

## Diverse Business Investment Grant Program APPLICATION INSTRUCTIONS

**Program Webpage:** <http://www.doa.wi.gov/pages/DiverseBusinessInvestment.aspx>.

*The Department of Administration is using DocuSign to collect applications for the Diverse Business Investment Grant Program.*

### What is DocuSign?

DocuSign is a web-hosted electronic document transmittal and secure signature service. Accessing DocuSign documents requires internet access and a web browser. The DocuSign website is mobile-device friendly. You do not need a DocuSign account to access or complete the Grant Application. Use of DocuSign significantly reduces the amount of time needed by the program to process and evaluate applications.

**Please review the Program Grant Announcement and these instructions prior to beginning the application process.**

The program is not able to make changes to applications on your behalf, any errors will result in the applicant having to restart the application.

### APPLICATION CHECKLIST AND DOCUMENT LINKS

	Document	Note	Due Date
<input type="checkbox"/>	Application Form and IRS Form W-9	<b>Required.</b> <a href="#">Available here.</a>	January 21, 2022, at 2:00 PM Central Time
<input type="checkbox"/>	DOA-3027	<b>Optional, please see page 9 for more information.</b> <a href="#">Available here.</a>	January 21, 2022, at 2:00 PM Central Time

### Convenience Copy of Grant Application

A link to a convenience copy of the application is [available here](#). The program has provided a link to a convenience copy of application for reference prior to submitting the application via DocuSign. The convenience copy is for internal organization review only and will not be accepted by the program as an official application.

Please continue reading this document for instructions on how to submit your official application.

## DocuSign Submission Instructions for all Documents:

### **To Begin Each Document:**

Open the link for the document you would like to complete in the table above.

The first page you will be directed to is the “PowerForm Signer Information.” The person entering the information on the application should be a Grant Preparer and/or Authorized Representative of the organization.

1. Enter the first and last name of the Grant Preparer of your Organization in the “Your Name” field, and the Grant Preparer’s email in the “Your Email” field. This person will be responsible for filling out pages 1-10 of the application and the W9 Form. Please see the convenience copy of the application on page 1 of these instructions if you have questions about what will be asked in the application process.
2. ***If applicable***, enter the Name and Email of the additional Authorized Representative of your organization. This person will be able to sign off on the information provided on pages 1-9 of the application but will not be able to make any changes to the submission.

Please ensure that this email is correct and free from errors, as any errors in this field could prevent your application from being received. It is the applicant’s responsibility to ensure that the Authorized Representative receives and completes the application prior to the application deadline on January 14, 2022 at 2:00 PM Central Time.

3. Do NOT change anything in the Grant Administration fields.
4. To receive a completed copy of your document, re-enter the first and last name of your organization’s Grant Preparer in the “Name” field, and the authorized representative’s email in the “Email” field under the “Email a Copy” Field. **Receiving a copy serves as confirmation of receipt by the program.** There are two additional fields if you would like to add additional recipients for the confirmation.
5. Please review all information as entered above for errors. Click “Begin Signing” when you are done reviewing information.

A diagram of these instructions is shown on page 3.

## Submission Instructions for all Documents (Continued):

The screenshot below shows steps 1-5

The screenshot shows a web form titled "PowerForm Signer Information" for the Diverse Business Investment Program. The form includes sections for Grant Preparer information, an Authorized Representative (if applicable), and a DOA Grant Administration field. There are also sections for receiving email copies. A "BEGIN SIGNING" button is located at the bottom of the form.

**PowerForm Signer Information**  
Application for Diverse Business Investment Program  
Please complete the application document by the submission deadline, January 14, 2022 at 2PM Central Time. More information is available on the Program Website: <http://www.doa.wi.gov/pages/DiverseBusinessInvestment.aspx>

Please enter your name and email to begin the signing process.

**Grant Preparer**  
**Your Name:** \*  
Full Name  
**Your Email:** \*  
Email Address

Please provide information for any other signers needed for this document.

**If Applicable Organization's Authorized Representative**  
**Name:**  
Full Name  
**Email:**  
Email Address

**(DO NOT CHANGE THIS FIELD) DOA Grant Administration**  
**Name:**  
(DO NOT CHANGE THIS FIELD OR EMAIL!) Diverse Business  
**Email:**  
diversebusinessinvestment@wisconsin.gov

**Receive an email copy (additional recipient)**  
**Name:**  
Full Name  
**Email:**  
Email Address

**Re-enter Authorized Representative name and email here to receive a completed copy.**  
**Name:**  
Full Name  
**Email:**  
Email Address

**Re-enter Grant Preparer name and email here to receive a completed copy.**  
**Name:**  
Full Name  
**Email:**  
Email Address

**BEGIN SIGNING**

**Callout 1 (top left):** Enter the first and last name of your organization's Grant Preparer in the "Your Name" field, and the authorized representative's email in the "Your Email" field. This will be the person signing and submitting the document.

