INTERNATIONAL TRADE
FINANCIAL ASSISTANCE PROGRAMS

IOWA economic development

Instructions

The International Trade Financial Assistance Programs are strictly to support eligible Iowa companies with particular expenses of INTERNATIONAL MARKETING. Domestic marketing is NOT covered in these programs.

Registration

Https://ieda.force.com
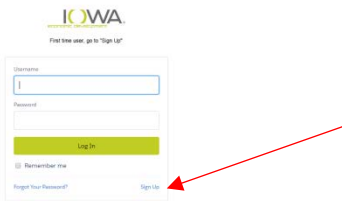
First-time users (to ieda.force.com) must register as a user of the International Grant Application System. Click on "Sign Up" in the lower right corner under the Login button.

Next, applicants are encouraged to complete ALL fields of the registration form. Applicants need the COMPANY'S TAX ID NUMBER to register. Required fields are noted in red and MUST be completed to "Submit" the registration.

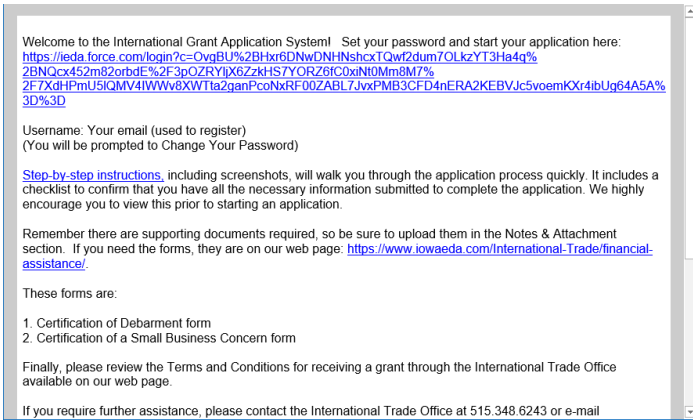> Complete column down, then proceed to the second column.

> If the contact's address is the same as the company address, check this box. The system will automatically populate the information.

> Note: The Contact Email provided will be the email where all correspondence regarding this application/grant, will be sent.

Applicants will receive an email (to the email provided on the registration form), indicating the registration was received and will be processed within two business days.

We have successfully received your request for access to the International Trade Grant Application System. Please allow up to two (2) business days to process your request. An email will be sent to lisa.longman9@gmail.com notifying you of the approval/denial of your registration.

If you do not receive your email within two business days,

If an email similar to the one below is not received, applicants should check the spam/junk folder, or check with their IT staff.

Welcome to the International Grant Application System!   Set your password and start your application here:
https://ieda.force.com/login?c=OvqBU%2BHxr6DNwDNHNshcxTQwf2dum7OLkzYT3Ha4q%
2BNQcx452m82orbdE%2F3pOZRYljX6ZzkHS7YORZ6fC0xiNt0Mm8M7%
2F7XdHPmU5IQMV4IWWv8XWTta2ganPcoNxRF00ZABL7JvxPMB3CFD4nERA2KEBVJc5voemKXr4ibUg64A5A%
3D%3D

Username: Your email (used to register)
(You will be prompted to Change Your Password)

Step-by-step instructions, including screenshots, will walk you through the application process quickly. It includes a
checklist to confirm that you have all the necessary information submitted to complete the application. We highly
encourage you to view this prior to starting an application.

Remember there are supporting documents required, so be sure to upload them in the Notes & Attachment
section. If you need the forms, they are on our web page: https://www.iowaeda.com/International-Trade/financial-
assistance/.

These forms are:

1. Certification of Debarment form
2. Certification of a Small Business Concern form

Finally, please review the Terms and Conditions for receiving a grant through the International Trade Office
available on our web page.

If you require further assistance, please contact the International Trade Office at 515.348.6243 or e-mail

Approved applicants will receive a welcome email providing a link to create a password. If you do not receive this email within two business days, check your Junk/Spam folders and check with your IT staff.
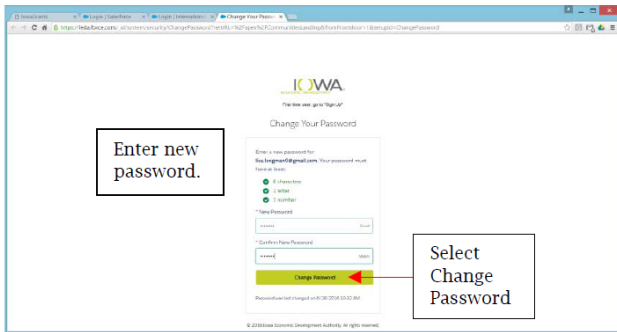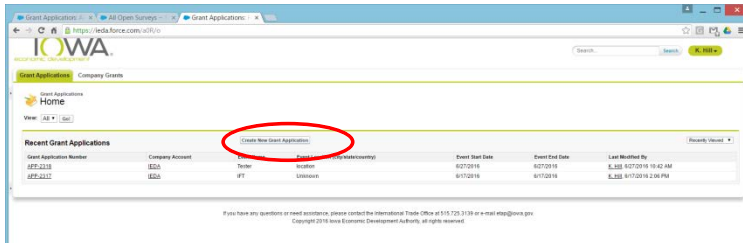

