October 2020

Highway Safety Office
Traffic Safety Grants

Applicant Training

publicis
sapient

COLORADO
Department of Transportation

Agenda

1. Salesforce Basics Overview
2. Navigation
3. Submitting an Application
   - Action Plan
   - Budget
4. Application Review/Revisions
   - Uploading Files
5. Submitting Claims
6. Activity Reporting

salesforce platinum consulting partner

Section 1

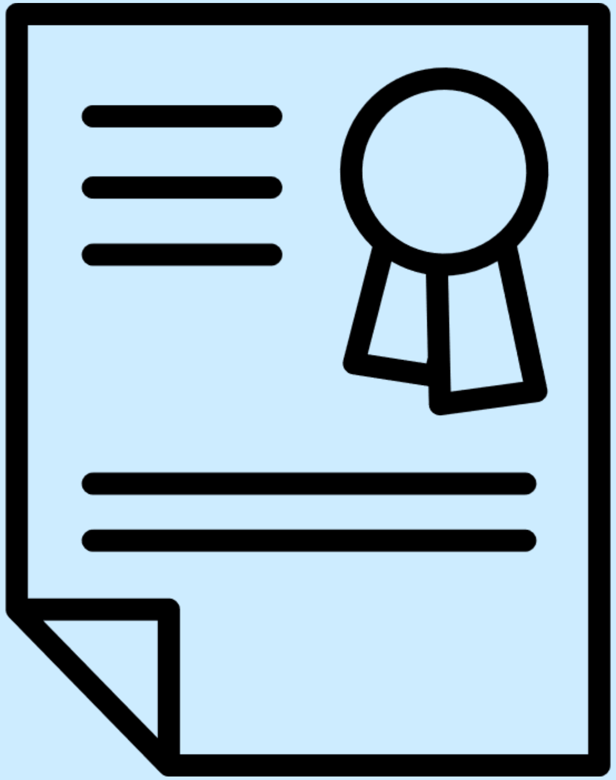
Salesforce Basics Overview

- What is Salesforce?
- What is a Salesforce Community?
  - How do I log in?

What is Salesforce?

Salesforce is a cloud-based system with an extremely flexible platform. The advantages are:

- Easy to maintain and update as needed
- No specialized software is required
- You can log in from any computer/device with Internet access
- Data is updated in real-time
- 24/7 availability



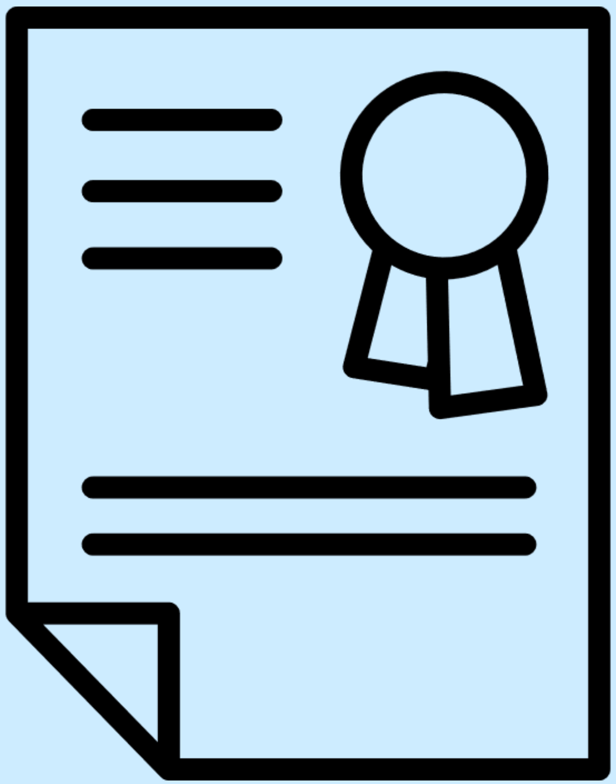
What is a Community?

A Community is a website where external authenticated (or logged-in) users can interact with HSO data.

1. Users must be granted log-in credentials to access.

2. Applicants will log-in to the Community to complete Applications, Budgets, Claims, etc.

3. Applicant interactions with data in the Community will update data in the HSO Staff Salesforce instance.



Login to the Community

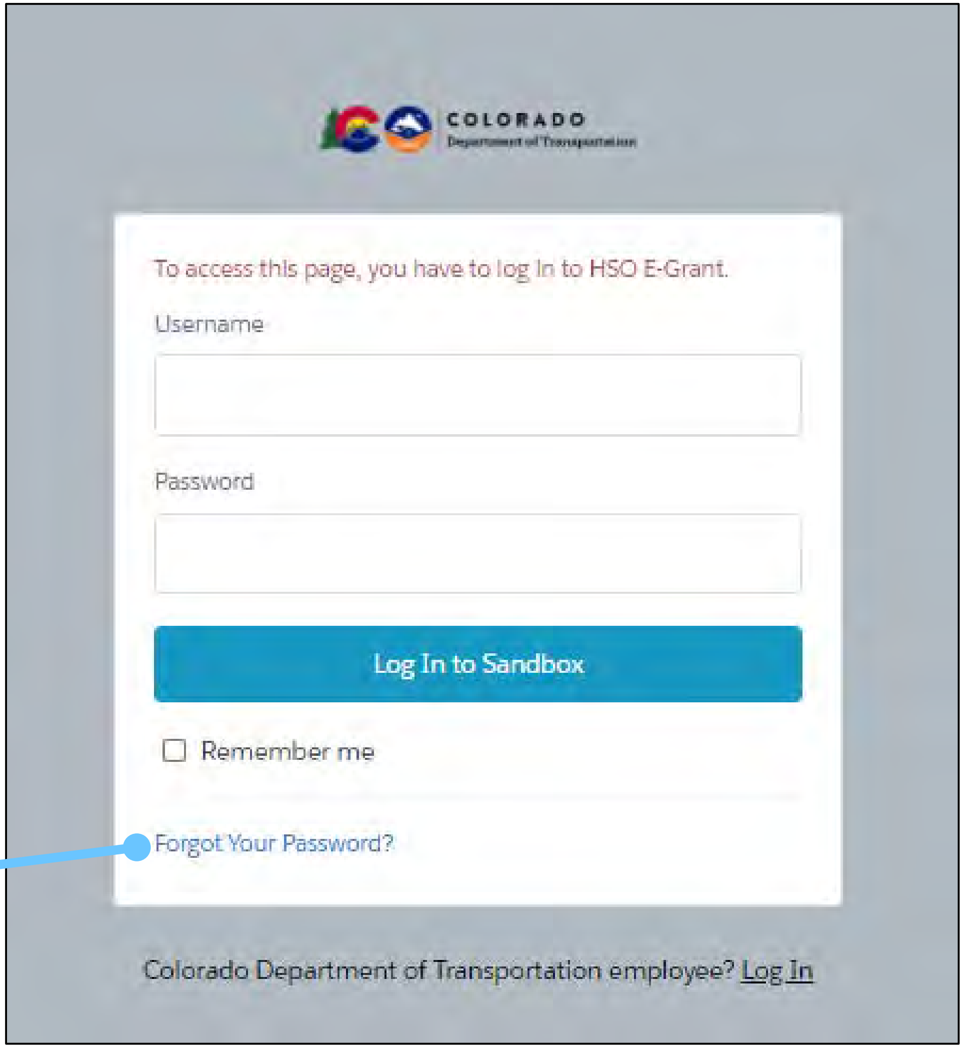
Community URL:
https://cdothso.my.salesforce.com/egrants

1. Applicants will be sent an automated email from Salesforce with username information and a process to establish a password.

