# **Co-Trustee Withdrawal Form Guidance Document**

## Introduction:

This guidance is for Co-Trustees looking to withdraw Restoration Funds from the NRDAR Fund. This step-by-step guidance will give you a walk-through of how to register, fill out a withdrawal form, and keep updated on the status of submitted withdrawals. At the end of the guide there are some helpful troubleshooting tips if you are experiencing issues as well as the contact information for ORDA Operations for seeking any further assistance. Do not hesitate to reach out as we can always be reached at DOINRDAR@ios.doi.gov.

### To access the Co-trustee withdrawal Form, you must go to the DARTS Website.



Scroll to the bottom and click the "View Your Restoration Projects and Withdrawal Requests" button. That button will take you to the <u>account login page.</u>

If you are a co-trustee here to check the status of your restoration withdrawal requests and update restoration project details, visit the Co-Trustee Dashboard. You can find a link from the dashboard to the form for submitting new withdrawal requests, and also from each of your Case Detail pages within the Case Document Library. You must be a registered user and loop to view these erass of the site.

View Your Restoration Projects and Withdrawal Requests

Log in.		<b>Register A New U</b>	Register A New User					
		Create a new account						
Use a local account to l	og in.							
Email		Email						
Password		Please Select your Co-Trustee Type	~					
	Remember me?	Password						
	Log in	Confirm password						
Register as a new user		Somm publicity						
Forgot your password?		I	Register					

#### Registering as a New User:

If you have not registered, please go to the "Register as a new user" on the log in page. When registering, please use a work email and choose your Co-Trustee Type and subsequent selection. Once registered, a confirmation email will be sent to your registered email. Please confirm your login within the email. If at any time you forget your password, it can be reset.

Once logged in, you will be directed to the Co-Trustee Dashboard where all your requests that are saved, submitted, and completed are located as well as access to your restoration projects.

To access your projects, please email <u>DOINRDAR@ios.doi.gov</u> with your email and the cases you should be assigned. You will not be able to submit a withdrawal form without being assigned to cases.

To submit a withdrawal, press the "submit a new withdrawal" request button.

#### **Co-Trustee Dashboard**

o-trustees are able to add and update restoration projects, enter cost collection data, ar	nd submit withdrawa	l request f	orms from this dashboard									
OTICE: Please logout when completed by clicking the logout link, and do not sav	e login information	/passwor	d on public computers.						l L	ogged in as: che .og out	lcey_nordstro	m@ios.doi.gov
Restoration Projects		With	drawal Requests									
Your assigned Cases and their associated projects are displayed here. If you are not case you are adding a restoration project or are not able to find a case, please conta Admins.	sure to which ct NRDAR	Vie	Submit a New Withdrawal w the Withdrawal Request G	Reques Jidance	t document.							
The case names below are links to the public Damage Case page if they are publicly Restoration projects for each case are listed below the case names. Clicking on a re name will take you to the Restoration Project Detail page for editing the project data restoration project, click the Add New Restoration Project button under a case name.	available cases. storation project To add a new	Save	ed/Submitted Request	s								
Case Name		View							Total Reques Amt.		Enterec Date	
Y				Y		Y		Y			Y	
Deepwater Horizon NRDA		No re	ecords to display.									
TEST Case												
+ Add New Restoration Project		-										
Restoration Project Name	Last Modified	Corr	npleted Requests									
Bank Stabilization of the Test River	6/1/2023								Total			
h	3/31/2023	View							Request Amt.		Entered Date	
International project	4/14/2023			7	Z		7					07/18/2022
New project	4/13/2023											07718/2023
test	4/6/2023	No re	ecords to display.									
Testing document issues	3/27/2023											

## How to submit a withdrawal:

Select a Request type, Case Name, and project name. If the restoration project is not listed, please return to the Co-Trustee Dashboard to add the new project under the case. Financial accounts for the given case will be listed and the financial account should be chosen that will be used to fund the restoration project.

Provide a description in the remarks section that states what the project is, where funds are going, and if all the information provided is attached (Signed Trustee Council Resolution, Restoration Plan, etc). If a document is not showing as previously uploaded, you are able to upload a document through the Upload Supporting Documents area. Make sure to give the document a title, and type from the provided list and press upload. It will appear under supporting documents. Previously uploaded documents should be unchecked if they do not pertain to your request.

#### Withdrawal Request Form

	If you intend on returning to this form and edit	ing the request, you must use the Save button at the bottom of this page.
Case and Request Details		
Request Type	Y	
Case Name	•	
Project Name	•	
	If the project is not available in the dropdown list, please e	enter the project name in the field provided:
Financial Account(s)	please first select a case from the dropdown	
Restoration Funding Type		
Remarks @		
Upload Supporting Documents	Select Document (?)	Browse
	Restoration Project	
	Document Title	
	Document Type	•
	Upload	
Uploaded Supporting Documents	No supporting documents have been uploaded. Please use t	he tool above to upload these documents. A trustee council resolution memo must b

Inserting financial information is based on the trustees listed on the case details pages. If a trustee is not listed, please let ORDA Operations know and we will add them behind the scenes. DOI bureaus are listed on the left along with the ability to add DOI Bureau Indirects.

Amounts To B	e Allocated ⑦						
To DOI Bureaus							
Bureau	Amount						
BIA							
BLM							
BOR							
FWS							
NPS							
USGS							
ORDA							
Other							
enter bureau name							
DOI Bureau Indi	rects						
+ Add new record							
Bureau	Indirect Destination Office	Destination Financial Account					
No records to disp	No records to display.						
Total:							

The Co-trustee agencies are listed on the right. The list is populated by the co-trustees listed on the case details page. For state agencies, enter the total of all state funds under the corresponding state agency, and then a secondary list of individual state agencies will generate under the NRD Trustee State Agencies area. Once all funds are complete, there is the ability to save or submit your request. Once submitted, emails will be sent to you as requests are "In Progress" and completed by the NRDAR Fund Manager.

To Non-DOI Federal Agencies ③				
Agency			Amount	Destination Financial Accounts
No records to display.				
Total:				
To State Agencies ③				
Agency			Amount	Destination Financial Accounts
No records to display.				
Total:				
NRD Trustee State Agencies ⑦				
Agency	Amount	Destination F	inancial Accounts	
No records to display.				
Total:				
To Tribes ⑦				
Agency			Amount	Destination Financial Accounts
No records to display.				
Total:				

Withdrawal Form Troubleshooting:

Q: I do not see my financial account, Case list, or withdrawal submission.

• Please contact ORDA Operations at <u>DOINRDAR@ios.doi.gov</u>.

Q: The form is not letting me press "submit".

- There are several reasons that might be the case:
  - Are there any errors/missing information that is needed? The list can be seen above the submit button
  - Is the circle in the browser running? If so, it is trying to submit so just give it a few more minutes.

## **ORDA Operations Unit Contact Information:**

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