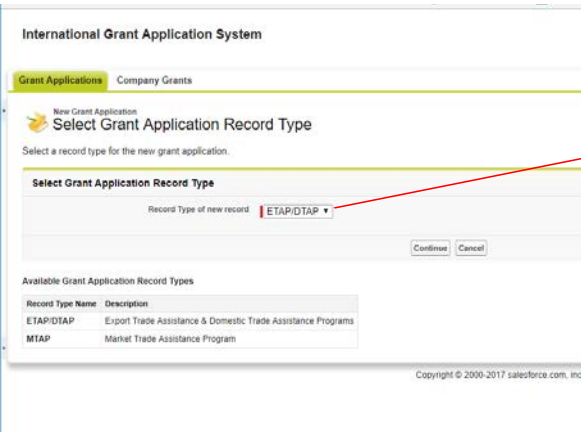Set your password from the link provided in the above Welcome email.

In ieda.force.com:

Select Create New Grant Application.

Select the grant application type, and click Continue.

ETAP/DTAP: Trade shows/trade missions

MTAP: Market assistance (compliance, translations and international marketing)
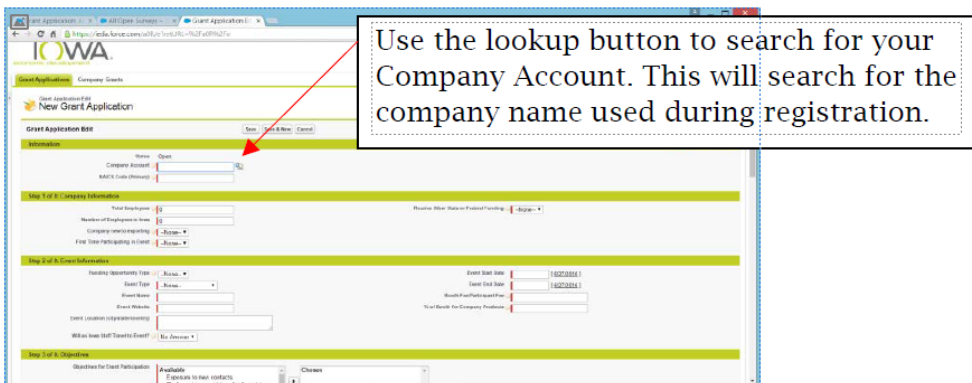
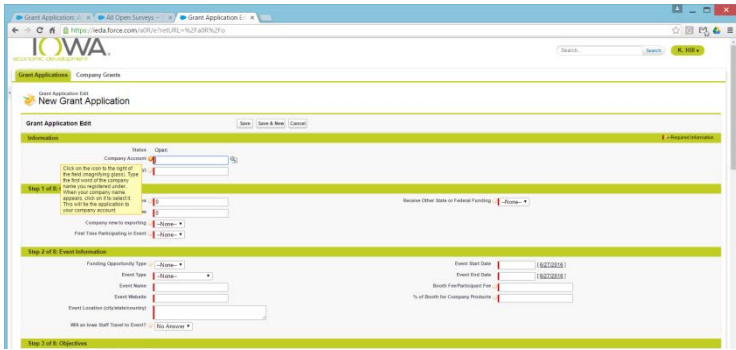**ETECH:** Participation in CIRAS ExporTech Program

Click "Continue"

There are three steps required to for a complete application:

    A. Complete Application Fields and save (all required fields must be completed to save)
    B. Required Documentation
   C. "Submit for Approval"

A. Complete all Fields on Application

Fields marked in red are required. Applicants will be unable to save the application without completing these fields.

