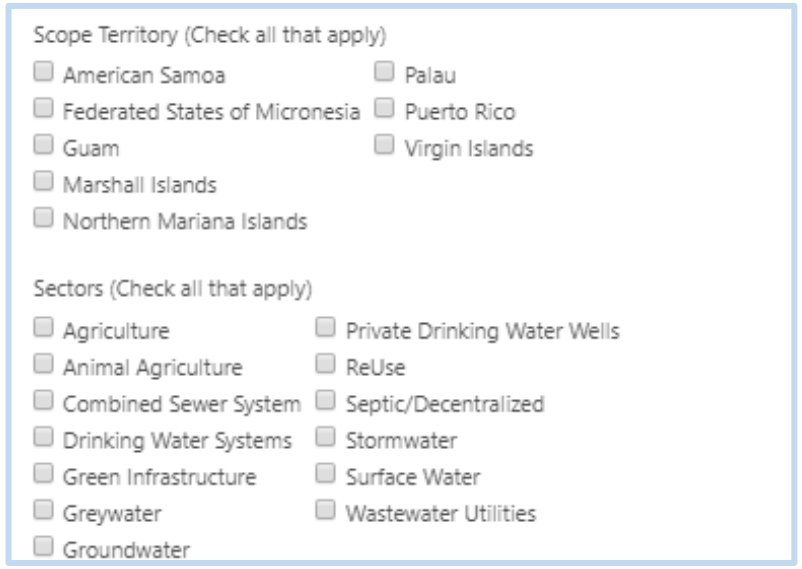
Resource Tags

Other Resource tag categories include:

- *Scope*
- *Community Population Size*
- *Scope State*
- *Scope Territory*
- *Sectors*
- *Financing Approaches*
- *Special Topics*
- *Authors*
- *Funding Sources*
- *Funding Sources Federal*





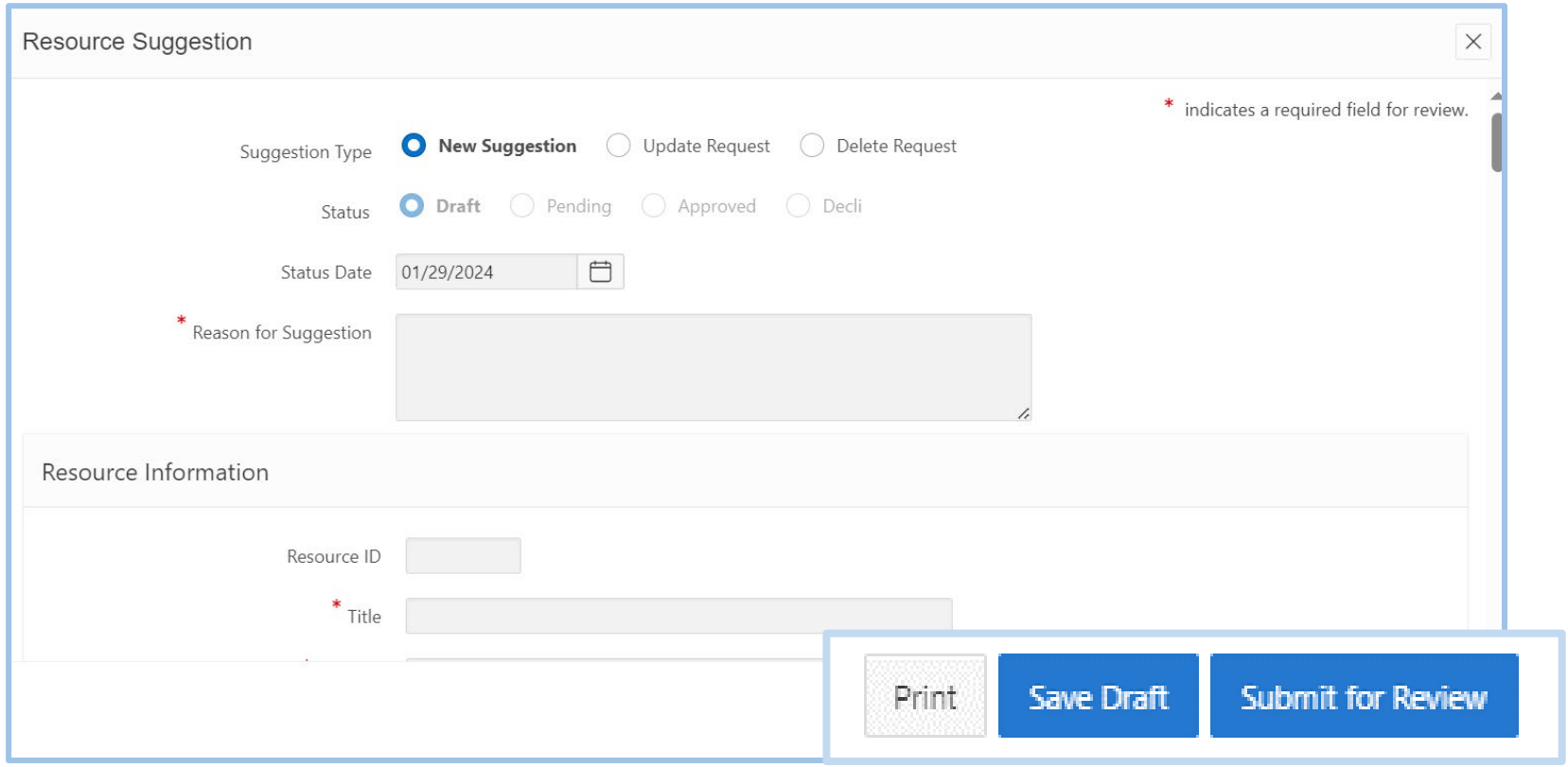


Submitting Resource Suggestion

Submit the Suggestion for Review

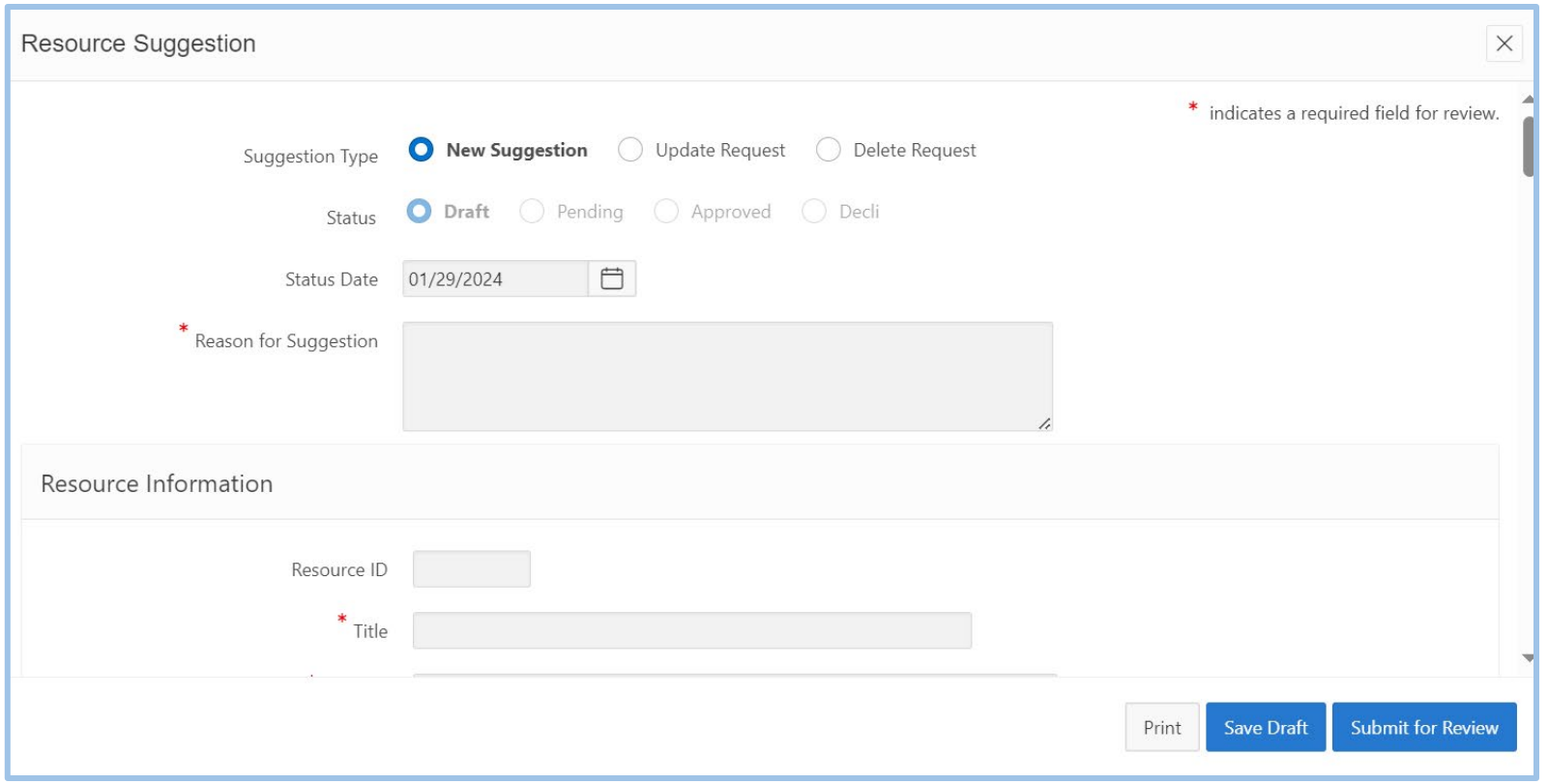
A Water Finance Clearinghouse administrator will review it

The Contributor will be notified when the suggestion is accepted, edited, or denied.



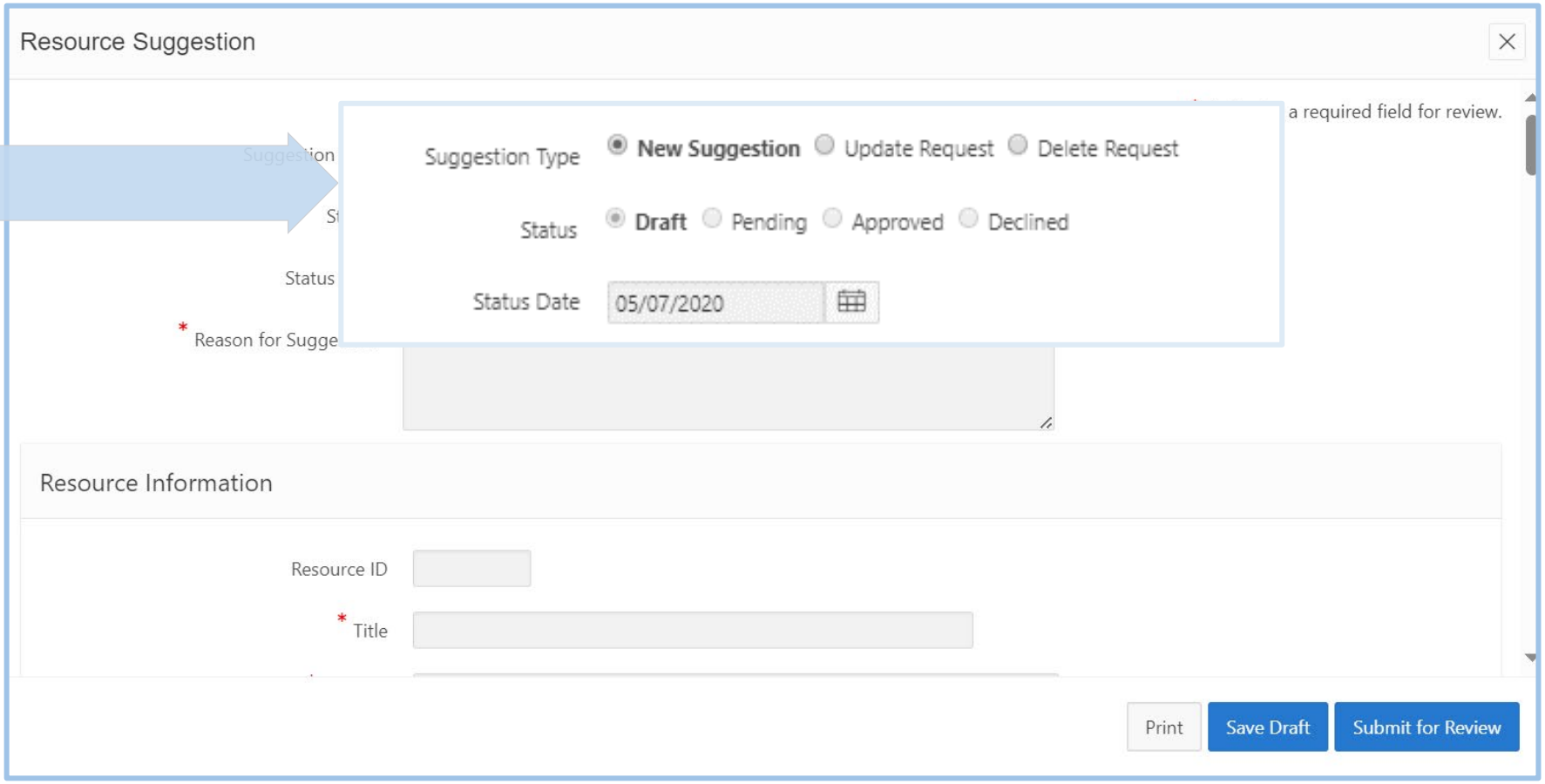
Suggesting a Funding Source

The Funding Source Suggestion pop up allows users to Draft, Save, Print, and Submit new Resource entries



