Continuum of Care (CoC) Applicant Profile

e-snaps Instructional Guide

Version 1

CoC Applicant Profile

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CoC Applicant Profile

Introduction

Welcome to the CoC Applicant Profile instructional guide. This resource covers important information about accessing and completing the Collaborative Applicant Profile.

The organization designated by the Continuum of Care (CoC) to submit the CoC Consolidated Application, which includes the CoC Application, CoC Priority Listings, and project applications, is the Collaborative Applicant. A Collaborative Applicant can also request Unified Funding Agency (UFA) designation as part of the CoC Registration process.

Throughout the year, the Collaborative Applicant Profile can be updated by logging in to *e-snaps* and selecting "Applicants" in the left menu bar.

In addition, for the CoC Program Registration process, HUD requires Collaborative Applicants to review the CoC Applicant Profile in *e-snaps*, which entails logging in, putting the CoC Applicant Profile in edit-mode, updating and saving information, and selecting the "Complete" button on the Submission screen. This instructional guide provides the instructions for these steps.

Objectives

By the end of this instructional guide, you will be able to do the following:

- Access *e-snaps*
- Complete the CoC Applicant Profile

Overview of this Instructional Guide

The instructional steps in this guide follow the progression of screens in *e-snaps*:

- **Accessing *e-snaps*.** **All** *e-snaps* users need usernames and passwords in order to log in to the online *e-snaps* system. In order to see an organization's CoC Applicant Profile, CoC Registration, and the CoC Consolidated Application (consisting of the CoC Application, CoC Priority Listing, and the project applications after they are submitted to the CoC), the *e-snaps* user needs to be associated as a "registrant" with the organization's *e-snaps* account. This section identifies the steps to create user profiles and add/delete registrants.

- **CoC Applicant Profile.** The Collaborative Applicant must update the CoC Applicant Profile during the year as needed (e.g., when contact information changes) and select the "Complete" button. In addition, the Collaborative Applicant is required to review and complete the CoC Applicant Profile during the CoC Registration process. This section provides instructions on how to do so.

CoC Applicant Profile

Accessing *e-snaps*

The CoC Applicant Profile, CoC Registration, and the CoC Consolidated Application with attached project applications are submitted electronically in *e-snaps* during the CoC Program Competition process.

NOTE:	*Each e-snaps user must have his or her own log-in credentials. Preferably, each organization will have two people with access to e-snaps—the Primary Contact and one or more additional staff.*

CoC Applicant Profile

Existing Users

Step	Description
1.	Direct your Internet browser to www.hud.gov/esnaps.
2.	On the left menu bar, enter your username and password, then select the login button. You will then enter the *e-snaps* system and arrive at the "Welcome" screen.
3.	If you forgot your password, select "Forgot your password?" under the "Login" button.

New e-snaps Users

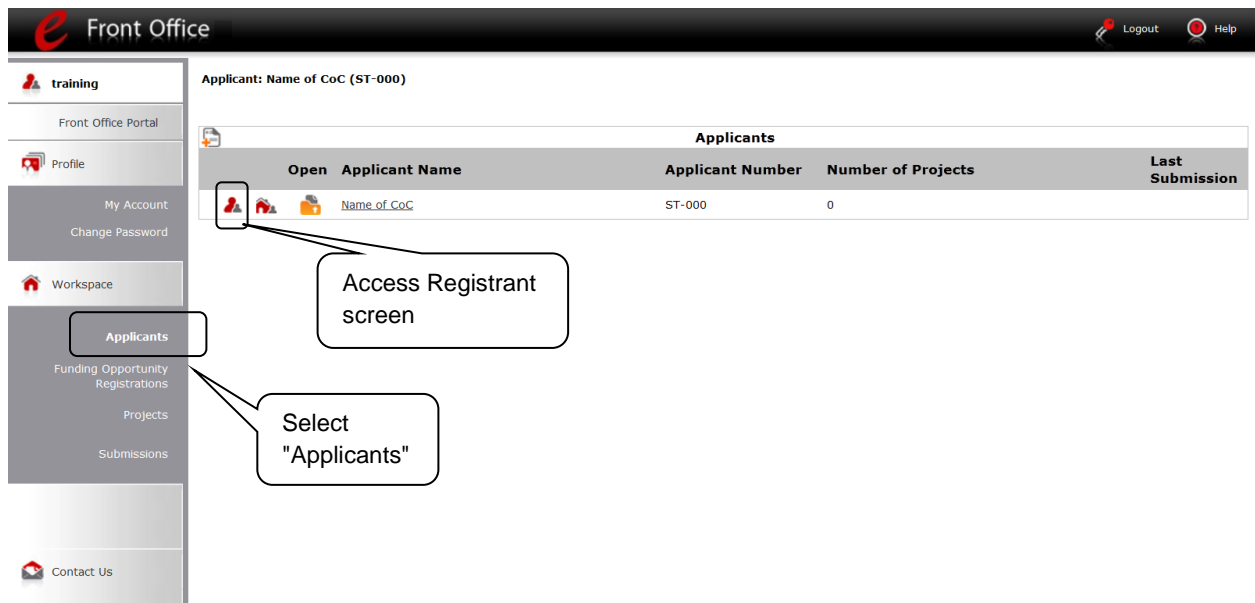| Step	Description
1.	Create an *e-snaps* username and password by selecting the "Create Profile" link.
2.	Log-in as instructed under Existing Users above.