Use the lookup button to search for your Company Account. This will search for the company name used during registration.
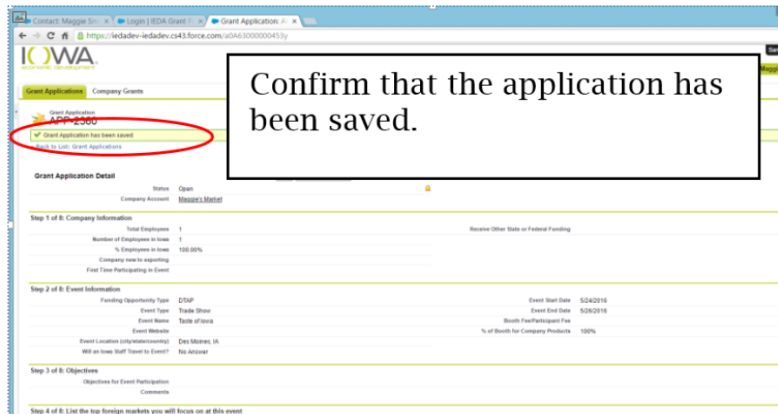
A small pop up provides detailed information on the field when hovering over the small question icon next to the field name.

Additional field definitions are available on the Application Field Definitions page in the Appendix below.
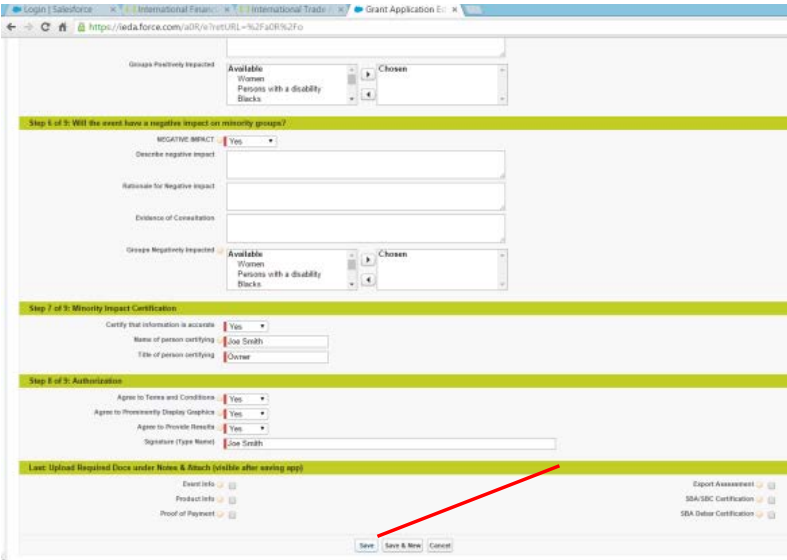
After completing the application fields, **SAVE** the application.

Confirm that the application has been saved.

Grant funds are to support eligible Iowa companies with certain expenses for **international marketing**. Companies MUST be able to provide documentation of proof of international, documentation for event/service being provided. Any services without approved documentation will not be considered.

B. Required Documentation (refer to the Documentation Checklist in Appendix for complete list)

Scroll down the page to the Notes & Attachments section, select Attach File. Multiple files can be attached.

Step #1: Select Choose File and browse to select the first file to upload. The document name should appear next to Choose File to confirm the correct document has been selected.

Step #2: Select Attach File, to attach the file. The name of the file uploaded is shown under the green bar entitled "You have just uploaded the following File" as noted below, to confirm the document was uploaded.

<u>Repeat Steps 1 & 2 for all documents.</u>

The name of uploaded file should appear under the green bar. When finished, select Done (#3 on the screen).

Any payment documents in another currency MUST include the exchange rate AND the total in USD.

Return to the Notes & Attachments section to confirm the list of ALL documents uploaded as shown below. This is where you will see the running list of documents uploaded.

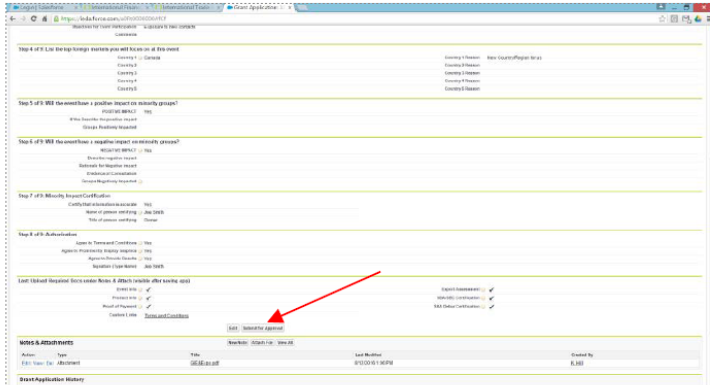*NOTE: Be sure to upload ALL required documentation and complete all fields.*

*INCOMPLETE APPLICATIONS WILL <u>**NOT**</u> BE CONSIDERED. Please review the Documentation Checklist in the Appendix before proceeding.*

C. Submit for Approval: Applicant(s) must <u>Submit</u> for the application to be processed.

<mark>Confirm application is complete:</mark>
  A. All fields in the application are completed.
  B. All required documents are uploaded under Notes & Attachments.
  C. Select "Submit for Approval". The following message will pop up to notify applicants that they **will not be able to edit** the application or documentation once submitted. Click OK.

iedadev-iedadev.cs43.force.com says:

Once you submit this record for approval, you might not be able to edit it or recall it from the approval process depending on your settings. Continue?