2. Applicants enter username and password and click ‘Log In’

3. Important to save username and password.

Applicants can use the "Forgot Your Password" link



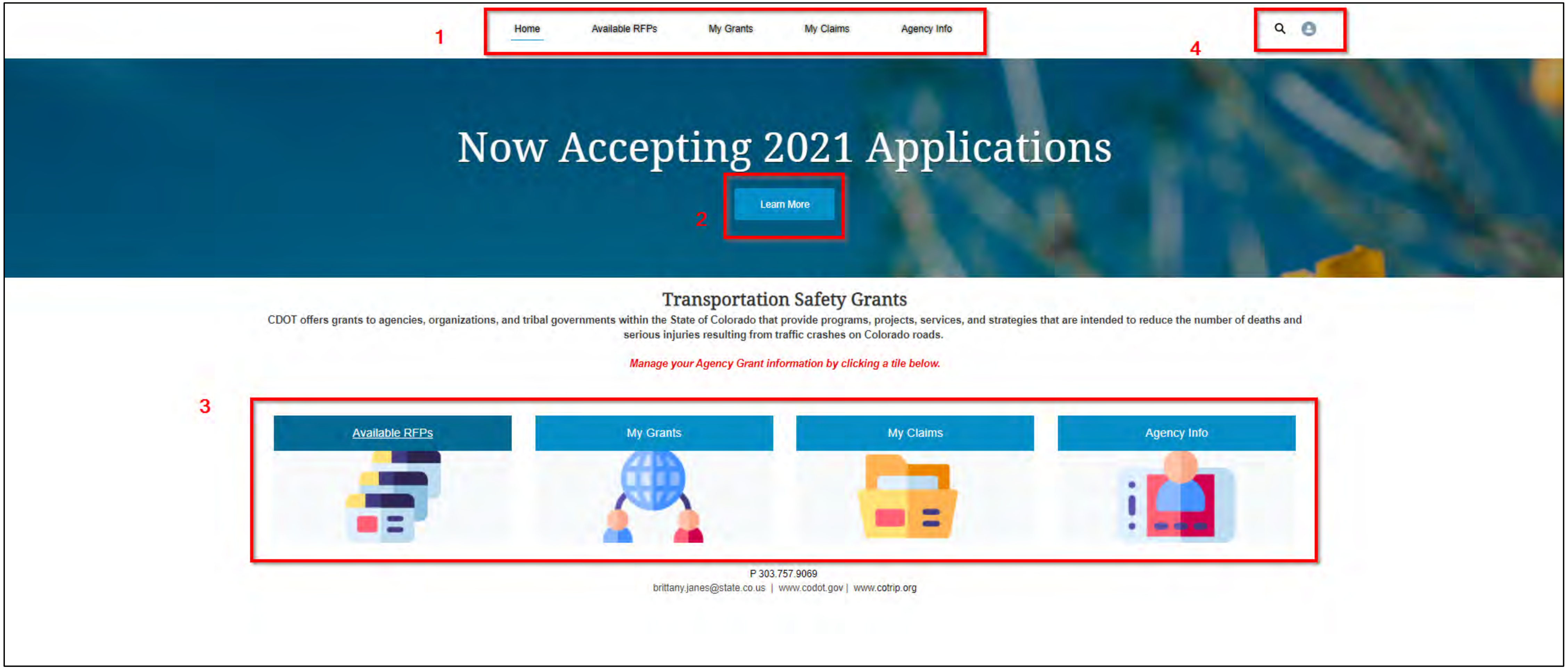
Section 1

Navigation

- ‘Learn More’ Button
- Navigating with Tabs

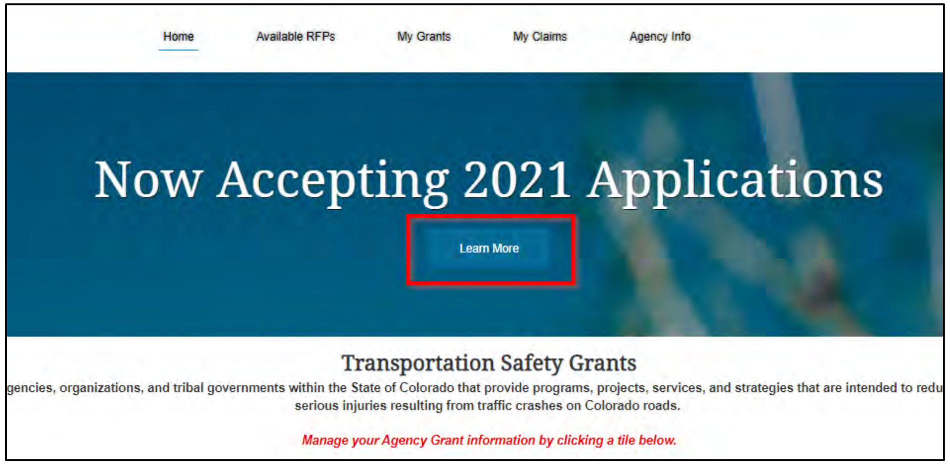
Navigating the Community

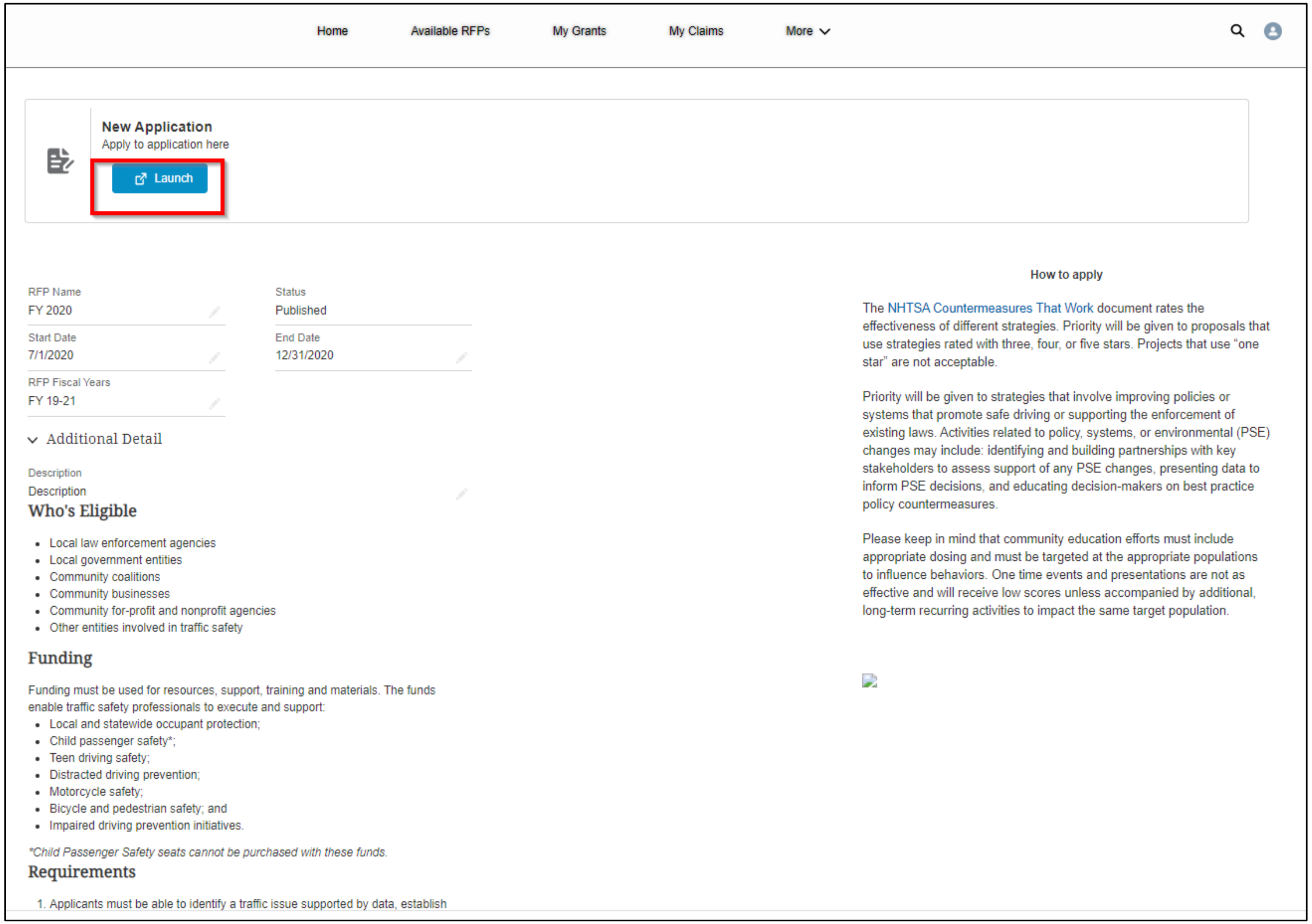
1. Tabs – Used to navigate to different pages within the Community.
2. Learn More – When clicked, takes Applicants to the active RFP screen to apply and find info.
3. Tab Icons – Display the tabs links in number 1 in a more visual way.
4. User Icon – Where Applicants can view their user information and log out.



Navigating the Community

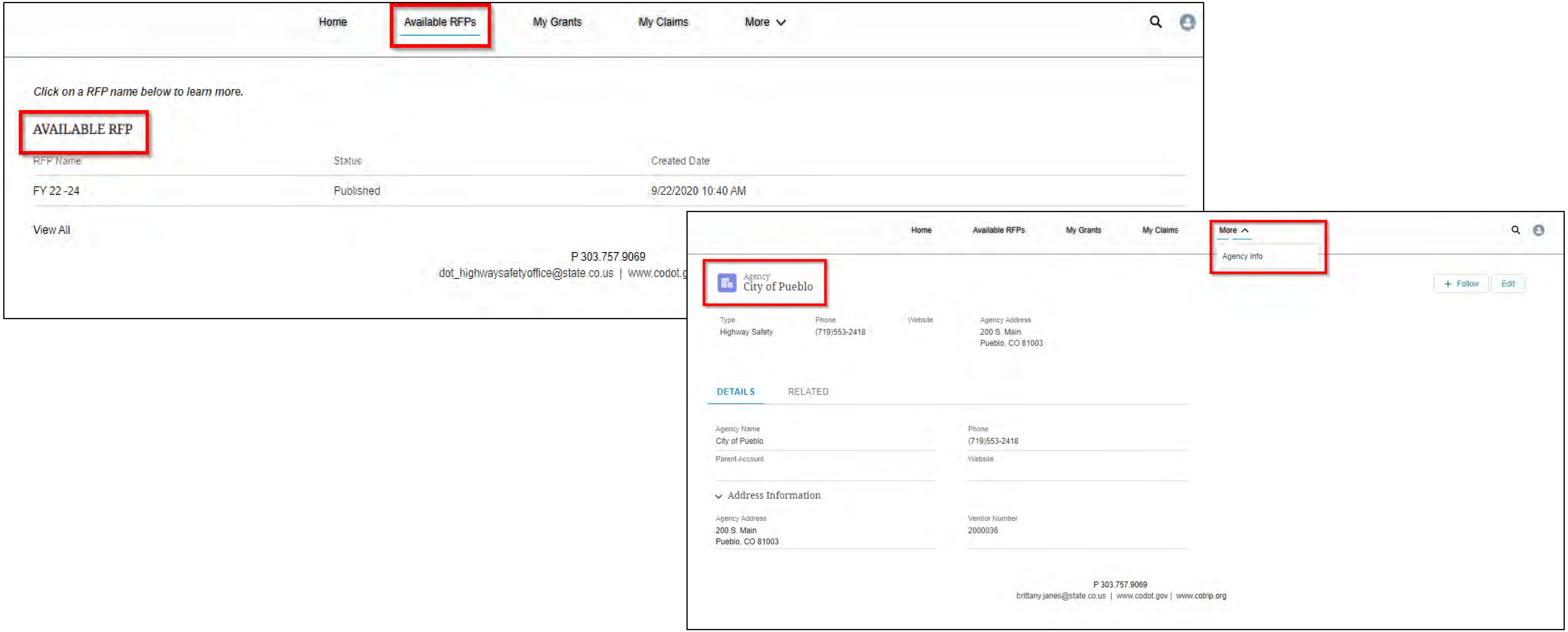
- The 'Learn More' button takes applicants to the active RFP screen where they can view RFP information and start an Application by clicking the 'Launch' button.





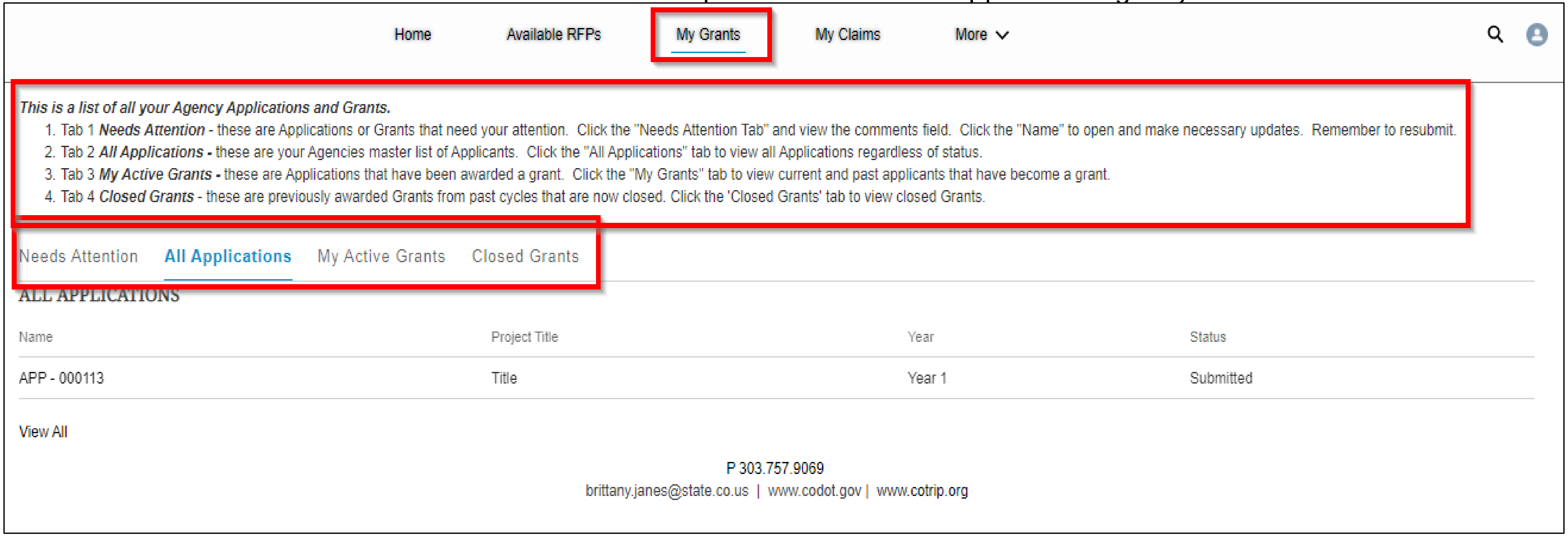
Navigating the Community

- The ‘Available RFPs’ tab displays all current RFP’s that can be applied against.
- The ‘Agency Info’ tab displays the applicant’s Agency information.
  - Information can be updated by clicking the ‘Edit’ button.



Navigating the Community

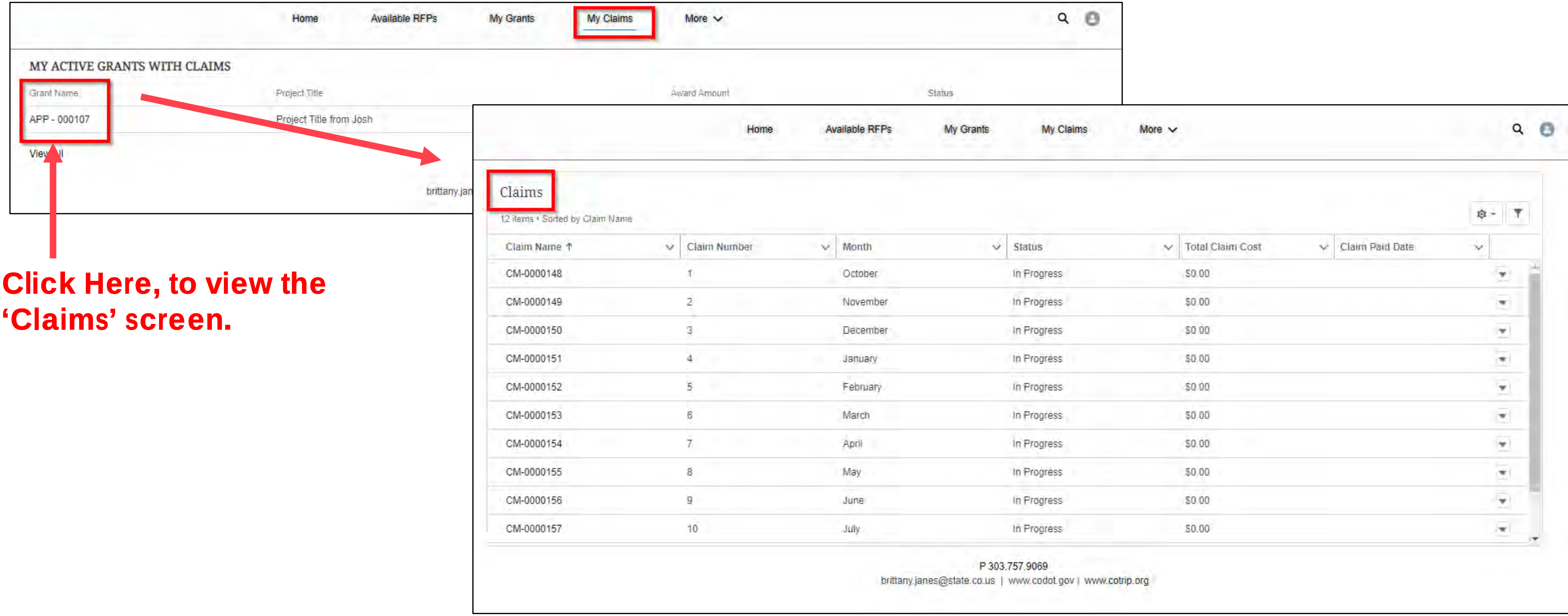
- The ‘My Grants’ tab is where applicants can access Applications and Grants.
- When clicked, the ‘My Grants’ tab displays 4 separate tabs or ‘lists’ as well as a brief description of what each displays:
  - Needs Attention – Shows all Applications or Grants for the applicant’s Agency where a revision has been requested by the HSO PM.
  - All Applications – Shows all active Applications for the applicant’s Agency.
  - My Active Grants – Shows all active/current Grants for the applicant’s Agency.
  - Closed Grants – Shows a historical list of all past Grants for the applicant’s Agency.



IMPORTANT NOTE: Both Grant and Applications in the system use the APP – 000113 numbering format.

Navigating the Community

- The 'My Claims' tab is where applicant's will go to submit Claims.
- When clicked, the 'My Claims' tab displays a list called 'MY ACTIVE GRANTS WITH CLAIMS' which displays all current Grants for the Agency that have Claims ready to be filled out and submitted by Applicants.
- When the applicant clicks the (ex: APP – 000107) link in the 'Grant Name' column, they are taken to the Grants Claims. These Claims can then be opened and filled out.



Click Here, to view the 'Claims' screen.