> *For a refresher on how to navigate through the e-snaps system, the "Introduction to e-snaps Features and Functions" resource is available on the CoC Program Competition Resources webpage on the HUD Exchange at: https://www.hudexchange.info/e-snaps/guides/coc-program-competition-resources/*

CoC Applicant Profile

Adding and Deleting Registrants

Having a user profile enables a person to access *e-snaps*; however, only people who have been associated with the organization as a registrant (also referred to as a registered user) have the ability to enter information in the CoC Applicant Profile, CoC Registration, and the CoC Consolidated Application associated with the organization.

Anyone who currently has access to an organization's *e-snaps* account (i.e., who can see the organization's CoC Applicant Profile, past Registrations and CoC Consolidated Applications) can add or remove other registrants by following the instructions provided below.

Step	Description
1.	Select "Applicants" on the left menu bar.
2.	On the "Applicants" screen, click the "Registrant" icon. This icon looks like a person and is located to the left of the Applicant Name.

NOTE	*Before anyone can be added as a registrant in e-snaps, the individual must have an e-snaps user profile with a username and password. The username and email address that was used to create the e-snaps user profile will be used when adding the person as a registrant.*

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Add a Registrant

Step	Description
1.	Select the "Add Registrant" icon. ⚭ This icon is at the top left of the list.

Step	Description
1.	Enter the user name and email address of the registrant.

- There is a "Group" field. This item is NOT being used this year. You do not need to do anything.

2.	Select the "Add Registrant" button.
3.	Select the "Back to List" button to return to the "Registrants" screen, where you will see the person added to the list.
4.	On the "Registrants" screen, select the "Back to List" button to return to the "Applicants" screen.

For information on how to add and delete users, refer to the Adding and Deleting Users resource on the CoC Program Competition Resources webpage on the HUD Exchange at: https://www.hudexchange.info/resource/2903/adding-deleting-registrants-in-esnaps.

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Delete a Registrant

Deleting the user will remove, or dissociate, the user from the Applicant Profile. This person will still be able to access *e-snaps*, but will no longer be able to access the organization's CoC Applicant Profile, CoC Registration, or CoC Consolidated Application.

Step	Description
1.	Select the "Delete" icon ⊗ next to the person's name.
2.	Select the "Back to List" button to return to the "Applicants" screen.

Edit Registrant Information

To edit a registrant's information, delete the person first and then add the person again.

Step	Description
1.	Select the "Delete" icon ⊗ next to the person's name.
2.	Follow the instructions identified previously for adding the person again with the correct information.

CoC Applicant Profile

Collaborative Applicants must ensure the CoC Applicant Profile is kept up-to-date. For the CoC Applicant Profile to be complete, the Collaborative Applicant must ensure the data entered in the CoC Applicant Profile is accurate and select the "Complete" button on the Submission Summary screen of the Applicant Profile.

This section provides instructions on gaining access to the Applicant Profile and completing the forms.

NOTE:	*If the organization designated as the Collaborative Applicant is also a direct recipient of funds, (e.g., CoC planning funds) the organization MUST have a second Applicant Profile as the Project Applicant.*
	There is a separate resource for completing the Project Applicant Profile as a Project Applicant. It is posted on the CoC Program Competition Resources webpage at: https://www.hudexchange.info/resource/2958/instructions-for-updating-the-project-applicant-profile/.

CoC Applicant Profile

Accessing and Completing the Applicant Profile

Collaborative Applicant *e-snaps* users will access the CoC Applicant Profile on the "Applicants" screen.

