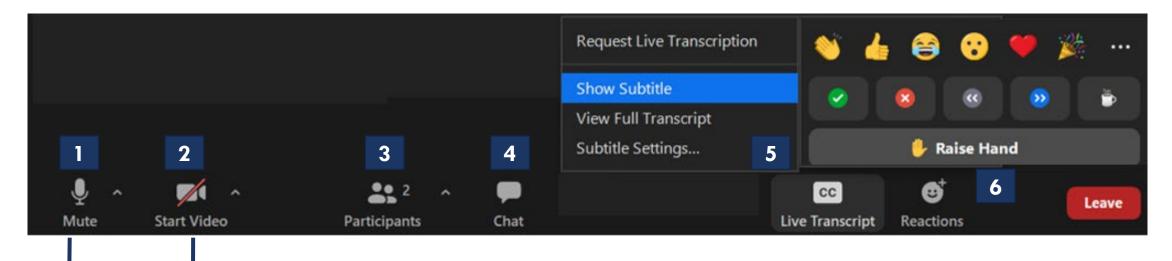


## **Using Zoom**

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.

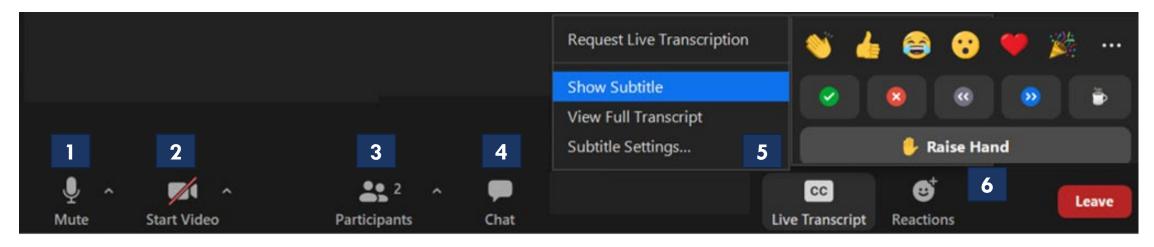


For this presentation, please keep your video 2 OFF and mic 1 MUTED until the Q&A portion

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.



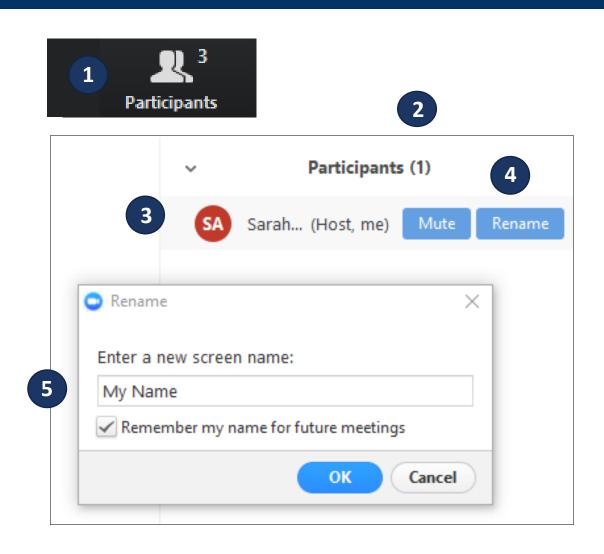
#### To ask a question during this time, you can:

- 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.

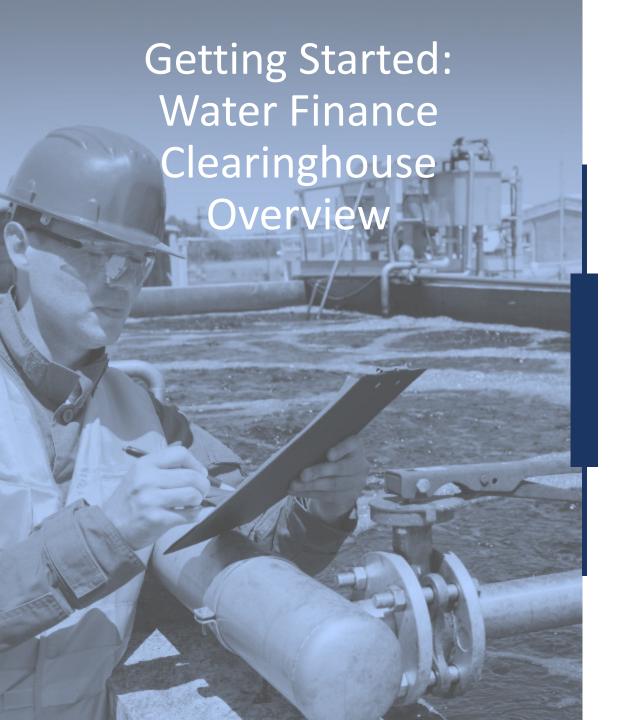
## **Using Zoom – Renaming Yourself**

- 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"**





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



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

Home About Resources Funds Map Learning Modules Submit Feedback or Resource

What is the Water Finance Clearinghouse?

The Water Finance
Clearinghouse is an easily
navigable web-based portal to
help users locate information
that will assist them in making
informed decisions for their
water sector infrastructure
needs.











State Revolving Funds





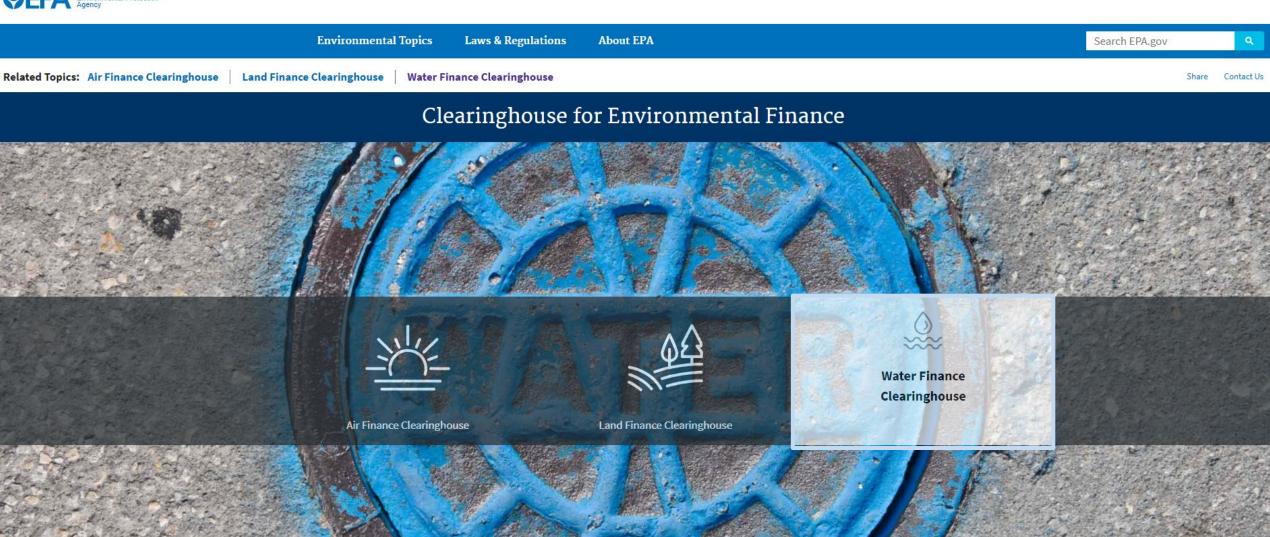






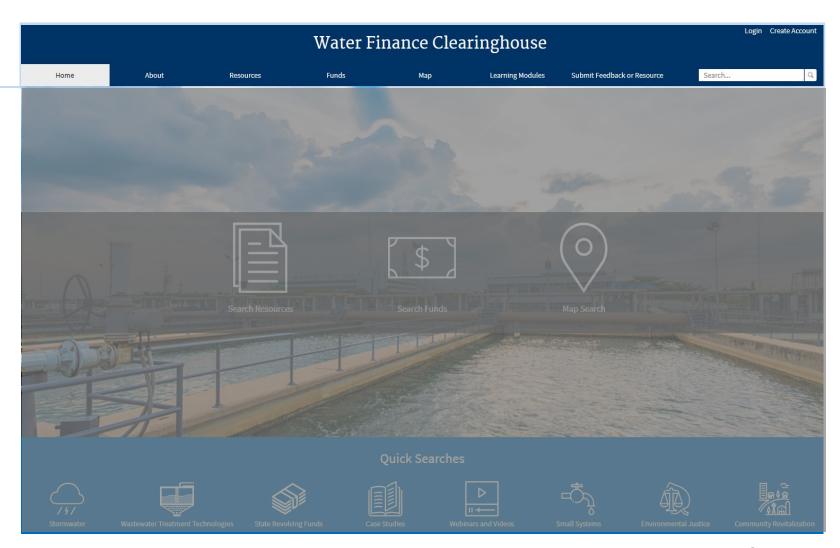
## Clearinghouse for Environmental Finance





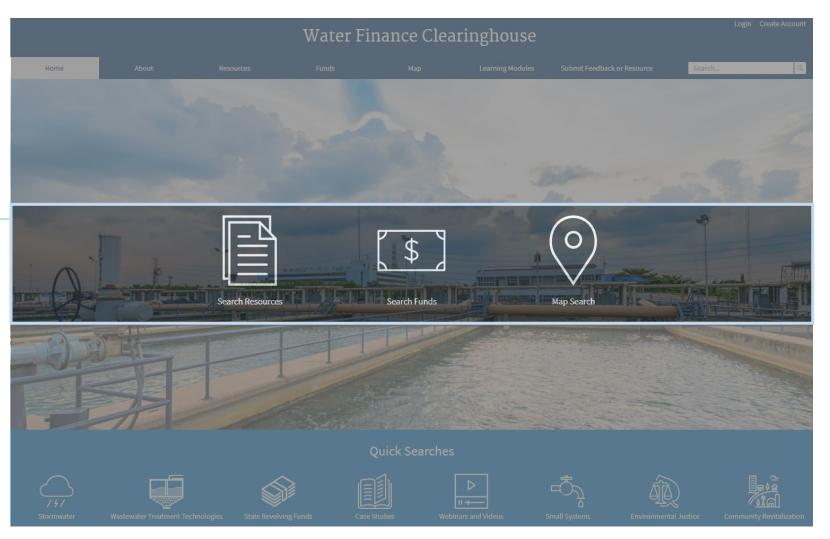
#### Top navigation bar links:

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



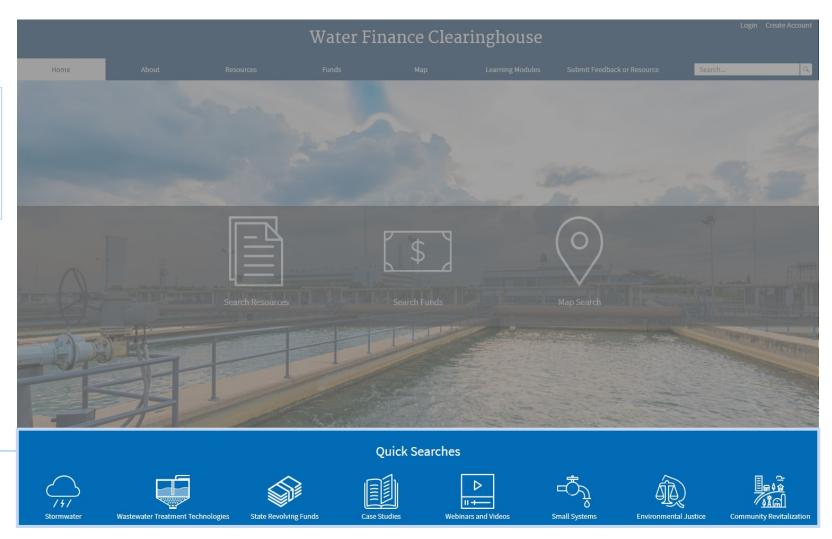
# Center navigation bar links contain the 3 main search methods:

- Search Resources
- Search Funds
- Map Search

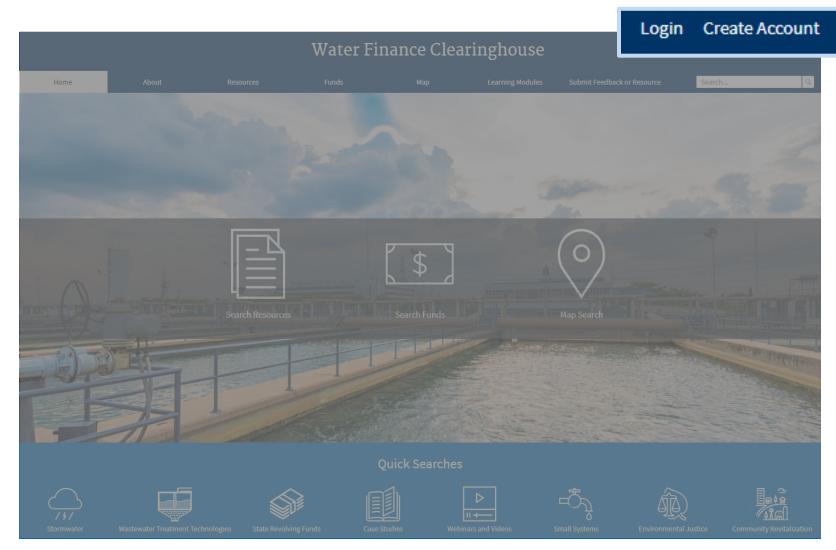


# Bottom navigation bar links:

Contain Quick Searches for popular resources and funding sources.



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

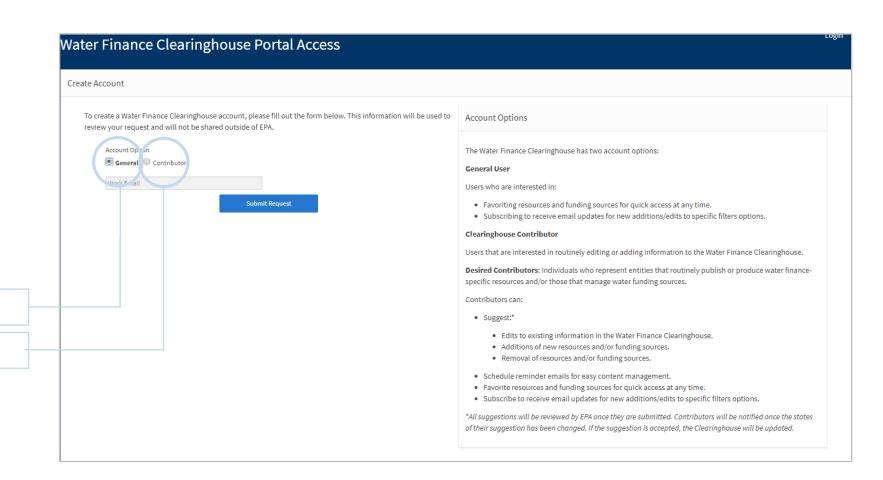


### Water Finance Clearinghouse User Accounts

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

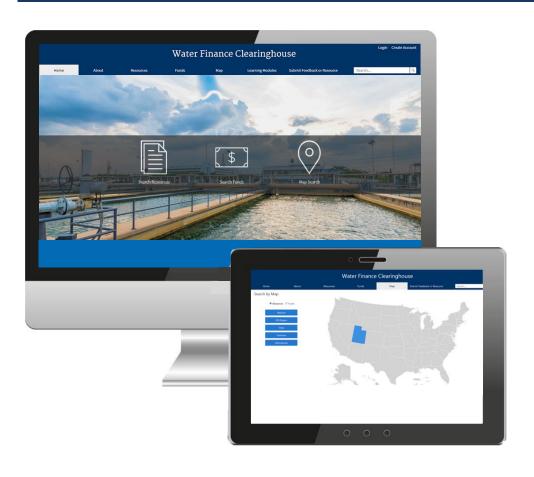
#### **General Users**

- 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.

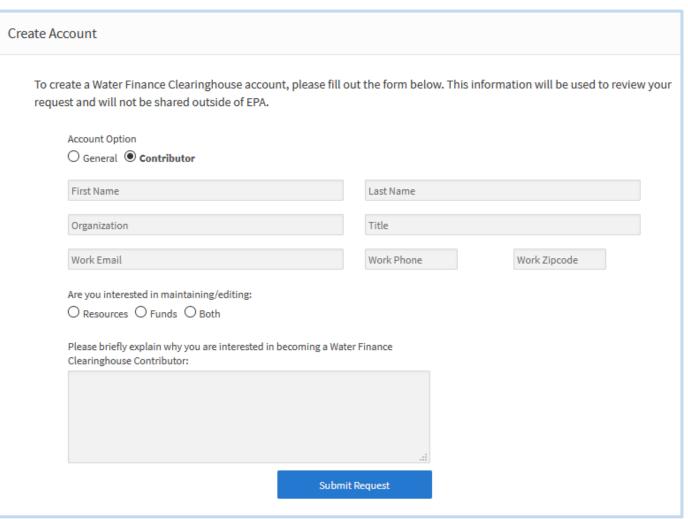
Contributors are individuals who represent entities that routinely publish or produce water finance-specific resources and/or those that manage water funding sources.

#### **Contributor Benefits:**

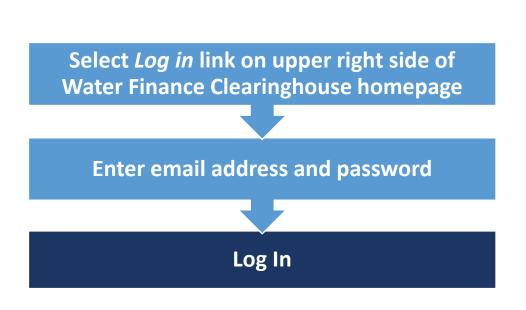
- Resource Suggestions options are more detailed (See Suggesting a Resource or Funding Source section)
- Can be saved as draft and return to suggestions later
- Contributors can monitor the status of their suggestion

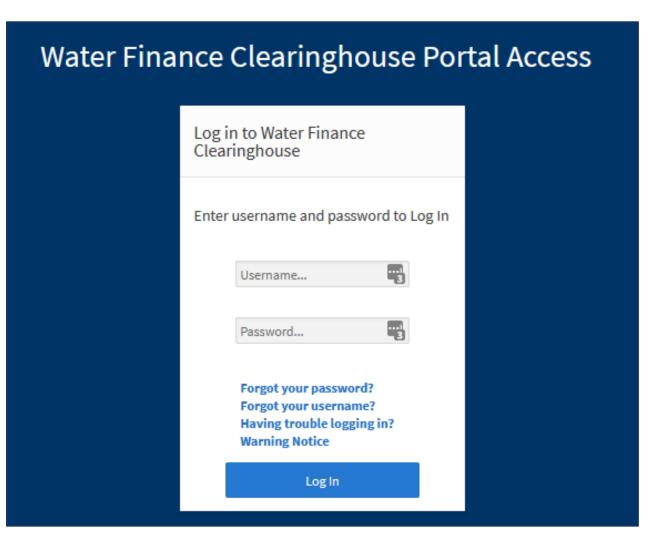
#### Create a Contributor Account





#### Create a Contributor Account

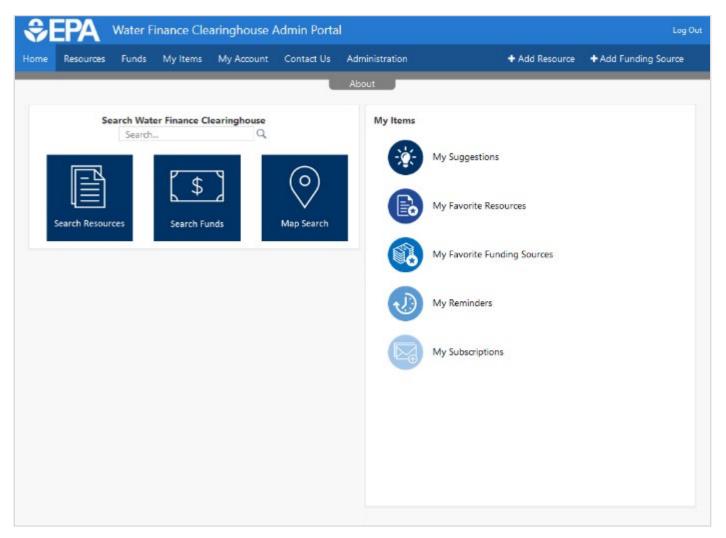




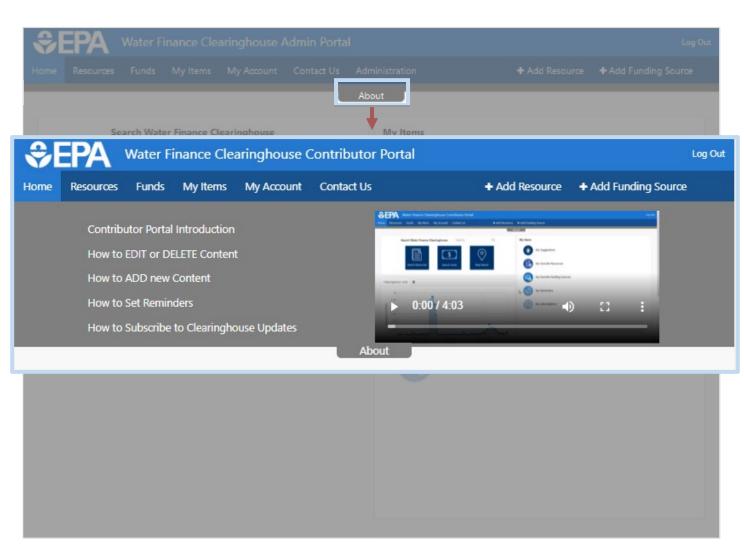


- Contributor Account Portal
- Resources and Funds
- Suggest a Resource or Funding Source
- My Items
- Contributor Portal Exports
- Additional Contributor Portal Functions

