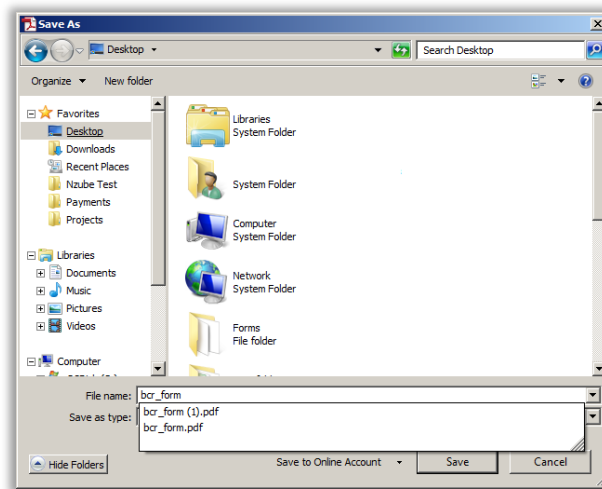


## UPLOADING A BUDGET CHANGE REQUEST WITH PEP

This user guide will show you how to save, convert, and upload a Budget Change Request (BCR) with the PEP as a CUF Document into GeoTracker. Currently, CUF Documents uploaded in GeoTracker cannot accept Excel files. Therefore, the PEP must be converted into a PDF file and combined with the BCR Form prior to uploading.

### BCR Form

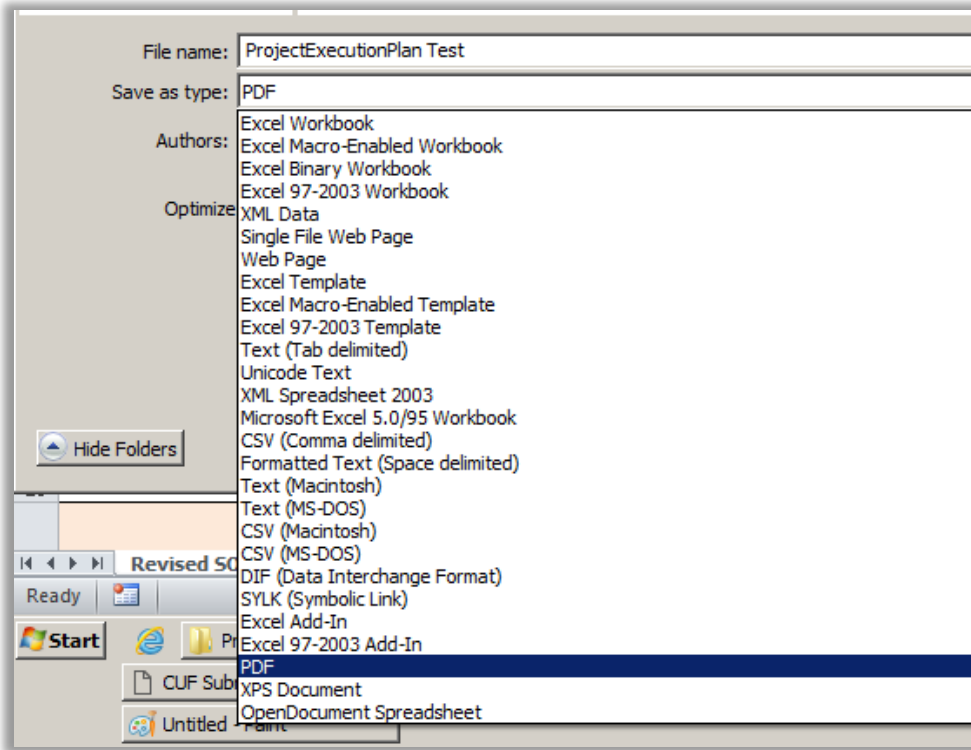
1. Download and complete the Budget Change Request Form in its entirety. The form can be obtained at: [http://www.waterboards.ca.gov/water\\_issues/programs/ustcf/docs/budget/bcr\\_form.pdf](http://www.waterboards.ca.gov/water_issues/programs/ustcf/docs/budget/bcr_form.pdf).
2. Once the BCR Form is completed, save the BCR Form as a PDF onto your computer, as seen in the example below. (NOTE: Make a note of where this PDF file is saved because it will be used later.)



