

**State of Maryland**  
**Interagency Commission on School Construction**

**Business Management System**  
**CIP Funding Application Request**  
**Process User Guide**



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This guide is available for download at [iac.mdschoolconstruction.org](http://iac.mdschoolconstruction.org)

A complete Capital Improvement Program (CIP) submission requires the use of two processes within the BMS. One process, the CIP Front End Upload Process, involves submission of LEA-wide supporting documentation. The second process, the CIP Funding Application Process, should be submitted once for each project that is being requested for funding.

Instructions for the CIP Front End Upload Process begin on this page.

Instructions for the CIP Funding Application Process begin on page 5.

# CIP Front End Upload Process

## Purpose of Process

This process will be used to add all "Front End" documentation into the individual "Global" LEA project.

## Starting the Process

To start this process, you must go to your Global LEA project. Your specific project will be named, "\* - (Your LEA Name) Global Project". This should be the very first project in your project list. Once you are within that project, please use these steps to start the process.

1. In the Project Menu on the left side of the page, select the "Processes" tab.
2. In the "Project Processes" home screen, click on the "Start process" button which is situated in the top right corner of the page.

The screenshot shows the BMS Project Processes interface. The top navigation bar includes Home, Dashboard, Projects, Processes (selected), Documents, Contacts, Cost, Reports, and Setup. The Project Menu on the left has 'Processes' highlighted. The main content area shows a table of processes with columns for Instance, State, Subject, Step, In Step Since, Date Due, Status, and Requested Comment. A 'Start process' button is visible in the top right corner.

Instance	State	Subject	Step	In Step Since	Date Due	Status	Requested Comment
FRPG - 1	Closed	* - DUMMY Global Project, Funding Revision	Finish	Aug 7, 2024		Approved	
PCP - 1	Open	Some school 240130153245 Project Request,	Admin Create Project	Jan 30, 2024		Submitted	
FRPG	Draft	* - DUMMY Global Project, Funding Revision				NotAssigned	

3. Once you have clicked the "Start Process" button, you will be presented with a list of processes that you have access to start or submit.
4. Choose the process by clicking on the name.

## Select process



Q CIP Front Section Upload Process (CFSU) X

- ✓ CIP Front Section Upload Process (CFSU)
- Educational Facilities Master Plan (EFMP)**  
For annual submission and review of LEA Educational Facilities Master Plans (EFMP).
- Facilities Status Change (FSC)**  
To submit changes to the status of an existing school facility (such as name change, grade configuration, etc.).
- Funding Revision Process Global (FRPG)**  
Funding Revision Process for global projects.
- Project Creation Process (PCP)**  
To initiate the creation of a new school construction project.
- Site Review Process (SRP)**

 Download CFSU

**Start CFSU**

5. You will then be presented with the initial step of the process.

## Initial Submission Layout

The initial, aka Start, step is a simple one. There are two required fields that will ask you to drag and drop or upload the CIP Front End as a PDF, and the Form 102.4-102.6 as an excel spreadsheet. Once you have added that information, then click on the "Submit" button in the top right hand corner of the screen. This will submit the front end CIP Documentation, and initiate the review process.

## CIP Front Section Upload Process (CFSU)

**Start Process** Print Check Spelling Submit Save Draft Cancel

Project:	Test Global Project
Project Number:	GL_Dun25
Process:	CIP Front Section Upload Process

