Common Issues Encountered in *e-snaps*

This resource helps *e-snaps* users resolve commonly encountered issues, starting from when an *e-snaps* user logs in and continuing through the process until the application is submitted.

See the list of commonly encountered issues below. Each one is hyperlinked to enable you to navigate to it quickly in the document.

Accessing an Organization's e-snaps Account

- <u>I've logged into *e-snaps* for the first time and</u> can't find our organization's Project Applicant Profile.
- <u>I need to work on applications for multiple organizations</u>. Do I need separate login credentials?

Navigating to the Project Application

- <u>I can access my organization's *e-snaps* account, but</u> <u>I can't find the application I need to complete.</u>
- I created a project on the Project screen, but it was a mistake and I need to delete it.
- I created a Project, but I can't find it on the Submissions screen.
- When I try to access my project application on the Submissions screen, an error message appears stating "The application is connected to an applicant profile with an invalid applicant profile type...".

Filling out the Project Application

- I can only see Part 1 in my application.
- The pre-populated information in my project application is incorrect. How do I edit it?
- There is an error associated with HUD Form 2880, but I can't figure out how to correct it.
- On HUD Form 2880, we initially indicated our total funding request was less than \$200,000 but now we realize it's more than the threshold.

Submitting the Project Application

- I'm on the Submission Summary screen, and I can't submit.
- I'm on the Submission Summary screen, and there is a Note that states "The Applicant Profile must be completed before this form can be submitted."
- I submitted my application, but I don't know how to return to the main screen in *e-snaps*.
- I submitted my application and realized I made a mistake, but I can't edit it.

If you are unable to fix your issue with these tips, support is always available through the <u>HUD Exchange Ask-A-</u> Question (AAQ) help desk.

To submit a question to the *e-snaps* AAQ portal, select *"e-snaps"* from the "My question is related to" drop down list on Step 2 of the question submission process.

Accessing an Organization's e-snaps Account

I've logged into e-snaps for the first time and can't find our organization's Project Applicant Profile.

Each person who will access *e-snaps* must have a user profile and set up a username and password. If this is your first time accessing *e-snaps*, go to the *e-snaps* log in page and select "Create Profile" from the left menu, and then complete the fields on the screen, which include creating your own username and password. Once completed, this enables your access to *e-snaps*. However, this does not allow access to enter or change information related to your organization's information or to complete applications. Only an individual who is *associated* with the organization as a Registrant (also referred to as a registered user) has the ability to enter information in the Applicant Profile and applications associated with the organization. To gain access allowing you to enter or change information, one of the following must also be completed:

- If someone in the organization currently has access to the organization's *e-snaps* account, that person can give you access. Review the following resource for information: <u>Give Staff Access to</u> <u>Your Organization's *e-snaps* Account</u>
- If no one can access the organization's *e-snaps* account, you must request access by submitting a letter to the *e-snaps* AAQ desk. Review the following resource for information: <u>Request Access</u> to Your Organization's *e-snaps* Account

I need to work on applications for multiple organizations. Do I need separate login credentials?

No. You need only one login credential—only one username and password—regardless of your role, how many applications there are, or the number of organizations with which you are working.

When you log into the *e-snaps* system, you will see an "Applicant" field at the top of the screen. This field identifies the organization's account in which you are working. If you are associated with only one organization's *e-snaps* account, the field is static.

If you have *e-snaps* access to more than one organization's account, you will see a dropdown menu listing the organizations with which you are associated. Examples of access to multiple organizations include a person who represents both the Collaborative Applicant and project applicant(s) (i.e., UFA-designated Collaborative Applicant,

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sole recipient applicant), or a person within the Collaborative Applicant who has access to the CoC Application and CoC planning project application, or a person who is under contract with the CoC to facilitate the local competition process. Regardless, if your role includes access to both the CoC Application and project applications, you need only one *e-snaps* username and password to access both.