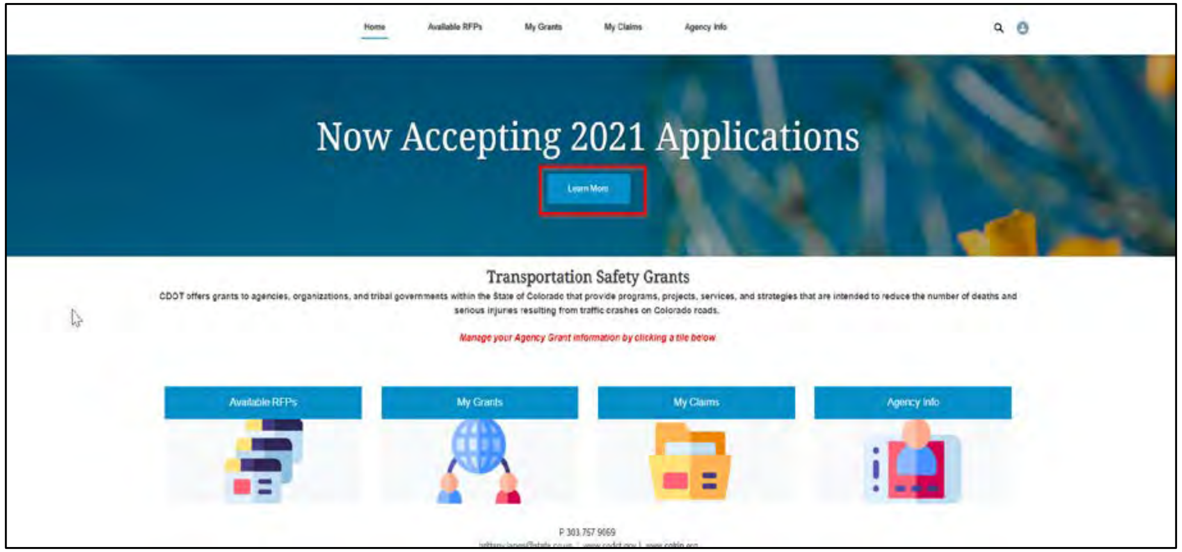
Section 3

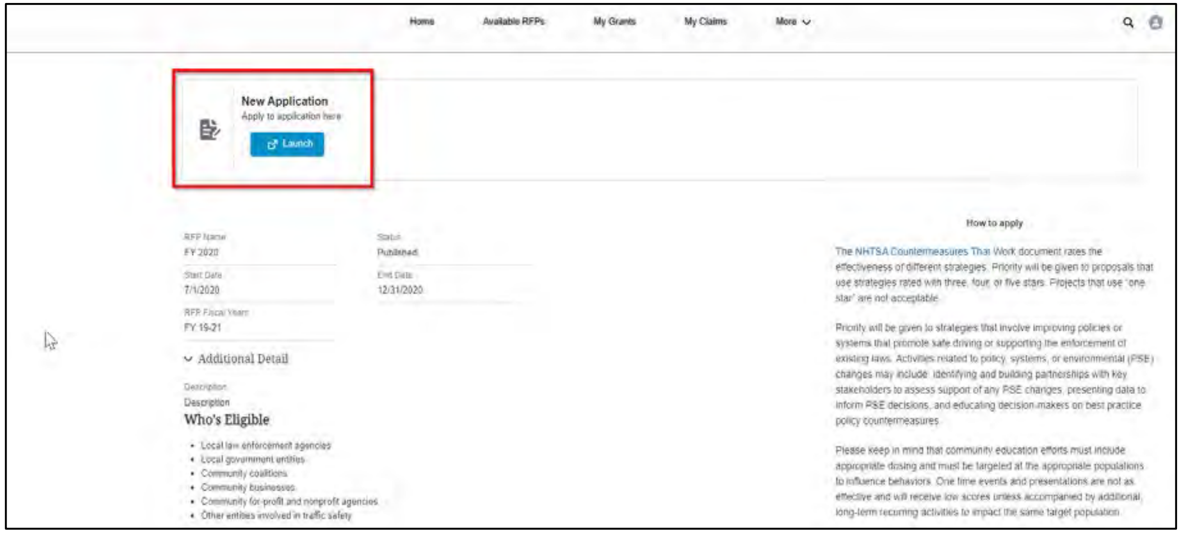
Application Creation & Submission

- Create an Application
- Completing the Application Form
  - Budget
  - Action Plan
- Submitting an Application

Creating an Application

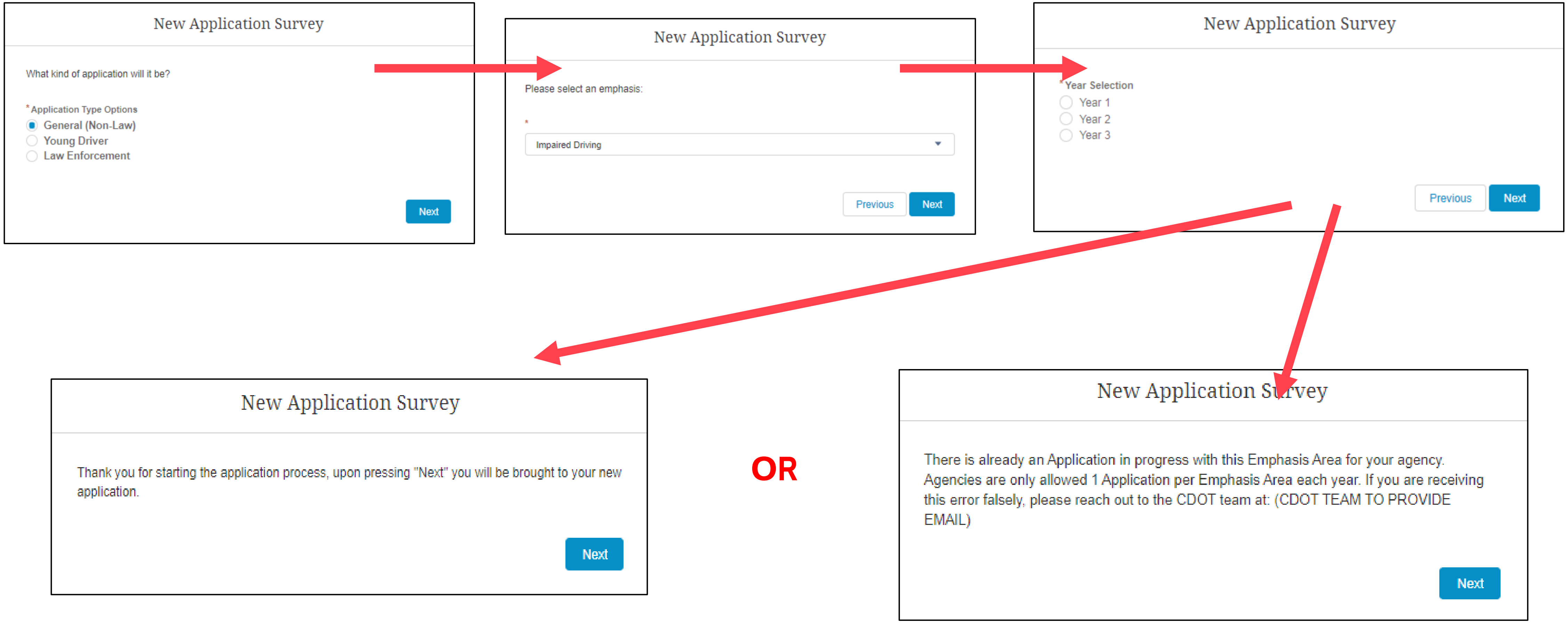
- **How Applicants create an Application:**
  - Log into the EGrants community (slide 6).
  - Click either the ‘Available RFPs’ tab, or the ‘Learn More’ button on the Home page.
    - The ‘Learn More’ button takes you directly to the current RFP, while the ‘Available RFPs’ takes you to a list view of all ‘Available RFP’s where you can select the RFP.
  - Click the blue ‘Launch’ button and complete the ‘New Application Survey’ by selecting relevant options and clicking ‘Next.’
  - After completing the survey the application form will open and can be completed.
    - If the Applicant is related to an Agency that already has an Application for the Year with the same Emphasis Area, they will receive an error message and an Application will not be created (click the launch button to start the creation process over and try again).





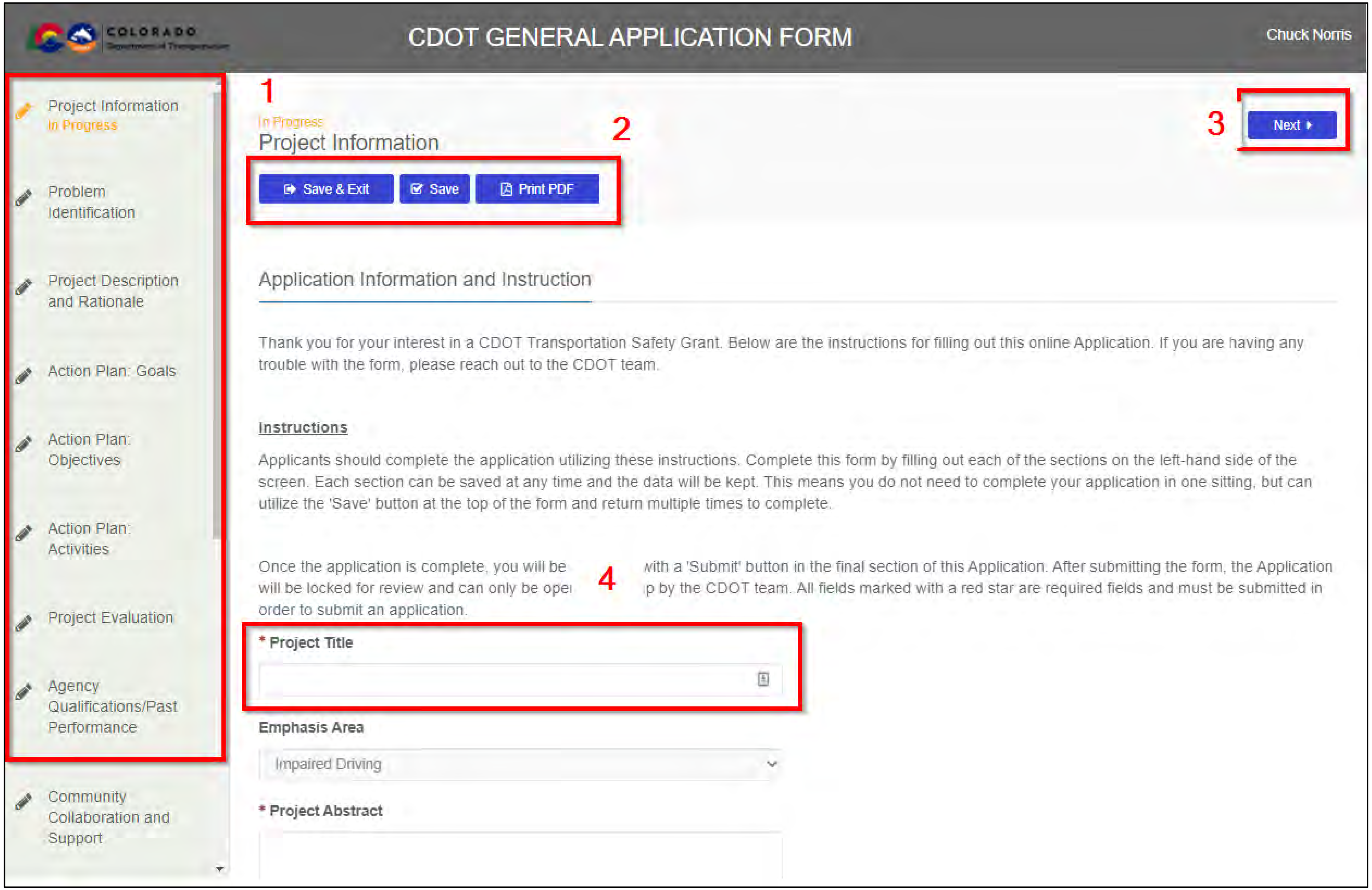
Creating an Application: New Application Survey

- When the ‘Launch’ button is clicked, a ‘New Application Survey’ pop-out window is opened.
- Applicants will select an Application Type, an Emphasis Area, and select the Year # for the current RFP cycle. Afterwards they are taken to an Application form.
- If the Agency has an Application for a certain Emphasis Area open already for the current year, then the applicant will receive the error message as shown below.



Completing the Application Form: Viewing the Form

1. Form Sections
2. Form Buttons
3. Next Button
4. Form Fields



Completing the Application Form

Application Form Basics:

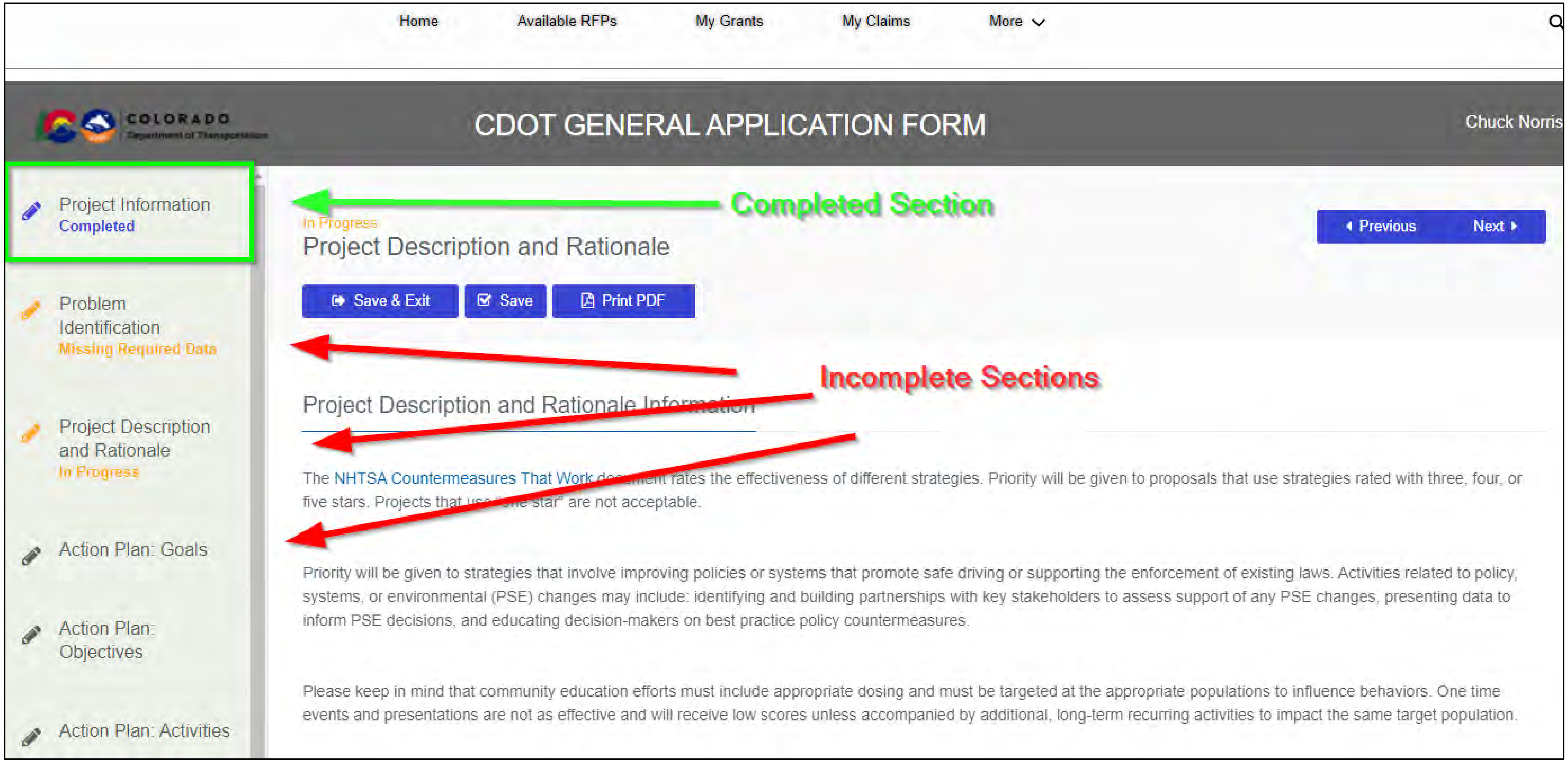
- Depending on selections made in the ‘New Application Survey’ the applicant will see 1 of 3 forms:
  1. General (Non-Law)
  2. Law Enforcement
  3. Young Driver

- The Applicant will complete the form by using the blue ‘Next’ button at the top of the page to navigate to and complete each form section.
  - Each section must have a blue ‘Completed’ text under the section name in order to submit.
  - All fields marked with a red ‘*’ are required for each section and must be completed.
  - You can navigate to any section of the form by clicking the form section on the left-hand side of the screen.