**Details** | Documents (0) | Attached Processes (0) | Attached Forms (0)

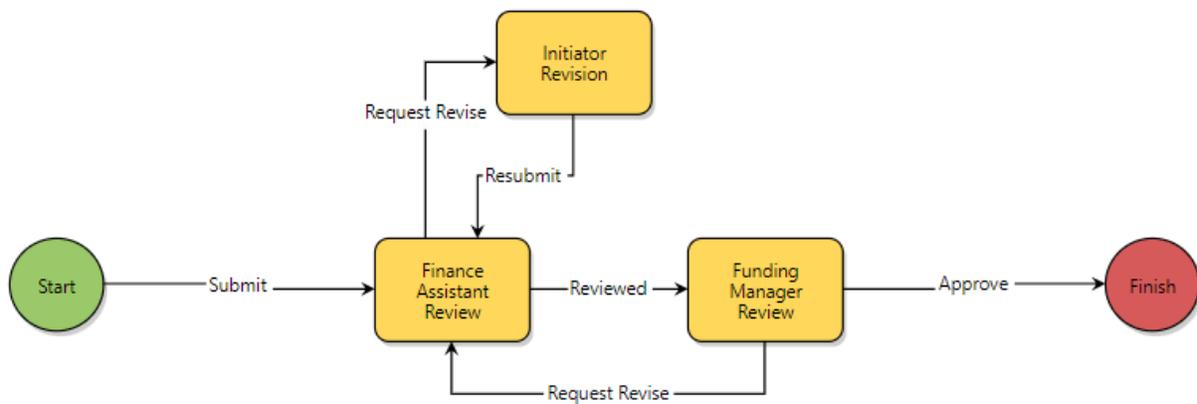
Expand All | Collapse All

**Please Upload the Following Files**

* CIP Front End (PDF):	Drag and drop file here	or	Browse Computer	Browse e-Builder
* Form 102.4-102.6 (Excel):	Drag and drop file here	or	Browse Computer	Browse e-Builder

Print Check Spelling Submit Save Draft Cancel

## Process Workflow



## Workflow Steps

1. **Start:** The process initiator will drag and drop all necessary documents into the required fields.
2. **Finance Assistant Review:** The IAC Finance Assistant will check the uploaded documents for completeness. If the information is correct, then the Finance Assistant will push the process to the next step. If more information is needed, or if there are any questions, then the Finance Assistant will provide information on what is needed, and route the process back to the process initiator.
3. **Funding Manager Review:** The IAC Funding Manager will review the information for completeness as well. If the information is correct, then the Funding Manager will finalize the process. If more information is needed, or if there are any questions, then the Funding Manager will provide information on what is needed and route the process back to the Finance Assistant.
4. **Finish:** The process is complete, and the correct documentation will have been uploaded to the project for future reference.

# CIP Funding Application Request Process

## Purpose of Process

To request school construction funding from the CIP.

## Starting the Process

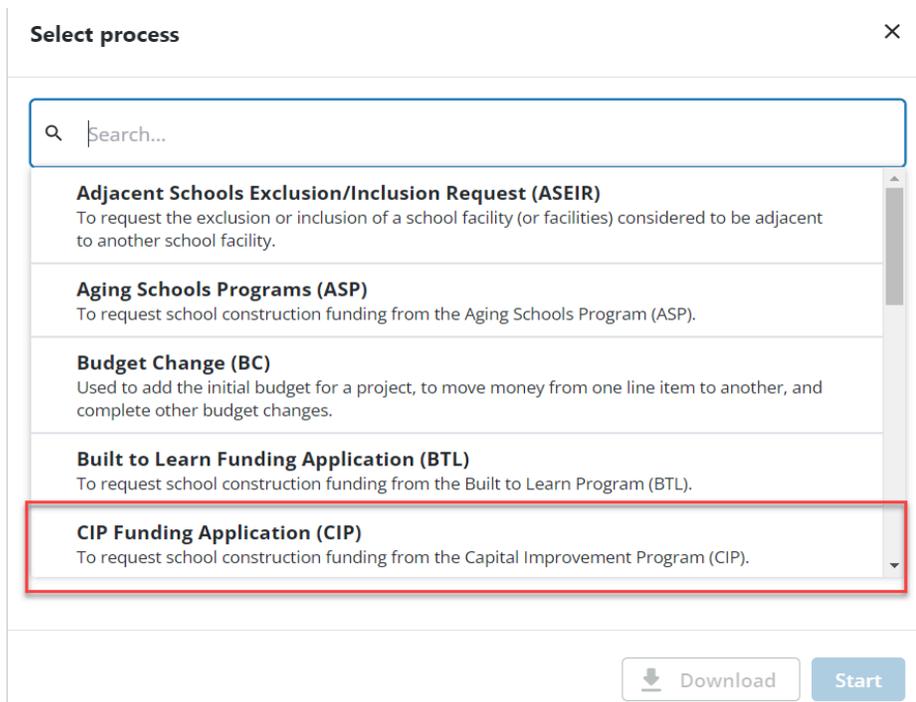
To start this process, you must choose the correct project where you are requesting the CIP funds. Once you are within that project, please use these steps to start the process.