This Applicant field and dropdown feature appears when working on the Applicants, Funding Opportunity, Projects, and Submissions screens. Only the items (e.g., Projects, Applications) pertaining to the Applicant listed in the field appear on the screen.

Navigating to the Project Application

I can access my organization's e-snaps account, but I can't find the application I need to complete.

There are four steps you need to complete to access your project.

- Complete the Project Applicant Profile.
- Register for the correct Funding Opportunity.
- Create a Project.
- Access the application by selecting Submissions on the left menu bar.

After going through the first three steps, users often assume they can access the application on the Projects screen, but you need to access the project application from the "Submissions" screen. Submissions" refers to both submitted project applications and project applications that are in progress, regardless of whether they will ultimately be submitted.

There are three resources in the <u>e-snaps 201 Toolkit</u> to guide you through the process of accessing the CoC Program project application in *e-snaps--*a video, its transcript, and an instructional document with screenshots.

I created a project on the Projects screen, but it was a mistake and I need to delete it.

You cannot delete a project in *e-snaps*; however, you can follow the instructions below to rename a project:

- Log in to *e-snaps*.
- Select "Projects" in the left menu bar.
- Find the project you want to rename.
- Select the icon next to it (it resembles a magnifying glass).
- On the "Project Details" screen that appears, in the "Project Name" field, rename the project.
- Select the "Save" or "Save and Back" button.

Ideally, the renewal project name should match the name on the current grant agreement or grant agreement, as amended. For example, if the project name for the current grant agreement is ABC Housing, HUD expects the renewal Project name to be ABC Housing, not ABCH or Housing ABC.

It is permissible to add the year if you prefer such as ABC Housing 2020 or ABC Housing FY20, etc.

I created a Project, but I can't find it on the Submissions screen.

There are a couple ways to find your project on the Submissions screen.

Option 1: "Project Name" dropdown menu

This method can be particularly helpful if your organization has many projects, often with similar names, because you can see the project names together in a list, rather than scrolling through screens.

- Review the "Project Name" dropdown menu in the "Submissions Filters."
- Select the project. Select the "filter" button.
- The project will appear on the screen.

Option 2: "Funding Opportunity Name / Step Name" column

Review the list of projects on the screen and use the "Funding Opportunity Name / Step Name" column to identify the project with the correct fiscal year and application type.

Option 3: Select additional filters

If you still do not see the project on the Submission screen, try using other filters.

- Select the "Clear Filters" button to the top left side of the filters on the screen. Confirm the filters are clear. The default should be as follows (but do not worry if these are slightly different; you can change them):
 - Applicant Project Name: All projects
 - Date Submitted: blank calendar date [There are two fields. The first one is just a dropdown that includes options like "Before," "On," etc. which is a reference to "Before the date in the calendar field, "On the date in the calendar field," etc. Since you are starting out with a blank calendar field, the first one isn't relevant.]
 - Project Status: Open Projects
 - Submission Value: Latest Version
 - Associate Type: All
- If you still cannot locate the project name (some people have very long lists), adjust the other filters. At this point, it may be helpful to add a date in the Date Submitted field.

When I try to access my project application on the Submissions screen, an error message appears stating "The application is connected to an applicant profile with an invalid applicant profile type. The application must be connected to an applicant profile with a "Project Applicant" profile type. To correct this error and submit the application, either (a) change the applicant profile type in the applicant profile to "Project Applicant", or (b) complete a separate applicant profile with the applicant profile type "Project Applicant".

In the Applicant Profile, screen 1. Profile Type, you have the option to choose "Project Applicant" or "Collaborative Applicant." When you want to complete a project application, the Applicant Profile must identify the organization as a "Project Applicant."

• Navigate to the Applicants screen.

- Select the folder next to the organization's Applicant name.
- On screen 1. Profile Type, make sure "Project Applicant" is selected.
- If it is not, update the Applicant Profile by following the instructions in this resource: <u>Update</u> <u>the Applicant Profile in Edit-Mode</u>

Some organizations function both as the Collaborative Applicant for the CoC and as a Project Applicant during the CoC Program Competition. These organizations need two separate Applicant Profiles to differentiate between the two roles—a CoC Applicant Profile and a Project Applicant Profile.