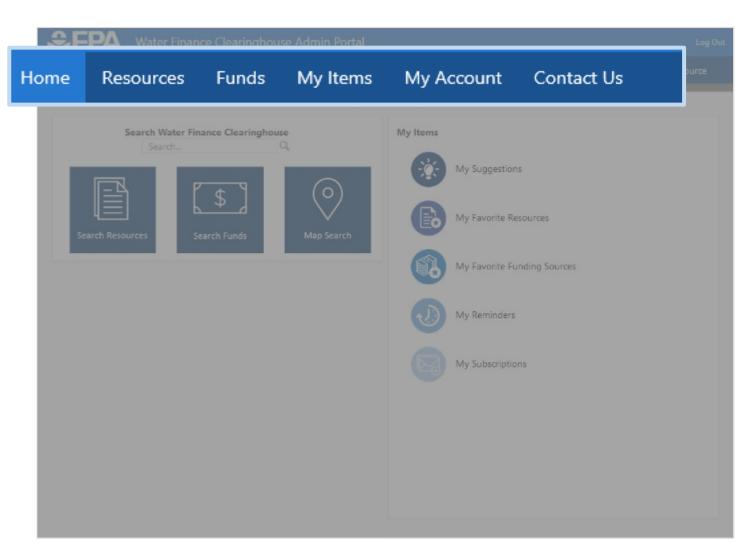
Once a user is granted a Contributor Account, they have access to the Contributor Account Portal



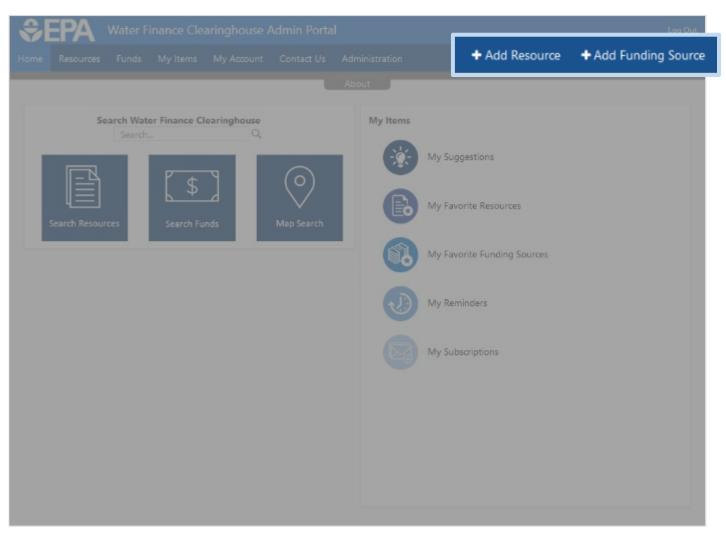
The About tab lets the user access Contributor Portal tutorial videos



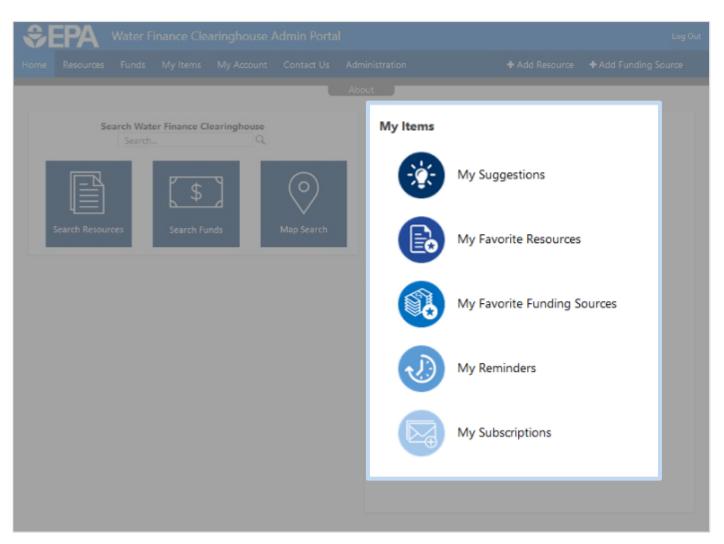
Top navigation bar links



Propose new entries using "+Add Resource" and "+Add Funding Source" buttons



Quickly access your content from the *My Items* links



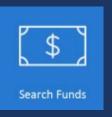


#### Resources and Funds

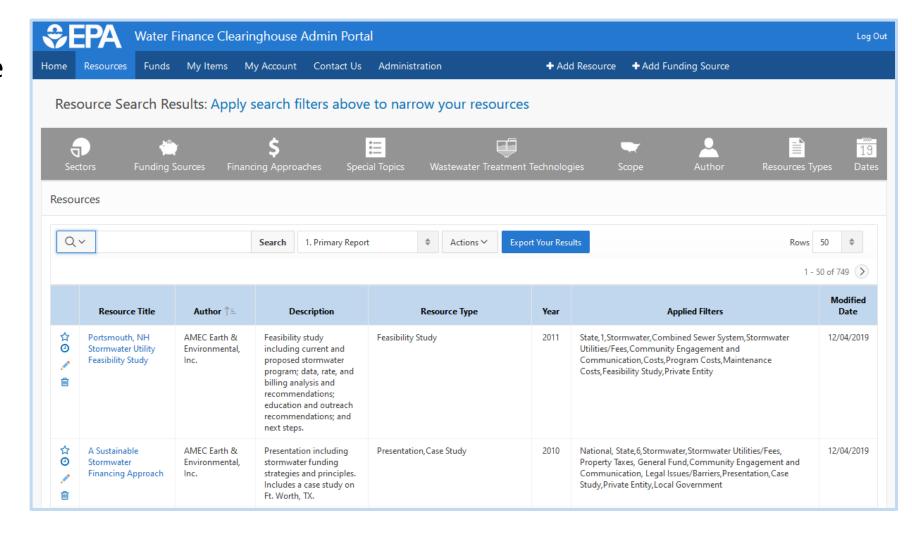
Search Resources and Funds using keywords, filters, or map search. Favorite Resources and Funds and set up email subscriptions and/or reminders based on preferences.



#### Search Resources and Funds



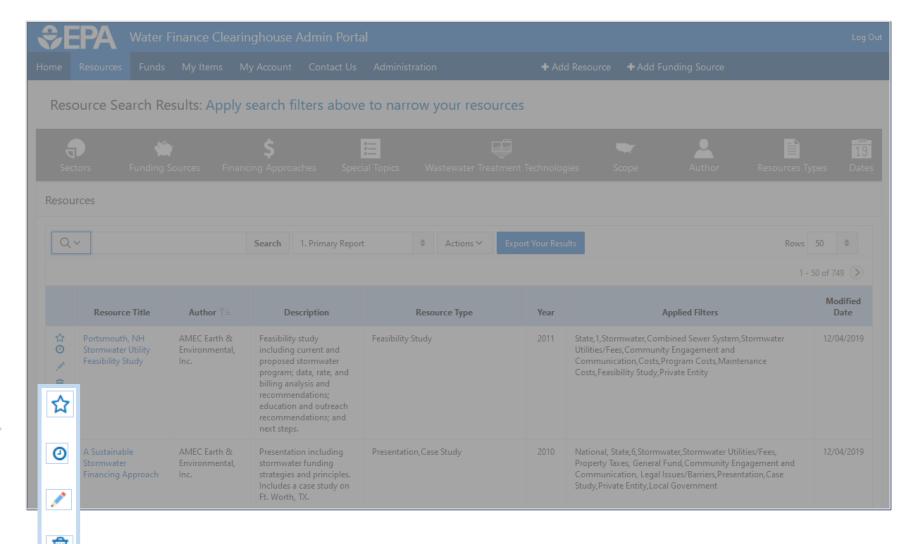
Contributors have access to the Resource and Funds Databases and search tools.





#### Search Resources and Funds

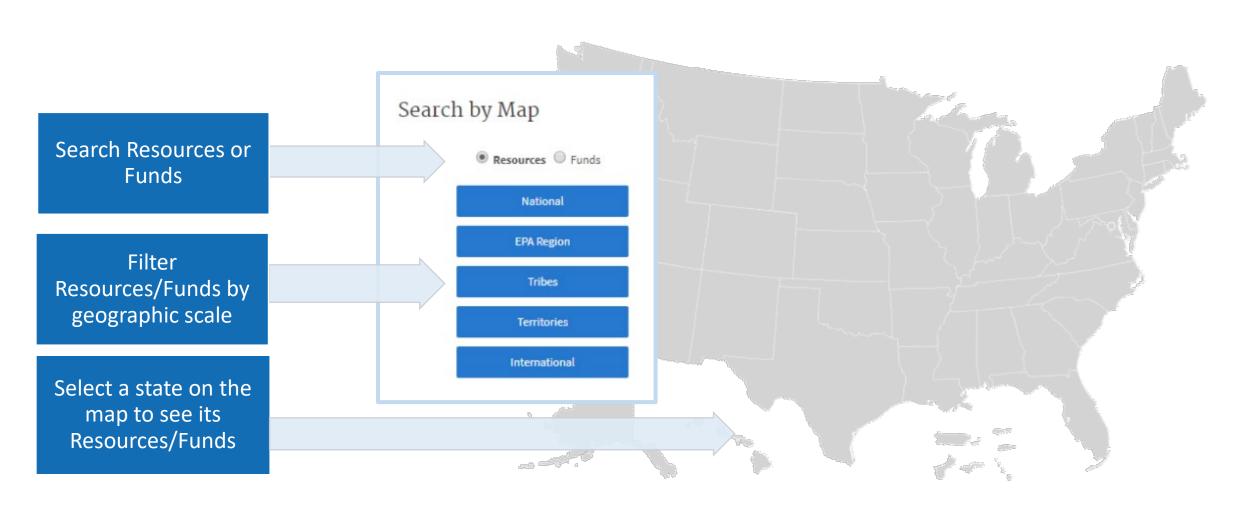




Favorite, Set a
Reminder,
Suggest Edits,
and Suggest
Removal for a
specific Resource
or Fund.