Step	Description
1.	After logging in, select the CoC Applicant name from the "Applicant" dropdown at the top of the screen.
2.	Select "Applicants" on the left menu bar.
3.	On the "Applicants" screen, locate the "Applicant Name" column. • Confirm the Applicant for which you should complete the Applicant Profile by reviewing the "Applicant Number" column. It should have a CoC number and not a number for a Project Applicant. The format of the CoC number is XX-###, where the XX is a two-letter state abbreviation and the ### is a three-digit number
4.	Select the "Folder" icon 🗂 next to the CoC name.

CoC Applicant Profile

Understanding "edit-mode"

> ! *The CoC Applicant Profile can be updated at any time. The e.Form must be placed in "edit-mode" in order to update the Applicant Profile. The CoC Applicant Profile must be marked as "Complete" in order for the updates to register.*
>
> *One of the requirements for the CoC Registration is the completion of the CoC Applicant Profile. In order to meet this requirement, the "Complete" button must be selected within the timeframe of the registration period.*
>
> *Therefore, when you login the first time after the CoC Registration period opens, even if there is a statement "This e.Form has been marked as complete," you must put the forms in edit-mode and select the "Complete" button again.*

When users access the CoC Applicant Profile, the CoC Applicant Profile may be marked as complete, in which case an "Edit" button will appear on the "Submission Summary" screen, as shown in the screenshot below.
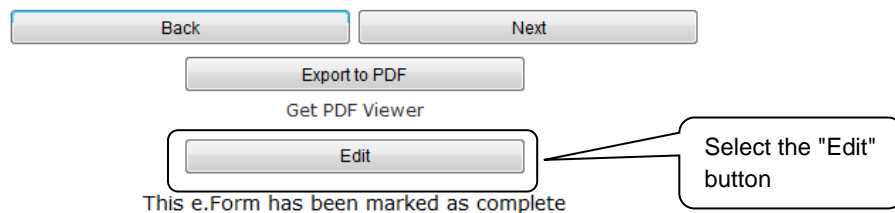
You need to put your Applicant Profile in edit-mode.

Step	Description
1.	Select "Submission Summary" on the left menu bar. • At the bottom of the "Submission Summary" screen, there is an "Edit" button with text below the button stating, "This e.Form has been marked as complete."
2.	Select the "Edit" button. • The "Edit" button and text will disappear and be replaced with a "Complete" button.
3.	Continue with the instructions in the next section of this instructional guide to review the Applicant Profile and select the "Complete" button.

For some *e-snaps* users, the CoC Applicant Profile may already be in "edit-mode," in which case a "Complete" button will appear on the "Submission Summary" screen. You can update the information. Continue with the instructions in the next section of the instructional guide to review the CoC Applicant Profile and select the "Complete" button.

Exiting the Applicant Profile

When working in the Applicant Profile, *e-snaps* users can return to the main screen by selecting "Back to Applicants List" at the bottom of the left menu bar. This screen is where Applicants, Funding Opportunity Registration, Projects, and Submissions are located on the left menu bar.
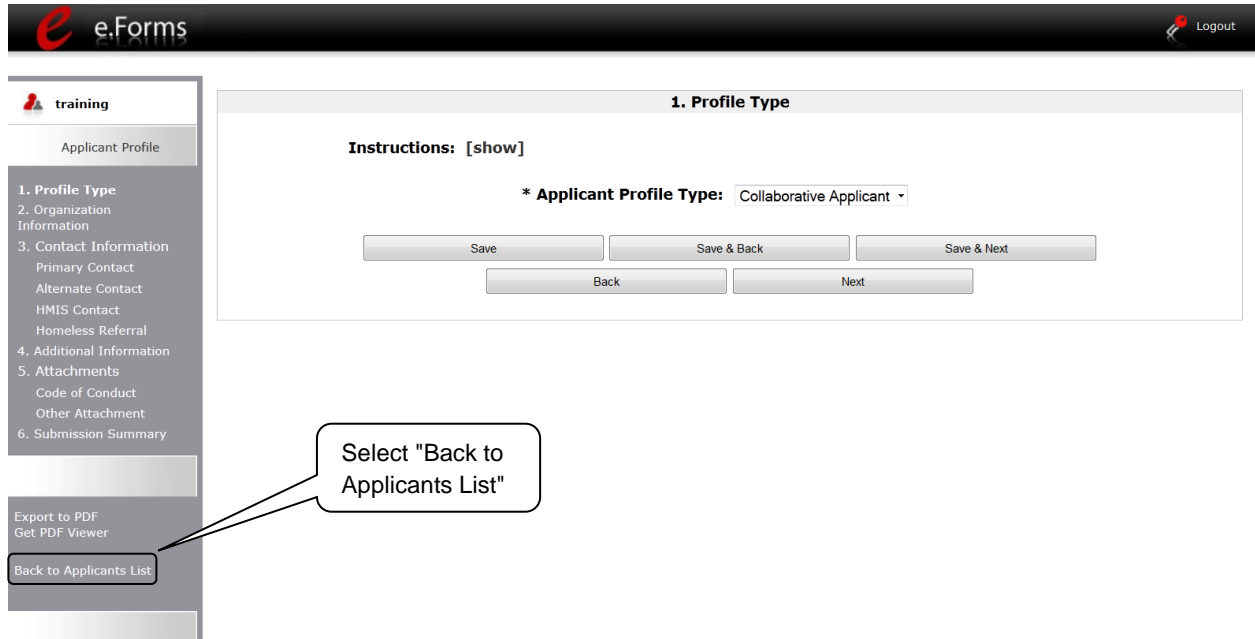
CoC Applicant Profile