- There are a few other buttons on the screen as well:
  - Save & Exit: Saves all progress on the form and takes the Applicant back to the home page of the community. The form can be re-opened and completed at a later session if needed.
  - Save: Saves the progress on the form. Applicants can return back to the application days later if needed to complete.
  - Print PDF: Generates a PDF of the entire form for printing.

Completing the Application Form

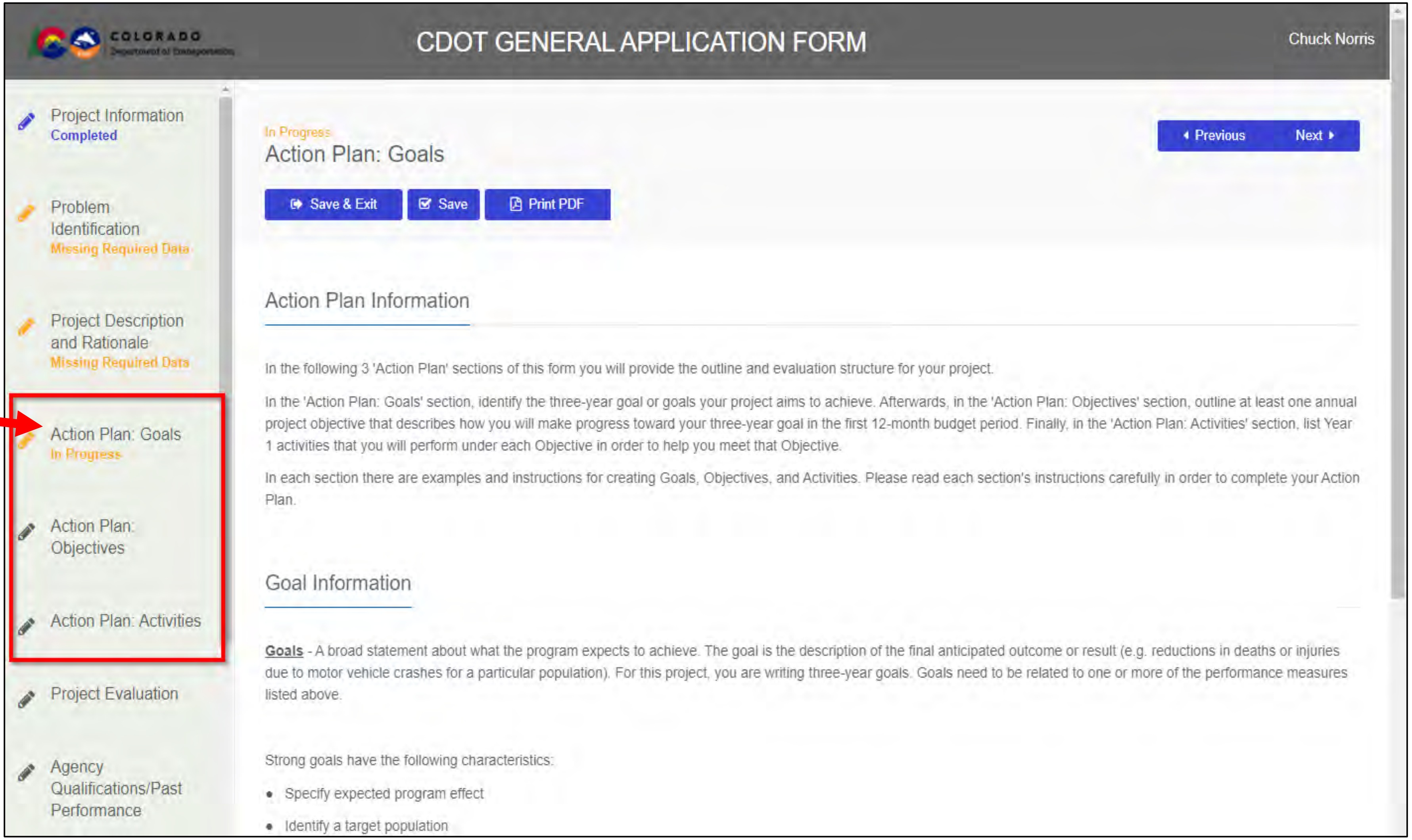
- All form sections must be ‘Completed’ in order to complete the Application and submit.
- A section is marked ‘Completed’ when all the required fields in that section have been populated.



Action Plan

- Applicants will fill out an Action Plan including Goals, Objectives, and Activities as part of their Application.

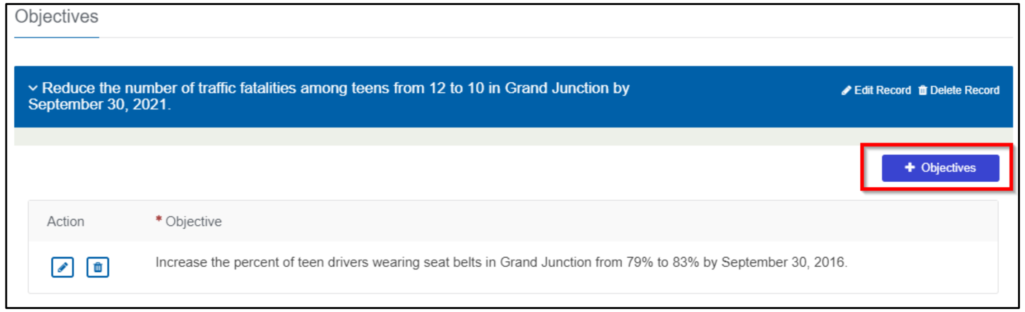
- Action Plan is divided into 3 sections: Goals, Objectives, Activities



Action Plan

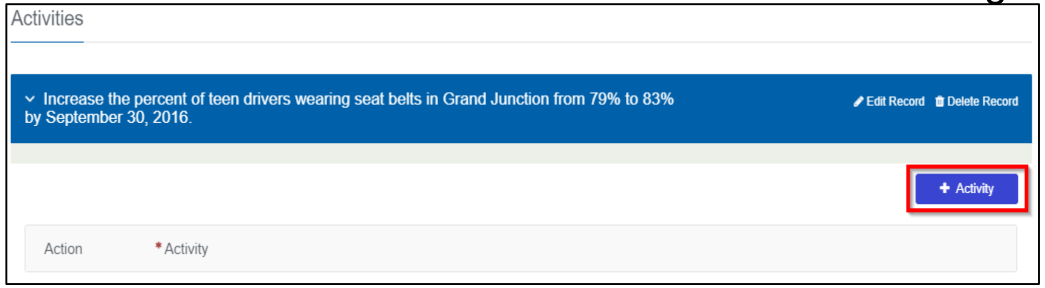
- Applicants must create a Goal on the ‘Action Plan: Goals’ section before they can create related Objectives or Activities.
  - Goals are created by clicking the blue +Goal button in the ‘Action Plan: Goals’ section and filling out the ‘Goal’ field, then clicking ‘Save’.

- After creating Goals, Applicants can create Objectives under each individual Goal by clicking the ‘+Objective’ button in the ‘Action Plan: Objectives’ section and filling out the ‘Objective’ field, then clicking ‘Save’.



Note: Goals, Objectives, and Activities can be edited or deleted after creation by using the ‘Edit Record’ and ‘Delete Record’ buttons.

- After creating Objectives, Applicants can create Activities under each individual Objective by clicking the ‘+Activity’ button in the ‘Action Plan: Activities’ section and filling out the ‘Activity’ field, then clicking ‘Save’.



Budget

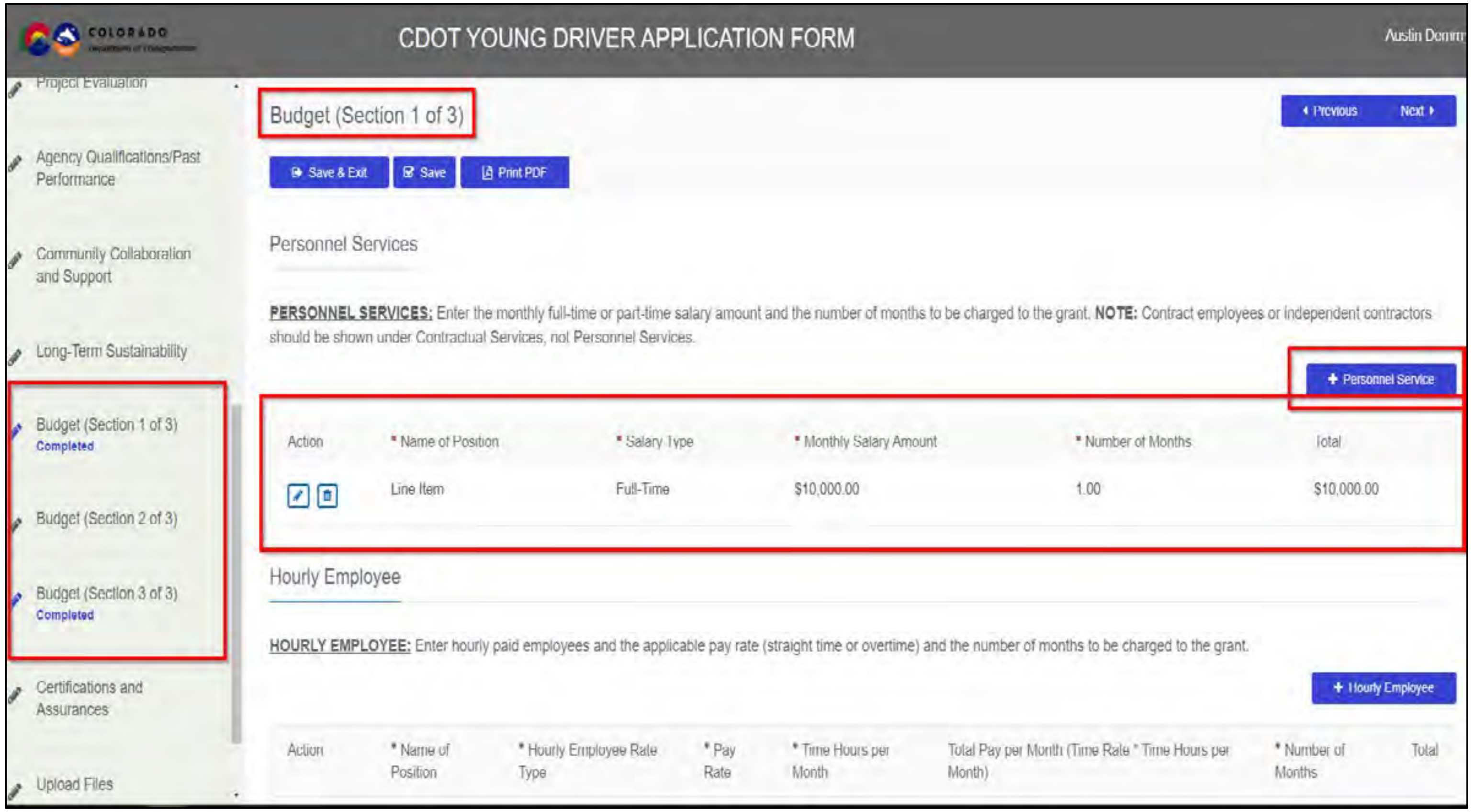
- Applicants will also fill out a 3 section Budget as part of their Application.

- Budget line items can be created according to 8 different Budget Categories.

- **To create a Budget Line Item related to a Budget Category:**
  1. Scroll to the category you would like to create a line item for in one of the 3 'Budget' section of the form (ex: 'Personnel Services' category in the 'Budget (Section 1 of 3)' section)

  2. Click the blue '+[budget category]' (ex: '+Personnel Service') button in that section, fill out the required fields in the pop-out window that appears, and click save.