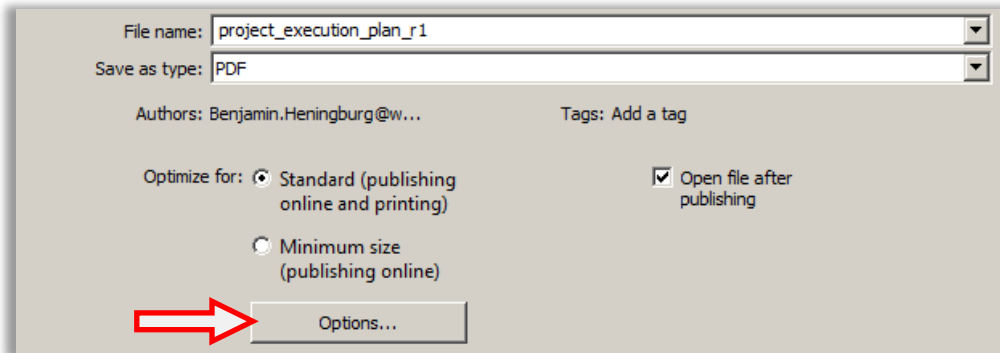
### Project Execution Plan

3. Download and complete the Project Execution Plan (PEP) Excel Workbook. The PEP is a macro-enabled Excel workbook and can be found at: [http://www.waterboards.ca.gov/water\\_issues/programs/ustcf/docs/project\\_execution\\_plan\\_r1.xlsm](http://www.waterboards.ca.gov/water_issues/programs/ustcf/docs/project_execution_plan_r1.xlsm). (NOTE: Make sure to save this file frequently as you are working on it to prevent accidental loss of information.)
4. After completing the PEP workbook, save the file in the Excel format, but do not close the file.
5. Once the completed PEP workbook has been saved in the Excel format, save the entire PEP workbook as PDF file by performing the following:
  - a. From the ribbon, select "File" -> "Save As..."

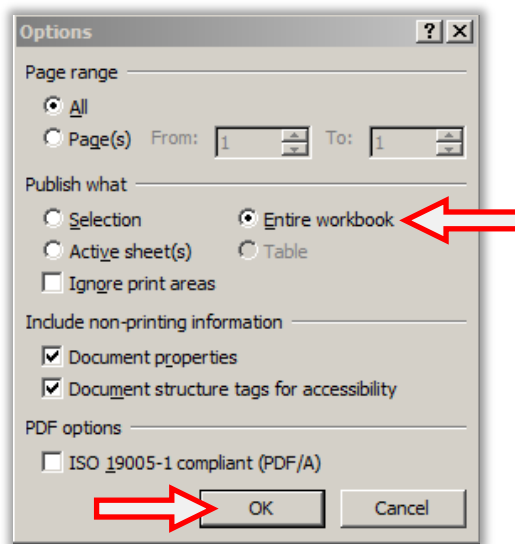
- b. In the “Save As” dialog box, name the file and change the “Save As” type to PDF.



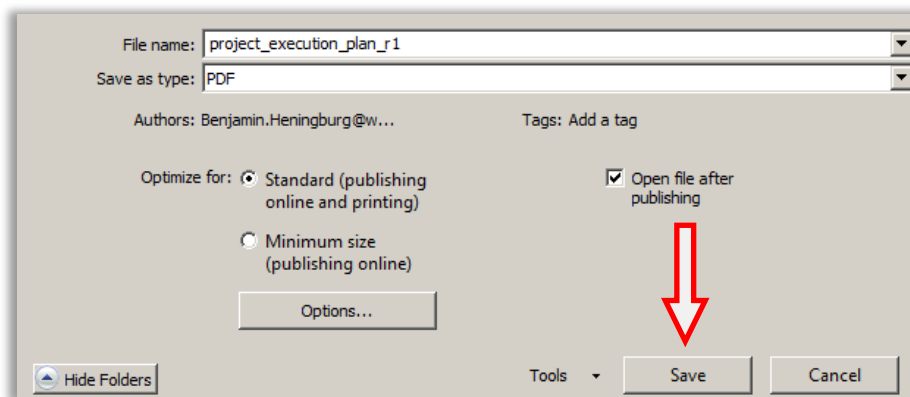
- c. Once you select the “PDF” Save as Type, select the “Options” button that appears at the bottom of the “Save as” dialog box as shown below:



- d. From the “Options” dialog box, click the “Entire Workbook” option under the “Publish What” heading to save the entire workbook as a PDF file. Then, select “OK” to close the “Options” dialog box.