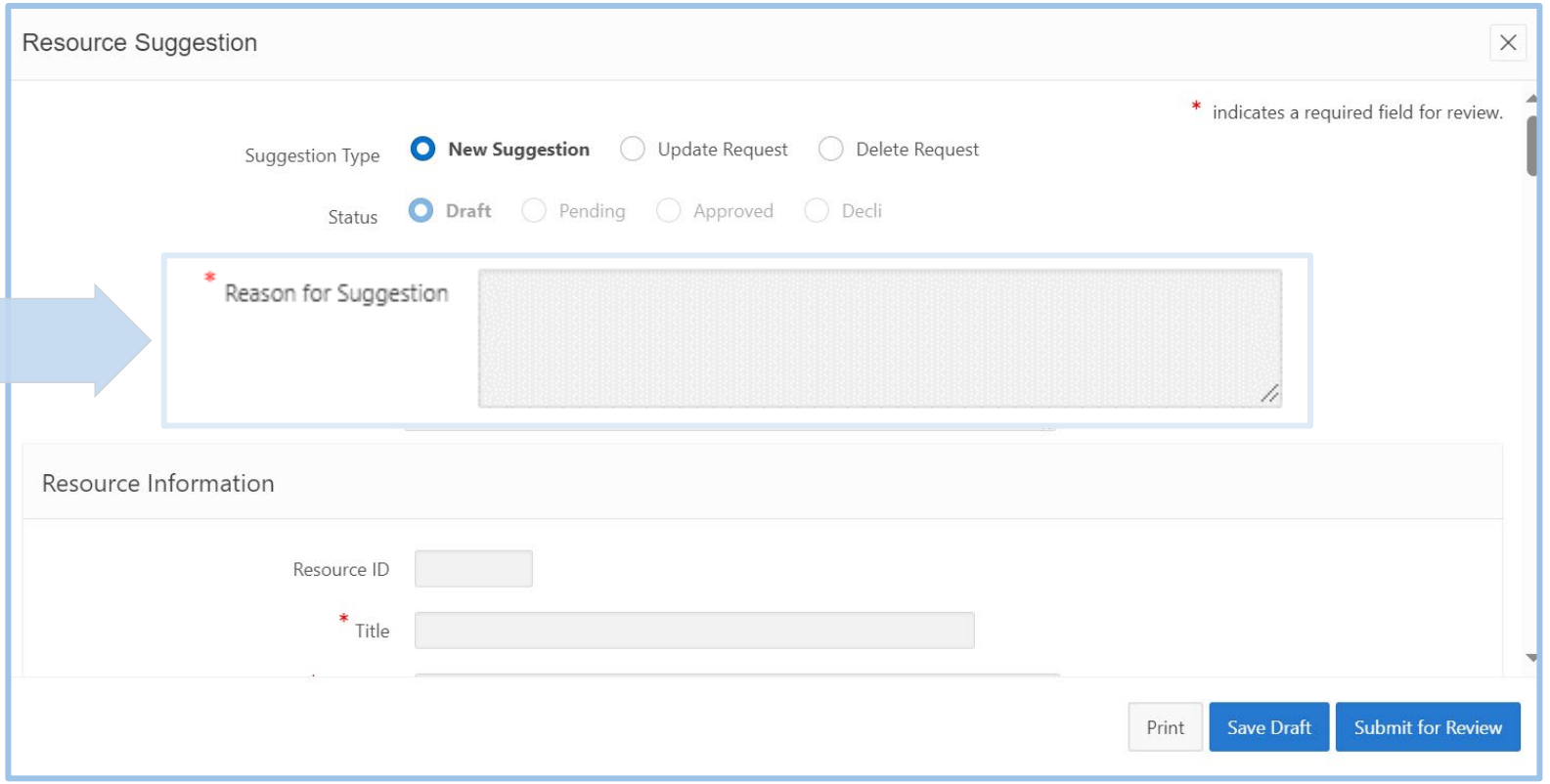
Suggesting a Funding Source

Suggestion Type and Status details update automatically



Suggesting a Funding Source

Enter the reason for the suggestion

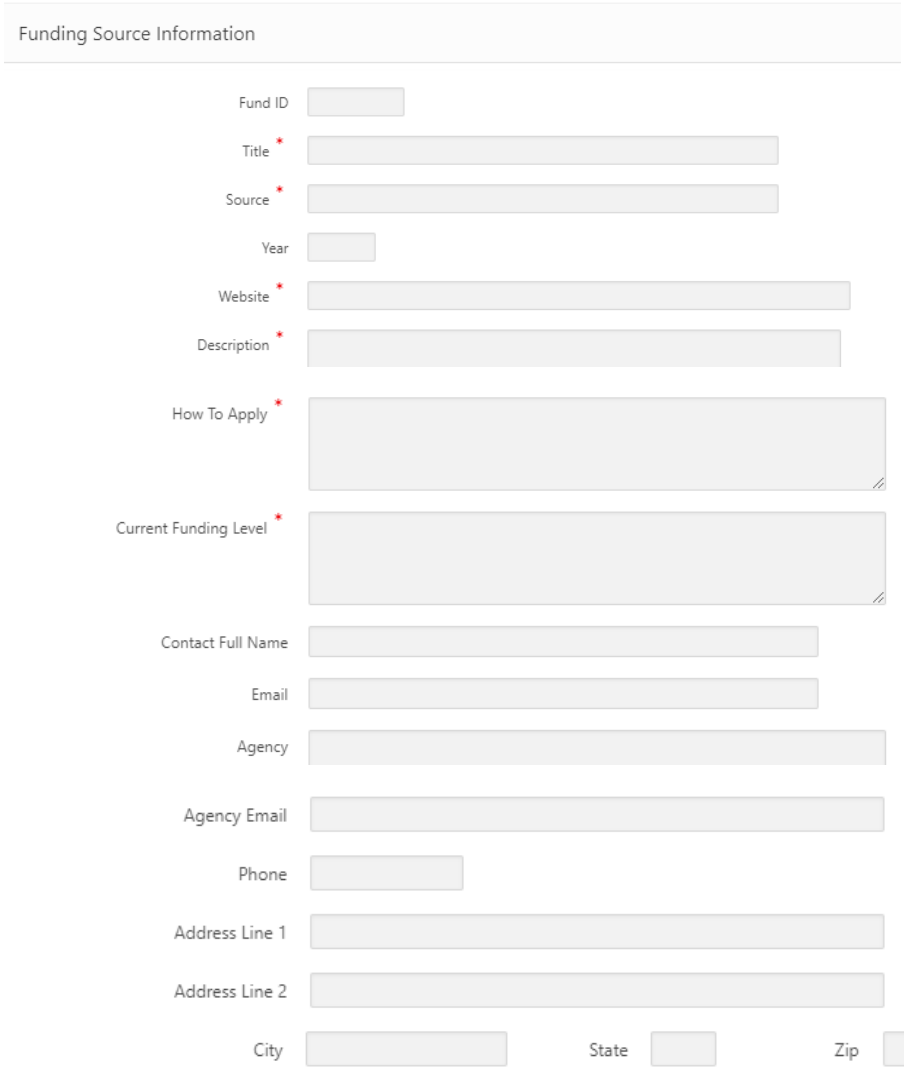


Funding Source Information

Funding Source

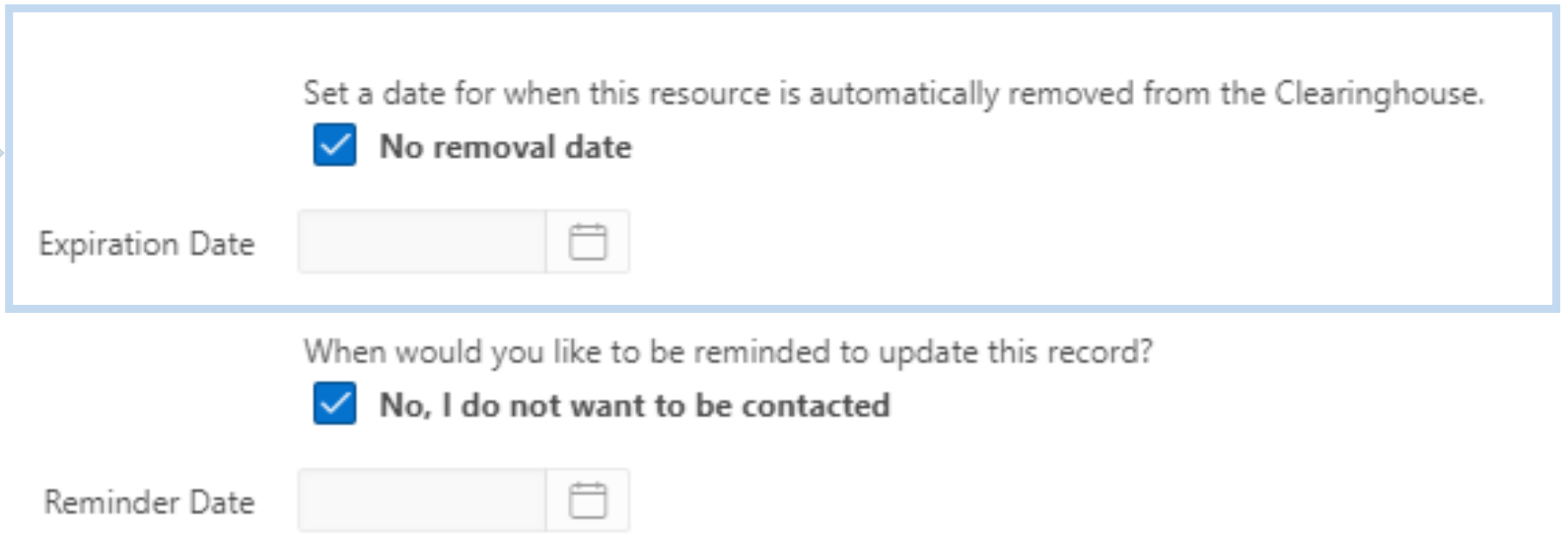
Information fields include:

- *Title*
- *Source*
- *Year*
- *Website*
- *Description*
- *How to Apply*
- *Current Funding Level*
- *Contact Information: Full Name, Email, Agency, Agency phone, Address*



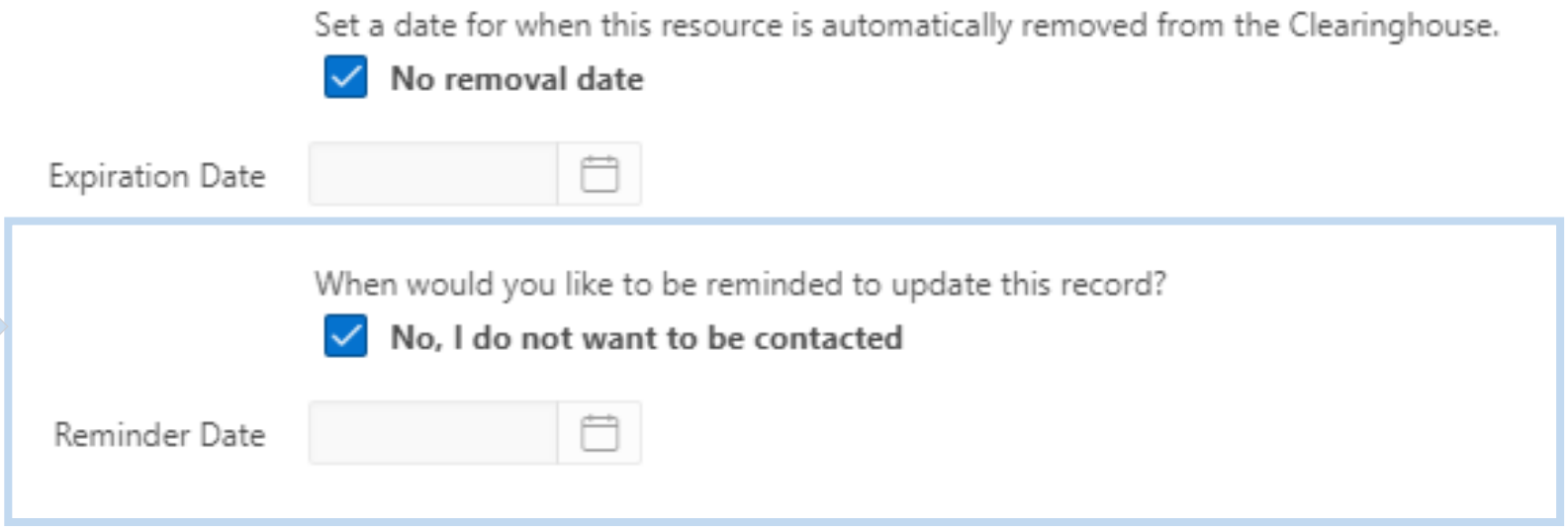
Reminder and Expiration Date

Set a date for the removal of the entry.