1. In the Project Menu on the left side of the page, select the "Processes" tab.
2. In the "Project Processes" home screen, click on the "Start process" button which is situated in the top right corner of the page.



The screenshot shows a table with columns: Instance, State, Subject, Step, In Step Since, Date Due, Status, and Requested Comment. A row is visible with Instance 'CA - 2', State 'Closed', Subject '\*\*\* CA Process UAT, Contract Approval', Step 'Finish', In Step Since 'Mar 6, 2024', and Status 'Approved'. A 'Start process' button is highlighted in the top right corner. Below the table, there is a 'Page View' dropdown set to '100' and a status indicator 'Showing result 1 - 1 of 1'.

3. Once you have clicked the "Start Process" button, you will be presented with a list of processes that you have access to start or submit.
4. Choose the process by clicking on the name.



The screenshot shows a 'Select process' dialog box with a search bar and a list of processes. The 'CIP Funding Application (CIP)' option is highlighted with a red box. The list includes: Adjacent Schools Exclusion/Inclusion Request (ASEIR), Aging Schools Programs (ASP), Budget Change (BC), Built to Learn Funding Application (BTL), and CIP Funding Application (CIP). At the bottom, there are 'Download' and 'Start' buttons.

- You will then be presented with the initial step of the process. This will include lengthy instructions on filling out the request.

## Initial Submission Layout

Your initial step will require you to determine the type of project and request. These fields are required and will not let you submit the request without the information. The entire bottom of the request (Budget Change and Funding Adjustment sections) should be ignored. This section is designated in the picture below.

CIP Funding Application (CIP)

Start Process Print Check Spelling **Submit** Save Draft Cancel

Project: \*Washington/Governor/ Mickey Memorial/ Overpass/ Project (0.14455669982211)  
 Project Number: CFIS-1234  
 Process: CIP Funding Application

Details Documents (0) Attached Processes (0) Attached Forms (0)

Expand All | Collapse All

**CIP Request Type**

\* FY: -- Please select an option --  
 \* Has this project received construction funding in the past?:  Yes  No  
 \* Is this project a systemic?:  Yes  No

**This section is for MD IAC only, please disregard.**

**Budget Change Details** Ignore This Section

Status: Draft  
 Reason Code: CIP (Changes)  
 Date Of Change: 08.20.2024

**Budget Change Custom Fields**  
 There are no budget change custom fields.

**Funding Adjustments**

Funding Source	Funding Category	Projected Funds	Adjustment Description	Adjustment Amount	Custom Field(s)
2024-SPECF	Special Funds		0.00	0.00	
CIP FY 2022			20,005.00	0.00	
CIP FY 2023			20,250.00	0.00	
FY 2025	Bond Funds		205.00	0.00	
Local Fund	PAYGO Funds		1,200,350.00	0.00	
Test Funding Source			0.00	0.00	
<b>Totals</b>			<b>1,240,810.00</b>	<b>0.00</b>	

Once you have completed all required fields, click submit in the right hand corner of the application page.

## Second Step

This process will require you to take an additional step to submit the request. Due to the varying data needed for the individual types or projects and requests, there are several different layouts for you to complete. The initial submission step reads the initial information, and directs the process to the appropriate second step.

		(L0144556699882211), CIP Process	Manager 75%	
<input type="checkbox"/>	CIP - 11	<b>Open</b>	*Washington/Governor/ Mickey Memorial/ Overpass/ Project (L0144556699882211), CIP Process	Systemic Prior Funding Aug 20, 2024

Page View 100

Showing result 1 - 4 of 4 1

Make sure to answer all requested questions and upload all required documents. Once complete, choose the Submitted action in the top row and click "Take Action" to continue your application.