1. Profile Type

The "Profile Type" screen indicates whether the Applicant Profile is for a Collaborative or Project Applicant. In this guide, you are creating a profile for the Collaborative Applicant.

Step	Description
1.	Select "Collaborative Applicant" from the "Applicant Profile Type" dropdown menu.
2.	Select "Save & Next".

CoC Applicant Profile

2. Organization Information

The "Organization Information" screen is where you enter information about your organization.

Step	Description
1.	Complete the required fields.
2.	Complete the optional fields, as appropriate.
3.	Select "Save & Next".

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The **required fields** include the following:

- Legal Name of Organization

- Organization Type

  o Select from the dropdown menu.

  o Note: If a Collaborative Applicant is a private or public nonprofit, it is required to provide documentation of its status. This documentation will be uploaded in the "Attachments" sections later in the CoC Applicant Profile.

- Employer or Tax Identification Number

- Address – Street 1 (and 2, if necessary), City, State, Zip/Postal Code, and County

- Notification regarding whether the mailing address and organization address are the same.

  o Select "Yes" or "No" from the dropdown menu.

  o If "No," additional fields will appear into which the mailing address must be inserted.

The **optional fields** include the following:

- Department Name

- Division Name

- Organization Type – If Other field

- Organization DUNS Number (and DUNS Extension, if applicable)

  o Collaborative Applicants must have a DUNS Number. The agency should include it.

- Address – Street 2, and County

3. Contact Information

There are four contact information screens in the Applicant Profile:

- Primary Contact

- Alternate Contact

- HMIS Contact

- Homeless Referral Contact

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Primary Contact Information

The Primary Contact is the contact for the Collaborative Applicant. This person has the primary responsibility for ensuring that the CoC Applicant Profile, CoC Registration, and CoC Consolidated Application are submitted to HUD. **The Department will communicate with this person regarding the CoC Registration and the CoC Consolidated Application; therefore, this information must be current to prevent delays in communication.**

Step	Description
1.	Complete the required fields, which are denoted with asterisks.
2.	Complete the optional fields, as appropriate.
3.	Select "Save & Next"

The **required fields** include the following:

- Prefix

- First Name and Last Name

- Title

- Phone Number and Fax Number

- E-mail Address and Confirm E-mail Address

The **optional fields** include the following:

- Middle Name

- Suffix

- Organizational Affiliation

    o Note: This field should be completed if the Primary Contact is affiliated with an organization other than the applicant organization.

- Alternate Phone Number

- Extensions for Phone Numbers

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Alternate Contact Information

The Alternate Contact is the backup person to the Primary Contact. This person is responsible for ensuring that the CoC Applicant Profile, the CoC Registration, and the CoC Consolidated Application are submitted to HUD in the event that the Primary Contact is unable to perform the function. **In the event the Department is unable to establish communication with the Primary Contact, the Alternate Contact person listed will receive the communication; therefore, this information must be current to prevent delays in communication.**

The required and optional fields for the Alternate Contact Information are the same as those for the Primary Contact Information.

Step	Description
1.	Complete the required fields, which are denoted with asterisks.
2.	Complete the optional fields, as appropriate.
3.	Select "Save & Next".