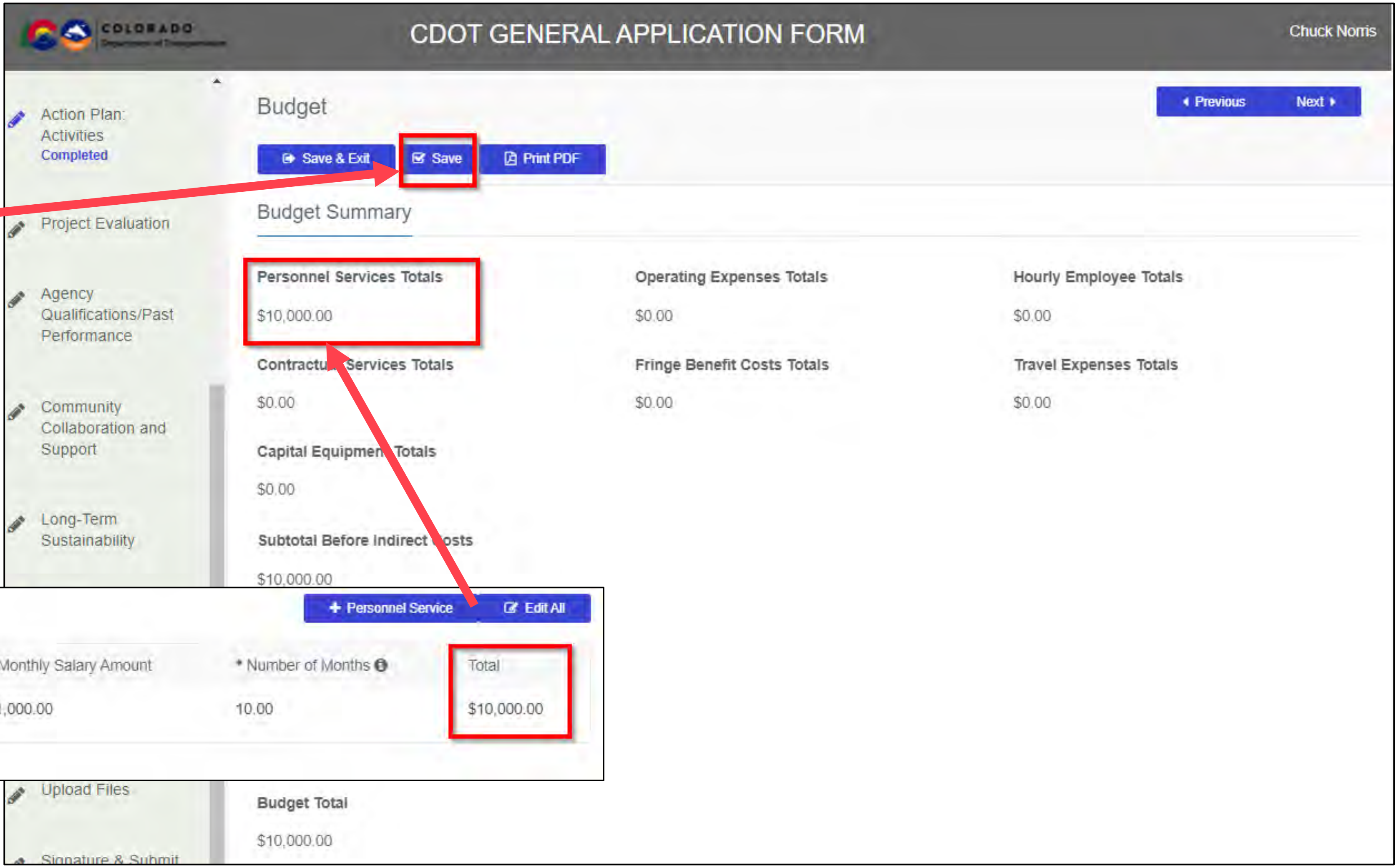
  3. Upon save of the record, the system populates the 'Total' field for that line item and adds it to the Budget Category.



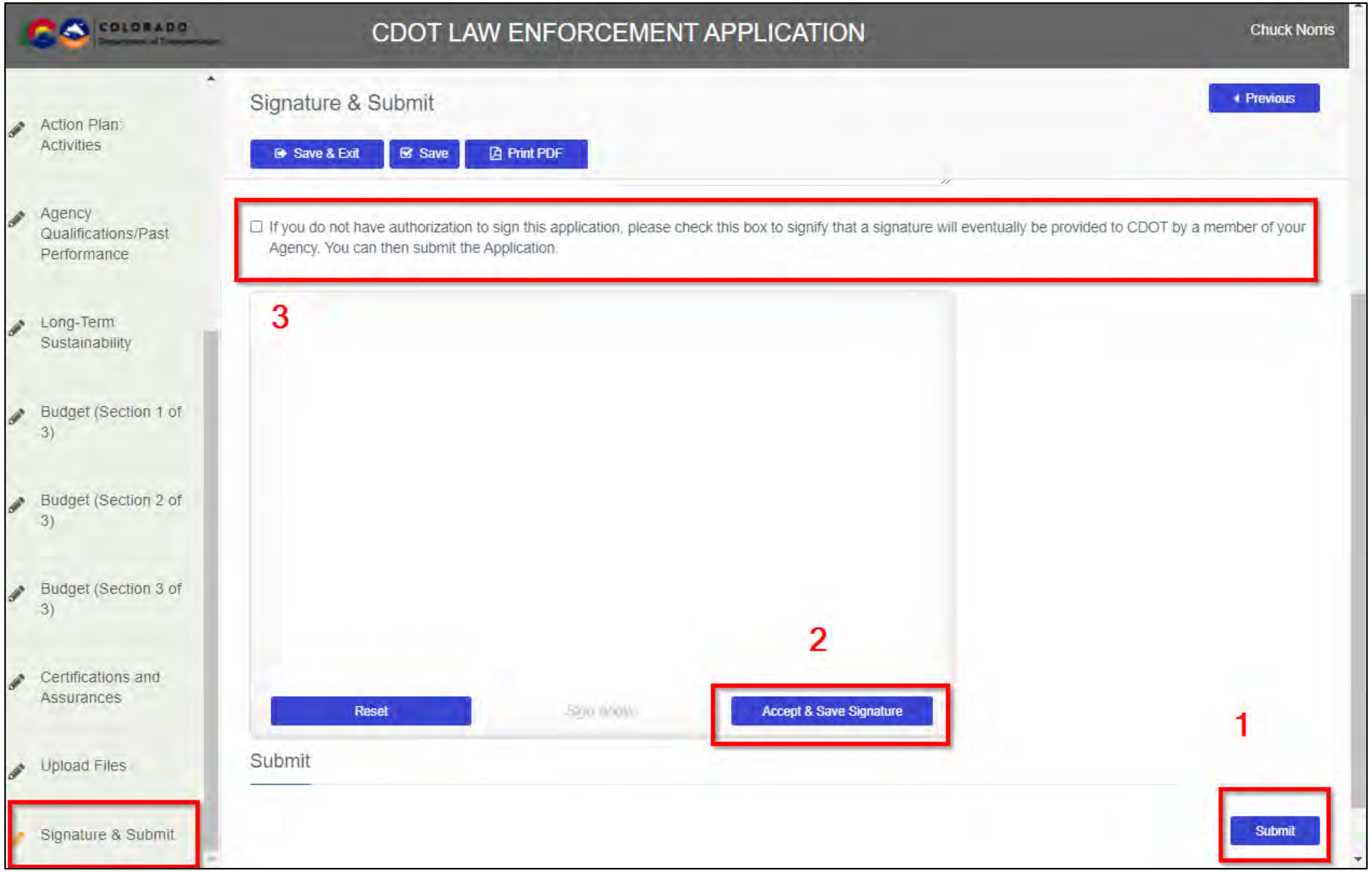
Budget

- As Applicants create line items, the ‘Budget Summary’ section at the top of the ‘Budget’ page will update.
- Each total represents the total of all Budget line items created specific to each Category, as well as a ‘Budget Total’ which totals all Budget Category totals.

  - Note: You must click the blue 'Save' button at the top of this screen for Budget Summary fields to update with most recent values.



Submitting an Application



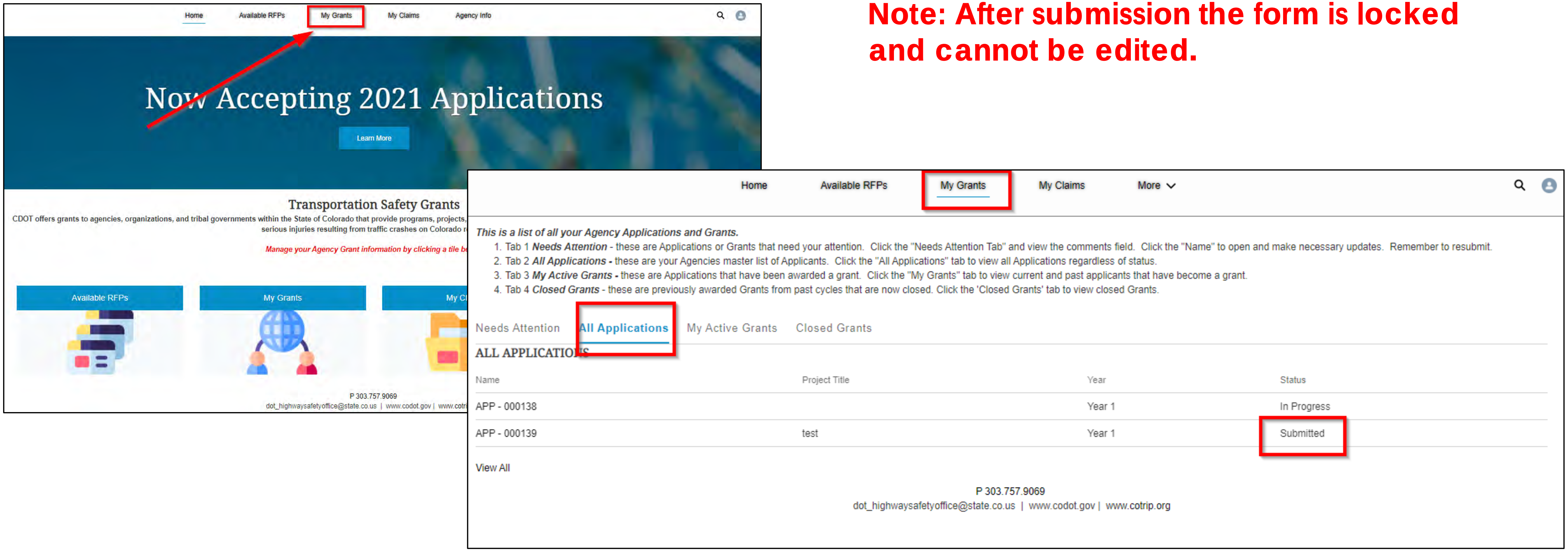
1. Submit Button – Use this button to submit form. **(Note: Form cannot be edited after submission)**
2. Accept & Save Signature - After electronically signing the Signature component, ensure that you click this button.
3. Optionally, for Law Enforcement Applications, you can temporarily bypass a signature by checking this box.

Submitting an Application

Warning! Please complete all sections before submitting form.

- After clicking the 'Submit' button the applicant is taken back to the Community Home Page.
    - Note: If all form sections have not been completed, you will receive an error message at the top of the screen and will need to complete the incomplete sections and click 'Submit' again.
- To locate the recently submitted Application the applicant can click the 'My Grants' tab and find the 'All Applications' view on the 'My Grants' screen and click into it.
    - You will then see the Application number, Project Title, and Year columns with the Status column reading 'Submitted'.

Note: After submission the form is locked and cannot be edited.



Application Statuses

- Listed below is a breakdown of all Application Statuses:

1. **In Progress** – The Application has not been submitted and is still being filled out by the Applicant.

2. **Submitted** – The Application has been submitted.

3. **Scoresheet Review** - Only applicable for Year 1 of the RFP. Shows that the Application has been Submitted and is in review.

4. **Revision Requested** - A revision has been requested by the HSO team.

5. **Revisions Completed** – An Applicant has re-submitted a form after revisions were requested.

6. **Accepted** - Application has been Accepted and will remain in this status when it becomes an active Grant.

7. **Denied** – Denied Application.

8. **Closed** – The Grant is no longer Active and has completed its yearly lifecycle.