CIP Funding Application (CIP) - 11

Delete Instance    Workflow Override    All Fields View

Submitted    **Take Action**    Check Spelling    Print    Copy    Delegate    Save    Cancel

Project:	*Washington/Governor/ Mickey Memorial/ Overpass/ Project (L0144556699882211)	Project Number:	LFIS-1254
Process Document:	CIP - 11	Overall Due Date:	
Current Workflow Step:	Show History   Current Actors	Step Due Date:	
Subject:	Systemic Prior Funding Show Workflow Diagram		
Status:	*Washington/Governor/ Mickey Memorial/ Overpass/ Project (L0144556699882211), CIP Process		
	Submitted		

Details    Comments (0)    Documents (0)    Attached Processes (0)    Attached Forms (0)    Attached To (0)

Expand All | Collapse All

### CIP Request Type

Systemic with prior construction funding

\* FY: 2022

\* Has this project received construction funding in the past?:  Yes  No

\* Is this project a systemic?:  Yes  No

\* Systems addressed (systemic or limited renovation):

- Boiler
- Chiller
- HVAC
- HVAC Controls
- HVAC Units

Note: Please hold Ctrl to select multiple items from the list.  
Please select an option --

\* Is this project forward Funded?:  Yes  No

\* Is this a net zero energy project?:  Yes  No

Project Type: Pre K/K Addition/ Renovation  
Project Subtype: TBD

---

Show Filter | Select All    Row Height: 1X

	z	Cost Type	Total Cost	State Cost	Local Cost
<b>Grand Totals</b> (0 Items)					

Add New Item for Dynamic Grid

\* Cost Type: Please select...

\* Total Cost:

\* State Cost:

\* Local Cost:

Clear    Add

### Estimated Project Budget

\* Maximum Construction Allocation:

\* Total Prior State Funds:

\* Current Funding Request:

\* Fiscal Year 2 State Funding Amount Expected Request:

\* Fiscal Year 3 State Funding Amount Expected Request:

\* Fiscal Year 4 State Funding Amount Expected Request:

\* Fiscal Year 5 State Funding Amount Expected Request:

\* Monthly Project Draw Schedule:  or

\* Describe any scope changes since the first year of funding:

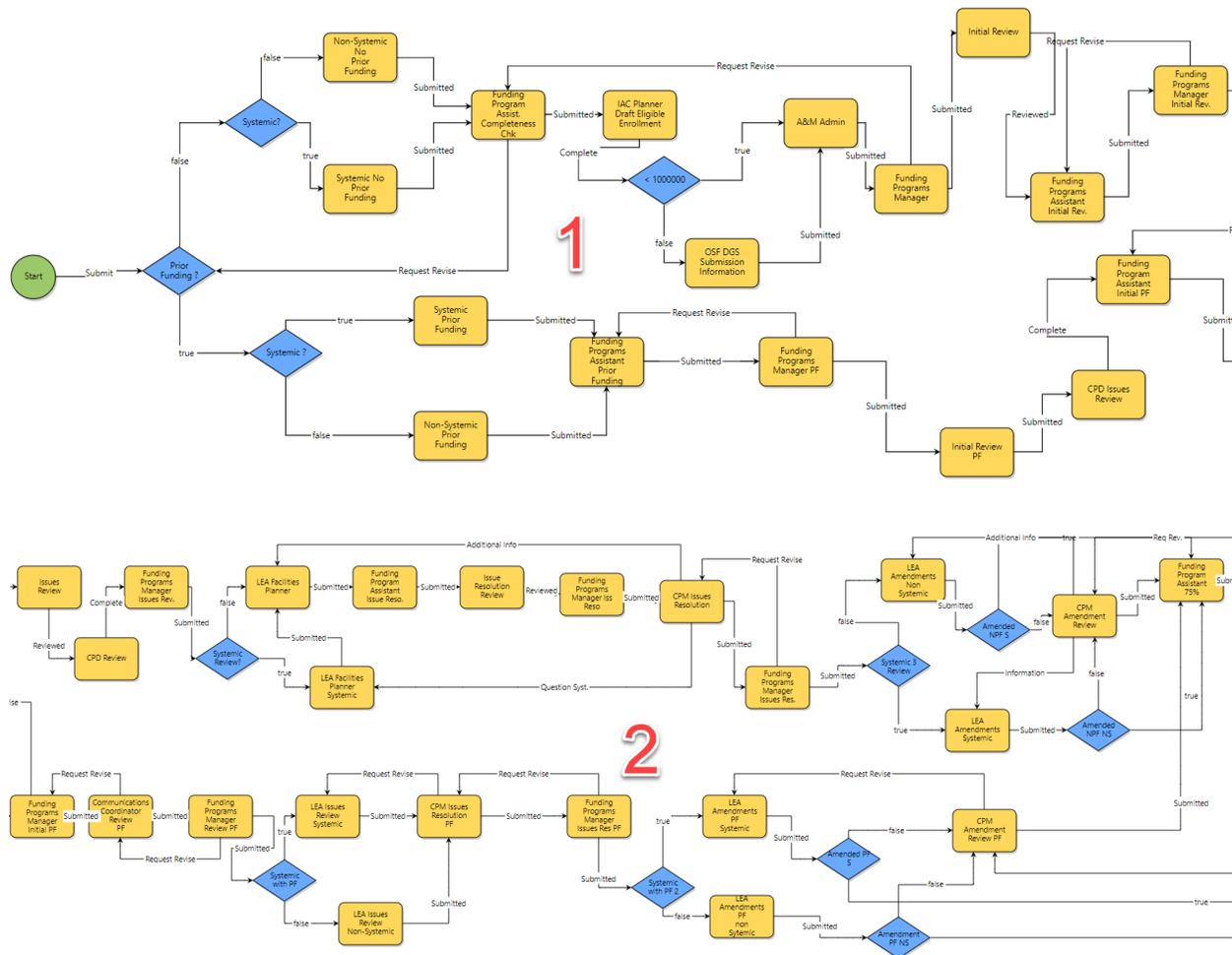
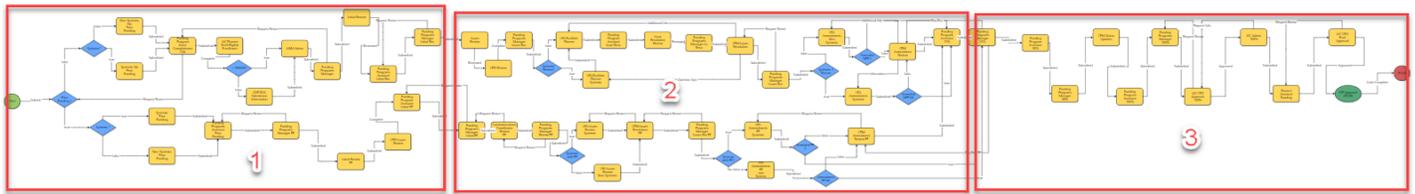
"Segoe UI", A, 12px

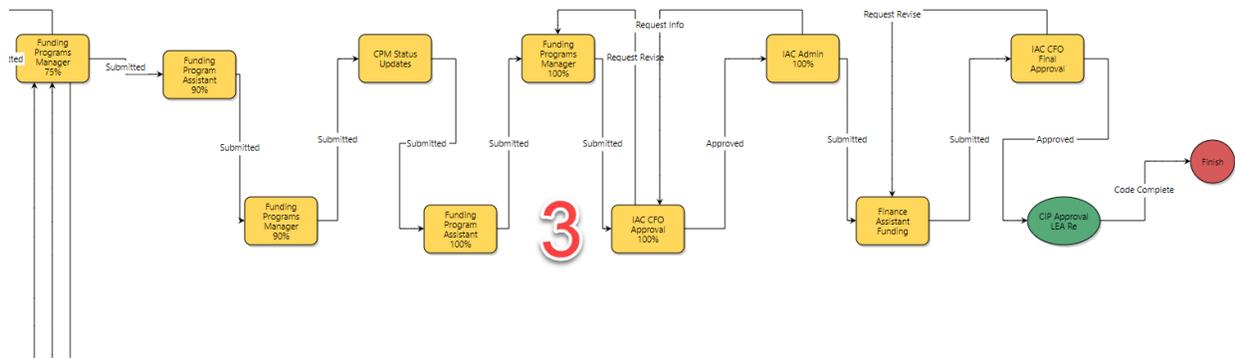
**SCHEDULE:**

Date given notice to proceed:		Estimated Bid Opening Date:	
Schematic Design submitted for review:		Estimated Construction Start Date:	
Design Development submitted for review:		Estimated Construction Substantial Completion Date:	
Construction Document submitted for review:		Actual Bid Opening Date:	
Actual Construction Start Date:		Actual Project Final Completion Date:	