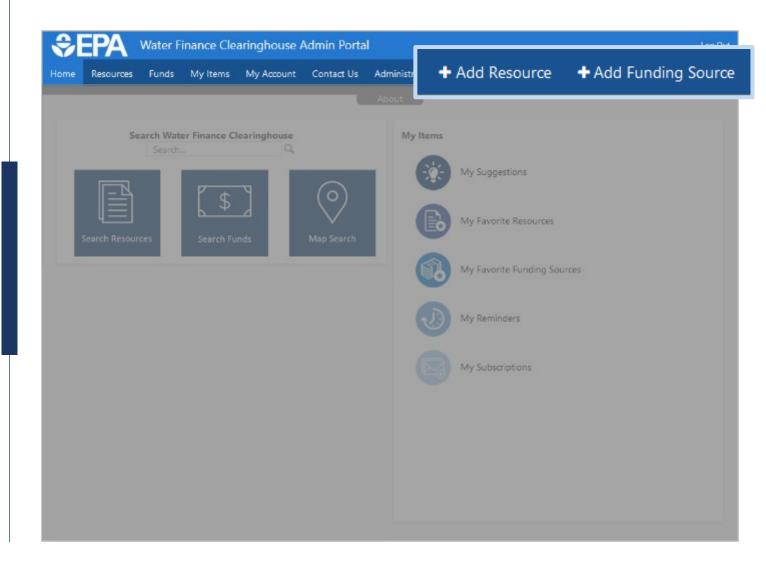
## Map Search



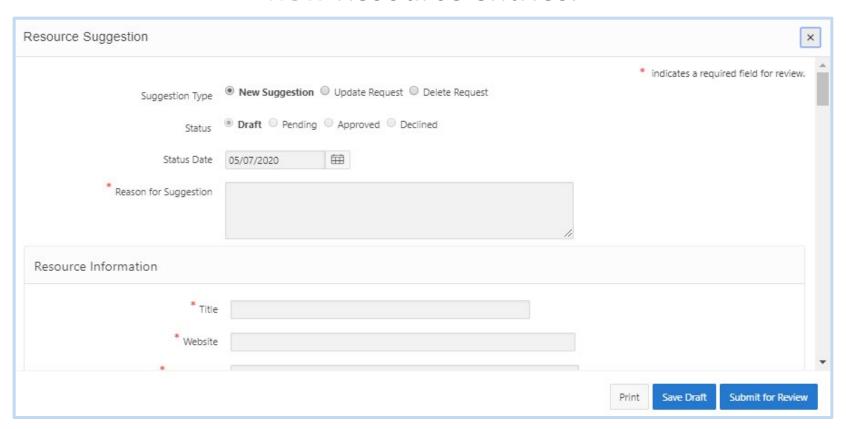


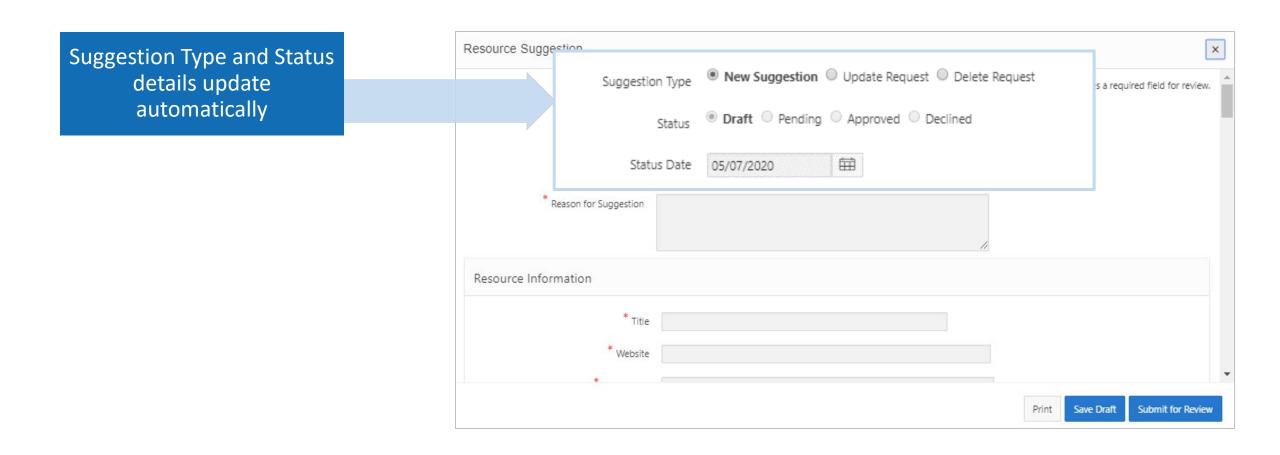
# Suggesting a Resource or Funding Source

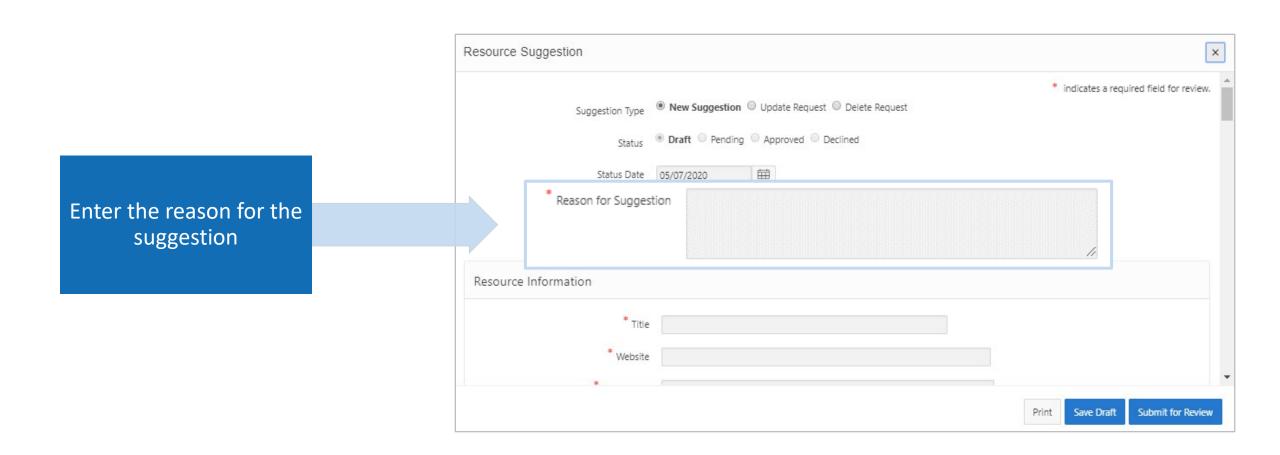
Contributor Account users can suggest additions to the Clearinghouse that will be reviewed by Clearinghouse Administrators.



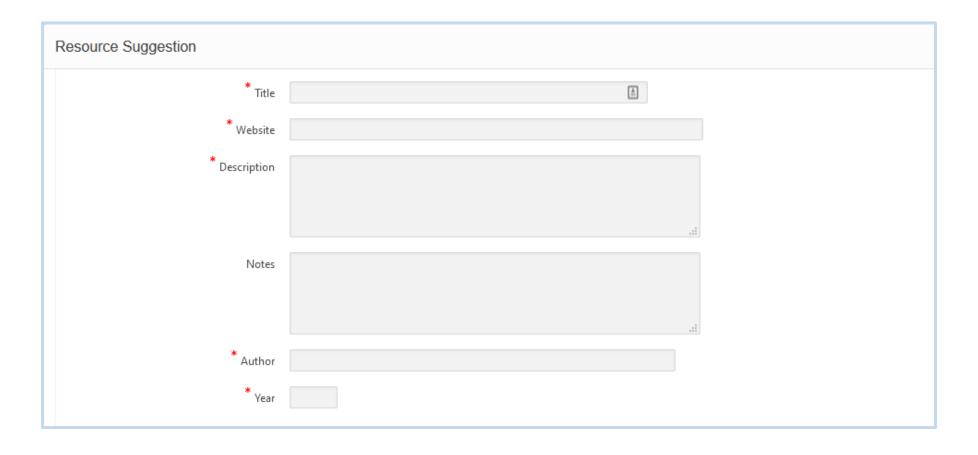
The Resource Suggestion pop up allows users to draft, save, print, and submit new Resource entries.



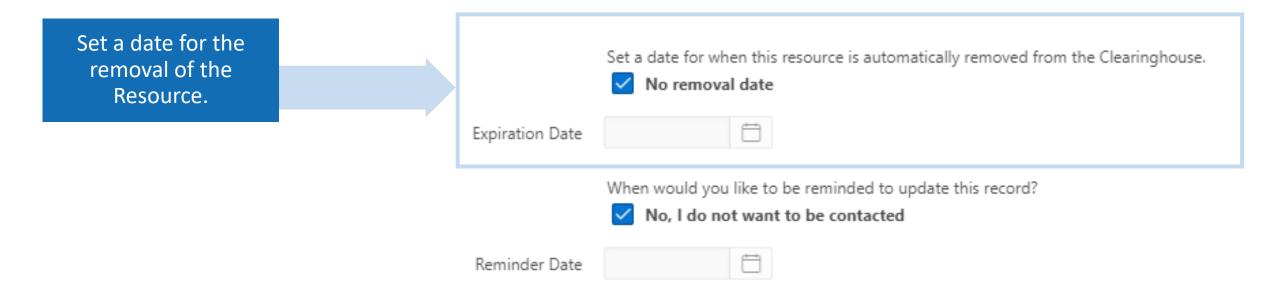




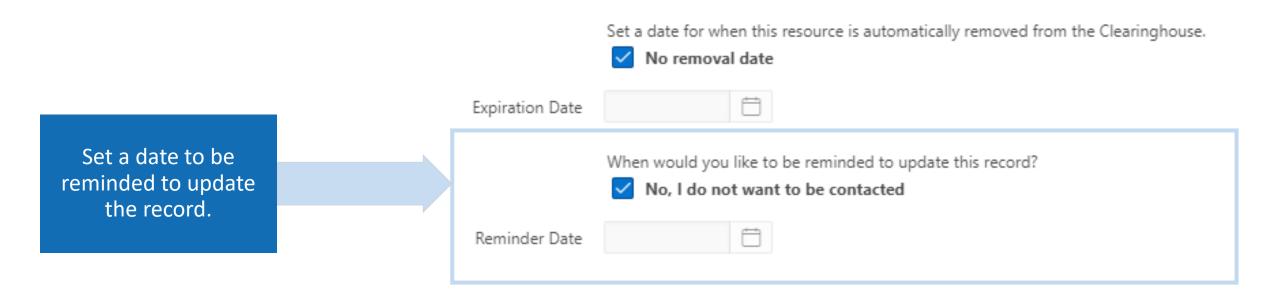
#### **Enter Resource Information**



## Reminder and Expiration Date



## Reminder and Expiration Date



### Select Resource Type tags

Resource Suggestion	
,	* Resource Types (Check all that apply)
	☐ Article ☐ Regulation
	☐ Case Study ☐ Report
	Event Resource List
	Feasibility Study
	☐ Guide ☐ Training
	☐ Other Resource Type ☐ Video
	Outreach Webinars & Videos
	Presentation
Si	cope (Check all that apply)
	□ National
	☐ Tribes & Alaskan Native Villages
_	International
C	Community Population Size (Check all that apply)
	☐ Small (less than 10,000)
_	☐ Medium (10,000 – 99,999)
	Large (100 000 and above)