OK   Cancel

REQUIRED ATTACHMENTS:

1. Certification of Debarment (current date)
2. Certification of Small Business Concern (current date)
3. Company general brochure (screenshot of website accepted)
4. A. ETAP/DTAP: Receipt of at least partial booth payment OR
   B. MTAP: Copy of the selected project quote.
5. ETAP/DTAP Event general information (screenshot of website accepted).
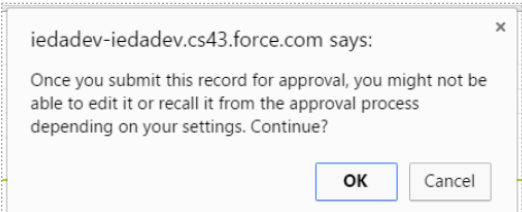
Log out

Click your name in the upper right corner; a menu should appear allowing you to Logout.
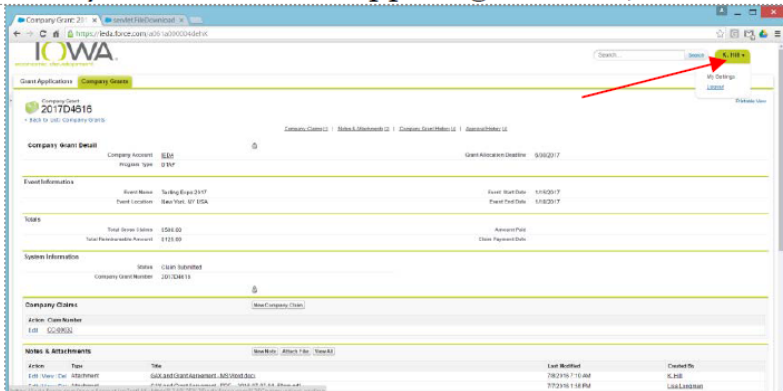
Check the status of the Application

Log into https://ieda.force.com

To check the status of the application, click on the Application number.

Status:

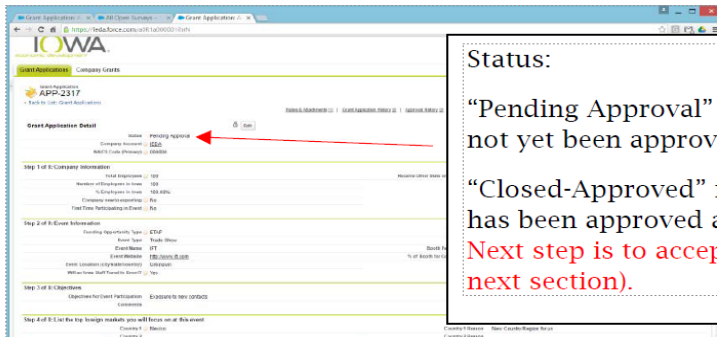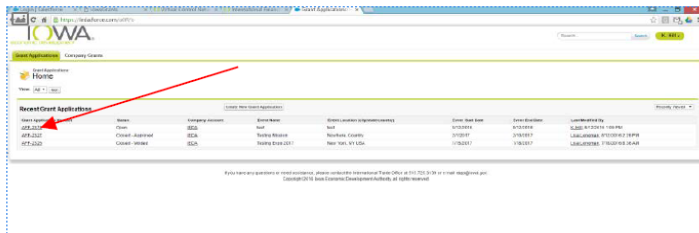"Pending Approval" - if application has not yet been approved.

"Closed-Approved" if the application has been approved and is now a Grant. Next step is to accept the grant (see next section).

Application Approval/Denial

After submitting a completed application, applicants receive email notice once the application has been through the approval process. Typically, this process can take up to two weeks.

A. Approval

Approved applicants will receive email notification indicating the application has been approved.
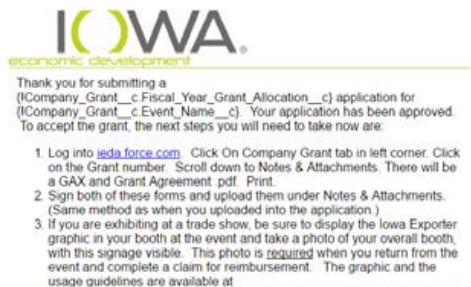
You must accept the grant prior to the event/ project start. Accepting the grant is to sign the grant agreement and upload the signed copy to the Notes & Attachments.