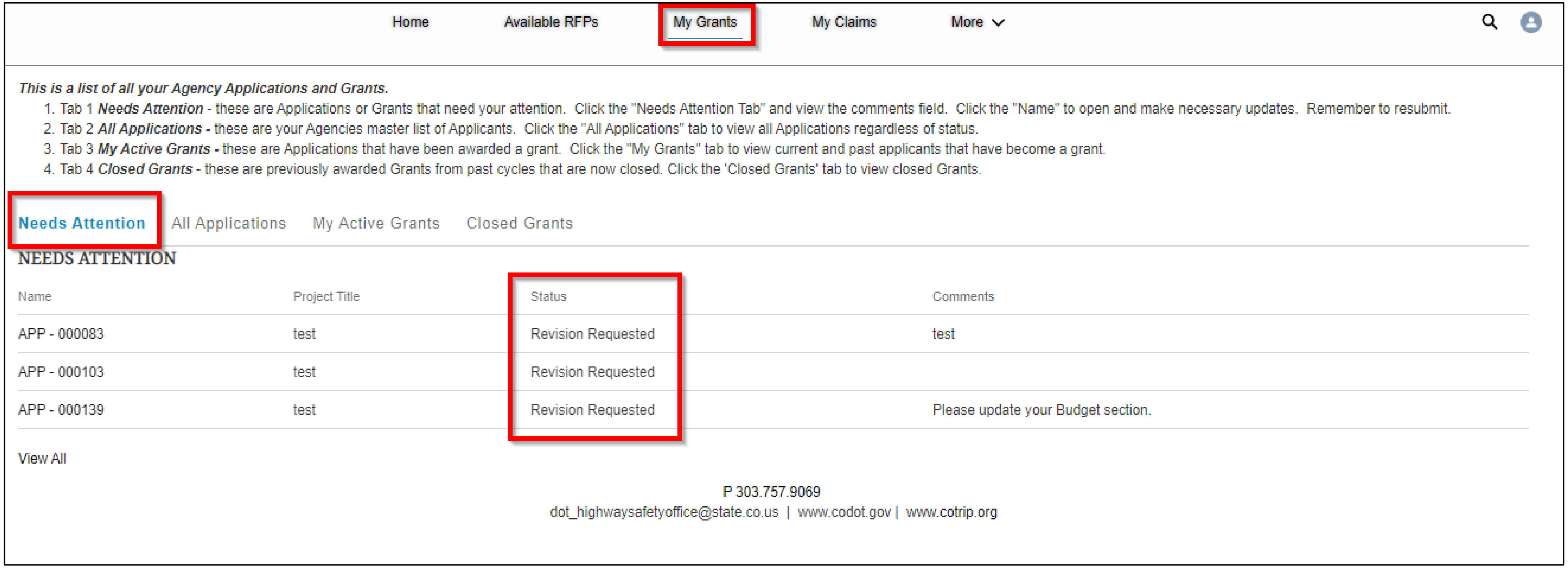
Section 4

Application Review/Revisions

- Revisions Request
- Uploading Files to Applications

Revisions Request

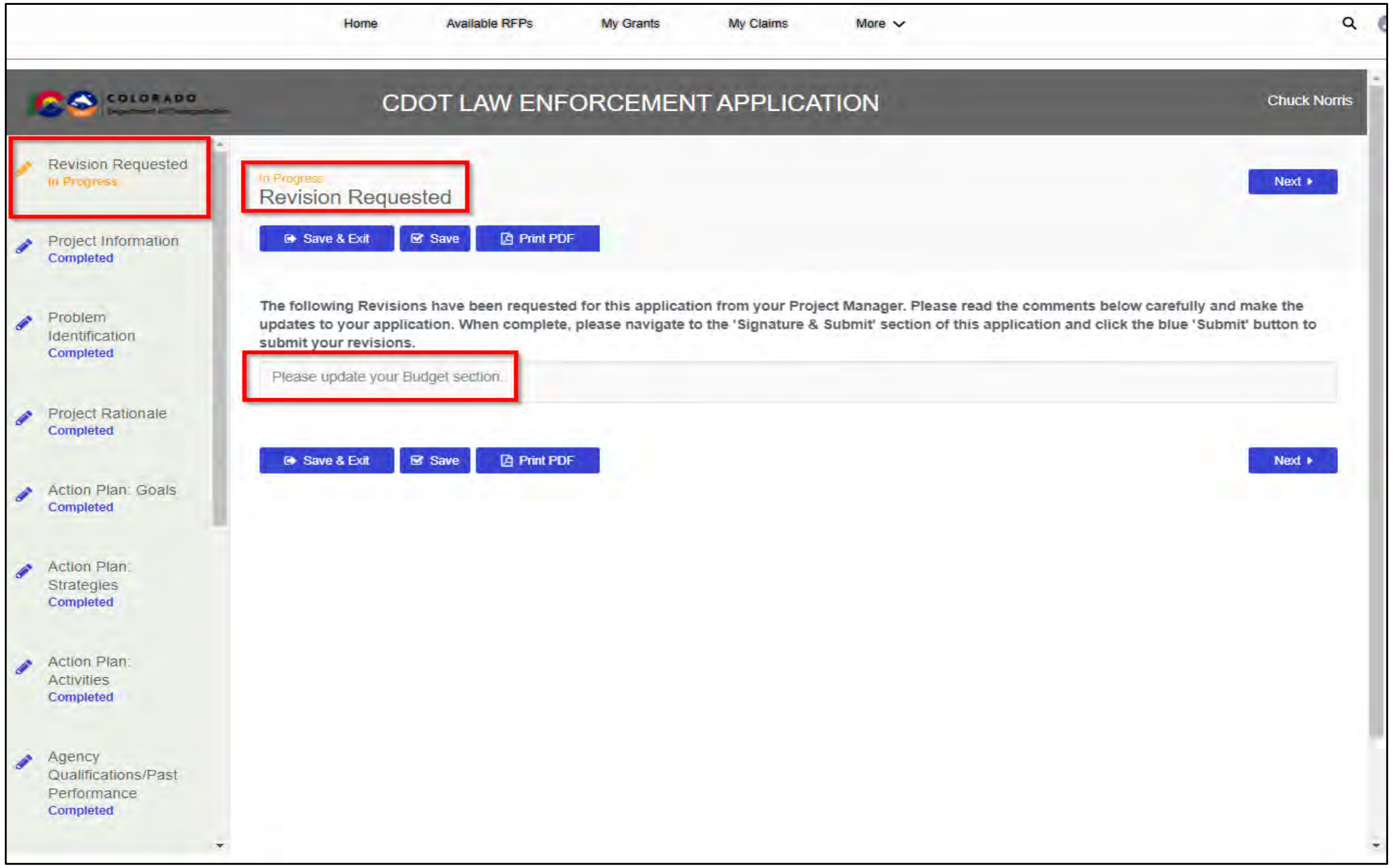
- After an Application has been submitted it will be reviewed by an HSO team member.
- Before Accepting an Application, an HSO team member may request a revision to an Application, Budget, or Action Plan.
- If this occurs, the Applicant will receive an email from the PM informing them that the Application has been unlocked and needs to be revised and re-submitted.
- This Application will appear in the ‘Needs Attention’ list on the ‘My Grants’ tab in the online community.



Revisions Request

- When the applicant clicks into an Application in the ‘Needs Attention’ tab, they will see the form open up to a new form section called ‘Revision Requested’.
  - Displayed are the revisions needed for the Application. (PM may email you instructions as well).

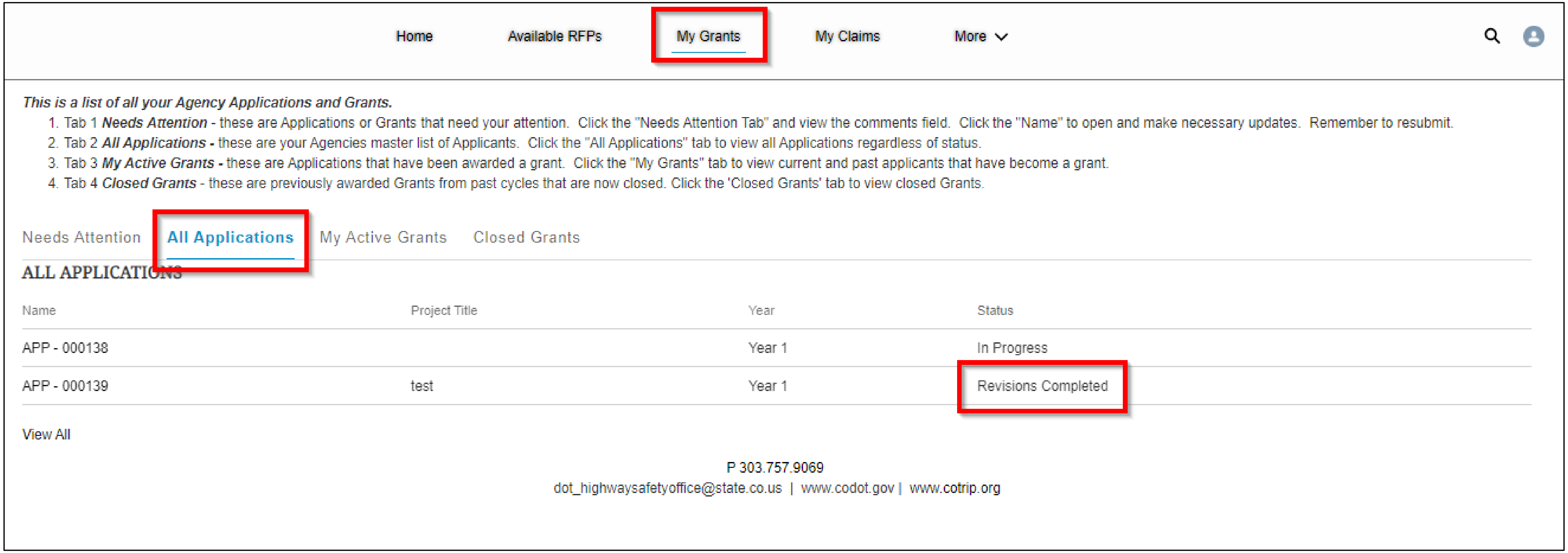
- To complete revisions, the applicant will navigate to the correct section of the form, make the requested changes, then navigate to the ‘Signature & Submit’ section of the form and click the ‘Submit’ button to re-submit.
  - The applicant who submitted the form and the PM for the Application will be notified of the submission.



Revisions Request

- After re-submitting the form the applicant will be taken back to the Community Home Page.

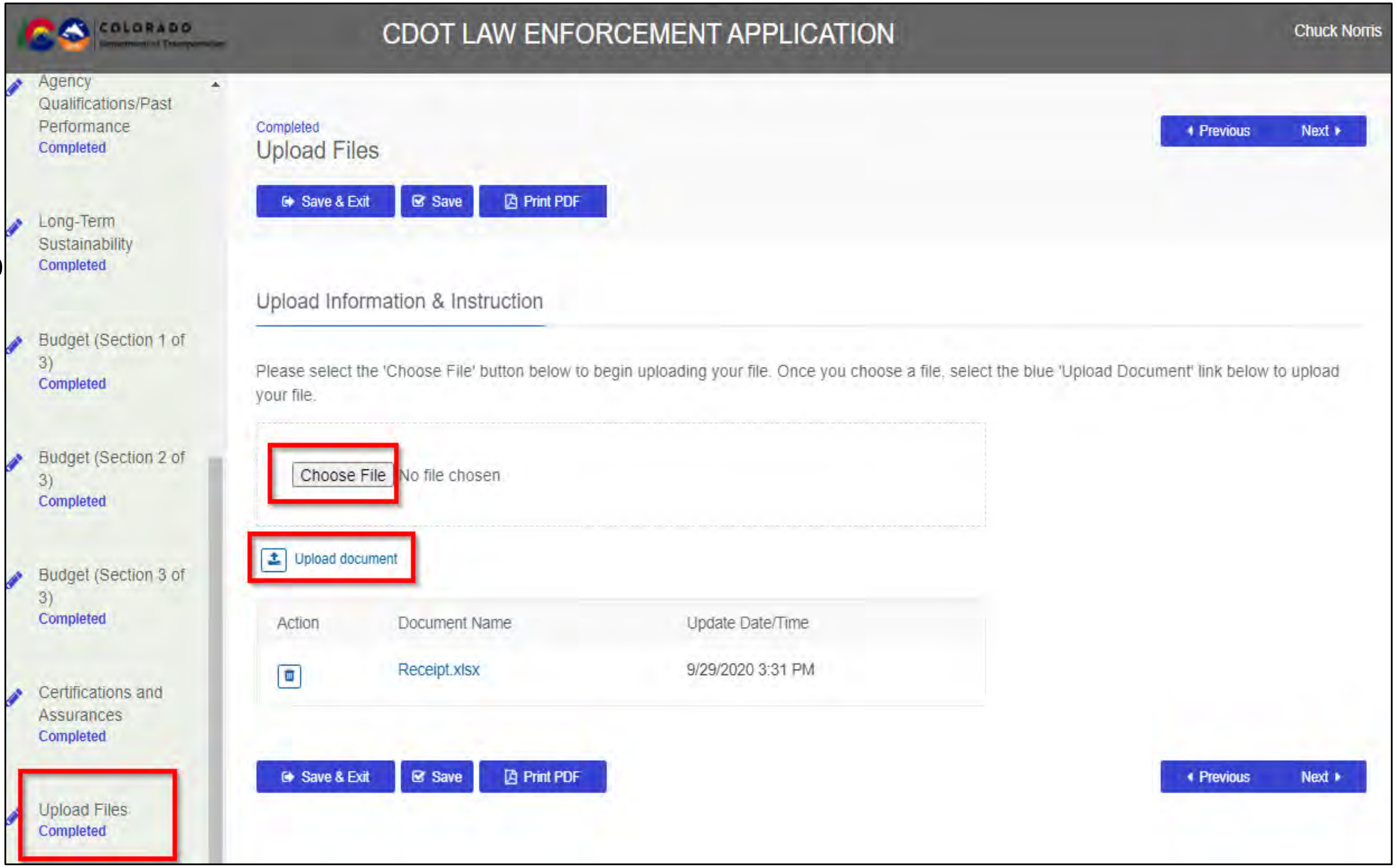
- Afterwards, the recently submitted Application can be found by navigating to the 'My Grants' tab and clicking the 'All Applications' list.
  - The status of the Application will read 'Revisions Completed'.



Uploading Files to Applications

- After an initial submission of the Application, files can be uploaded at any time.

- To upload a file to an Application:
  1. Navigate to the Application form.
  2. Within the Application form, navigate to the ‘Upload Files’ section.
  3. Select ‘Choose File’ and select a file from your computer.
  4. Click the blue ‘Upload document’ link. The file is now uploaded.
  5. Click ‘Save & Exit’ or upload more files if needed.