#### 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

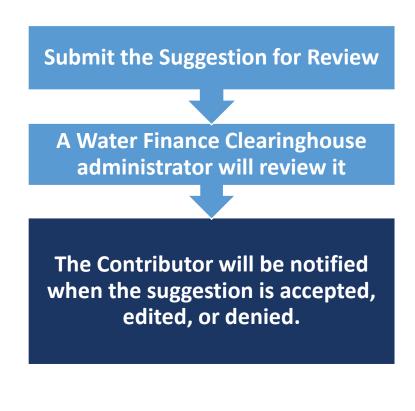
Scope (Check all that apply)
□ National
☐ Tribes & Alaskan Native Villages
☐ International
Community Population Size (Check all that apply)  Small (less than 10,000)  Medium (10,000 – 99,999)  Large (100,000 and above)

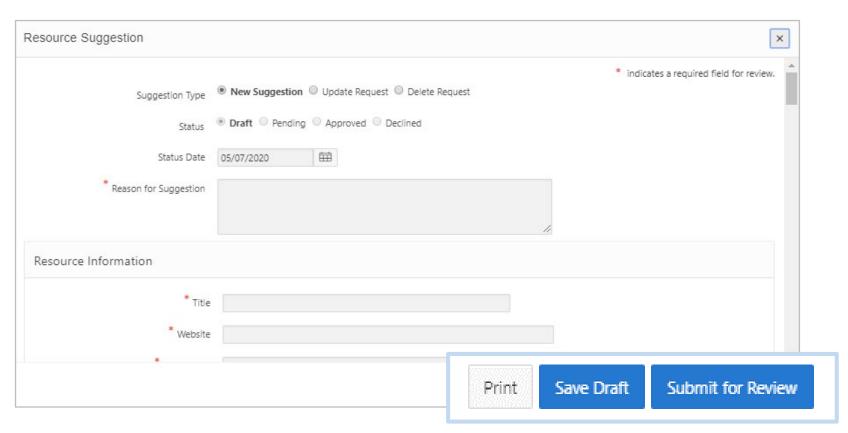
Scope State (Check all that apply)			
Alabama	Louisiana	Oklahoma	
Alaska	Maine	Oregon	
Arizona	■ Maryland	Pennsylvania	
Arkansas	Massachusetts	Rhode Island	
California	Michigan Michigan	South Carolina	
Colorado	Minnesota	South Dakota	
□ Connecticut	Mississippi	Tennessee	
Delaware	■ Missouri	☐ Texas	
District of Columbia	■ Montana	Utah Utah	
Florida	○ Nebraska	○ Vermont     ○	
☐ Georgia	■ Nevada	☐ Virginia	
Hawaii	New Hampshire	■ Washington	
Idaho Idaho	New Jersey	West Virginia	
Illinois	New Mexico	Wisconsin	
Indiana	New York	Wyoming W	
lowa	North Carolina		

Scope Territory (Check all that apply)
American Samoa Palau
☐ Federated States of Micronesia ☐ Puerto Rico
☐ Guam ☐ Virgin Islands
☐ Marshall Islands
□ Northern Mariana Islands
Sectors (Check all that apply)
☐ Agriculture ☐ Private Drinking Water Wells
☐ Animal Agriculture ☐ ReUse
☐ Combined Sewer System ☐ Septic/Decentralized
☐ Drinking Water Systems ☐ Stormwater
☐ Green Infrastructure ☐ Surface Water
☐ Greywater ☐ Wastewater Utilities
Groundwater

Financing Approaches (Check all that apply)	
Conservation Financing	☐ Property Taxes
Drinking Water Rates	<ul> <li>Public Property Incentives</li> </ul>
Environmental Markets/Trading Programs	<ul> <li>Public-Private Partnerships</li> </ul>
☐ Fees	<ul> <li>Public-Public Partnerships</li> </ul>
General Fund	☐ Stormwater Utilities/Fees
Green Bonds	☐ Tax Districts
☐ Multi-Use/Multi-benefit Approaches	☐ Tax Incentives
☐ Municipal Bonds	☐ Voluntary Programs
Pay for Performance	☐ Wastewater Rates
<ul> <li>Private Property Incentives</li> </ul>	

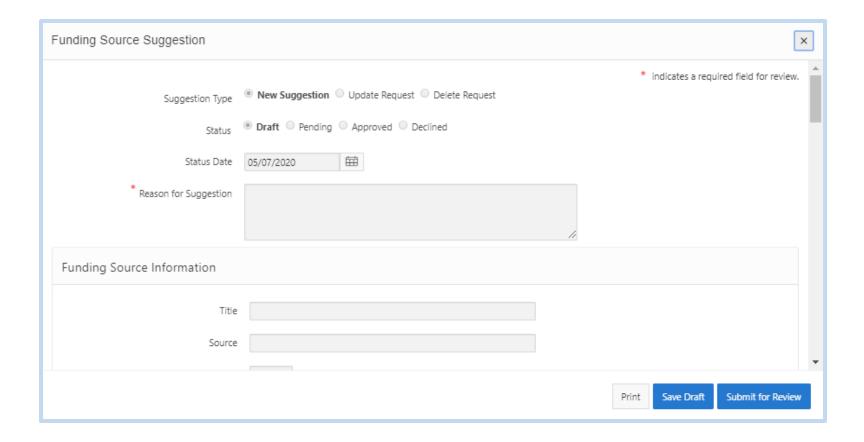
#### Submitting Resource Suggestion



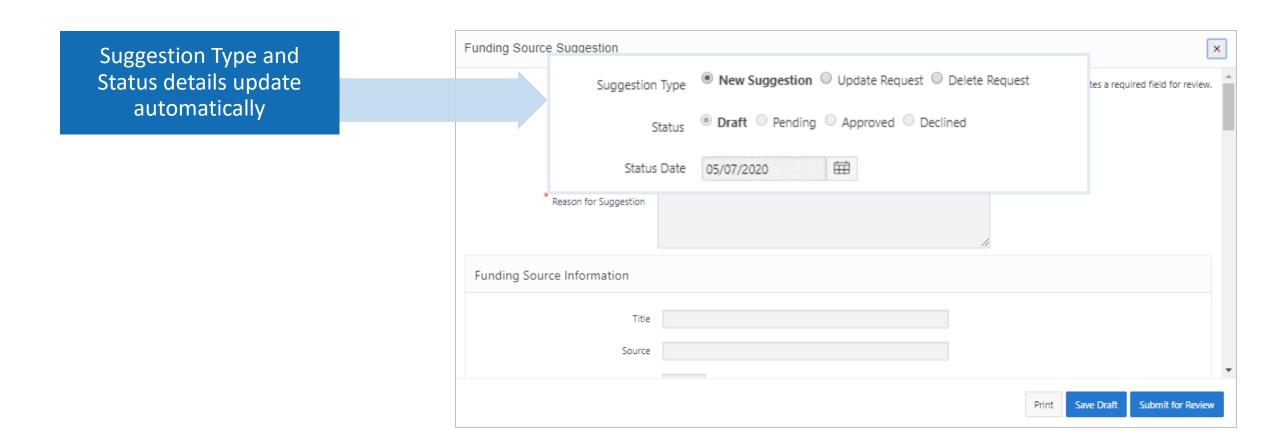


### Suggesting a Funding Source

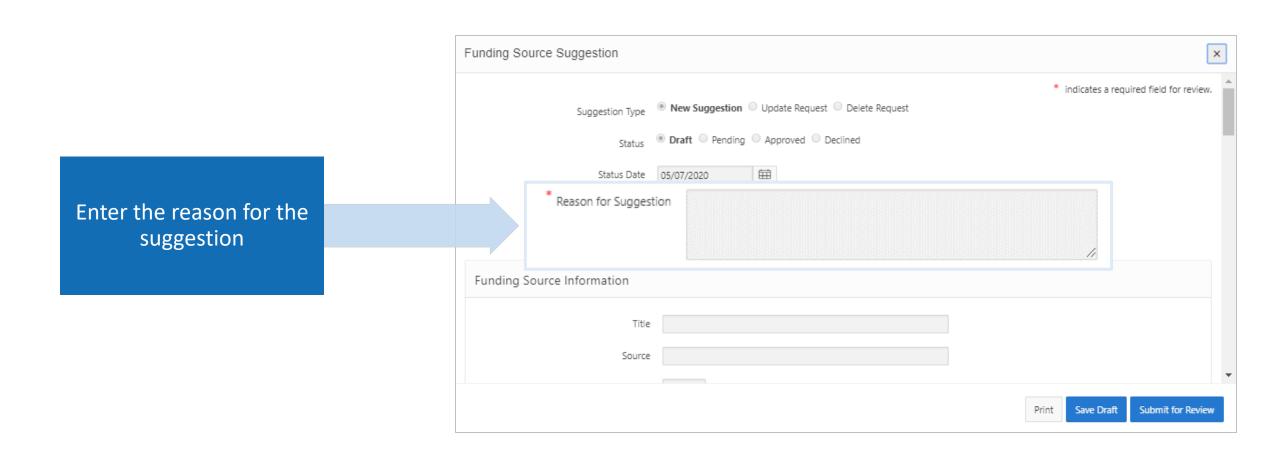
The Funding Source
Suggestion pop up
allows users to Draft,
Save, Print, and Submit
new Resource entries