**Callout 2 (top right):** If applicable, enter the Name and Email of the additional Authorized Representative of your organization. Please ensure that this email is correct and free from errors, as any errors in this field could prevent your application from being received. It is the applicant's responsibility to ensure that the Authorized Representative receives and completes the application prior to the application deadline on January 14, 2021 at 2:00 PM Central Time.

**Callout 3 (middle right):** Do NOT change anything in the Grant Administration fields.

**Callout 4 (bottom right):** Click "Begin Signing" when you are done entering information.

**Callout 5 (bottom left):** If you would like to receive confirmation of your submission, re-enter the first and last name of your organization's Grant Preparer in the "Name" field, and the Grant Preparer's email in the "Email" field under the "Email a Copy" Field. Receiving a copy serves as confirmation of receipt by the program. There are two additional fields if you would like to add additional recipients for the confirmation.

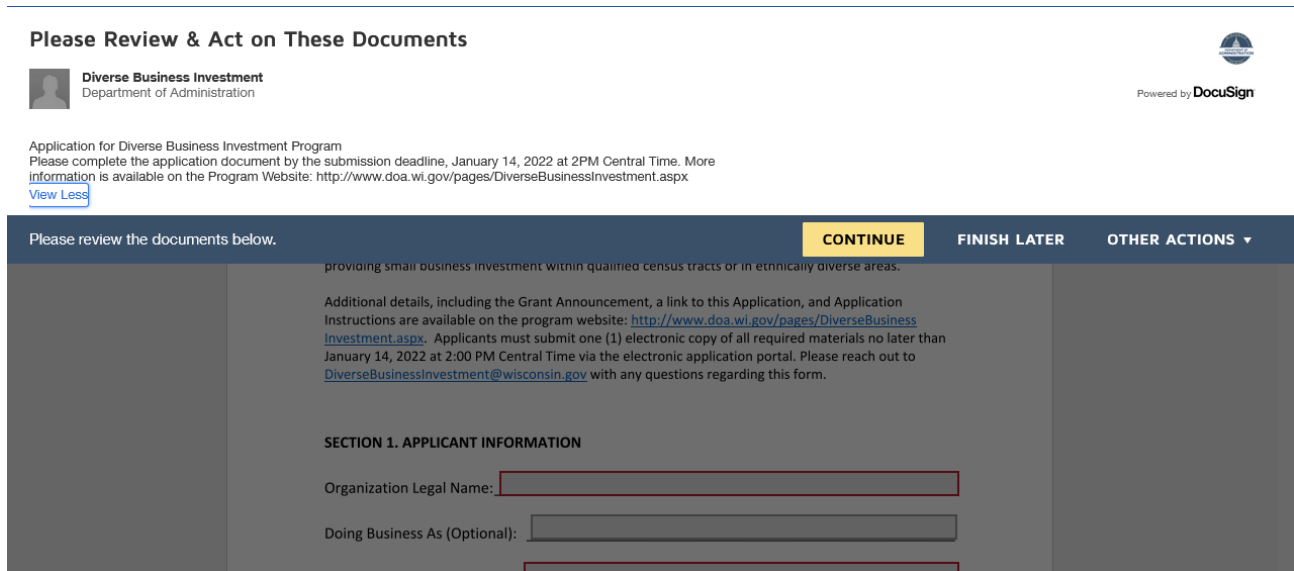
Submission Instructions for all Documents (Continued):

**Filling Out Each Document:**

The next page will be “Please review & act on These Documents.”

1. Agree to DocuSign disclosures, if prompted.
2. **Strongly Recommended:** Click “Finish Later” button. Clicking “Finish Later” creates a link to your documents that can be re-visited at any time prior to clicking “Finish” on the document. An email with the link will be sent to the Grant Preparer’s email you provided in the previous step. Click “Review Documents” from that email link to continue the signing process. The program also strongly recommends clicking “Finish Later” any time you close the application to ensure any newly entered information is saved.
3. Click through to “Continue” to fill out the application.
4. Please fill out all fields as applicable to your organization.

The screenshot below shows the “Please review & act on These Documents” page.



**To Submit each document:**

Click “Finish” when you have reviewed and completed all required fields on the application. This step will send the completed application to the Grant Administrator and to any additional emails you provided as an “Email Copy Recipient”. Your application will not be submitted to the program until you click “Finish”.

The page will automatically re-direct to the Department of Administration Homepage when you click “Finish”. Please select another document link from the table on page 1 of these instructions to proceed with the application.