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HMIS Contact Information

On the "HMIS Contact Information" screen, enter the CoC's designated HMIS Lead Organization and person who is responsible for the HMIS that covers the CoC's geographic area. **The organization listed on this form MUST be the same organization that submits the HMIS-dedicated Project Application.**

The required and optional fields on the HMIS Contact Information screen are the same as those on the Primary Contact Information screen, with these additional required fields:

- Notation regarding whether the Collaborative Applicant also serves as the HMIS Lead
- HMIS Lead Organization

Step	Description
1.	Complete the required fields, which are denoted with asterisks.
2.	Complete the optional fields, as appropriate.
3.	Select "Save & Next".

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Homeless Referral Contact Information

On the "Homeless Referral Contact Information" screen, enter the person in the CoC who is responsible for homeless referrals. This is the person that will receive inquiries from homeless persons and/or interested parties seeking referrals to projects in the CoC.

The required and optional fields for the Homeless Referral Contact Information are the same as those for the Primary Contact Information.

Step	Description
1.	Complete the required fields, which are denoted with asterisks.
2.	Complete the optional fields, as appropriate.
3.	Select "Save & Next".

4. Additional Information

Complete the fields on the "Additional Information" screen.

Step	Description
1.	Indicate the Collaborative Applicant's congressional district(s) by selecting the congressional district in the "Available Items" box on the left and moving it to the "Selected Items" box on the right. • Use the arrow buttons to move the selected item(s).
2.	Select "Yes" or "No" from the dropdown menu to indicate whether the applicant is a faith-based organization.
3.	Select "Yes," "No," or "Not Applicable," from the dropdown menu to indicate whether the applicant has ever received a federal grant.
4.	Select "Yes" or "No" from the dropdown menu to indicate whether the applicant's Code of Conduct is already on file with HUD. • See the NOTE below.
5.	Select "Save & Next."
NOTE: **Code of Conduct**	*An applicant whose name is listed at HUD website http://www.hud.gov/offices/adm/grants/codeofconduct/cconduct.cfm is not required to submit another copy, unless the information has been revised. If you are uncertain about whether you need to upload the Code of Conduct document, HUD encourages you to upload it anyway.*

5. Attachments

There are three attachment screens in the Applicant Profile:

- Applicant Code of Conduct
- Nonprofit Documentation *(This screen appears only for those who selected a Nonprofit Organization Type on the "Organization Information" screen)*
- Other Attachment

NOTE:	*Attachments that were uploaded to the Applicant Profile prior to the opening of CoC Registration may not be available. All required attachments must be uploaded by the Collaborative Applicant.*

The instructions for uploading and deleting an attachment are the same for all screens. The steps are provided for the Applicant Code of Conduct on the next page and can be applied to the other attachments.

A screenshot has been provided for each attachment screen and the accompanying attachment details screen.

NOTE:	***Document naming convention***
	Use the following naming convention: "CoC Number" and "Form Name"
	• *For example, if you are saving the Code of Contact for CoC AA-500, enter the following as both the Document Description and File Name:* *AA-500 Code of Conduct*

Applicant Code of Conduct

HUD must have a copy of the organization's Code of Conduct. The *e-snaps* system, however, does not require that the document be attached in the CoC Applicant Profile in order for the applicant to complete the CoC Applicant Profile.

- An applicant that has a name listed at HUD's website http://www.hud.gov/offices/adm/grants/codeofconduct/cconduct.cfm is not required to submit another copy in *e-snaps*, unless the information has been revised.

If you are uncertain about whether you need to upload the Code of Conduct document, you are encouraged to upload it anyway.

- The file format for the Code of Conduct must be one of the following: docx, ZIP*, xlsm, rtf, txt, doc, zipx, pdf, wpd, zip, xls, jpg, xlsx.

- The maximum file size for the Code of Conduct is 10 MB.

- Attach the first five (5) pages of the Code of Conduct.

Step	Description
1.	Select the document name under "Document Type."
2.	The "Attachment Details" screen appears.

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Step	Description
1.	Enter the name of the document in the "Document Description" field.
2.	Select "Browse" to the right of the "File Name" field to upload the file from your computer.
3.	Select "Save & Back to List" to return to the "Attachment" screen.
4.	On the "Attachment" screen, select "Next."