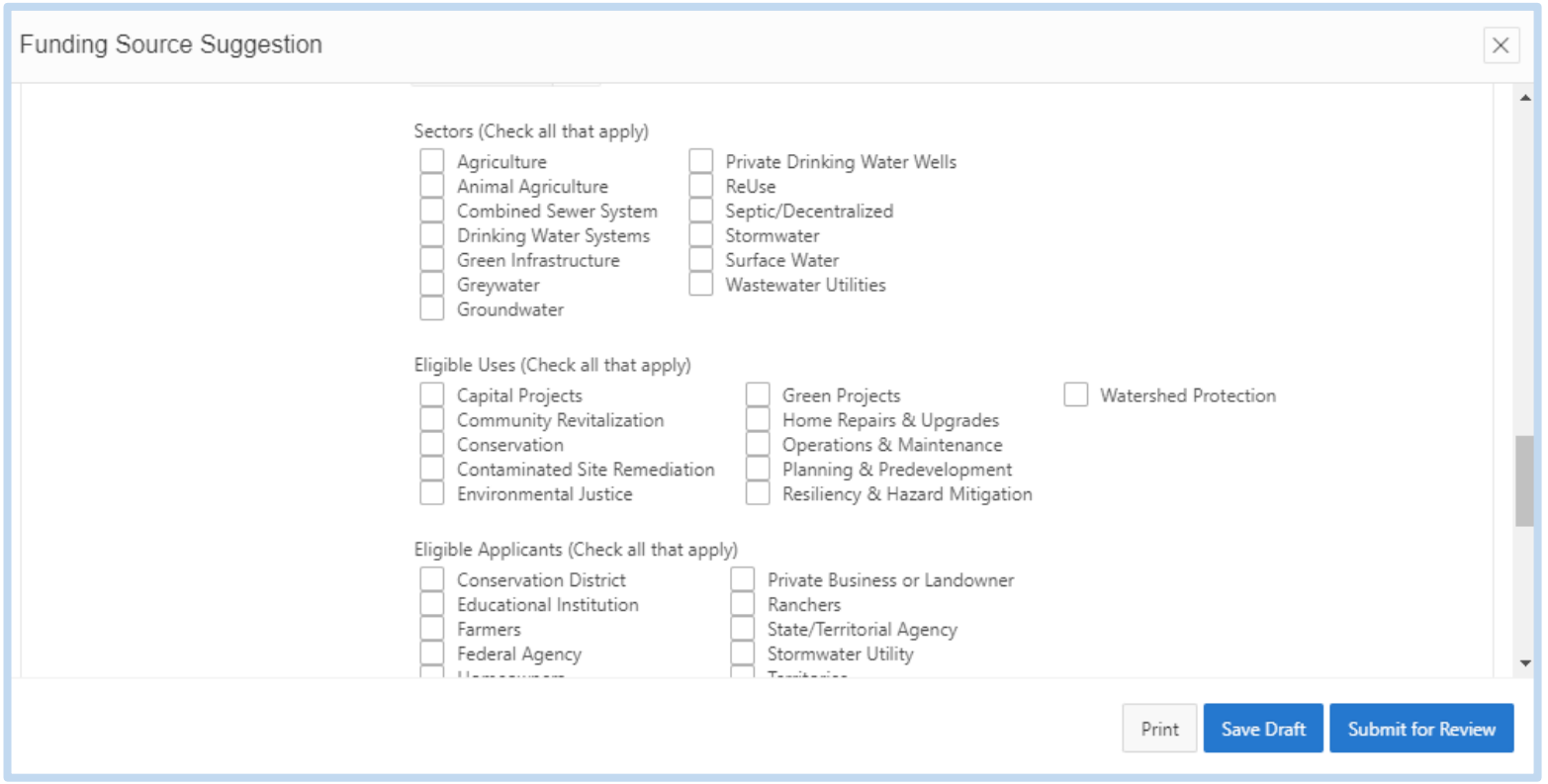
Reminder and Expiration Date

Set a date to be reminded to update the record.



Funding Source Tags

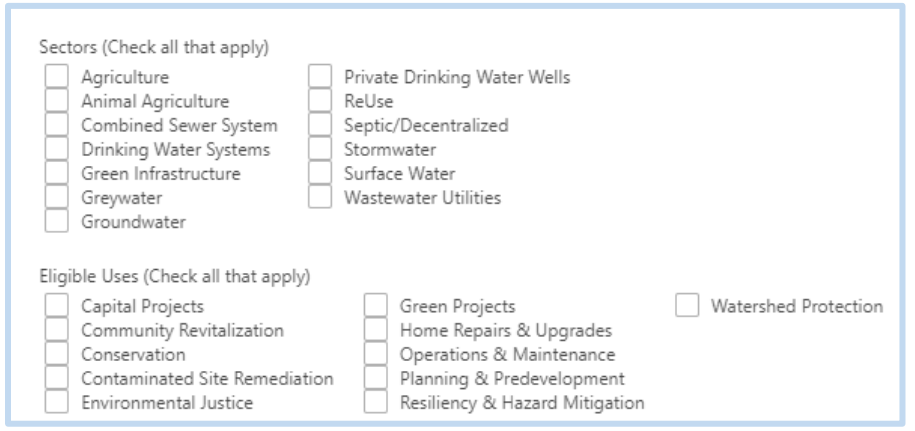
Within the Funding Source Suggestion window there is the option to apply tags to make you entry searchable.

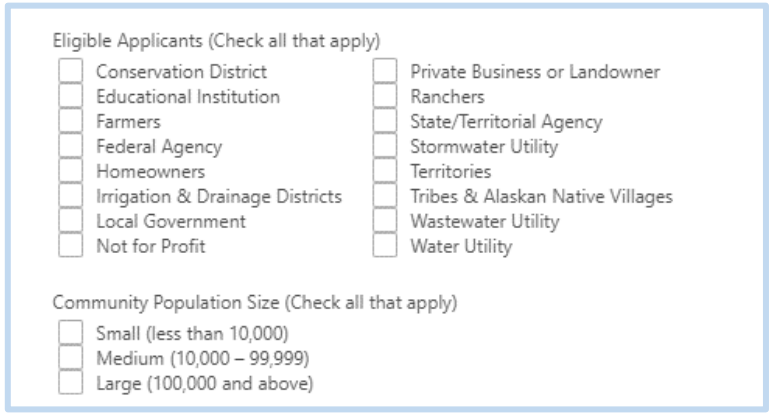


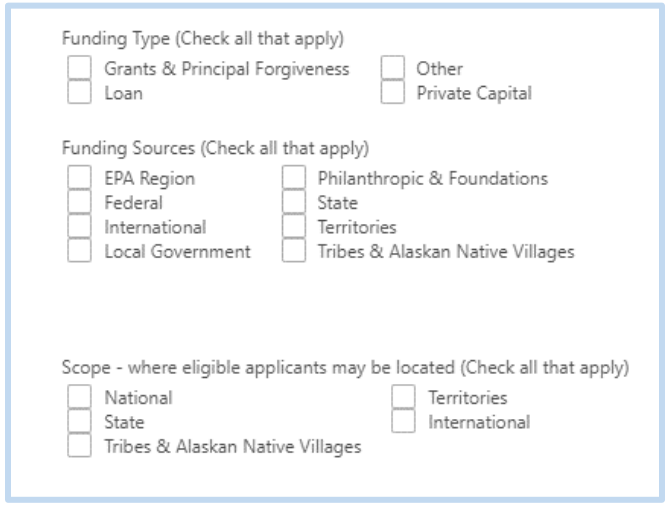
Funding Source Tags

Funding Source tag categories include:

- *Sectors*
- *Eligible Uses*
- *Eligible Applicants*
- *Community Population Size*
- *Funding Type*
- *Funding Sources*
- *Scope*





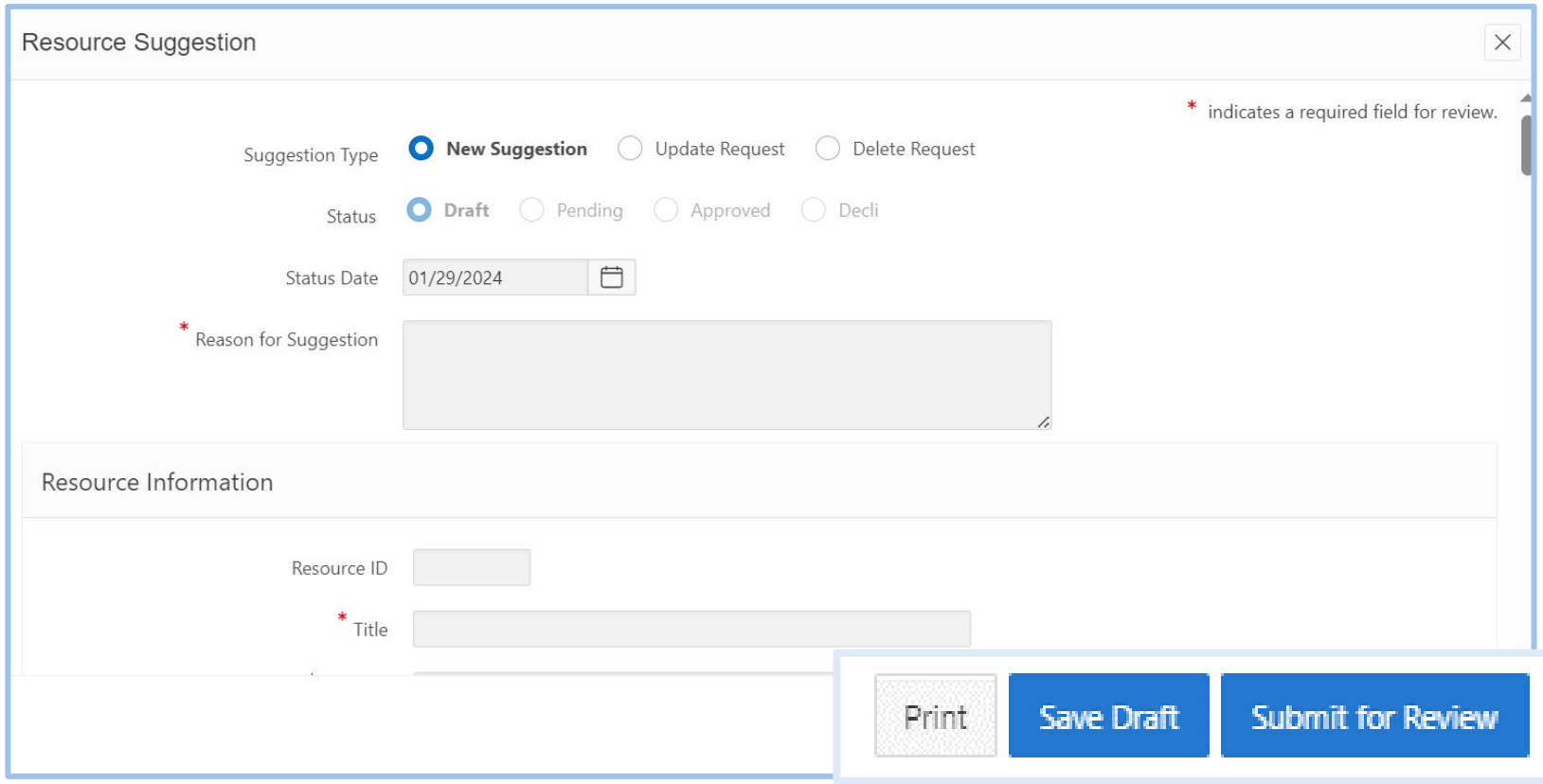


Submitting Funding Source Suggestion

Submit the Suggestion for Review

A Water Finance Clearinghouse administrator will review it

The Contributor will be notified when the suggestion is accepted, edited, or denied.

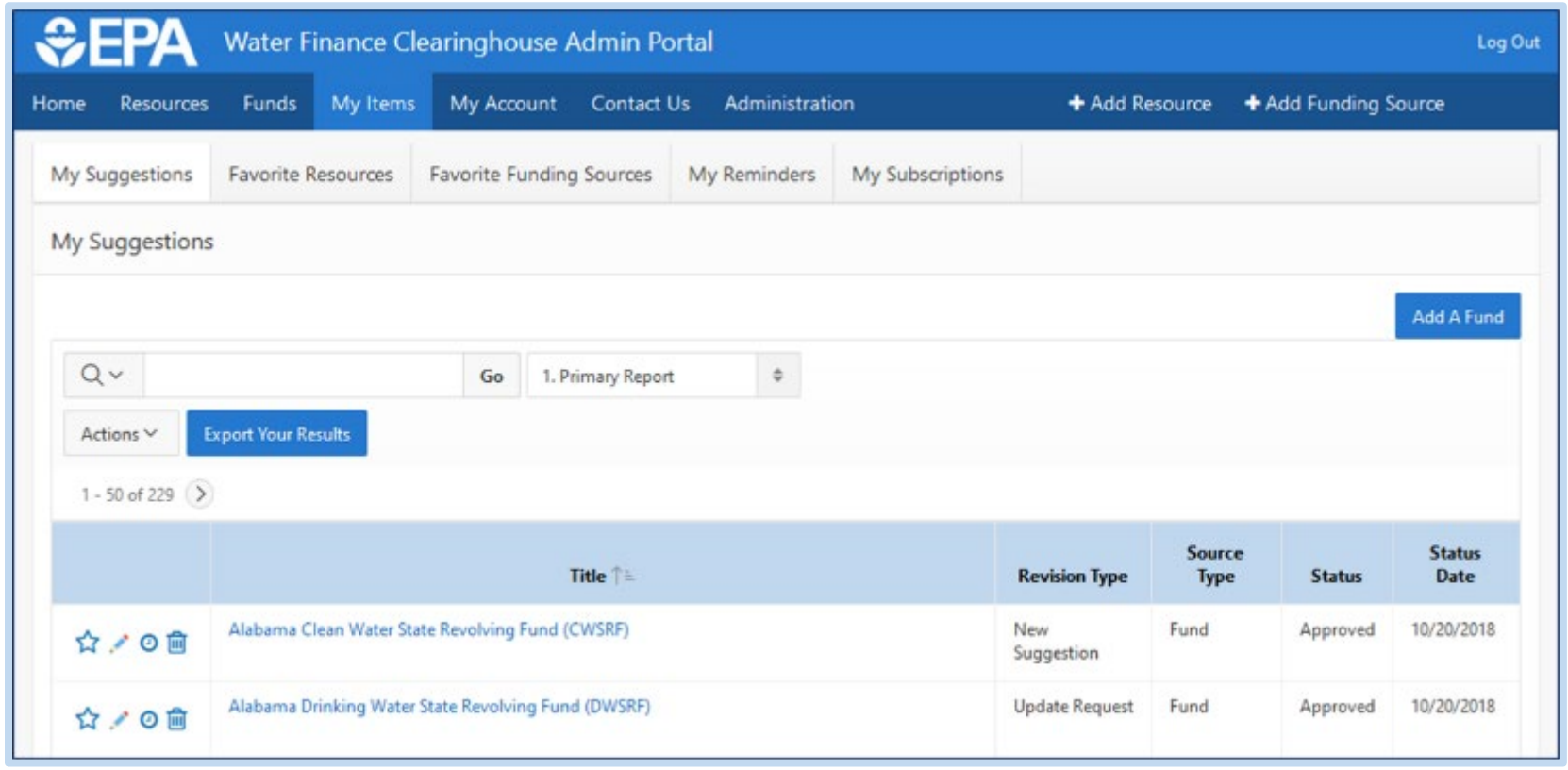


My Items

Manage Suggestions, Favorite Resources, Favorite Funding Sources, Reminders, and Subscriptions.