Section 6

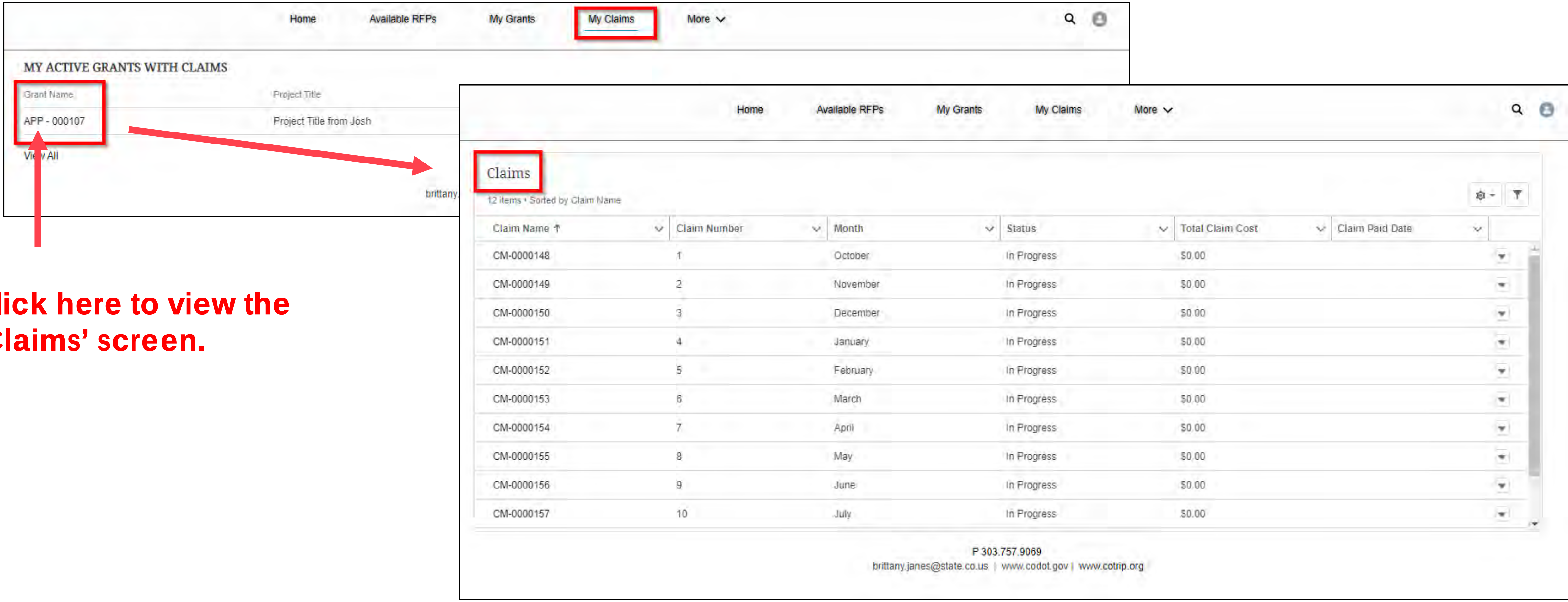
Submitting Claims

- Claim Creation/Navigation
- Completing the Claim Form
- Submitting a Claim

Claim Creation/Navigation

- After the Application has been accepted and the grant approved, the EGrants system will automatically create 12 monthly claim records for every approved Grant.
  - Grantees will never need to create a new Claim.

- These 12 Claim records can be accessed and submitted using the ‘My Claims’ tab.
  - Click into any Application in the ‘MY ACTIVE GRANTS WITH CLAIMS’ list to view all 12 related Claims for the year.



Claim Name	Claim Number	Month	Status	Total Claim Cost	Claim Paid Date
CM-0000148	1	October	In Progress	$0.00	
CM-0000149	2	November	In Progress	$0.00	
CM-0000150	3	December	In Progress	$0.00	
CM-0000151	4	January	In Progress	$0.00	
CM-0000152	5	February	In Progress	$0.00	
CM-0000153	6	March	In Progress	$0.00	
CM-0000154	7	April	In Progress	$0.00	
CM-0000155	8	May	In Progress	$0.00	
CM-0000156	9	June	In Progress	$0.00	
CM-0000157	10	July	In Progress	$0.00	

Click here to view the ‘Claims’ screen.

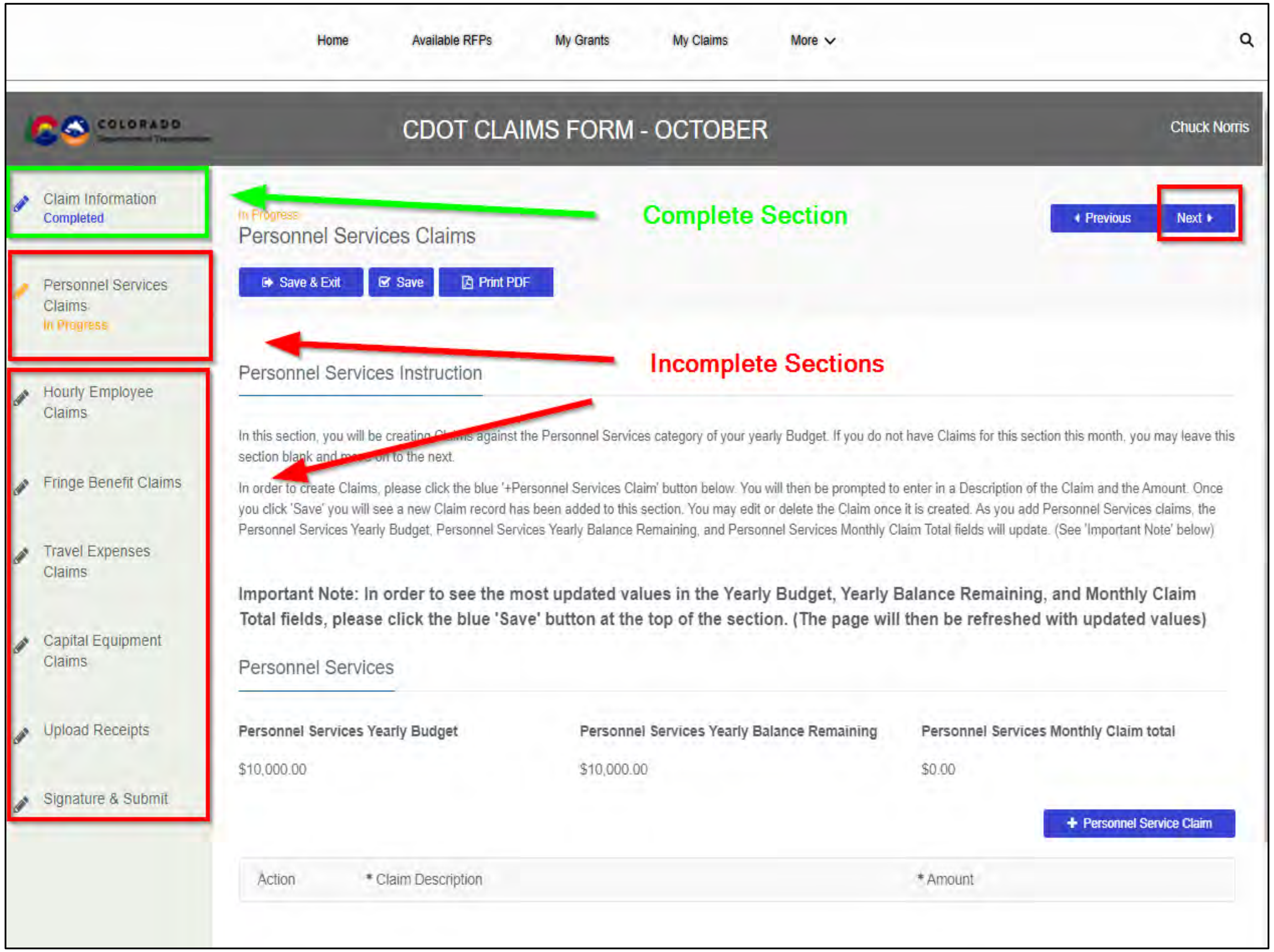
Completing the Claim Form

- When an Applicant clicks into a Claim record using the link in the 'Claim Name' column in the Community, they are taken to the Claim form.

- The form is broken down into sections based on the Budget Categories.
    - Note: If the Grant does not have budget for a Budget Category, it is not displayed in the Claim form for that Grant.

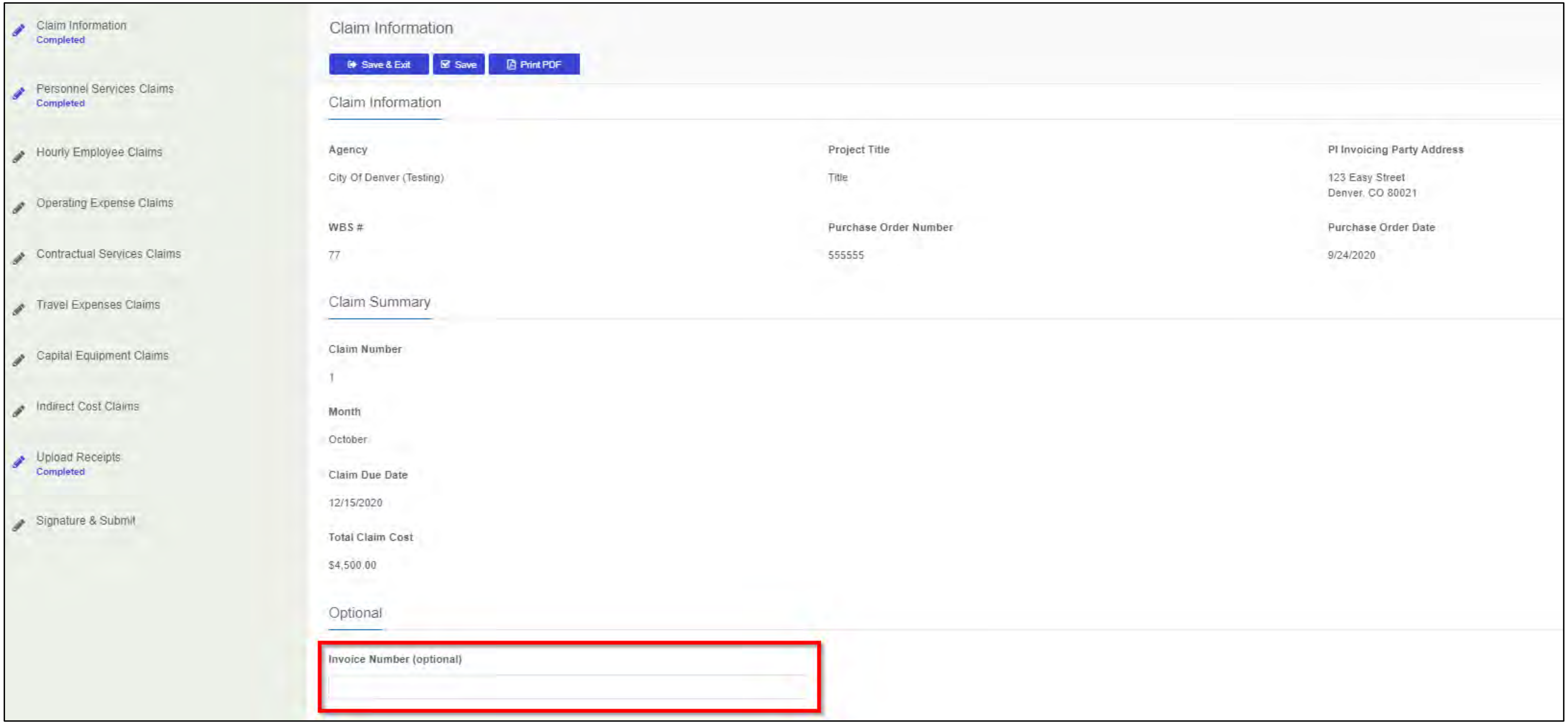
- The Applicant can navigate through the form using the 'Next' button.

- In order to submit the form, the Applicant must complete all sections and click 'Submit' in the 'Signature & Submit' section of the form.
    - Note: If the Applicant has no Claims to make for the month, the form can still be submitted without the creation of Claim line items. The Applicant simply needs to click 'Next' through all the sections of the form so that they are marked as 'Completed'.



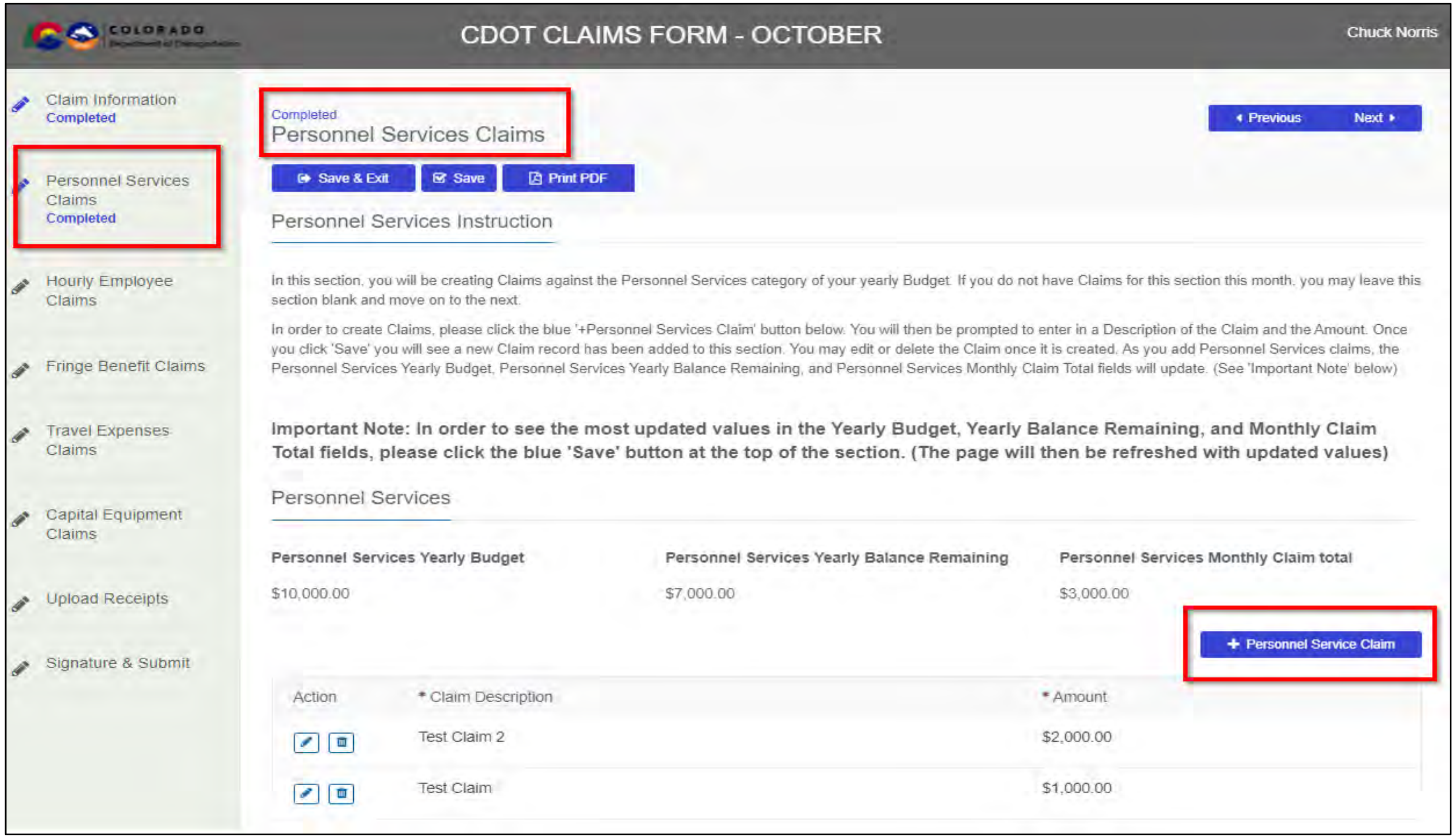
Completing the Claim Form: Claim Form Sections

- The first section of the Claim form (Claim Information) is purely informational except for an optional Invoice Number field which can be filled out by the Grantee.