Approved applications will receive a second email for an electronic signature on the Grant Agreement document. This is an Adobe Sign document. Please do not lock or verify as a second signature from our office is required to execute the grant. A copy of the final executed grant will be kept in the GRANT section on ieda.force.com. (Grant number is on the grant agreement in the top right corner.

B. Denial

Denied applicants will receive an email. Some examples may include, but are not limited to:

1. Application or documentation was incomplete
2. Event takes place outside the funding period
3. Company is ineligible

Details regarding the denial may be requested by email to international@iowaeda.com.

Grants received for exhibiting at a trade show MUST display the most current Iowa Exporter graphic in a prominent place in the booth. <u>A photo of the overall booth, with this signage visible, must be submitted after the event as part of the claim for reimbursement.</u> Failure to provide this could void the grant.

The current Iowa Exporter ID graphic is available in .pdf at <u>iowaeda.com/international-trade/</u> <u>financial-assistance</u> in the Resources box. Additional file formats may be provided upon request. Email <u>international@iowaeda.com</u> to request the desired format.

Graphic looks like (this is a partial view of the graphic):

After the Event or Project End

Receipts:
- Trade Show:
  - Booth rental matching invoice and receipt or proof of payment
    Booth furnishings (carpet, chairs, tables, utilities for booth, set up of booth at show site – does <u>not</u> include printing of materials for show)
  - Shipping of materials to and from show site
  - Photo of booth at show with the Iowa Exporter graphic visible
  - Interpreter receipt, if interpretation was necessary
- ExporTech
  - Proof of payment of participation fee (copy of check or zero balance invoice
- Trade Mission:
  - Shipping of materials to and from destination
  - Interpreter, if not covered in the event participation fee
- Project:
  - Matching invoice(s) and receipt(s) showing work completed and payment made
  - Electronic copy (screenshots) of completed work and analytics if applicable - see below

We need to be able to see who was paid, when, the amount and exactly what the charge(s) were for.   Also, PROOF of activity - i.e. photo of booth at event, photo of digital ad, screenshot of SEO ranking from browser, analytics report of countries, translated piece, etc.

Trade Shows: Do not submit receipts for airfare, meals and lodging. Airfare is not eligible under the programs.

Once the recipient has all necessary documentation uploaded to support the expenses to be reimbursed, complete a claim.

1. Log into http://ieda.force.com

2. Select Company Grant tab
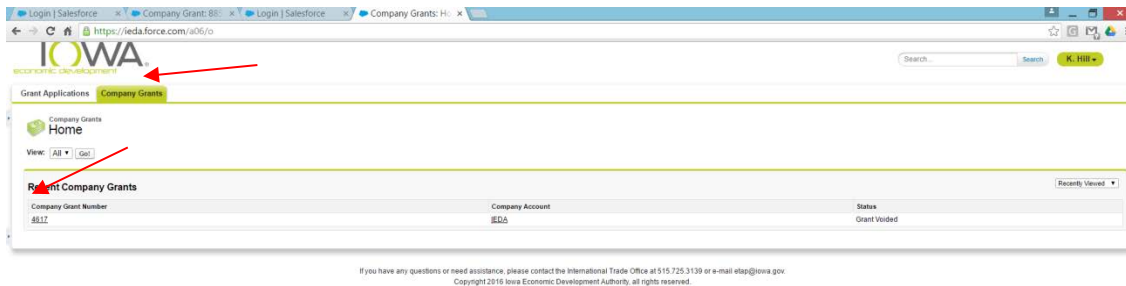
Grant funds are to support eligible Iowa companies with certain expenses for international marketing. Companies **MUST** be able to provide documentation of all expenses paid and provide proof services are specifically for international marketing purposes. Any services without approved documentation will not be reimbursed.

Under Company Claims section, click "New Company Claim" button.
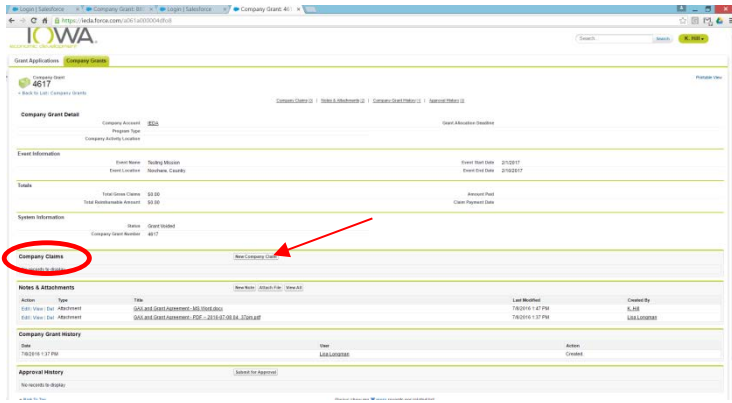
Select the first expense type:

If there is more than one receipt in a category, enter the total of all receipts for that category in the Expense Amount. Confirm all receipts have been uploaded in the Notes & Attachments section supporting the total entered.
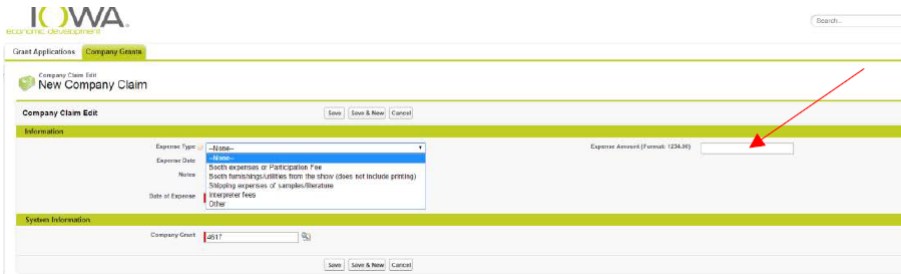
Trade Shows:

Fill in the Expense Date (receipt date – or first receipt date if multiple receipts) and amount. Some trade show booths are quite costly so if the booth expense category is $5,400 or higher, enter only one claim for booth expense. (The maximum reimbursement will be reached with this one expense.)

If the first expense is less than $5,400 and additional expenses were incurred, click Save & New to enter the additional items.
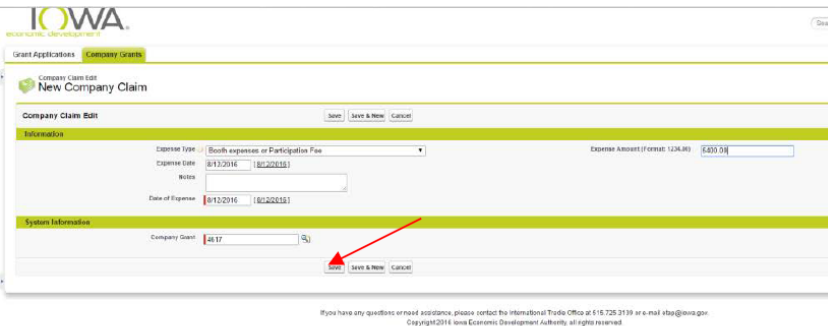
Verify the claim is saved in the yellow bar.
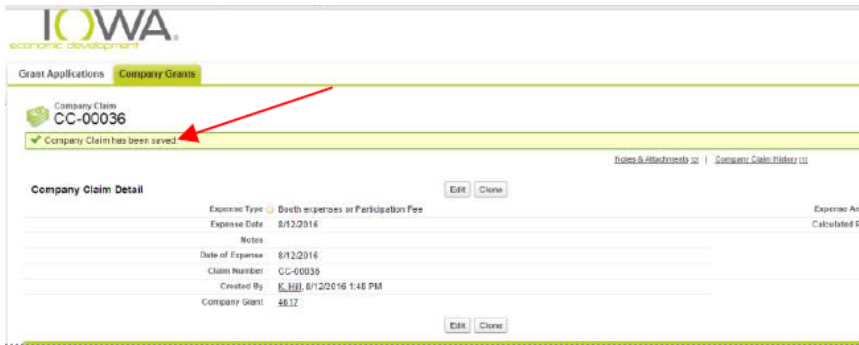
IMPORTANT!

Next, upload the receipts for the expenses entered under Notes & Attachments (steps are the same as the Application documents). Expenses without a receipt cannot be reimbursed. Also, if the receipt is in another currency, please note the exchange rate and the total i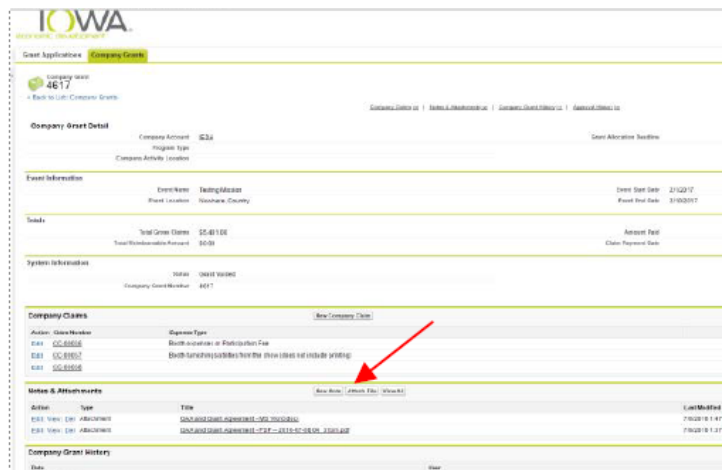n $USD on each receipt. Receipts without this will result in a claim denial. If MTAP, also upload copies of completed project work.