Submitted | Take Action | Check Spelling | Print | Copy | Delegate | Save | Cancel

## Process Workflow





## Workflow Steps

5. **Start:** Requested by the LEA Facilities Planner. The LEA Facilities Planner should complete all required fields and ignore the cost data at the bottom of the page as outlined in the instructions on the step.
6. **Decision Point:** In the start step, you will determine whether the project you are requesting funding for has had prior funding or not. The process will route the application accordingly.

### No Prior Funding, Systemic Project

7. **Non-Systemic No Prior Funding:** The process initiator will continue to fill out the request. This layout will be specific to a project that is non-systemic, with no prior funding applied.

### No Prior Funding, Systemic Project

8. **Systemic No Prior Funding:** The process initiator will continue to fill out the request. This layout will be specific to a project that is systemic, with no prior funding applied.

### No Prior Funding, Non-Systemic Project

9. **Non-Systemic No Prior Funding:** The process initiator will continue to fill out the request. This layout will be specific to a project that is non-systemic, with no prior funding applied.

### No Prior Funding

10. **Funding Programs Assistant Completeness Checklist:** Once the application has been completely filled out by the LEA, the Funding Programs Assistant will check all data and documents for completeness. If there are any changes, or questions, the assistant will send the process back with an explanation of what is needed.

11. **IAC Planner Draft Eligible Enrollment:** The IAC Planner will add any needed information about the eligible enrollment. This and any other step can be viewed by the process initiator, but the information will not be editable.
12. **<1,000,000:** this is a conditional decision point that needs no action. This condition will route the process by the value of the contract. If the contract is above 1,000,000, then it will go to the Office of School Facilities (OSF) for review. If it is below, then it will go straight to the Assessment & Maintenance Admin.
13. **OSF DGS Submission Information:** Both of these teams will update the application status and review the previous information.
14. **A&M Admin:** The Assessment & Maintenance Admin will add information pertaining to the facility.
15. **Funding Programs Manager:** The IAC FPM will review the application and all information for completeness prior to review by the team.
16. **Initial Review:** A team from the IAC will review the application and add any issues that may arise. These issues will be available for the LEA to review and respond to in a further step.
17. **Funding Programs Assistant Initial Review:** The FPA will review the issues made by the team and add any comments or questions.
18. **Funding Programs Manager Initial Review:** The FPM will review the issues made by the team and add any comments or questions.
19. **Issues Review:** The process will route back to the IAC team to see any comment or questions added by the FPA, or FPM.
20. **CFO Review:** The IAC CFO will review the issues and provide comments or questions.
21. **Funding Programs Manager Issues Review:** The process will route to the FPM again to see all comments and questions.
22. **Systemic Review?:** This is a conditional decision point that needs no action. The process will be routed again by the project type.
23. **LEA Facilities Planner:** The process initiator, depending on the project type, will be able to see all issues, comments, and questions. They will then be able to respond to any of these items.
24. **Funding Programs Assistant Issues Resolution:** The FPA will address all comments from the process initiator and send the application for review.
25. **Issue Resolution Review:** The IAC team will review the application and add any comments or questions.
26. **Funding Programs Manager Issues Resolution:** The FPM will review any new comments or questions that have arisen from the initial issues review.
27. **CPM Issues Resolution:** The CPM will then provide their review and add comments and questions to the issues list.
28. **Funding Programs Manager Issues Resolution 2:** The FPM will follow up on all comments and complete the issues grid.
29. **Systemic Review Conditional:** This is a conditional decision point that needs no action. This condition will route the process by whether the project is Systemic or Non-systemic.