#### Suggesting a Funding Source



### Suggesting a Funding Source



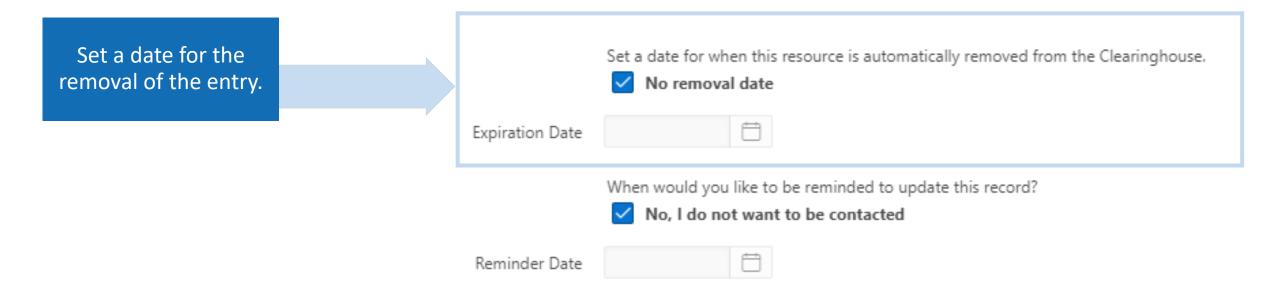
#### Funding Source Information

# Funding Source Information fields include:

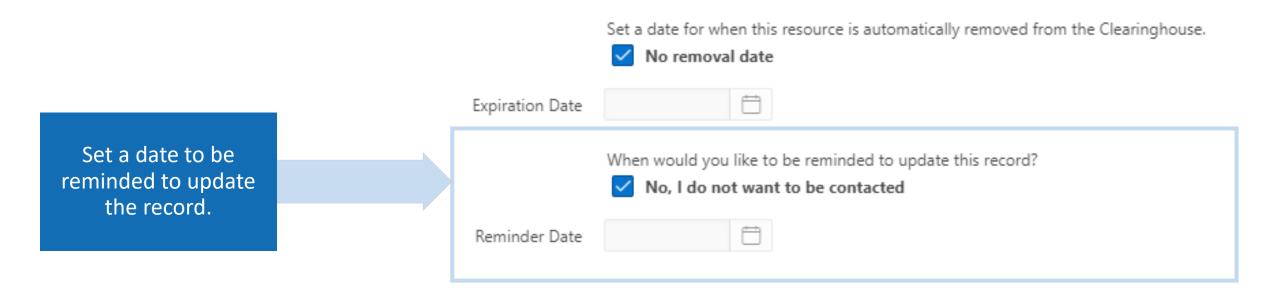
- Title
- Source
- Year
- Website
- Description
- How to Apply
- Current Funding Level
- Contact Information: Full Name, Email, Agency, Agency phone, Address



## Reminder and Expiration Date



## Reminder and Expiration Date



#### Funding Source Tags

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

Funding Source Suggestion		×
Sectors (Check all that apply)  Agriculture Private Drinking Water Wells Animal Agriculture ReUse Combined Sewer System Septic/Decentralized Drinking Water Systems Stormwater Green Infrastructure Surface Water Greywater Wastewater Utilities Groundwater		•
Eligible Uses (Check all that apply)  Capital Projects Green Projects Community Revitalization Home Repairs & Upgrades Conservation Operations & Maintenance Contaminated Site Remediation Planning & Predevelopment Environmental Justice Resiliency & Hazard Mitigation	Watershed Protection	
Eligible Applicants (Check all that apply)  Conservation District Private Business or Landowner  Educational Institution Ranchers  Farmers State/Territorial Agency  Federal Agency Stormwater Utility		•
	Print Save Draft Submit for Review	

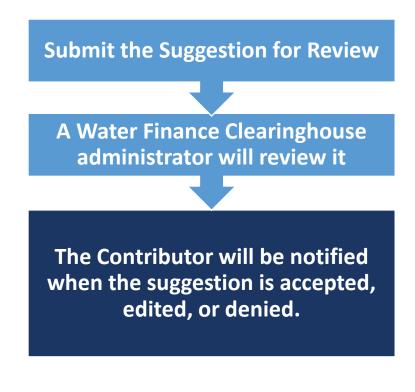
### Funding Source Tags

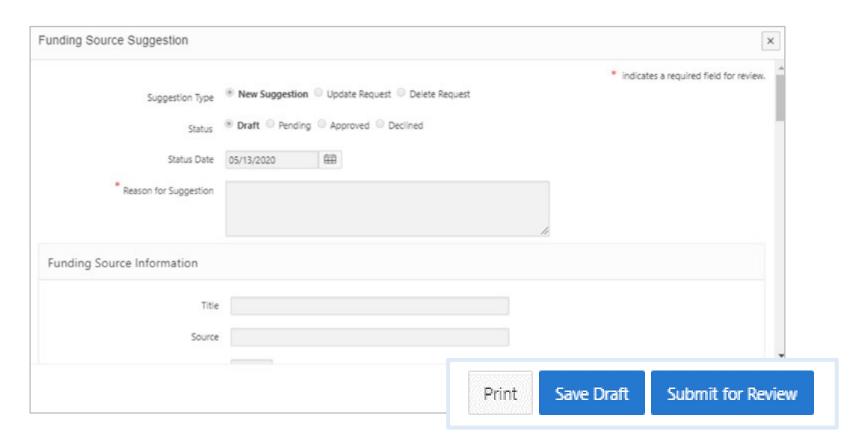
## Funding Source tag categories include:

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

Animal Agriculture ReUse Combined Sewer System Septic/De Drinking Water Systems Stormwat Green Infrastructure Surface W				
Eligible Uses (Check all that apply)  Capital Projects Community Revitalization Conservation Conservation Contaminated Site Remediation Environmental Justice  Green Projects Watershed Protection Operations & Maintenance Planning & Predevelopment Resiliency & Hazard Mitigation				
Eligible Applicants (Check all that apply)  Conservation District Private Business or Landowner Educational Institution Ranchers Farmers State/Territorial Agency Federal Agency Stormwater Utility Homeowners Territories Irrigation & Drainage Districts Tribes & Alaskan Native Villages Local Government Wastewater Utility Not for Profit Water Utility	Funding Type (Check all that apply)  Grants & Principal Forgiveness Loan  Funding Sources (Check all that apply)  EPA Region Philanthropic & Foundations Federal State International Local Government  Tribes & Alaskan Native Villages			
Community Population Size (Check all that apply)  Small (less than 10,000)  Medium (10,000 – 99,999)  Large (100,000 and above)	Scope - where eligible applicants may be located (Check all that apply)  National  State International  Tribes & Alaskan Native Villages			

#### Submitting Funding Source Suggestion



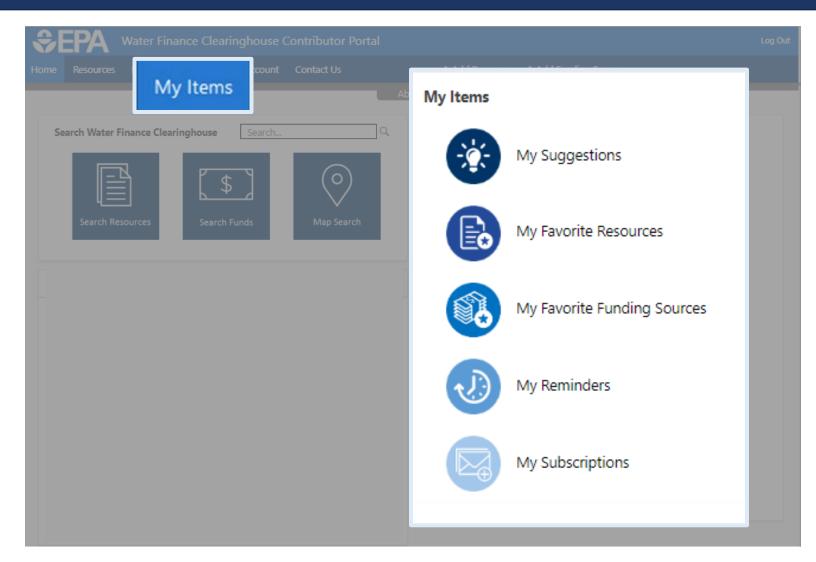




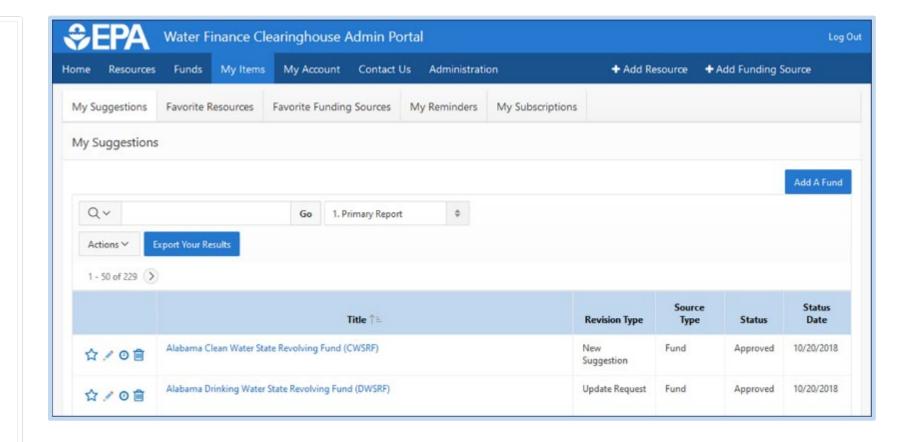
Manage Suggestions, Favorite Resources, Favorite Funding Sources, Reminders, and Subscriptions.

My Items can be accessed via the homepage quick access buttons or the tab.