## Individual Form Submission Instructions and Tips

### Application and W9 Form (Required):

#### Section 1: Applicant Information

Fill out all of the required fields (outlined in red in DocuSign) and any additional optional fields, as applicable. We have highlighted some required fields that may require additional attention here:

- Your Organization's DFI (Department of Financial Institutions) **Entity ID** is available to search at the following link: <https://www.wdfi.org/apps/CorpSearch/Search.aspx> Per Section 4.1.2 of the Program Grant Announcement, Applicants, *If required, must be registered with the Wisconsin Department of Financial Institutions and have one of the following statuses as of the Grant Announcement closing date: "restored to good standing", "incorporated/qualified/registered", "organized", or "registered". This field is required.*
  - Please reach out to the [Department of Financial institutions](#) with any questions regarding your organization's status.
  - Please enter "N/A" if your organization is not required to be registered with the Department of Financial Institutions.
- **EIN** or "[Employer Identification Number](#)". This is the number under which you file your organization's taxes. Please have this number match your W-9. **This field is required.**
- **Remit information:** Please have your organization's remit address match your W-9. If it does not match a prepared W-9, you will have the opportunity to fill out a new W-9 via the W-9 submission process. This address must be able to receive a paper check, if necessary. **These fields are required.**
- **Please list the Wisconsin counties in which this organization operates:** List all of the Wisconsin counties in your organization's operating area. **This field is required.**

#### Section 2: Narrative

Be sure to answer the questions fully and adhere to all question character counts.

##### **Troubleshooting tips for the Narrative section.**

A small number of applicants have reported issues with copying and pasting text into the narrative boxes of the application. The program is providing these potential troubleshooting tips as a courtesy to applicants.

Please complete the application to the best of your ability. The program will not accept applications after the deadline.

The program has confirmed that the sections are all set to the same character limit of 1750 characters, including spaces. Please ensure that your current word count includes spaces to adhere to the 1750 character limit.

Narrative Entry Methods:

Hand Type Method (preferred):

The program believes many of the problems result from applicants using rich text formatting in their responses, which may conflict with the formatting already present in DocuSign.

- The program has found that the best way to ensure DocuSign will recognize all of your characters is to re-type the response into the narrative section, instead of copying and pasting from another document. If the applicant has already tried to copy and paste text into the field, before you trying to copy and paste again, click into the narrative box you are having issues with, and holding down the delete key to ensure there are no additional invisible spaces leftover in the field.

Copy Paste Method:

- If the applicant has already tried to copy and paste text into the field, before trying to copy and paste again, click into the narrative box and holding down the delete key to ensure there are no additional invisible spaces are present.
- Then, paste the text in as a "plain text" formatting. Applicants may be able to do this by right clicking and selecting "paste as plain text" or by copying the text into a "notepad" application and then copying and pasting from there.

Change Internet Browsers:

- If an applicant is still having issues after trying all of the above steps, the program recommends trying another browser to complete the application. You may do this by right clicking on the link from the "finish later" email, copying it, and then pasting it into another browser. Please see page 10 of this document for DocuSign's supported browser versions.

Clean Slate Method:

- To ensure clean, error free copy, the program recommends opening a new application and hand typing all responses if none of the above tips work. Applicants do not need to notify the program to start a new application unless an application was previously completed and submitted.

**Section 3: Budget**

Please group similar expenses in the **Expense Description** field. This is meant to be a high-level review of your program's grant budget.

- If you receive an error in section 3 **Budget Amount** fields when trying to submit your application, please make sure that you have only entered numbers in the **Amount** field. Additional non-numerical characters or extra spaces before or after the number may

result in an error. To ensure you do not have spaces after the character, you must click into the field and press the “delete” key after the number.

**Section 4. Attestations and Required Signature**

Applicants must certify compliance with all of the statements in the attestation section. Please consult your organization’s legal counsel if you have any questions regarding your responses to the attestation statements.

**Applicant Authorized Representative- Grant Preparer:**

If more than one authorized representative is required to sign the application, please contact the program at [DiverseBusinessInvestment@wisconsin.gov](mailto:DiverseBusinessInvestment@wisconsin.gov) to add an additional authorization page.

**W-9 Form (Required):**

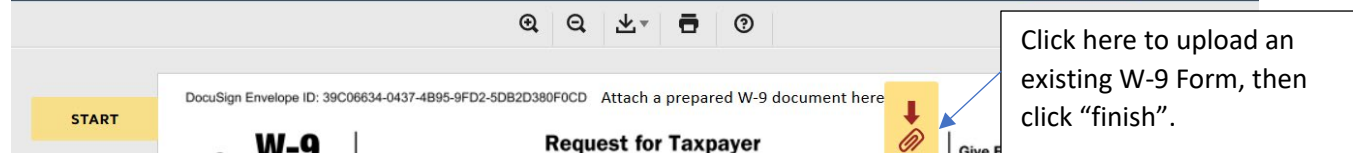
There are two options for submitting your W-9 form via DocuSign:

- Attach an existing W-9 to the document by selecting the paperclip icon and uploading your W-9. Click “Finish” to submit.