If you do not have complete documentation, your claim will be denied.

We need to be able to see who was paid, when, amount, and exactly what the charge(s) were for. Also, PROOF of activity - i.e. photo of booth at event, photo of digital ad, screenshot of SEO ranking from browser, analytics report of countries, translated piece, etc.

After each expense is entered, and the receipts to support those expenses have been uploaded into Notes & Attachments:
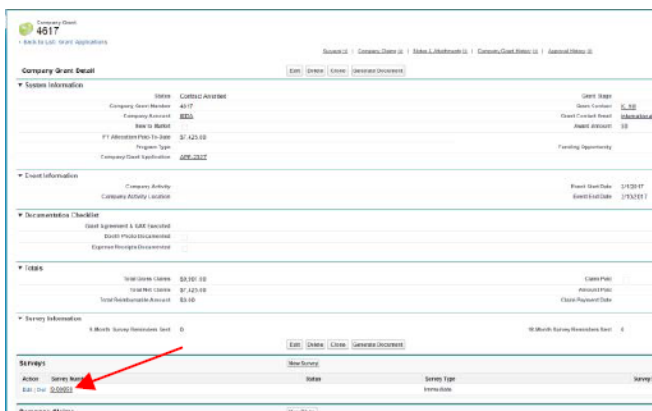
Lastly, **complete the "Immediate Survey."** This provides the results from the event, which are used to report on the impact of utilizing state/federal funds.

Under the Surveys component, click the Survey Number (Survey Type will be "Immediate").

CLAIMS WILL BE DENIED WITHOUT THIS RESULTS SURVEY COMPLETED!

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Complete the applicable fields. Click on the edit button at the top if the fields aren't available for editing.

Enter your information in the applicable fields.
In the "Status" field - select "Survey - Completed"

Click **Save** when finished.

When finished each of three parts (Claim Expenses, Receipts Uploaded and Survey completed), **Submit** the claim for approval <u>for the claim to be processed.</u>

Submit for Approval

ieda.force.com says:

Once you submit this record for approval, you might not be able to edit it or recall it from the approval process depending on your settings. Continue?

OK   Cancel

Once the claim has been submitted, it will be locked from editing.

Follow Up (9 and 18 month Surveys)

Grant recipients will receive an automatic email when 9- and 18-month surveys are due. Please complete this (and save) within 30 days of receiving the email notice. <u>Companies must be compliant with all past grant surveys</u> to remain eligible for future grants.

Please provide survey results to the best of your ability. These numbers are utilized and reported, on the aggregate, to gauge the success of each program.

Example of the survey email:

Log into <u>ieda.force.com</u>

Be sure to click on the <u>Survey</u> tab,

Choose from the dropdown, 9-month or 18-month surveys due. Click Go button.

Click on the Survey number associated with the due survey.

Click Edit button to complete that survey.

Complete all the fields possible. Remember to change Status to: "Closed: Survey Complete". Click SAVE. Survey is completed.
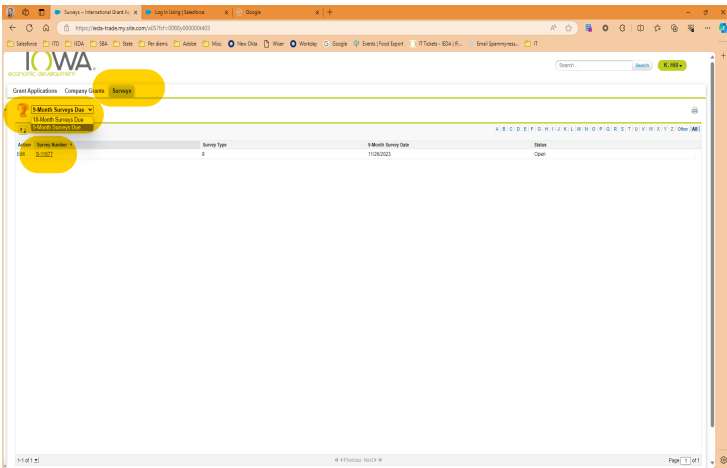
DOCUMENTATION CHECKLIST

REQUIRED DOCUMENTATION FOR APPLICATION

Forms are available at iowaeda.com/international-trade/financial-assistance in the Resources box.