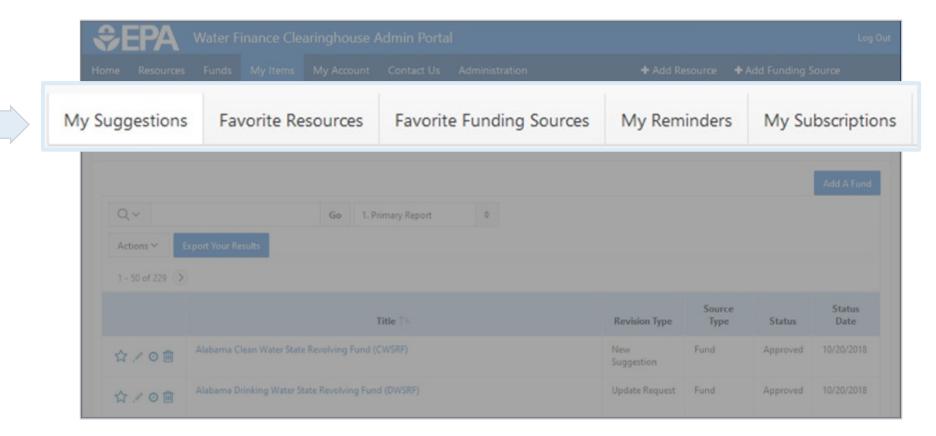
The quick access buttons link directly to sub-pages within "My Items"



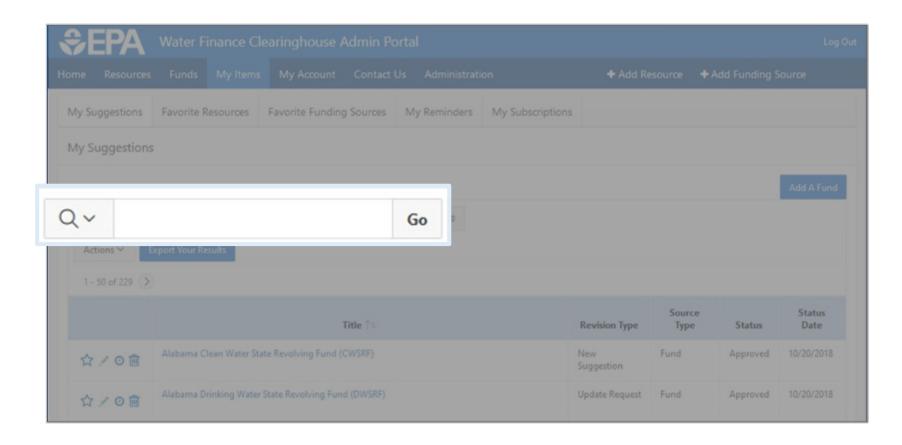
The *My Items* page contains the content that the Contributor has created or saved.



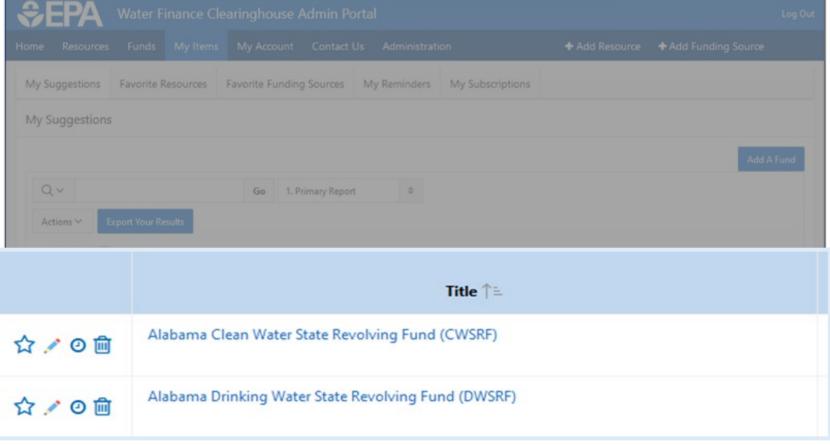
Navigate "My Items" sub-pages using tabs.



Search
Contributor
content using
keywords.

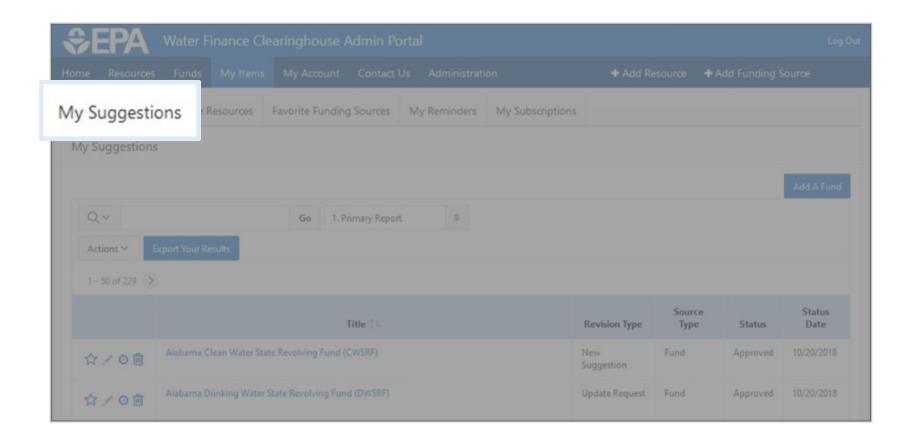


View and Manage content using this table.



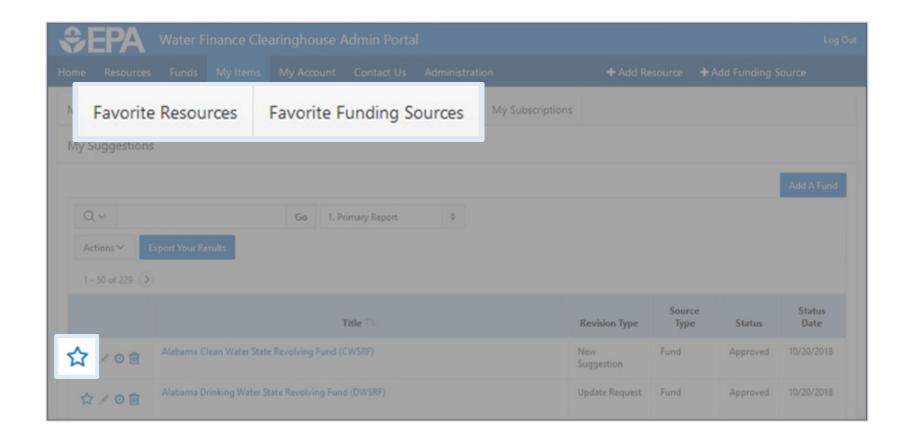
#### My Suggestions

The "My
Suggestions" tab
allows user to
manage all
suggestions:



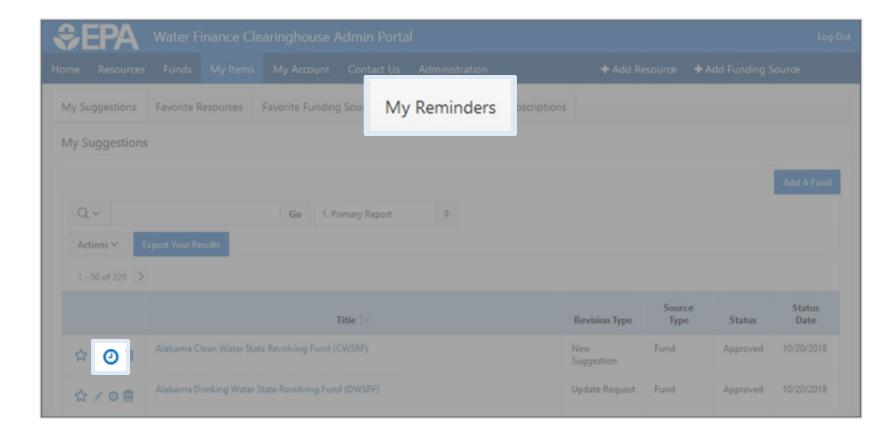
#### Favorite Resources & Favorite Funding Sources

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



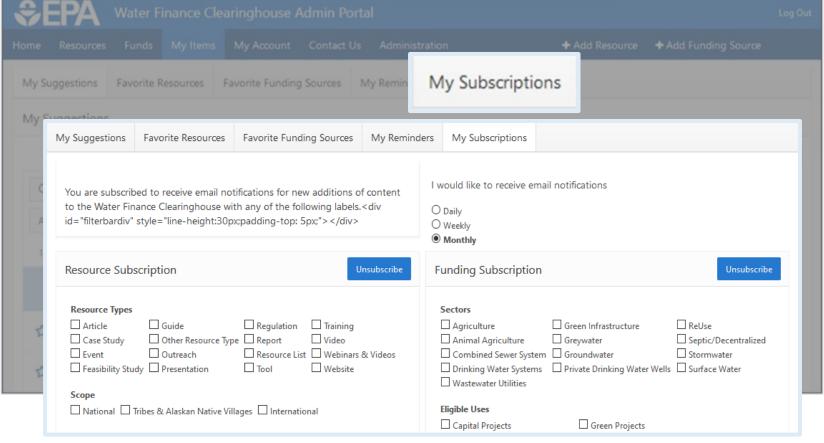
#### My Reminders

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



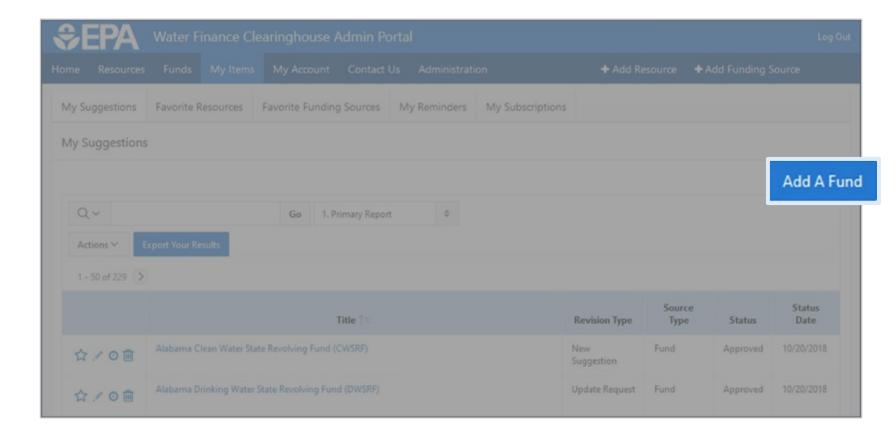
#### My Subscriptions

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



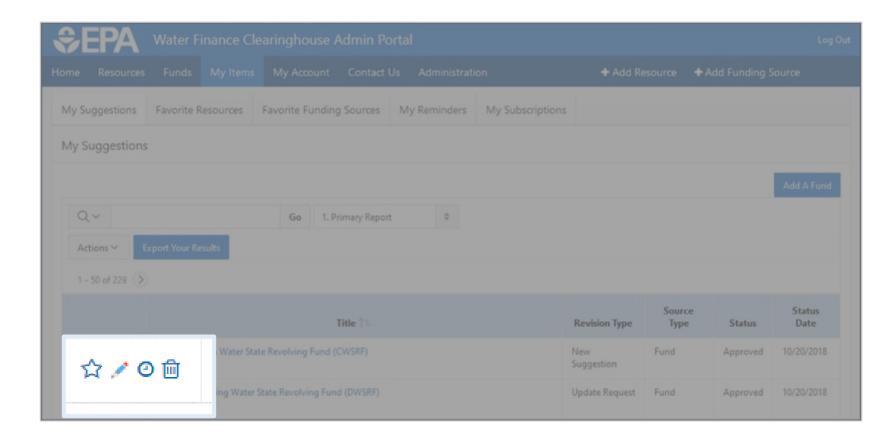
#### Add a Fund

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



#### Manage Suggestions

Suggestions can be managed and edited.