**OR**

- Complete the W-9 Form with all information applicable to your organization, sign and date, and then click “Finish” to submit. Scroll down to review the instructions if necessary.

Please be sure that the EIN and Remit information on the W-9 match the information you provided above for either submission option.



If you do not have an existing W-9, fill out the W-9 fields, sign and date.

Please note: If filling out a new W-9, you must fill out all fields applicable to your organization. Scroll down to review the instructions if necessary.

DocuSign Envelope ID: 39C06634-0437-4B95-9FD2-5DB2D380F0CD Attach a prepared W-9 document here

**W-9**  
Form (Rev. November 2017)  
Department of the Treasury  
Internal Revenue Service

**Request for Taxpayer Identification Number and Certification**  
▶ Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

Optional

Give Form requester. Do not send to the IRS.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

Individual/sole proprietor or single-member LLC

C Corporation

S Corporation

Partnership

Trust/estate

Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶

Other (see instructions) ▶

**Note:** Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) ▶

Exemption from FATCA reporting code (if any) ▶

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.

Requester's name and address (optional)

6 City, state, and ZIP code

7 List account number(s) here (optional)

**Part I Taxpayer Identification Number (TIN)**

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Social security number

or

**Select “finish” to submit and send your application on in the process.**

- If your organization does not require an additional Authorized Representative to sign, your application form will be sent to the Program for review after the application deadline. You will receive a copy of the completed application if you re-entered your information as directed on page 2, Step 4. **This copy serves as confirmation of application receipt by the program.**
- For entities which require an additional Authorized Representative signature, please continue reading.

**If Applicable, Additional Authorized Representative**

For organizations with an additional Authorized Representative, your form will be forwarded to the email you provided on Step 2, Page 2 of these instructions for their signature.

The program is not able to make changes on behalf of the applicant. If there are errors in the application noticed by the Additional Authorized Representative, a new application should be started by the Grant Preparer.

It is the applicant’s responsibility to ensure that the Additional Authorized representative receives and completes the application prior to the Application Deadline on January 14, 2022 at 2:00 PM Central Time. Your application is not considered complete without the Additional Authorized Representative’s Signature. The Grant Preparer will receive a copy of the completed application if you re-entered your information as directed on page 2, Step 4. This copy serves as confirmation of application receipt by the program.



## **Form DOA 3027: Designation of Confidential and Proprietary Information (Optional):**

Review the information below, and, if applicable, complete and submit the DOA-3027 via the link provided on page 1 of this document.

DOA-3027 is optional, do not submit this document if the following does not apply to information submitted in your application.

Applicants should submit this form if their application materials contain proprietary and confidential information which qualifies as a trade secret, as provided in s. 19.36(5) Wis. Stats., or is otherwise material that can be kept confidential under the Wisconsin Open Records Law.

Other information cannot be kept confidential unless is a trade secret. Trade Secret is defined in s. 134.90(1)(c), Wis. Stats. as follows: "Trade secret" means information, including a formula, pattern, compilation, program, device, method, technique or process to which all of the following apply:

1. The information derives independent economic value, actual or potential, from not being generally known to, and not being readily ascertainable by proper means by, other persons who can obtain economic value from its disclosure or use.
2. The information is the subject of efforts to maintain its secrecy that are reasonable under the circumstances.

To completed DOA-3027, follow the instructions on pages 1 and 2 of these instructions to add an Authorized Representative and Email Copy Recipient to the Document and begin signing.

- Please designate the section (application or w-9), page(s) of the application documents, and topics that you are requesting not be released on the DOA-3027 form.
- Click "Finish" to submit.

## Additional Helpful Links for DocuSign Troubleshooting:

Please be sure that your internet browser is up to date if you have any technical issues. DocuSign supports the most commonly used internet browsers. <https://support.docusign.com/guides/signer-guide-signing-system-requirements>

Additional DocuSign Help links are listed below:

Common Signing Issues: <https://docusigncommunity.force.com/en/articles/Common-signing-issues>

Adopting a signature: <https://support.docusign.com/en/guides/signer-guide-signing-adopt-new>

DocuSign Support Center: <https://docusigncommunity.force.com/en/home>

General DocuSign Walkthrough: <https://support.docusign.com/en/videos/New-Signing-Experience>