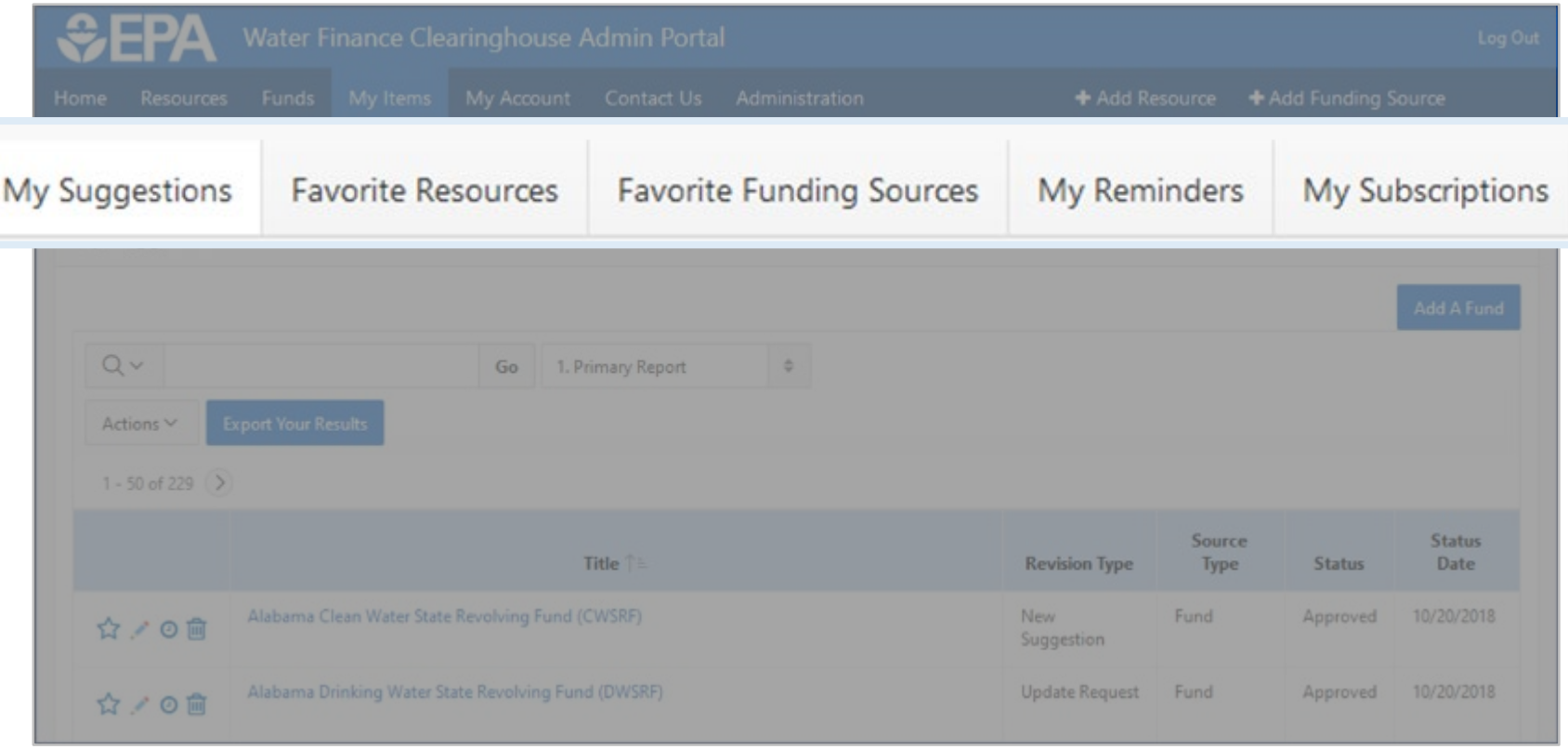
My Items

The *My Items* page contains the content that the Contributor has created or saved.



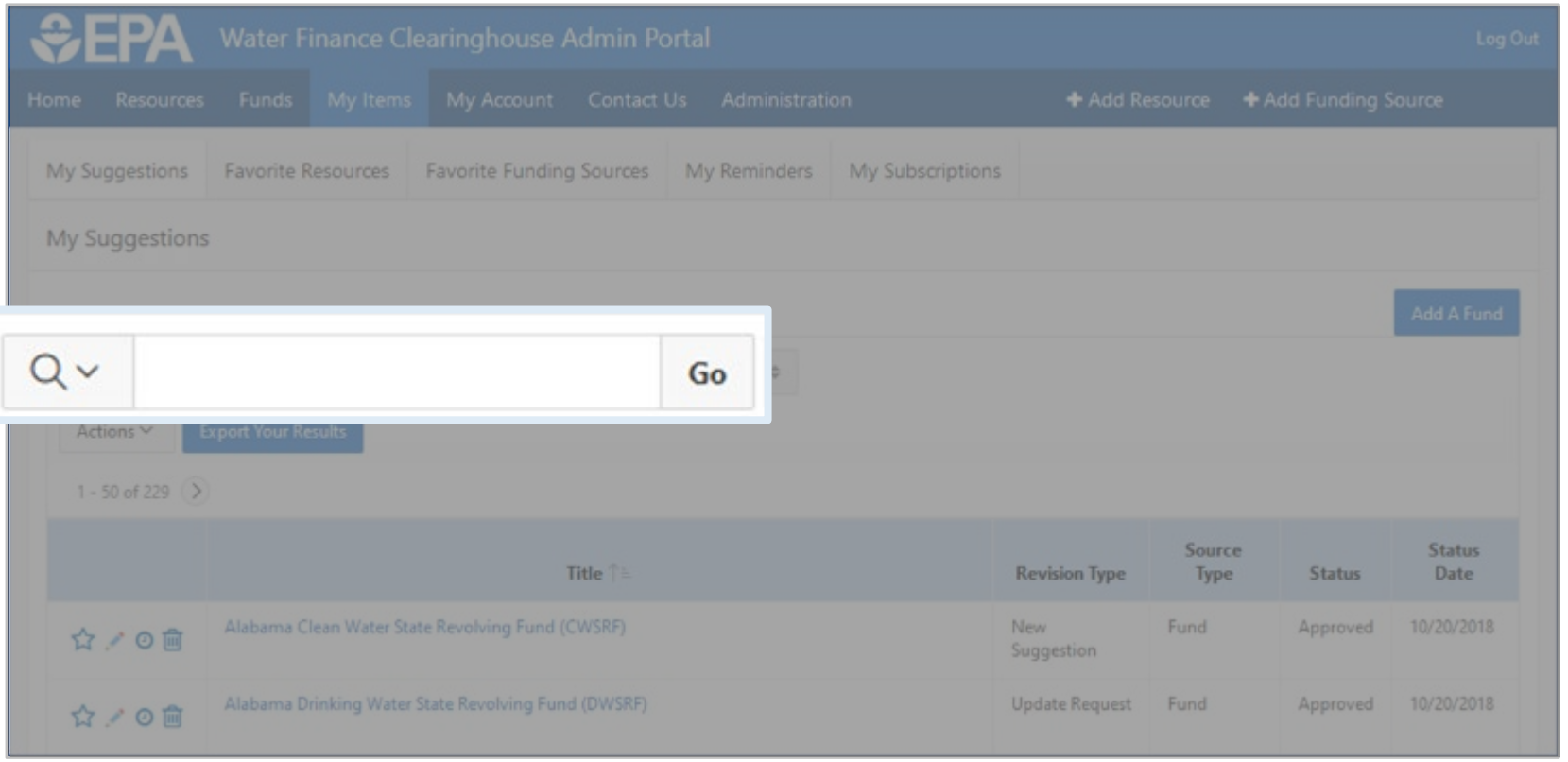
My Items

Navigate “My Items” sub-pages using tabs.



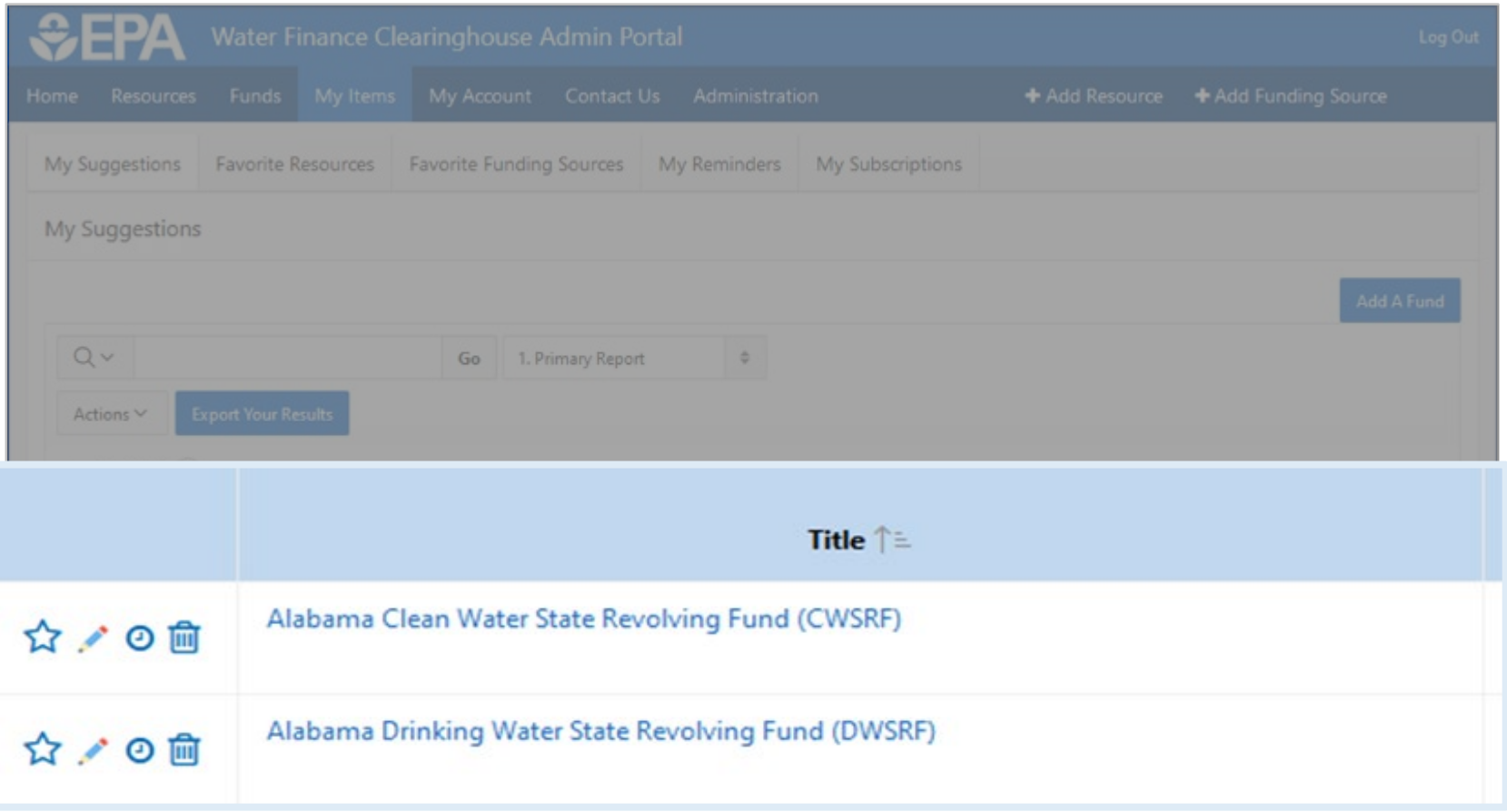
My Items

Search Contributor content using keywords.