30. **LEA Facilities Planner:** Reviews latest note on any issues brought up during the reviews. They are then able to amend any of the issues per the comment and questions from the IAC team.
31. **Amended?:** This is a conditional step that does not require action. The condition will check if the application has been amended by the LEA, and route the process accordingly.
32. **CPM Amendment Review:** The CPM will be able to review any changes or amendments to the application and comment on them.
33. **Funding Programs Assistant 75%:** The FPA will add all recommended funding for this stage of the process.
34. **Funding Programs Manager 75%:** The FPM will add all recommended funding for this stage of the process.
35. **Funding Programs Assistant 90%:** The FPA will add all recommended funding for this stage of the process.
36. **Funding Programs Manager 90%:** The FPM will add all recommended funding for this stage of the process.
37. **CPM Updates Status:** The IAC Capital Projects Manager will review all issues once again and update their statuses.
38. **Funding Programs Assistant 100%:** The FPA will add all recommended funding for this stage of the process.
39. **Funding Programs Manager 100%:** The FPM will review and approve the CIP funding for this project.
40. **Finance Assistant Funding:** The Finance Assistant will add the approved funding into the BMS cost module, where the funds will be available for contract approvals.
41. **IAC CFO Final Approval:** The IAC CFO will approve the application, and send the process to the end of the workflow.
42. **Prior Funding:** This is a conditional decision point that needs no action. This condition will route the process by whether the project is Systemic, or Non-systemic.

## Prior Funded Systemic

43. **Systemic Prior Funding:** The process initiator will continue to fill out the request. This layout will be specific to a project that is systemic, that has had prior funding applied.

## Prior Funded Non-Systemic

44. **Non-Systemic Prior Funding:** The process initiator will continue to fill out the request. This layout will be specific to a project that is Non-systemic, that has had prior funding applied
45. **Funding Programs Assistant Prior Funding:** Once the application has been completely filled out by the LEA, the Funding Programs Assistant will check all data and documents for completeness. If there are any changes, or questions, the assistant will send the process back with an explanation of what is needed.

46. **Funding Programs Manager Prior Funding:** The IAC FPM will review the application and all information for completeness prior to review by the team.
47. **Initial Review Prior Funding:** A team from the IAC will review the application and add any issues that may arise. These issues will be available for the LEA to review and respond to in a later step.
48. **CPD Issues Review:** The IAC Capital Projects Director will review all issues and provide feedback.
49. **Funding Programs Assistant Initial Review Prior Funding:** The FPA will review the issues made by the team and add any comments or questions.
50. **Funding Programs Manager Initial Review Prior Funding:** The FPM will review the issues made by the team and add any comments or questions.
51. **Communications Coordinator Review Prior Funding:** The Communications Coordinator will review the issues and provide feedback.
52. **Funding Programs Manager Second Review Prior Funding:** The FPM will then perform a second review of the issues made by the team and add any comments or questions.
53. **Systemic Project With Prior Funding Conditional Step:** This is a conditional decision point that needs no action. This condition will route the process by whether the project is Systemic, or Non-systemic.
54. **LEA Issues Review:** The process initiator will be able to see all issues, comments, and questions. They will then be able to respond to any of these items.
55. **CPM Issues Resolution Prior Funding:** The CPM will provide their review and add comments and questions to the issues list.
56. **Funding Programs Manager Issue Resolution Prior Funding:** The FPM will follow up on all comments and complete the issues grid.
57. **Systemic Project With Prior Funding Conditional Step 2:** This is a conditional decision point that needs no action. This condition will route the process by whether the project is Systemic, or Non-systemic.
58. **LEA Amendments Prior Funding Systemic:** The process initiator will be tasked with adding any amendments to the funding application. Once complete, the process will be routed to the Capital Project Manager to review the amendments.
59. **LEA Amendments Prior Funding Non-Systemic:** The process initiator will be tasked with adding any Amendments to the funding application. Once complete, the process will be routed to the Funding Programs Manager Review
60. **CPM Amendments Review Prior Funding:** The IAC Capital Projects Manager will review all proposed amendments, and add any feedback. This step will then be routed to the Funding Programs Assistant 75% step, which is #25 in this guide. The process will then move forward to the rest of the workflow described above.