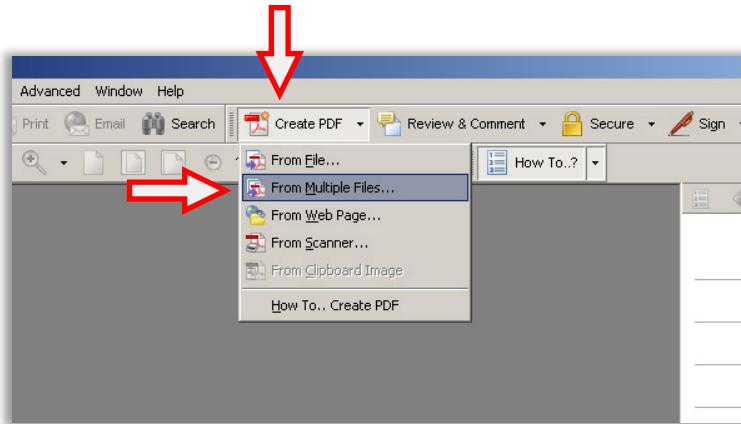
- e. Once you return to the “Save As” dialog box, select the save button to save the entire workbook as a PDF file to your computer. (NOTE: Make a note of where this PDF file is saved because it will be used later.)



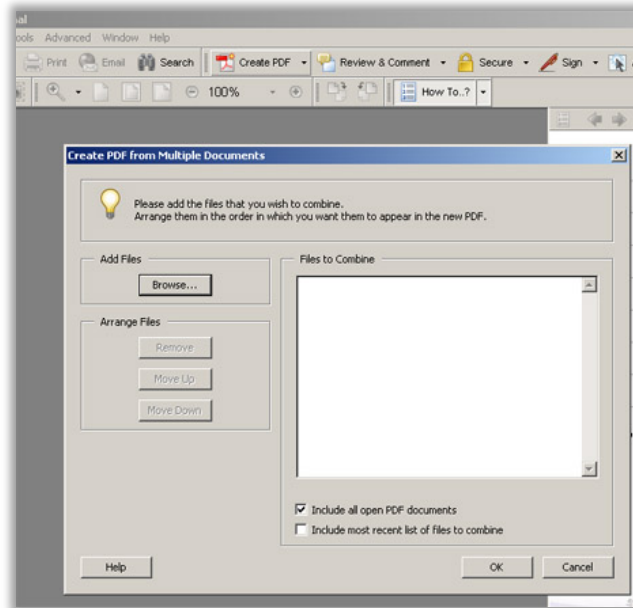
## Combining the BCR Form and Project Execution Plan into One PDF File

6. After converting the PEP into a PDF file, combine the PEP PDF file with the BCR PDF file to make one complete PDF file.

- a. Run the Adobe Acrobat Standard program (not to be confused with Acrobat Reader) and click "Create PDF" from the toolbar on the main screen. (NOTE: If this toolbar is not visible, from the menu bar click "View" -> "Task Buttons" -> "Show All Task Buttons". The toolbar should pop up and you can proceed with this step.)



- b. The "Create PDF From Multiple Documents" dialog box will open.
  - i. Under the "Add Files" area, click Browse to locate and add the two PDF files (BCR Form and PEP) you just saved on your computer. (NOTE: Files can either be added in any order, or the order you want them combined.)



- ii. After adding the PDF files (BCR Form and PEP), move them up/down on the list of PDF files until the list represents the order that you want the files merged together (from top to

bottom). After you have placed the PDF files in the correct order, click "Ok" to merge the files together.

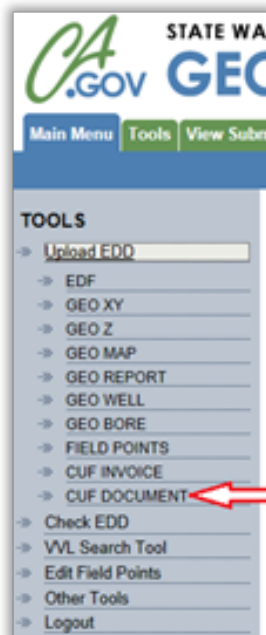
- c. The newly created PDF file will open that contains the BCR Form and the PEP as one document. Save the new file on your computer by clicking "File" -> "Save As..." and saving the new file (specify a new name and a location) on your computer. (NOTE: Make a note of where this PDF file is saved because it will be used later.)