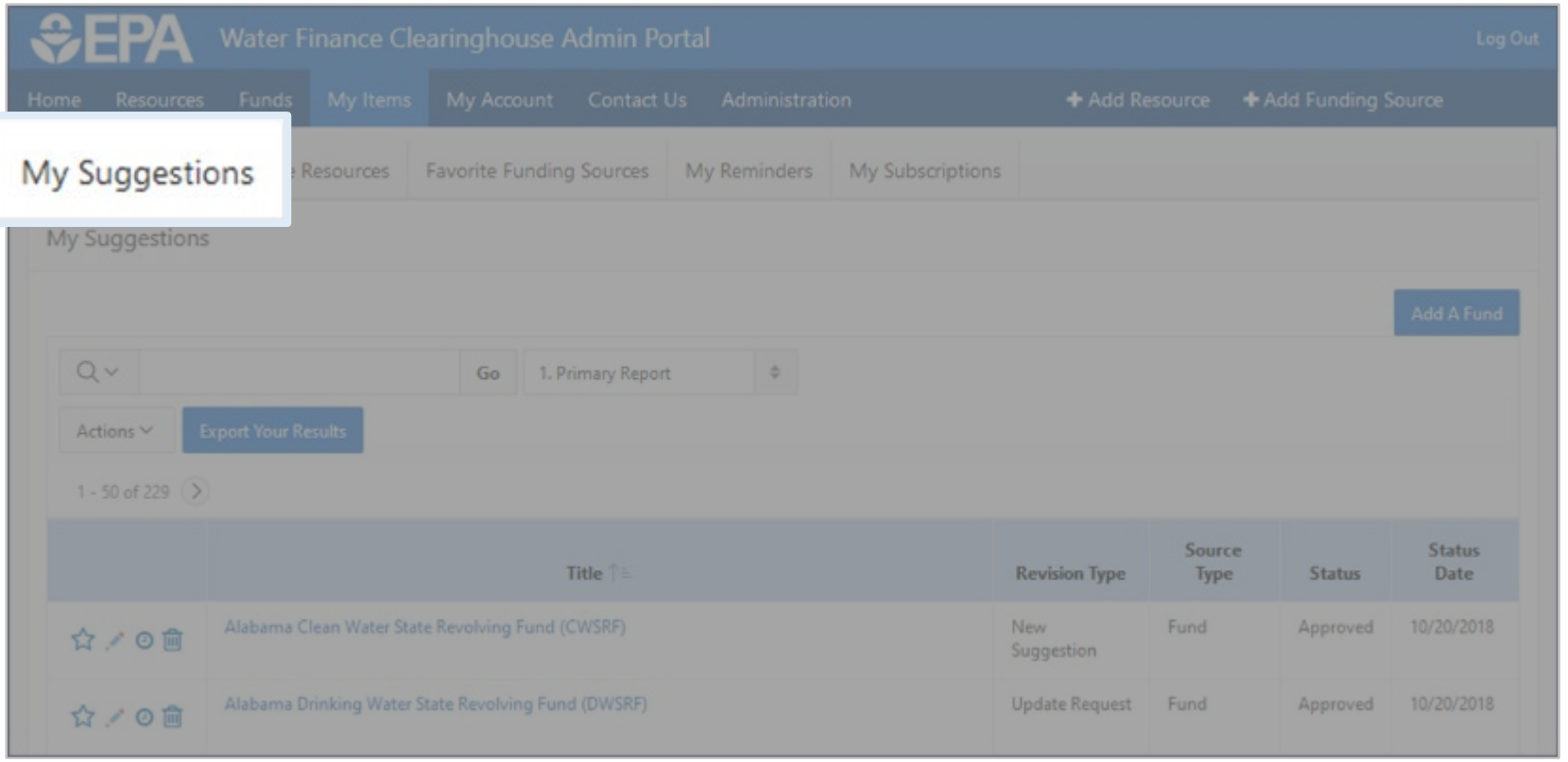
My Items

View and Manage content using this table.



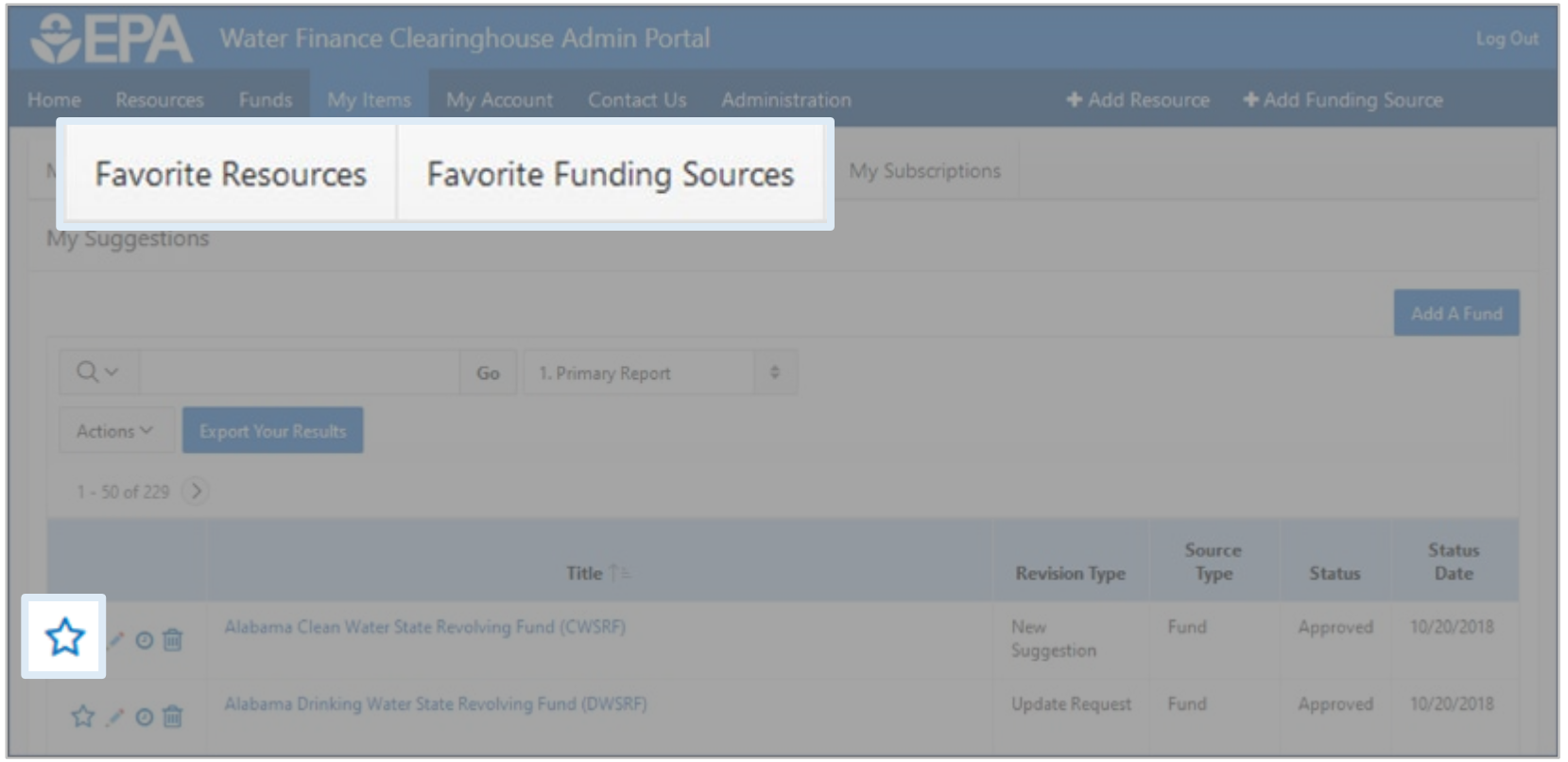
My Suggestions

The “My Suggestions” tab allows user to manage all suggestions:



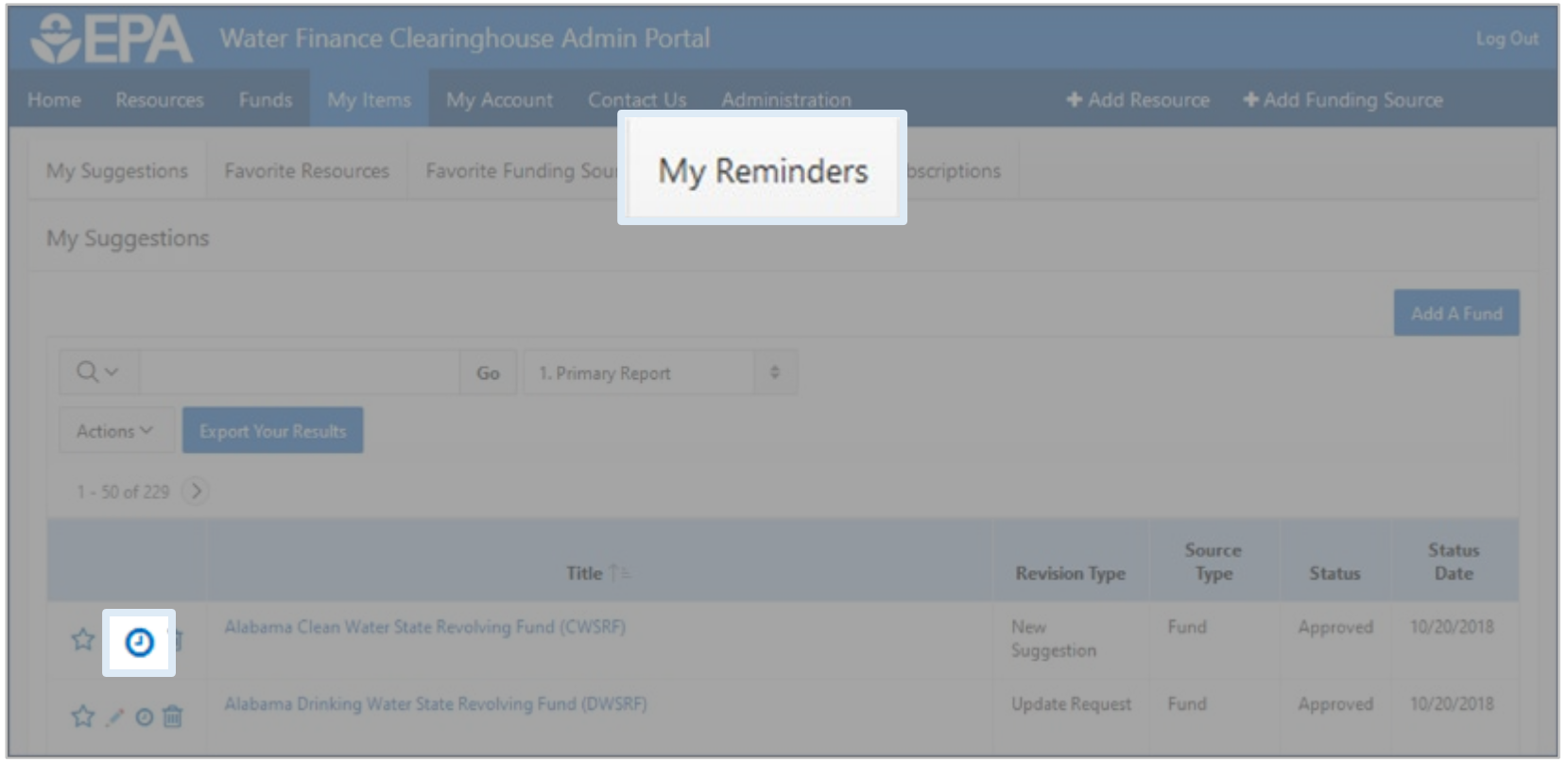
Favorite Resources & Favorite Funding Sources

The “Favorite Resources” and “Favorite Funding Sources” tabs allows user to manage your favorited items:



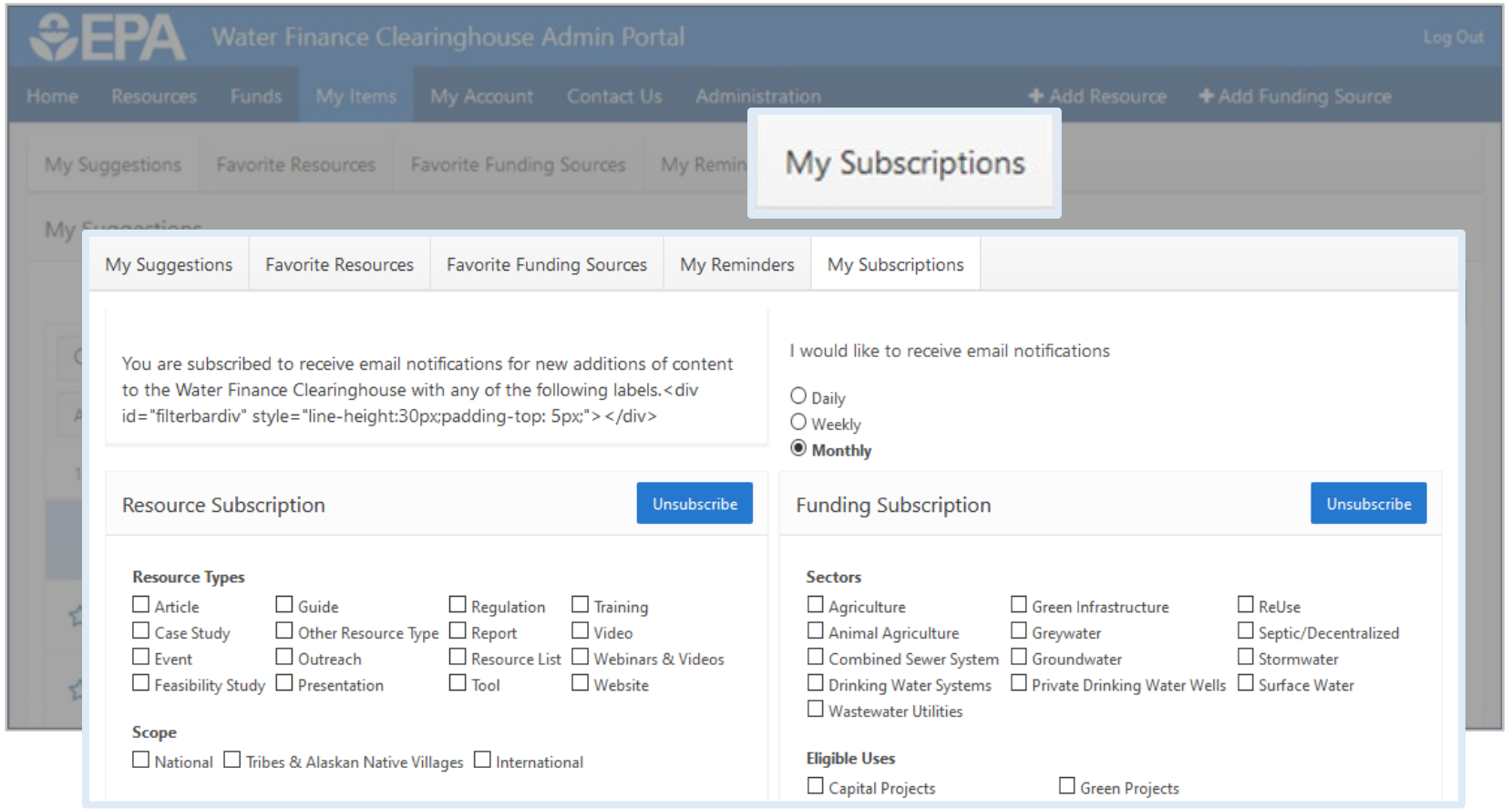
My Reminders

The “My Reminders” tab allows user to manage your items that have specific reminder dates set



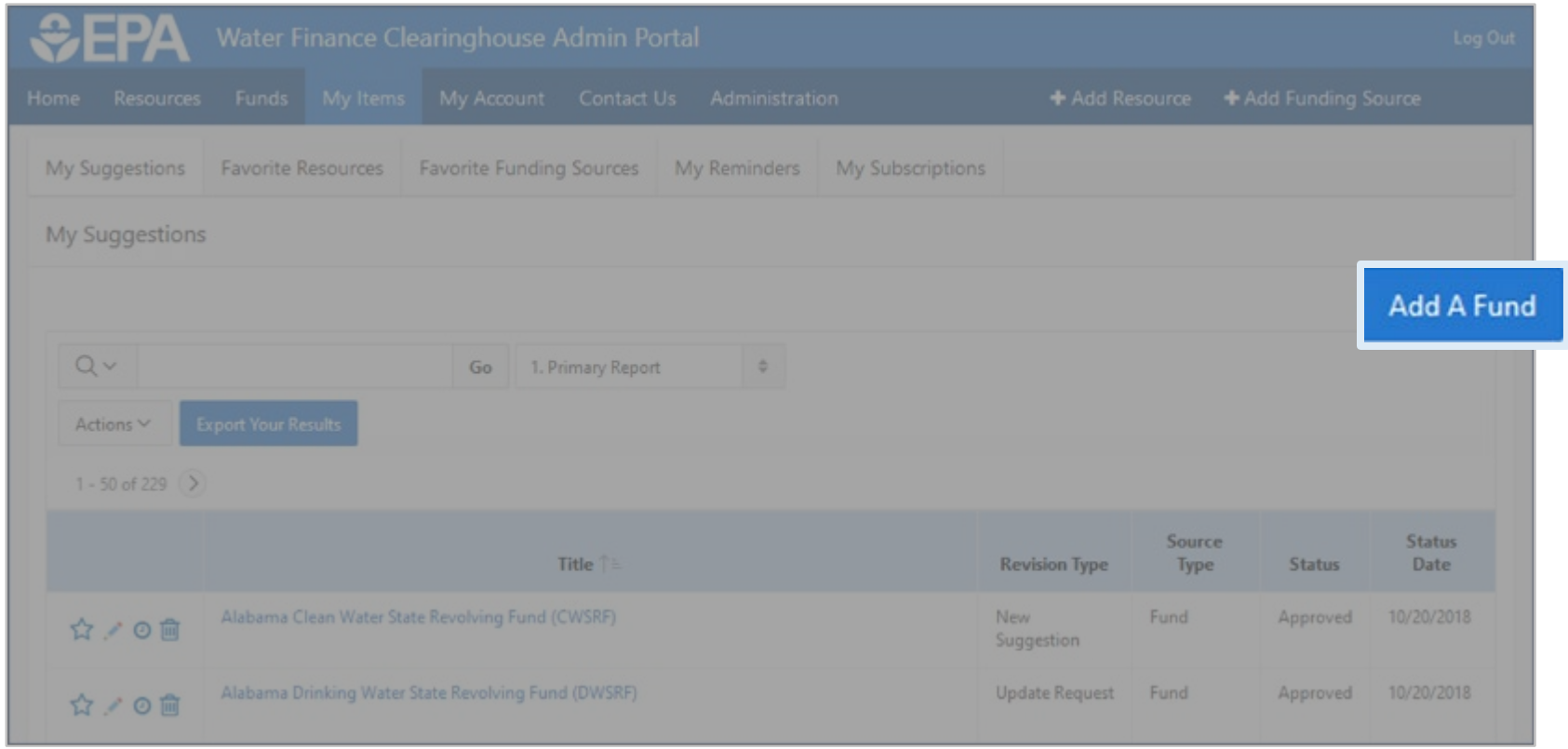
My Subscriptions

The “My Subscriptions” tab allows user to manage their email and subscription notifications



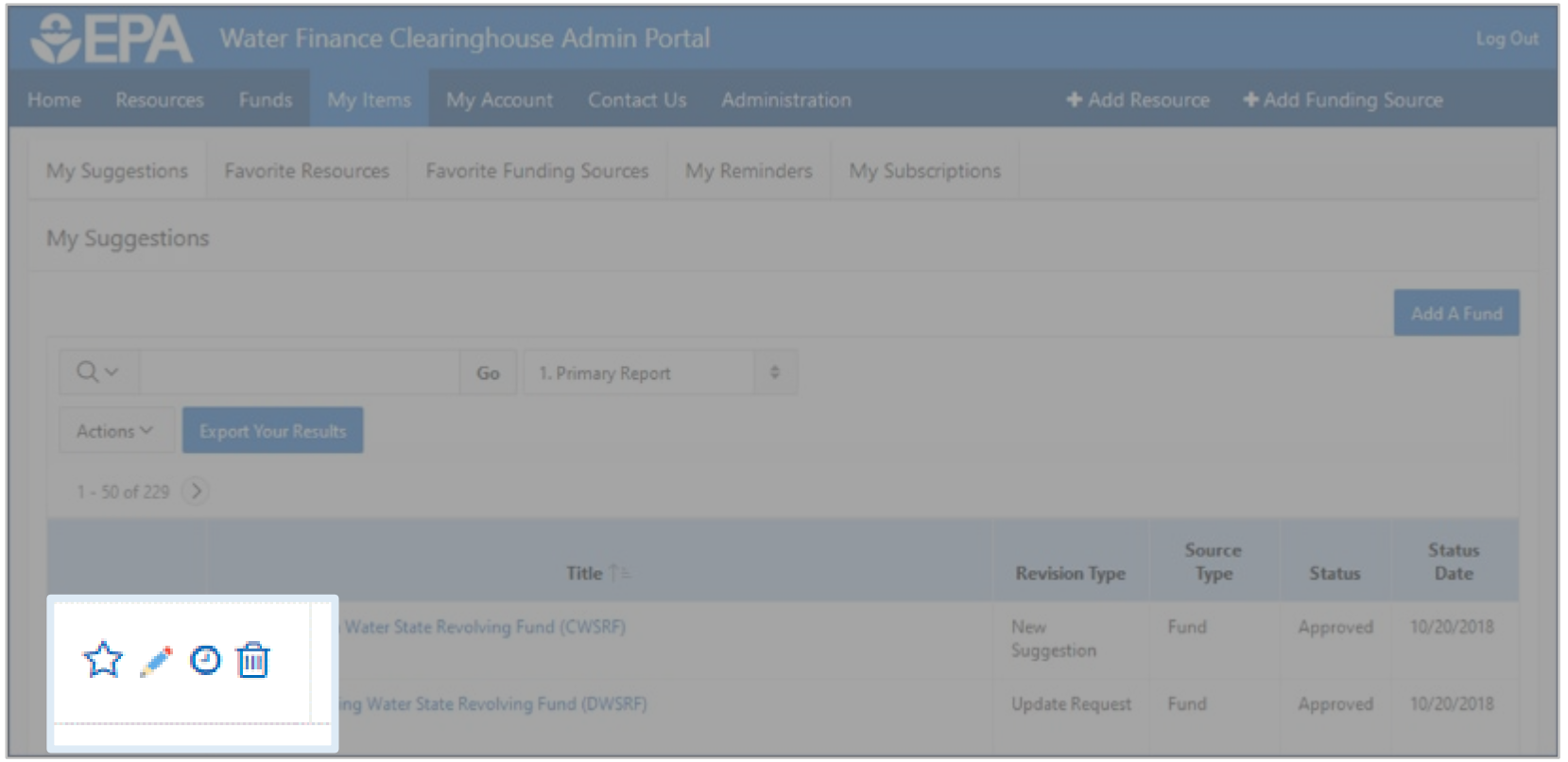
Add a Fund

The “Add a Fund” button links to the “Funding Source Suggestion” window



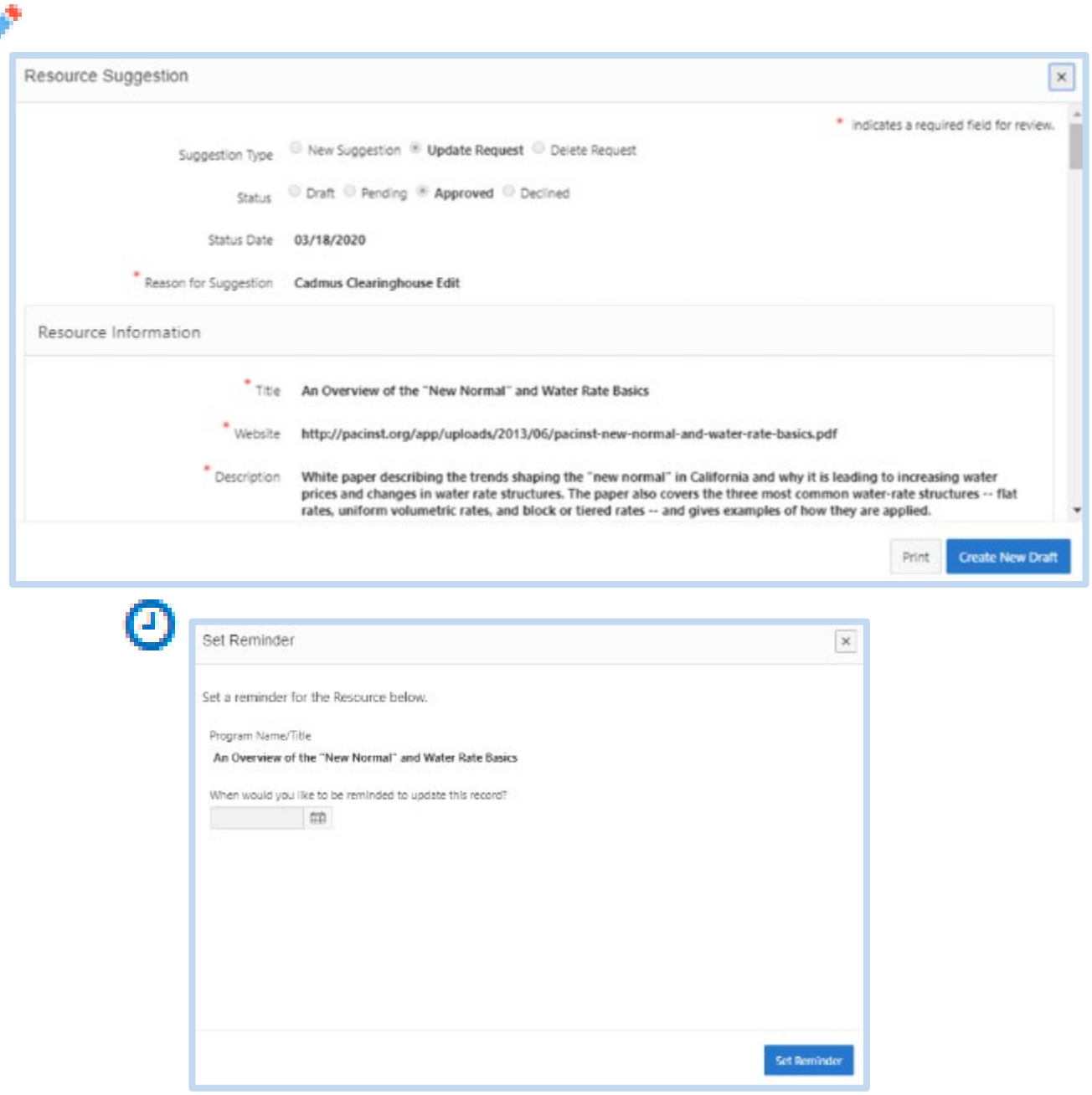
Manage Suggestions

Suggestions can be managed and edited.