If your organization has both roles, and you submitted the CoC Registration and CoC Consolidated Application, as well as one or more project applications, you should see two (2) Applicants in the Applicant dropdown menu at the top left side of the screen. Please ensure you are working under the correct applicant profile by selecting the name of your organization from the "Applicant" dropdown menu at the top of the screen.

You can determine which Applicant submitted the CoC Registration and CoC Application last year and which one submitted the project application by following these instructions:

- Take note of the Applicant in the Applicant field.
- Select "Submissions" on the left menu bar.
- Select "All Projects" from the "Project Status" dropdown.
- Identify whether the projects are for the Collaborative Applicant (e.g., CoC Registration, CoC Consolidated Application) or the Project Applicant (project applications, APRs).

If you cannot find the Applicant Profile you need, or if the CoC and Project Applicant projects are mixed up on the Submissions screen, please submit a ticket to the <u>HUD Exchange Ask-A-Question (AAQ) help</u> <u>desk</u>.

Filling out the Project Application

I'm filling out the Project Application, but I can only see Part 1. Where is everything else?

You will need to complete all required fields and check the appropriate box, when applicable, located toward the bottom of certain screens in Part 1: SF-424. This part of the project application is an embedded version of the required HUD Forms (e.g., SF-424 HUD-2880) and must be fully completed before you will see the actual project application.

If you think all the screens in Part 1: SF-424 are completed and you still cannot see the application screens, check the Submission Summary screen to see if there is an indication that something is incomplete, such as:

- A "please complete" notation in the list of screens
- A red "X" next to the screen name

• A note describing an error (notes are located between the list of screens and the navigational buttons)

Navigate to the screen identified as needing additional information and review the information to ensure completeness, paying close attention to all items marked with an asterisk, including the checkbox, if applicable. Once you have completed the missing information, select "Save." Once Part 1 is fully completed, Part 2 will appear.

The pre-populated information in my project application is incorrect. How do I edit it?

Some data may pre-populate from the Project Applicant Profile (i.e., *e-snaps* will bring it forward). If that happens, first review the pre-populated data. If any information is incorrect, you must go back and correct it in the Project Applicant Profile. Here are the steps to fix this issue:

- If you are in the project application and you need to update the Project Applicant Profile:
 - If you entered or updated information on the project application screen, make sure to select "Save" before taking the next step; otherwise, you will need to reenter or update the information again.
 - Select "Back to Submissions List."
 - Select "Applicants" on the left menu bar and select the orange folder next to the Applicant name.
 - Navigate to the Submission Summary page and click the "Edit" button.
 - Make the corrections as needed (e.g., change the information of the Authorized Contact) and select "Save" at the bottom of the screen after you make each revision.
 - Once you have made the necessary correction(s) to your Project Applicant Profile, continue to the "Submission Summary" screen and select "Complete."
 - Select "Back to Applicants" in the left menu bar.
 - Select "Submissions" in the left menu bar to return to the project application.
 - Navigate to the project application screen where you discovered the incorrect information. You should now see the corrected information.
- If the corrected information does not populate the project application, do the following:
 - Log out of *e*-snaps.
 - Log back in and navigate to the screen in the Applicant Profile where information needs to be corrected.
 - Navigate to the "Submission Summary" screen, select the "Edit" button at the bottom of the screen, and navigate to the screen where the information is located.
 - If the information is incorrect, correct it and save it. If the information is correct, then edit something that is incorrect, save it, then change it back to the correct entry, and save it.

- Navigate to the "Submission Summary" and select "Complete.
- Log out of *e-snaps*.
- Log in again.
- Navigate to the project application. You should now see the corrected information.

There is an error associated with HUD Form 2880, but I can't figure out how to correct it.

There is a connection between the HUD Form 2880 screen in the Project Applicant Profile and the one that is included in each project application.