### Uploading the BCR to GeoTracker

- 7. Now that the single PDF file has been created, upload the file as a CUF Document into GeoTracker.
  - a. Enter the following address into your web browser to access the area to upload a CUF Document: <https://geotracker.waterboards.ca.gov/esi/>
  - b. Enter your username and password at the login screen. If you do not have a username and password, you can request one from this screen.



- c. From the menu bar on the left side of the screen, choose: TOOLS >> Upload EDD >> CUF Document.



- d. Locate your site and select it by clicking the site name under the “Facility Name” column. If your site is not listed on the first page you can search for it, or jump to another page using the links at the top:

UPLOADING A CUF\_DOCUMENT FILE

45 RECORDS FOUND JUMP TO PAGE: 1 2 PAGE 1 OF 2

Global ID Facility Name Status Street Name City County Search Reset

GLOBAL ID	FACILITY NAME	STATUS	ADDRESS	CITY	COUNTY	FLQ PTS
T0608500119	<a href="#">ALL STAR GAS</a>	OPEN - SITE ASSESSMENT	1620 STORY ROAD	SAN JOSE	SANTA CLARA	33
T0607700906	<a href="#">ARCO - HAMMERSLEY</a>	COMPLETED - CASE CLOSED	3250 HAMMER LN W	STOCKTON	SAN JOAQUIN	21
T10000004571	<a href="#">My Test Site</a>	OPEN - SITE ASSESSMENT	498 PALMETTO AVENUE	PACIFICA	SAN MATEO	59
T0607301923	<a href="#">ARCO FACILITY #9732</a>	OPEN - REMEDIATION	398 EL CAJON BL	EL CAJON	SAN DIEGO	25
T0602300480	<a href="#">ARCO FINE COMPANY OFFICE</a>	OPEN - SITE ASSESSMENT	211 RAILROAD AVENUE	BLUE LAKE	HUMBOLDT	115
T10000003685	<a href="#">BONDY DON SCHOOL BOARDLINE SELECTION</a>	OPEN - ASSESSMENT & INTERIM REMEDIAL ACTION	1492 PINE FLAT ROAD	SANTA CRUZ (BONNY DOON)	SANTA CRUZ	11
T0607500185	<a href="#">BP Oil (Independent)</a>	OPEN - REMEDIATION	2099 SAN JOSE AVE.	SAN FRANCISCO	SAN FRANCISCO	25

- e. Once you have selected the appropriate case, select the claim number and document type from the drop-down lists. In this situation, select “Budget Change Request” as the document type.
- f. After you select your document type, new fields relevant to the type of document you have chosen will be displayed. Complete the fields.

UPLOADING A CUF\_DOCUMENT FILE

CUF\_DOCUMENT UPLOAD INSTRUCTIONS

DOCUMENT INFORMATION

CUF CLAIM # [ ] DOCUMENT TYPE [ Budget Change Request ]

FISCAL YEAR [ ] BUDGET CATEGORY REQUESTER [ ] AMOUNT REQUESTED [ ]

FILE [ ] Browse...

Upload File

- g. After completing the fields, select “Browse” to locate the previously created PDF document on your computer. Once you have selected the correct file, click “Upload File”.
- h. After successful upload of a document, the below screen (with your data) is displayed:

UPLOADING A CUF\_DOCUMENT FILE

**SUCCESS**

Your CUF\_DOCUMENT file has been successfully submitted!

**Submittal Type:** CUF\_DOCUMENT  
**Facility Global ID:** T0603702072  
**Facility Name:** TOPANGA CAR WASH  
**Document Type:** Budget Change Request  
**File Name:** TEST CUF FORM.pdf  
**Organization Name:** EcoInteractive  
**Username:** CUFTEST  
**IP Address:** 205.225.207.97  
**Submittal Date/Time:** 3/19/2014 10:40:05 AM  
**Confirmation Number:** 4622292697

(NOTE: You will be able to view your document immediately after submittal in the "View Submittals" section of the website. Documents awaiting Fund Staff review can be found in the "Pending Submittals" section. When a document is accepted by Fund Staff, it can be found under "Received Submittals". If your document has been denied by Fund Staff, it will be moved to the "Denied Submittals" area, and an email will be generated informing you of the reason for the denial.)

~~~~FOR HELP~~~~

If you have any questions, please contact us by email to:

[ustcleanupfund@waterboards.ca.gov](mailto:ustcleanupfund@waterboards.ca.gov)

Subject Line: "CUF Doc question"

Email inquiries will be responded to within 24 hours.

Telephone Message Line: 1-800-813-Fund (3863)

Telephone messages will be responded to within 48 hours.