Manage a Suggestion

- Favorite
- Edit
- Set Reminder
- Delete

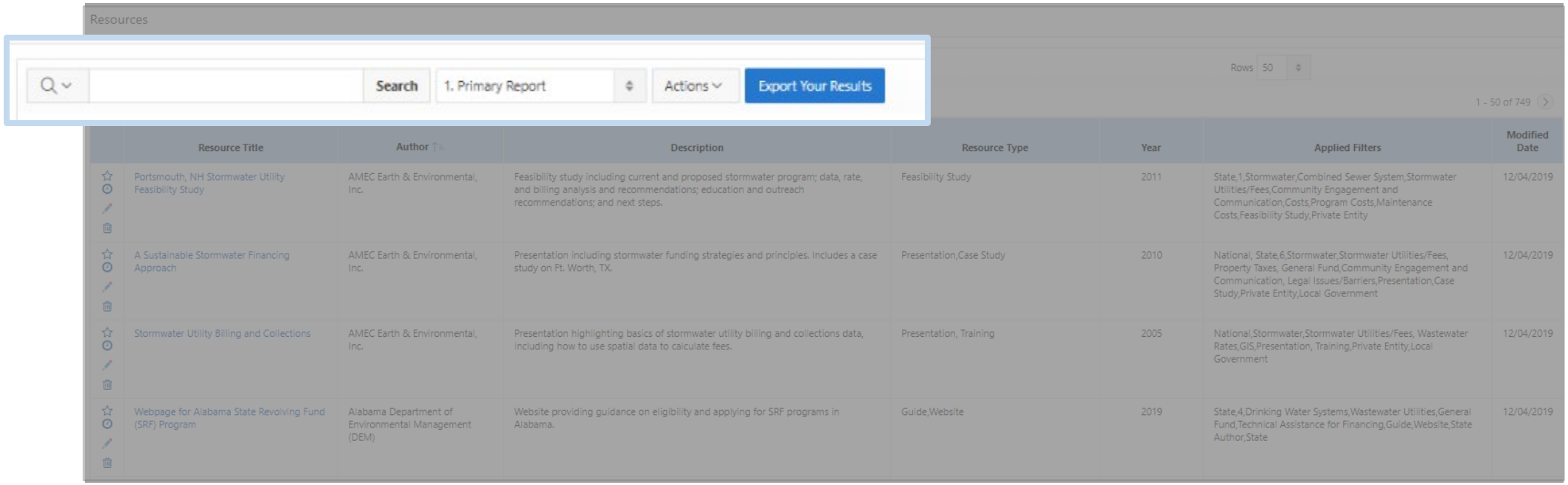


Contributor Portal Exports

Customize your Contributor Portal exports to show information relevant to specific resources, funds, or geographies.

Reports

Contributors can generate reports using Suggestions, Resources, and Funds content tables.

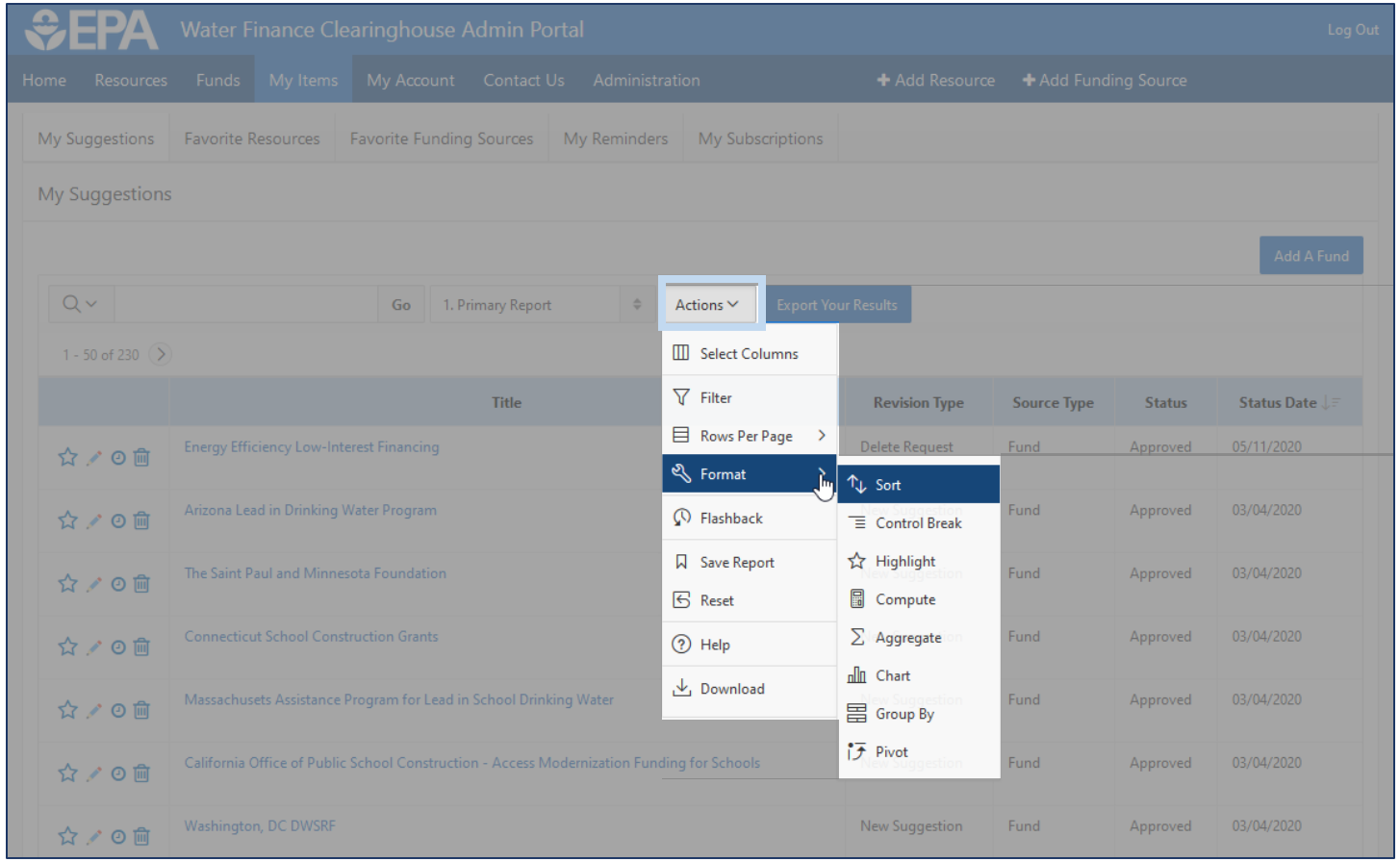


Altering Reports

Reports and lists can be modified with the “Actions” menu.

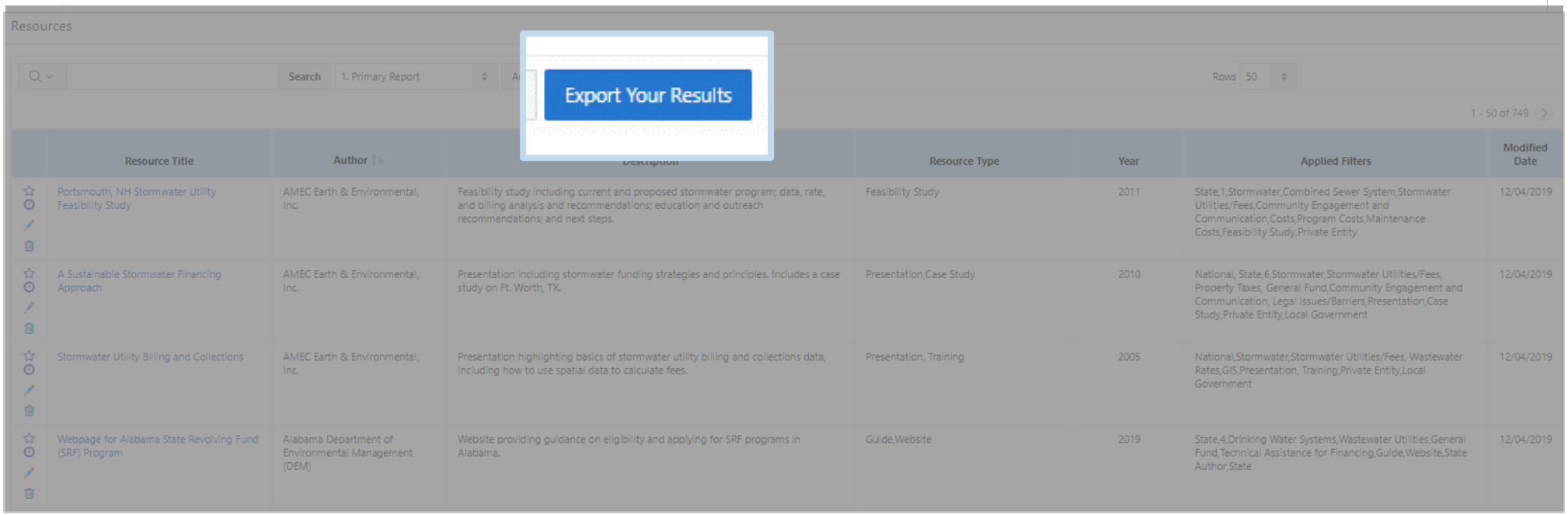
Important Actions:

- Select Columns
- Filter
- Rows Per Page
- Sort (found under Format)
- Save Report
- Download



Reports

Data can be exported and downloaded as a CSV file.

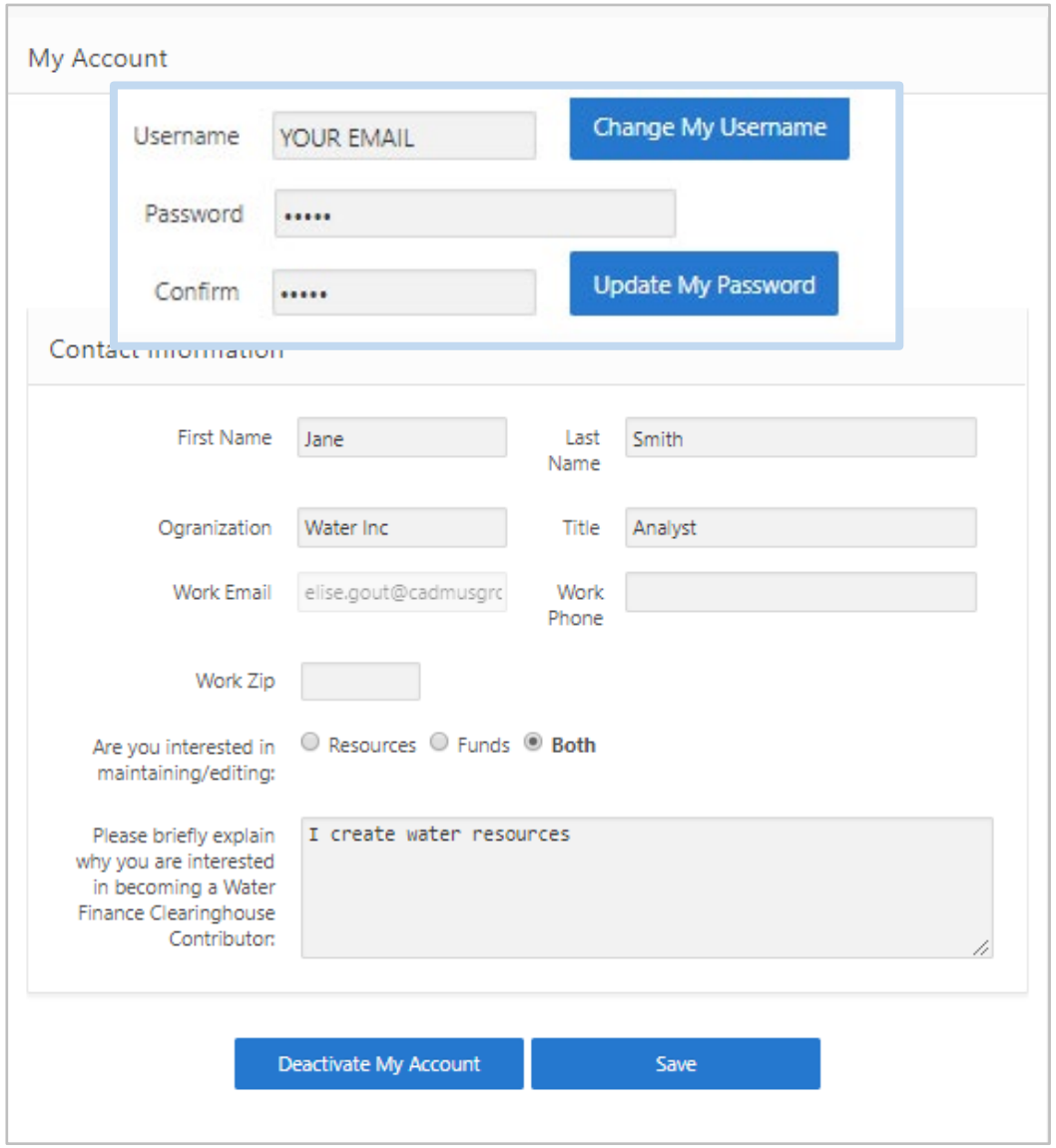


Resource Title	Author	Description	Resource Type	Year	Applied Filters	Modified Date
Portsmouth, NH Stormwater Utility Feasibility Study	AMEC Earth & Environmental, Inc.	Feasibility study including current and proposed stormwater program; data, rate, and billing analysis and recommendations; education and outreach recommendations; and next steps.	Feasibility Study	2011	State,1,Stormwater,Combined Sewer System,Stormwater Utilities/Fees,Community Engagement and Communication,Costs,Program Costs,Maintenance Costs,Feasibility Study,Private Entity	12/04/2019
A Sustainable Stormwater Financing Approach	AMEC Earth & Environmental, Inc.	Presentation including stormwater funding strategies and principles. Includes a case study on Ft. Worth, TX.	Presentation,Case Study	2010	National, State,6,Stormwater,Stormwater Utilities/Fees, Property Taxes, General Fund,Community Engagement and Communication, Legal Issues/Barriers,Presentation,Case Study,Private Entity,Local Government	12/04/2019
Stormwater Utility Billing and Collections	AMEC Earth & Environmental, Inc.	Presentation highlighting basics of stormwater utility billing and collections data, including how to use spatial data to calculate fees.	Presentation, Training	2005	National,Stormwater,Stormwater Utilities/Fees, Wastewater Rates,GIS,Presentation, Training,Private Entity,Local Government	12/04/2019
Webpage for Alabama State Revolving Fund (SRF) Program	Alabama Department of Environmental Management (DEM)	Website providing guidance on eligibility and applying for SRF programs in Alabama.	Guide,Website	2019	State,4,Drinking Water Systems,Wastewater Utilities,General Fund,Technical Assistance for Financing,Guide,Website,State Author,State	12/04/2019