In the Project Applicant Profile, on the HUD Form 2880 screen, you are asked whether the total amount that you're requesting/receiving is more than \$200,000. This question refers to the total funding for all project applications, not just a single project. Therefore, if your organization is submitting several project applications, you will need to add the funding request amounts from each application to determine if the total funding request for your organization totals \$200,000 or more before selecting the answer to this question.

Depending on whether you answer "No" or "Yes," there may be additional questions to answer.

e-snaps pre-populates your responses in the project application.

See the resource How to Complete the HUD Form 2880 in e-snaps for more information.

We initially chose "No" in the Project Applicant Profile on the HUD Form 2880 screen indicating that we are not requesting/receiving more than \$200,000; now that we are filling out our project application budgets, we realize that we are above that threshold and that the total amount that we're requesting this year is more than \$200,000.

This situation can trigger an error message on the Submission Summary screen that the Applicant Profile is not complete.

In the Project Applicant Profile, on the HUD Form 2880 screen, you are asked whether the total amount that you're requesting/receiving (for all project applications, not just a single project) is more than \$200,000.

If you answered "No," you would have moved along in the process and started filling out your project applications.

While you're filling out your application budgets, *e-snaps* is keeping track of the total budgets for each project and adding them together. In other words, if your organization is submitting two or more project applications (which includes renewal, new, CoC planning, and, if applicable, UFA Costs), as you complete each project application, *e-snaps* is adding the funding request for each individual project application behind the scenes.

Example:

You are submitting two project applications—one renewal at \$150,000 and one new at \$60,000.

When you initially completed the HUD-2880 in the Project Applicant Profile, you were only thinking of the renewal project and answered the question based on the renewal amount. You were able to complete and submit the renewal project application with no issues, but now you are attempting to submit the new project application with the \$60,000 funding request. The system will not allow you to submit the new project application until you update the HUD 2880 in the Project Applicant Profile to reflect your organization is requesting \$200,000 or more in federal funds.

In this scenario, once you start a project application and fill out a budget that takes you over the threshold, *e-snaps* will flag an error on your Project Applicant Profile HUD Form 2880 screen because the answer "No" is now incorrect. The total budgets are more than \$200,000 and you need to select "Yes" instead and answer a series of questions. *e-snaps* determines that the Project Applicant Profile is no longer complete.

To update and complete the Project Applicant Profile, the Applicant Profile must be in "edit mode." If you navigate to the Submission Summary screen and there is a "Complete" button, then you are already in edit-mode. If you see the "Edit" button, you will need to click it to place the Project Applicant Profile in edit-mode. Please see this resource for more information: <u>Update the Applicant Profile in Edit-Mode</u>

Once you are in edit-mode, correct the necessary field in the Applicant Profile, and select the "Complete" button, when you go to your project application, the information should have updated from the Applicant Profile.

See the resource How to Complete the HUD Form 2880 in *e-snaps* for more information.

Submitting the Project Application

I'm on the Project Application Submission Summary screen, and I can't submit.

Applicants may encounter issues when trying to submit their project application.

If the "Submit" button is gray (i.e., "grayed-out"), it is not active, and you cannot select it. The system will not allow you to submit your application at this time. The "Submit" button will appear gray if information is missing on any of the required project application forms or in the Applicant Profile.

Review your Submission Summary screen to determine which project application screen(s) need to be completed. Look for the following:

- A "please complete" notation in the list of screens
- A red "X" next to the screen name
- A note describing an error (notes are located between the list of screens and the navigational buttons)

"Please complete"

For any item(s) that has a "Please Complete" notation, either select the link under the "Page" column or select the item on the left menu bar.

- Complete the screen, saving the information on each screen before you navigate to a different screen.
- Return to the Submission Summary screen and confirm the "Last Updated" column identifies a date for that screen.

Red "X"

A red "X" indicates a section on the screen indicated is incomplete. A red "X" will prohibit you from submitting. For each screen that is required, you need a green checkmark. Either select the link under the "Page" column or select the item on the left menu bar to get to that screen to review each question ensuring you have provided a response.