#### Manage a Suggestion



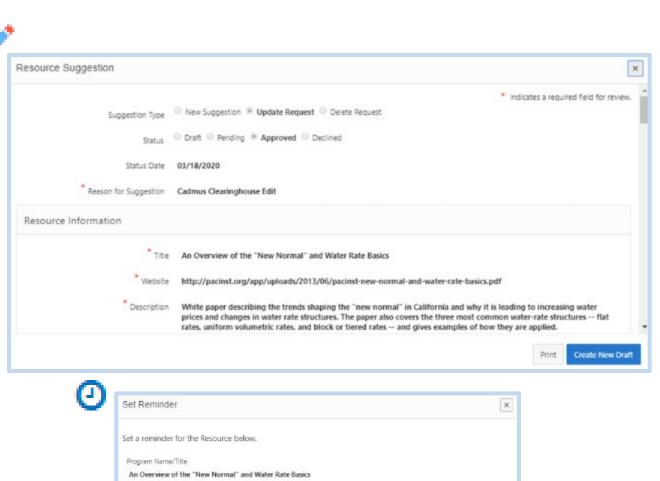
**Favorite** 

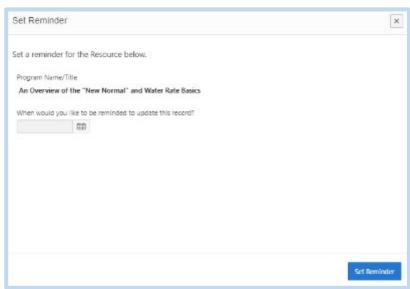


Edit









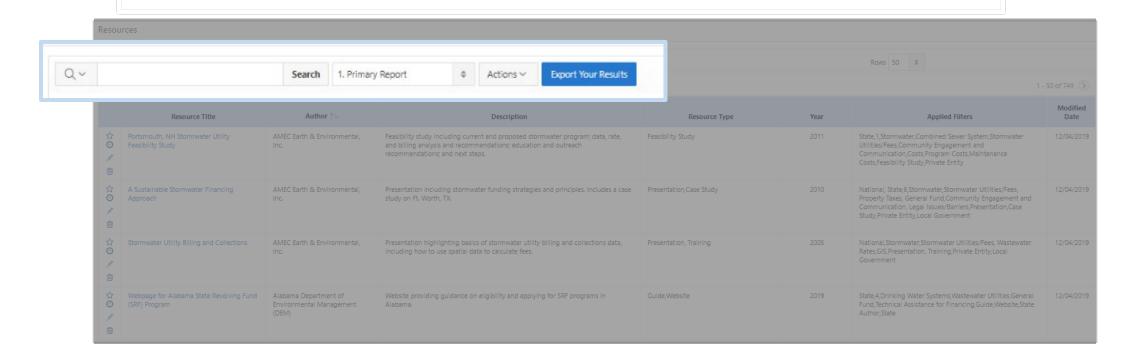


Contributor Portal Exports

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.

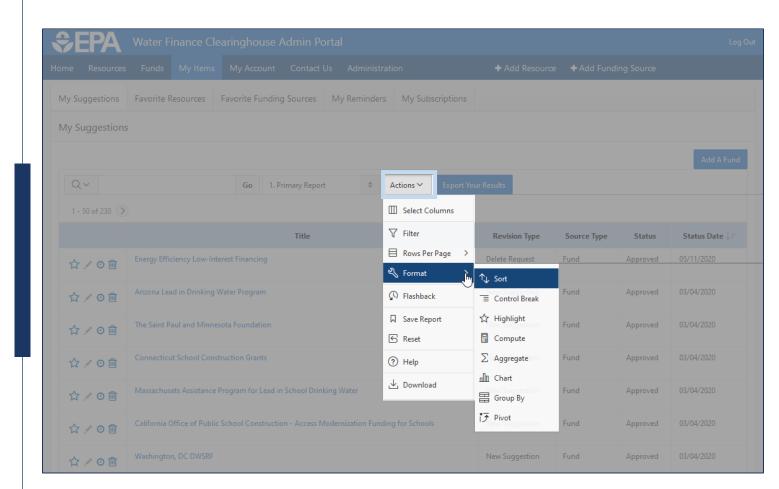


#### **Altering Reports**

Reports and lists can be modified with the "Actions" menu.

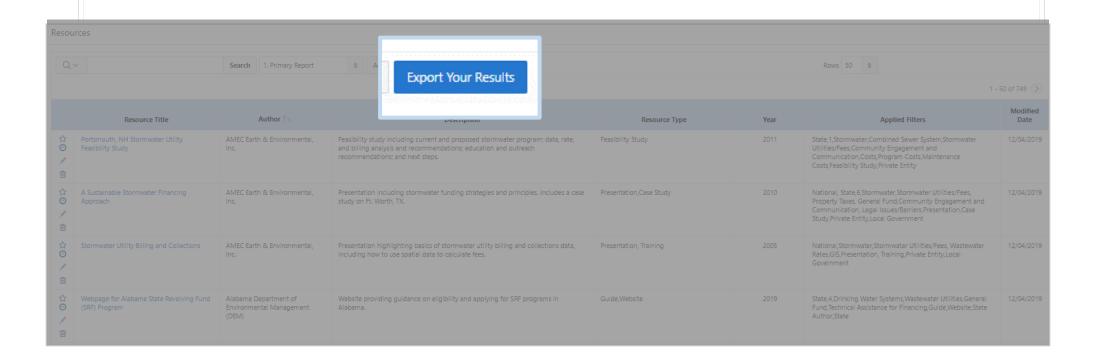
#### **Important Actions:**

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



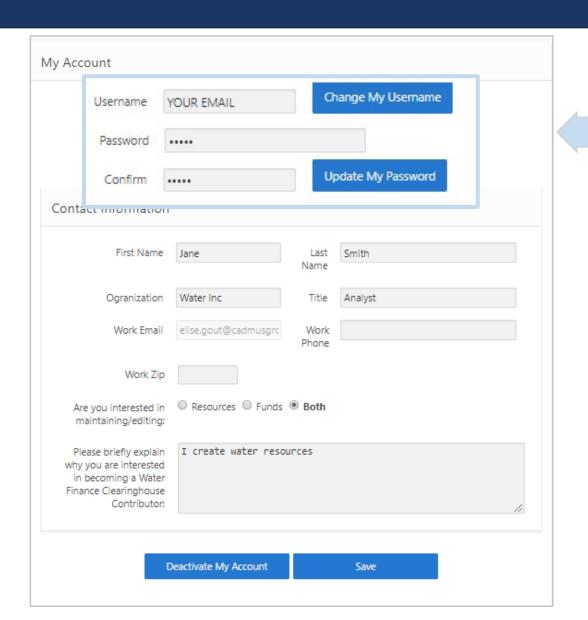
#### Reports

#### Data can be exported and downloaded as a CSV file.



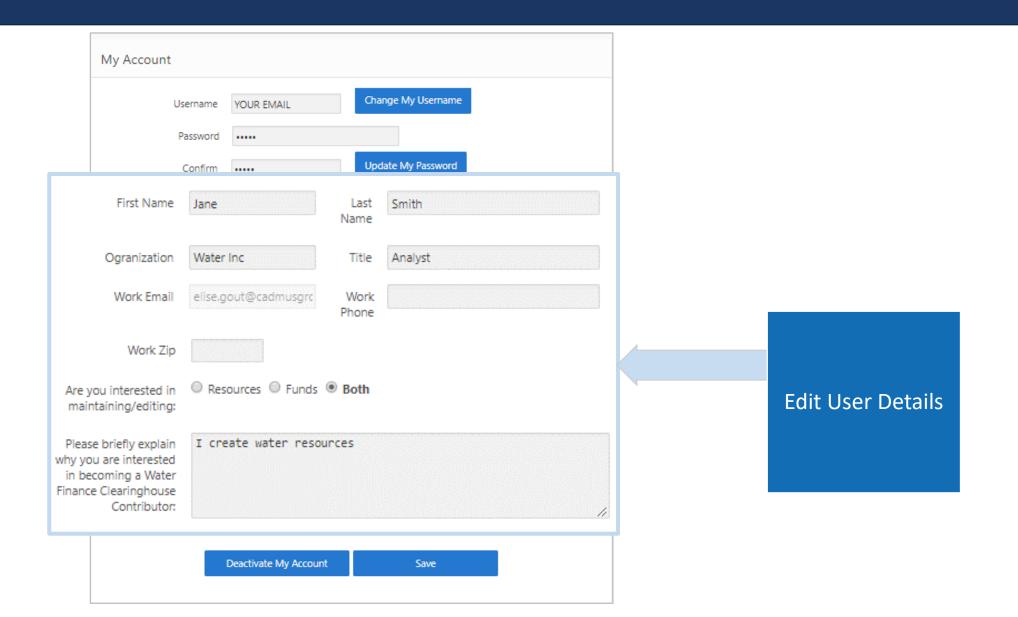


#### My Account

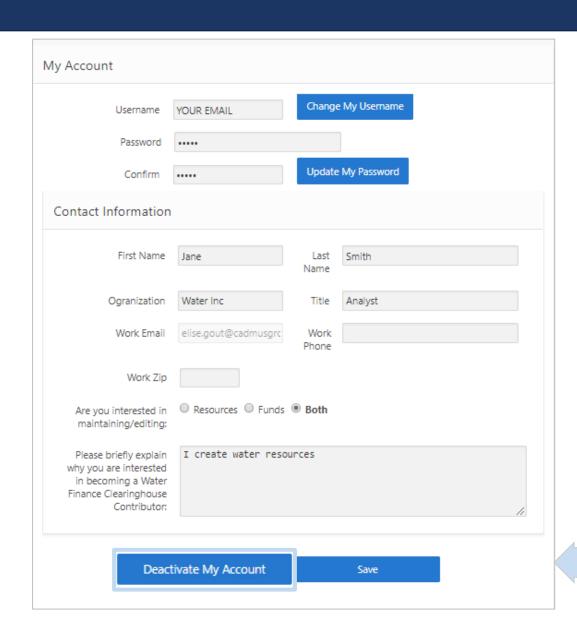


Manage username email and password

#### My Account



#### My Account



Deactivate Account

#### Contact Us

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