Additional Contributor Portal Functions

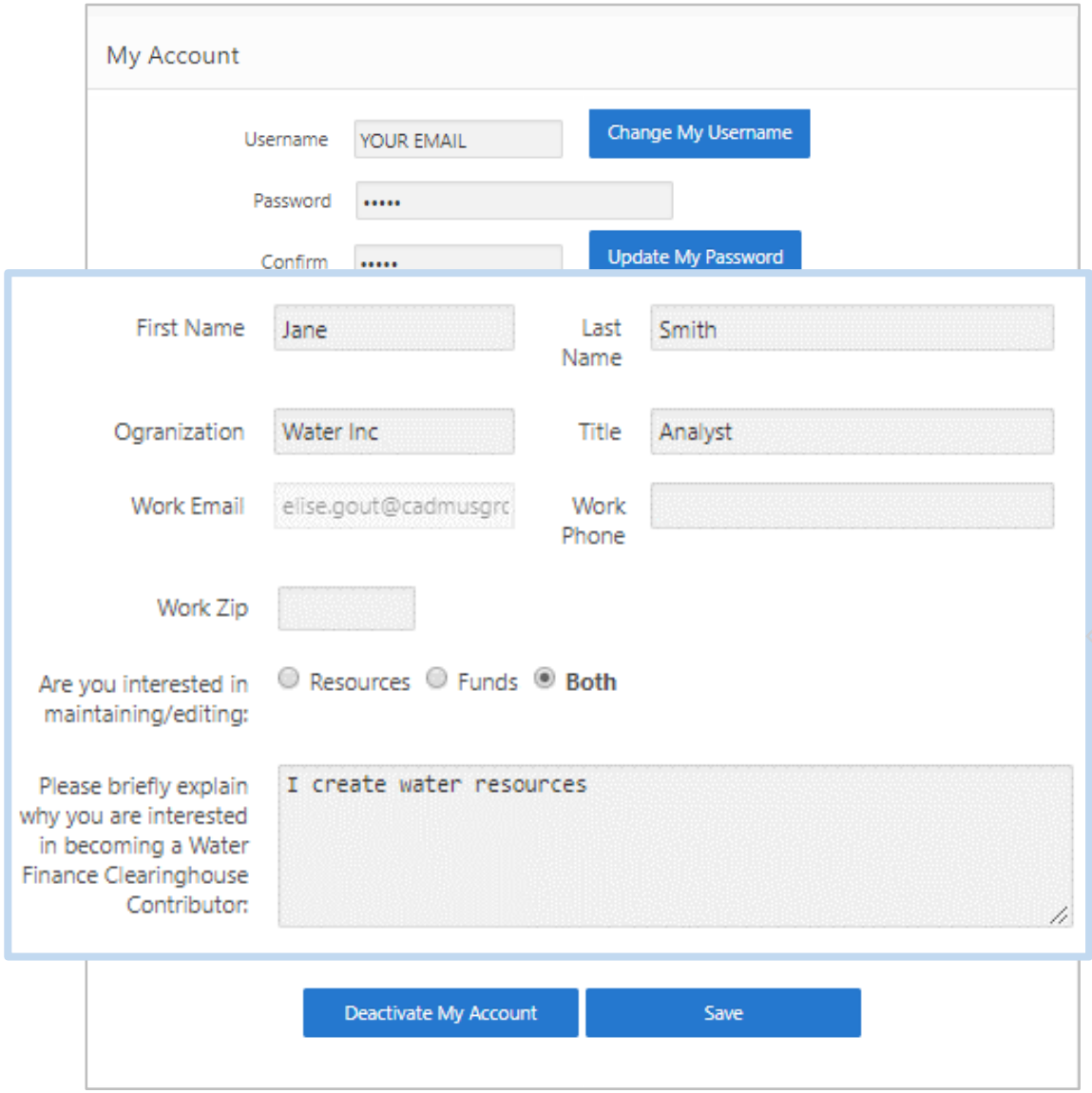
Editing your account and contacting the Water Finance Clearinghouse administrators.

My Account



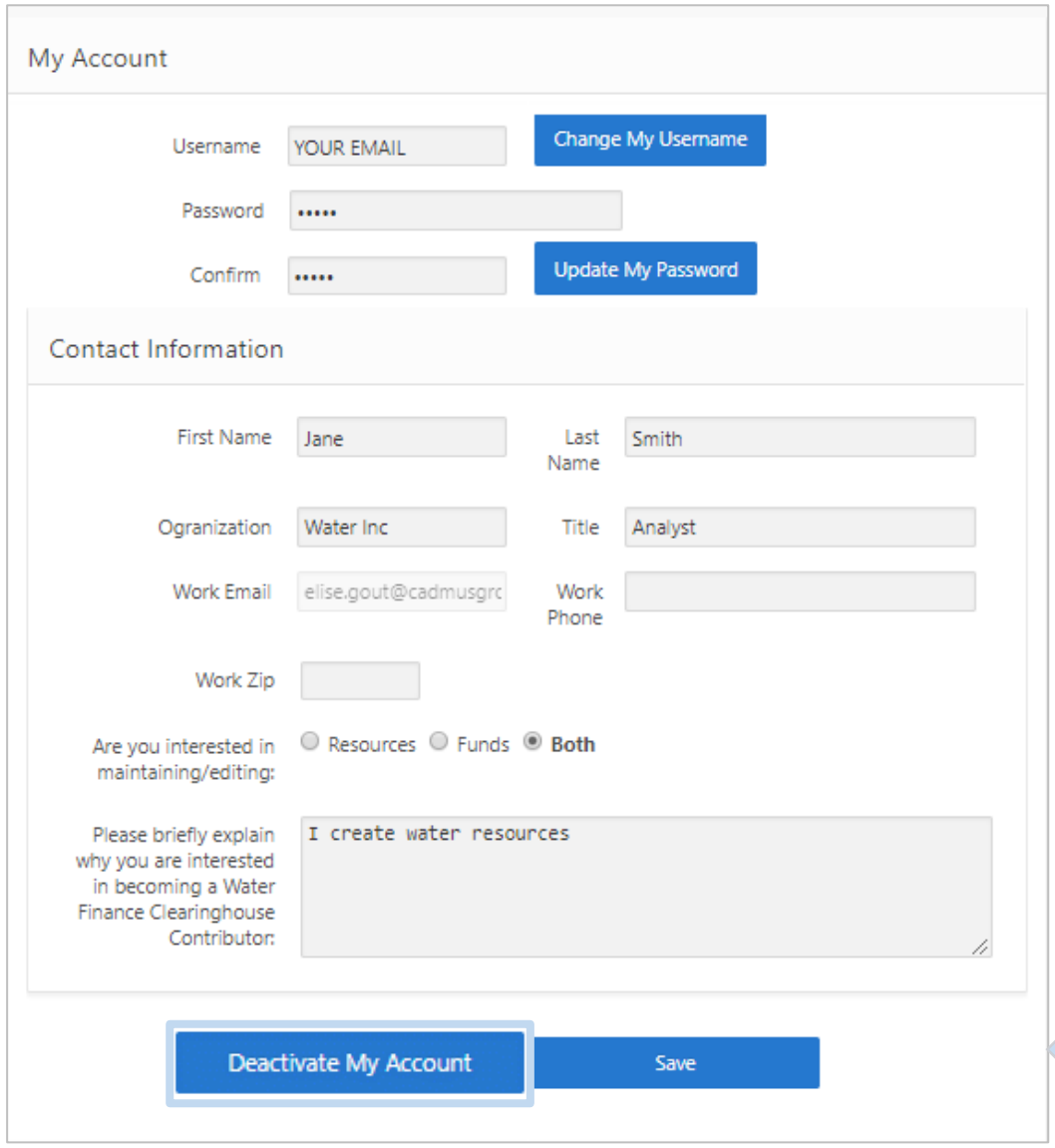
Manage username email and password

My Account



Edit User Details

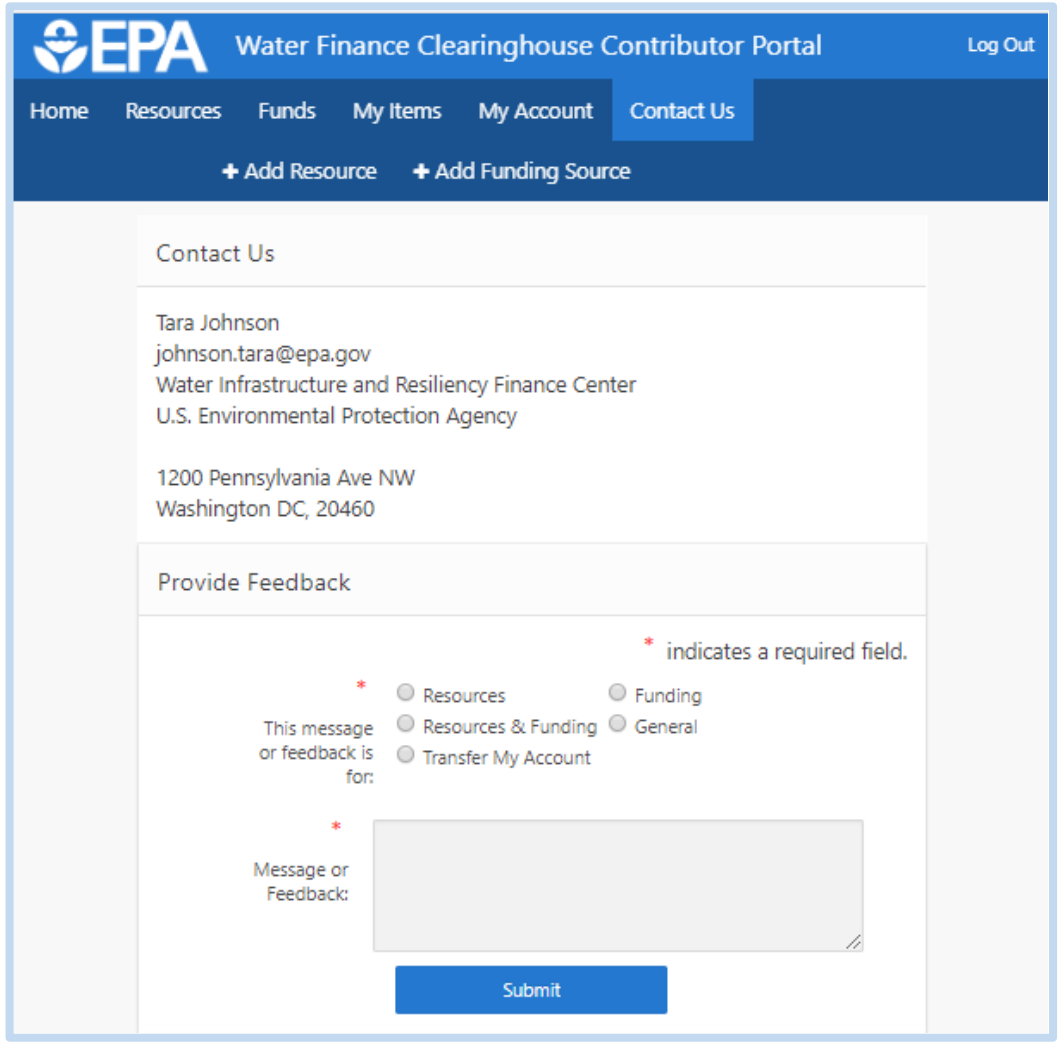
My Account



Deactivate Account

Contact Us

Contact Water Finance Clearinghouse Administrators about Resources, Resources & Funding, Transferring Account, Funding, and General Inquiries



Q&A

Submit questions in the chat and/or raise your hand

Thank You!

Thank you for attending this Water Finance Center Clearinghouse Contributor Training!

Visit www.epa.gov/waterfinancecenter to subscribe to updates from the center including news about additional trainings.