Notes

Look to see if there is a "Notes" section at the bottom of the submission page. Notes are not a standard section on the "Submission Summary" screen, so you will not see this all the time.

- If Notes appear on the screen, they are located under the two-column list and above the navigational buttons.
- The Notes provide information on the errors in the project application. Some Notes include a link to the applicable form and error(s).

Once there are no items with "Please Complete" and no red "X" marks or notes, the "Submit" button, located at the bottom of the screen under the navigation buttons, will be active for you to select and submit your application.

I'm on the Project Application Submission Summary screen, and there is a Note that states "The Applicant Profile must be completed before this form can be submitted."

There are situations when you complete the Applicant Profile, access the project application, fill out all the applications screens, and then, when you try to submit it, you see a message on the Submission Summary screen that the Applicant Profile is not complete.

You need to follow these steps:

- Log out
- Log in
- Select Applicants in the left menu bar
- Click on the folder next to the organization's Applicant name
- On screen 1. Profile Type, make sure it states "Project Applicant"
- Navigate to the Submission Summary screen
- Review the screen to see if there are any red "X's or error notes at the bottom of the screen
- Navigate to the applicable screen, complete the screen, and save

- Go back to the Submission Summary screen you should be able to select "Complete"
- Log out
- Log in
- Go to Submissions in the left menu bar
- Find your project and click on the folder to access it again
- Navigate to the Submission Summary screen
- Select the "Submit" button

I submitted my application, but I don't know how to return to the main screen in e-snaps?

To return to the main screen in *e-snaps*, select the "Back to Applicants" link at the bottom of the left menu bar.

I submitted my application and realized I made a mistake, but I can't edit it.

If changes need to be made to the project applications, the Collaborative Applicant will send the project back to the Project Applicant. Project Applicants may need to change the project application if they find an error or if the Collaborative Applicant requests that a change be made to one or more of the formlets. The following action steps must be taken by the Collaborative Applicant and Project Applicant.

Step	Who	Description	
1.	Either one	If a submitted project application needs to be changed, contact must be mac between the Project Applicant and the Collaborative Applicant outside of <i>e-snaps</i> (via email or phone).	
		 If a Project Applicant determines that a change to the project application is necessary, the Project Applicant should contact the Collaborative Applicant and request that it "send," or release, the project application back to the Applicant. 	
		• If the Collaborative Applicant requests a change, the Collaborative Applicant should contact the Project Applicant and provide the information that needs to be changed.	
2.	Collaborative Applicant	The Collaborative Applicant will notify the Project Applicant outside of <i>e-snaps</i> (via email or phone) that the project application has been sent back for changes.	

Step	Who	Description		
3.	Project Applicant	After the project application has been sent back for amendment, any person who is an authorized <i>e-snaps</i> user with the Project Applicant's organization will be able to reopen the project.		
		The following actions are taken by the applicant once the Collaborative Applicant has released the project application:		
		• Log in to <i>e-snaps</i> .		
		• Select "Submissions" on the left menu bar.		
		• Find the project application that was sent back to the applicant.		
		 Review the list under the Project Name column or use the Project Name dropdown menu and "Filter" button. 		
		 The Project Name for the project application will be listed, but it will no longer have a date under the "Date Submitted" column. 		
		 Select the "Open Folder" icon ⁶ to the left of the project with no submission date. 		
		• Make the required change(s), saving each form as it is revised.		
		• Select the "Submit" button.		
		 Notify the Collaborative Applicant that the project application has been re-submitted. 		
4.	Collaborative Applicant	After the Project Applicant has re-submitted the project application, the Collaborative Applicant must update the CoC Priority Listings for the project application to reappear on the appropriate project screen in the CoC Priority Listings.		

While phone or email are mentioned for notifications between the Project Applicant and Collaborative Applicant, email requests are preferred as this method ensures a record of the request: the date, time, persons involved, and reason.