1. Certification of Small Business Concern *(current, signed and dated within six months)*
2. Certification of Debarment *(current, signed and dated within six months)*
3. Proof of payment made for trade show/mission
   Projects need a quote from the chosen vendor *(no funds spent)*
4. Company/Product Brochure *(if MTAP, copy of all materials associated with project scope)*
5. Event General Information/Project Scope
   If <u>event</u>, copy of event information (screenshot of website is acceptable). Needs to include event name, location, and dates. If event is held in U.S., must include proof of international attendees to the show from past event (total number of attendees, number of attendees outside the U.S., number of countries represented.
   If MTAP, a copy of the selected service providers scope of work (detailed) with cost estimate and completion deadline.

DOCUMENTATION FOR CLAIM

Receipts for eligible expenses
If receipts are in another language, please include a description in English and converted USD amount.

MTAP: Include screenshots or copies of ads, rankings or analytics for digital ads/website grants. For translations, include the translated piece or link to it.

Invoices and receipts (proof of payment) must match. It needs to be easy to tell:

1. Who is being paid and what for

2. When and how much was paid

3. Documented <u>visual</u> of what was paid for (booth photo, translated piece, screenshot digital ad, country analytics, etc.)

Do not provide receipts for meals, lodging, airfare or other incidentals as these are not eligible expenses. If a per diem is eligible, it will automatically be added to your claim based on one representative, for the duration of the event (reimbursed at 50%).

Application Field Definitions

Company Account – Type in company name used during registration. When company name appears, select it. Or, use the lookup button to search for your Company Account.

Total Employees – This should include parent company and any other relationships which have a direct impact on your company's operation decisions.

Number of Employees in Iowa – This should be the number of company employees employed in Iowa.

NAICS (North America Industry Classification System) – Your company's <u>primary</u> NAICS. If you do not know, look up the code: https://www.sba.gov/contracting/getting-started-contractor/determine-your-naics-code.

Company New to Exporting – Select "yes" if your company has only exported within the last year or has rarely exported because of an order.

Minority Group Impact – This is a State-required question for all grants. Typically, a company's export initiatives/marketing would have no impact on minority groups in the U.S. However, feel free to answer these as you see fit.

Certify information Accurate – Answering yes indicates the information provided in the application and documentation is true and accurate to the best of your knowledge.

Agree to Terms and Conditions – Answering yes indicates you understand the requirements and agree to all.

Agree to Provide Results – Answering yes indicates your company will provide the required results to the best of your ability, after the event and again nine months and 18 months after the event.

SBA Interest – Answering yes allows U.S. Small Business Administration to contact you about other potential programs you may be interested in.

ETAP/DTAP SPECIFIC

First Time Participating in Event – Select "yes" or "no".

Receive Other State of Federal Funding – Select "yes" or "no" if you are receiving any other funds to help you participate <u>in this event</u>. (Examples include Food Export Association of the Midwest, U.S. Department of Commerce, etc.)

Funding Opportunity type – Select program. (ETAP, DTAP, MTAP, etc.)

Event Type – Select Event Type. (trade show, trade mission, etc.)

Event Name – Enter the official name of the event.

Event Website – Enter the full url for the event's official website.

Event Location – Include city, state/province, zip/postal code, country.

Will Iowa Staff Travel – Select "yes" or "no". (An Iowa-based employee isn't required to staff the event/travel.)

Event Start Date & End Date –These must be the **official** start and end dates of the event. Do not include additional travel or set up days.

Booth/Participation Fee – Include estimated **booth space rental** cost for a trade show or **participation fee** for a trade mission.

% of Booth – Applicable for trade shows only, enter 100 percent if booth is not shared with any other company. If booth will be shared, indicate your company's percentage of the booth. This is required field, so if you are applying for a trade mission, please enter 0.

Objectives – Select your objectives for participating and click on the right arrow to add them to the list. Select as many as you wish.

MTAP SPECIFIC

Project Title - Provide a name for the overall project (include company name in the title).

Project Description - Provide a description of the project and how it relates to the company's export plan.

Project Start Date - The date when work will commence on the project (must be MORE than 30 days from date of application).

Project End Date - The date when the final work will be completed on the project (NO later than the funding period end date).

Countries/Country Reason – Provide the country(s) targeted with this project. If a region, please list the top five underline specific countries. Also, by each country listed, select whether the country/region is new for the company or whether the company is focusing on a particular product that will be new to the country/region.

If you have any questions regarding the application process, email international@iowaeda.com.