NOTE:	*Document naming convention*
	Use the following naming convention: "CoC Number" and "Form Name"
	• *For example, if you are saving the Code of Contact for CoC AA-500, enter the following as both the Document Description and File Name:* *AA-500 Code of Conduct*

NOTE:	*To delete an uploaded attachment.*
	• *Click the "Delete" icon ⊗ that appears to the left of the document name.*
	• *Confirm the deletion in the pop-up window.*

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Nonprofit Documentation

The Nonprofit Documentation is a required form for nonprofit organizations. This screen will appear only for those who selected Nonprofit as the Organization Type on the Organization Information screen. The Nonprofit Documentation must be the IRS letter or ruling attesting to the organizations 501 (c) (3) status. The file format for Nonprofit Documentation must be one of the following: txt, doc, zipx, docx, ZIP*, pdf, wpd, zip, xls, jpg, xlsx, rft.

- The maximum file size for Nonprofit Documentation is 10 MB.

	NOTE:	Private nonprofit organization means an organization:
		(1) For which no part of the net earnings of which inure to the benefit of any member, founder, contributor or individual;
	Definition of Nonprofit	(2) That has a voluntary board;
		(3) That has a functioning accounting system that is operated in accordance with generally accepted accounting principles, or has designated a fiscal agent that will maintain a functioning accounting system for the organization in accordance with generally accepted accounting principles; and
		(4) That practices nondiscrimination in the provision of assistance.
		A private nonprofit organization does not include governmental organizations, such as public housing agencies.

The Collaborative Application must attach their IRS letter or ruling attesting to the organization's 501(c)(3) status.

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Step	Description
1.	Enter the name of the document in the "Document Description" field.
2.	Select "Browse" to the right of the "File Name" field to upload the file from your computer.
3.	Select "Save & Back to List" to return to the "Attachment" screen.
4.	On the "Attachment" screen, select "Next."

Other Attachment

At this time, there are no other required or optional attachments. Select next to continue to the submission summary screen.

6. Submission Summary

After the required information has been entered and the required attachments have been uploaded, the Collaborative Applicant must select the "Complete" button on the "Submission Summary" screen.

The "Submission Summary" screen shows the CoC Applicant Profile forms.

In the "Last Updated" column, the system will identify the following:

- A date if the screen is complete

- "No Input Required" if there is no input required

- "Please Complete" if more information is needed

The Collaborative Applicant *e-snaps* user can go back to any screen by selecting the screen name in the left menu bar. Remember to select "Save" after any changes.

NOTE:	*The "No Input Required" status on the Submission Summary indicates that additional information for that screen is not required for the applicant to proceed to the next step in the e-snaps system. HUD, however, may require the item prior to the awarding of program funds.*

The "Complete" button is located at the bottom of the screen under the navigation buttons. The "Complete" button will be active if all parts of the Applicant Profile are complete (and have a date) or state "No Input Required."

The following image shows the Applicant Profile "Submission Summary" screen with items that still require completion. Note that the "Complete" button is gray-shaded and you cannot select it.

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Completing the Applicant Profile

The following image shows the Applicant Profile "Submission Summary" screen with all items completed. Note that the "Complete" button is active and can be selected.

Step	Description
1.	Select the "Complete" button.
2.	The "Complete" button is replaced by an "Edit" button and text stating, "This e.Form has been marked as complete."

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The following image shows the completed Applicant Profile "Submission Summary" screen. Note that the "Complete" button no longer appears and the "Edit" button now appears. The form is marked "This e.Form has been marked as complete."

Exporting to PDF

Collaborative Applicants can obtain a hard copy of the CoC Applicant Profile using the "Export to PDF" button located at the bottom of the Submission Summary screen under the navigation buttons.

Step	Description
1.	Select the "Export to PDF" button.

Configure PDF Export

Step	Description
1.	On the "Configure PDF Export" screen, select the screen you would like included.
2.	Select "Export to PDF."

Remember, the "Applicant" field with the dropdown menu located at the top of the screen identifies the Applicant Profile in which you are working.

Please be sure you are working on the CoC Applicant Profile.

Next Steps

When updating the Collaborative Applicant Profile during the year, after the Collaborative Applicant has selected the "Complete" button on the "Submission Summary" screen, the Applicant Profile has been successfully updated.

When the CoC Registration is open, after selecting the "Complete" button on the Collaborative Applicant Profile, please return to the CoC Competition Resources webpage on the HUD Exchange at: https://www.hudexchange.info/e-snaps/guides/coc-program-competition-resources/. Additional instructional guides and resources are available to assist Collaborative Applicants successfully apply for funding.