Completing the Claim Form: Claim Form Sections

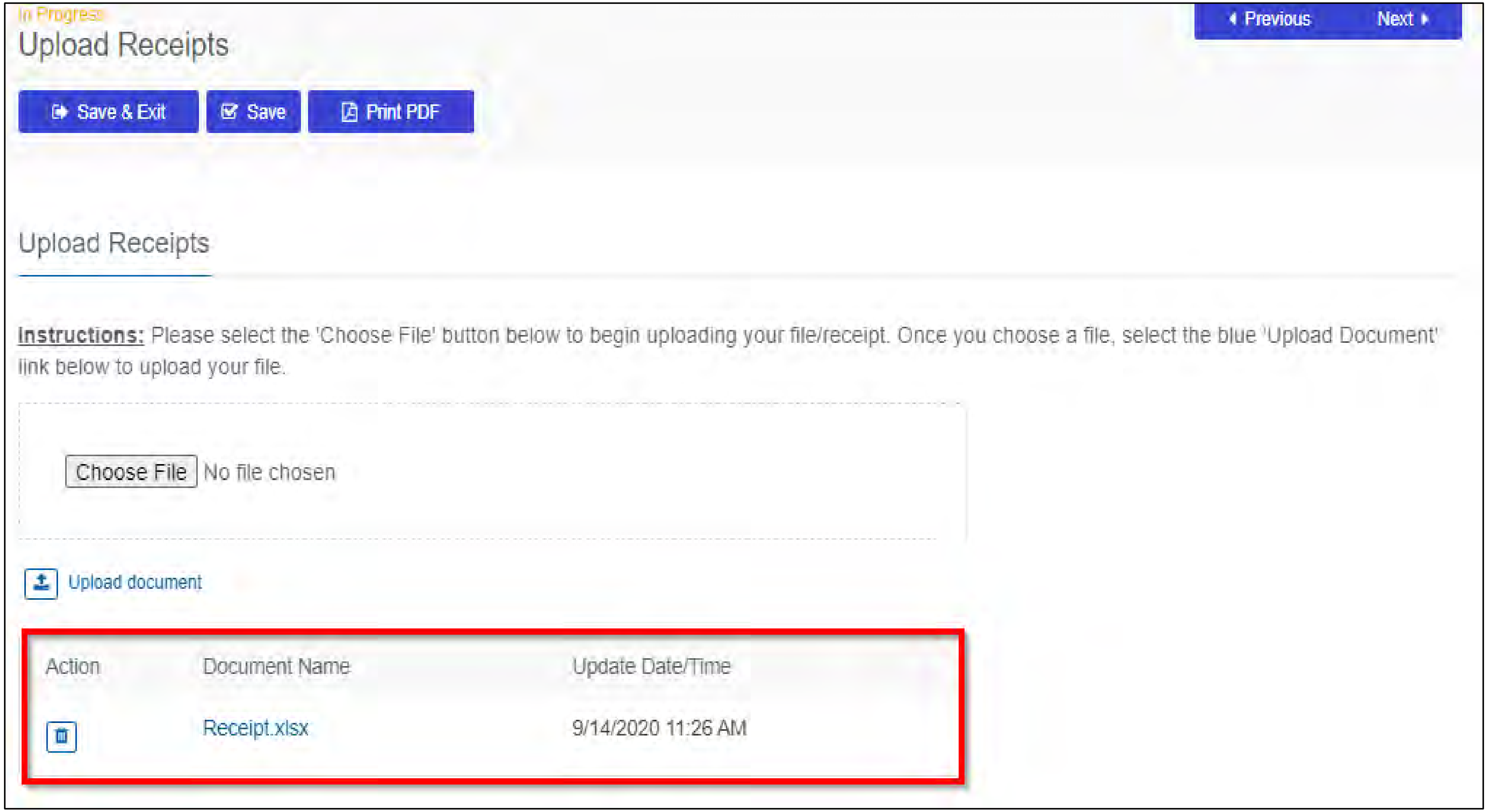
- The middle sections of the Claim form allows Grantees to create Claim 'line-items' against individual Budget Categories by navigating to the correct section and clicking the blue '+[budget category] Claim' (ex: '+Personnel Service Claim').
- As Claim 'line-items' are added, the 3 summary fields summarize the data as outlined below:
  - Yearly Budget – Set Yearly Budget for the Year.
  - Yearly Balance Remaining – Amount left in the Yearly Budget to claim against.
  - Monthly Claim Total – Amount claimed for the current month's claim.

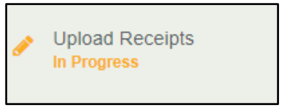


Note: A Claim line-item cannot exceed the 'Balance Remaining'. You will receive an error message and the record cannot be saved.

Completing the Claim Form: Upload Receipts

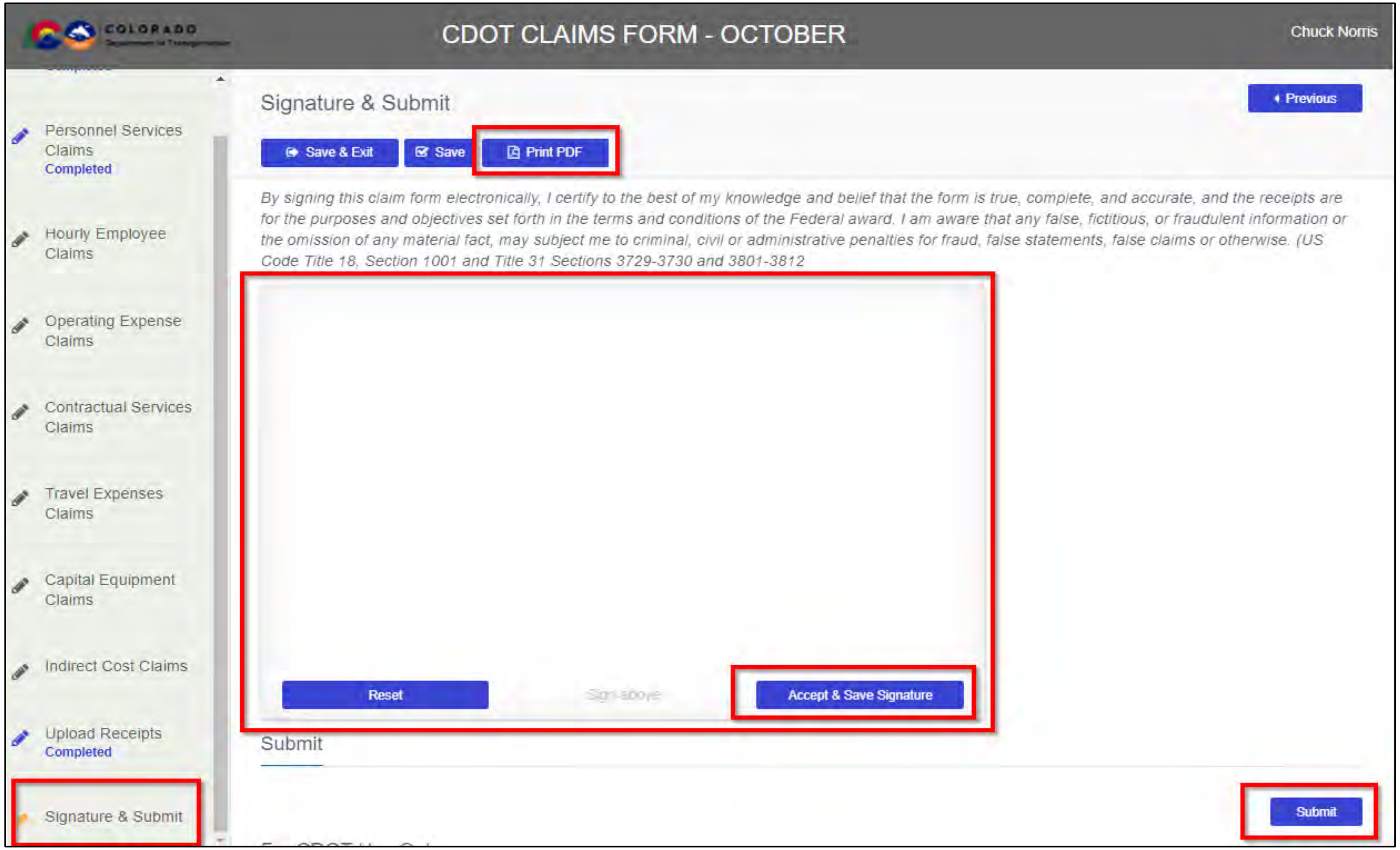
- After Claim sections are completed, Grantees can upload receipts using the ‘Upload’ section.
  - For further information on how to upload files to Claims, see slide 30.





Submitting a Claim

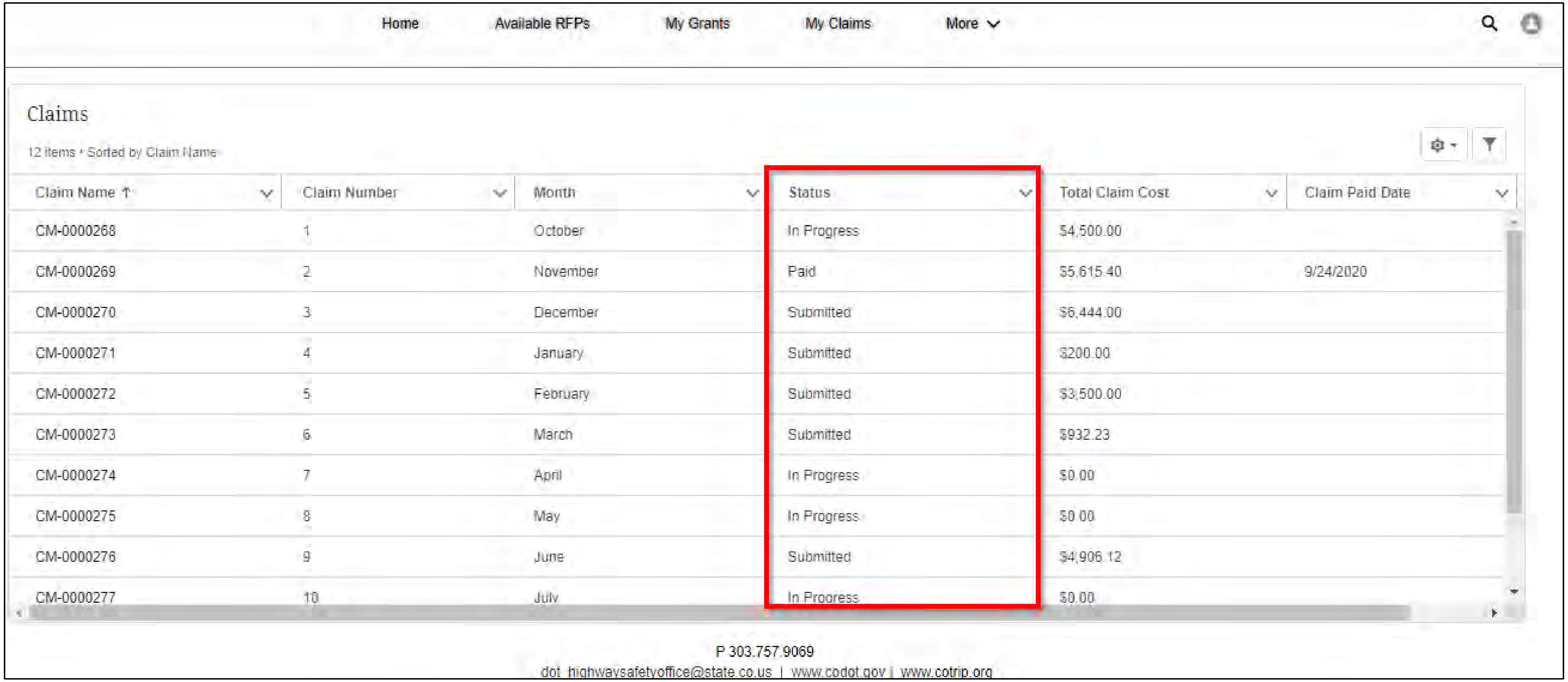
- The Claim must be electronically signed and submitted in the 'Signature & Submit' section.
  - Use the 'Submit' button to submit the Claim.
- Before submitting, Grantees can view the 'Claim Summary' component in the 'Signature & Submit' section to ensure the correct data was entered before submitting.
- A PDF copy of the Claim can be printed out for reference using the 'Print PDF' button on the Claim form.



Note: After submission, the Claim form is locked, but can be unlocked for revisions by an HSO PM by changing the status on the Claim to 'Revision Requested.'

Claim Creation/Navigation: Claim Status

- After Submitting a Claim, you can monitor the status by navigating to the 'My Claims' tab and clicking into a Grant record.



Claim Name	Claim Number	Month	Status	Total Claim Cost	Claim Paid Date
CM-0000268	1	October	In Progress	$4,500.00	
CM-0000269	2	November	Paid	$5,615.40	9/24/2020
CM-0000270	3	December	Submitted	$6,444.00	
CM-0000271	4	January	Submitted	$200.00	
CM-0000272	5	February	Submitted	$3,500.00	
CM-0000273	6	March	Submitted	$932.23	
CM-0000274	7	April	In Progress	$0.00	
CM-0000275	8	May	In Progress	$0.00	
CM-0000276	9	June	Submitted	$4,906.12	
CM-0000277	10	July	In Progress	$0.00	

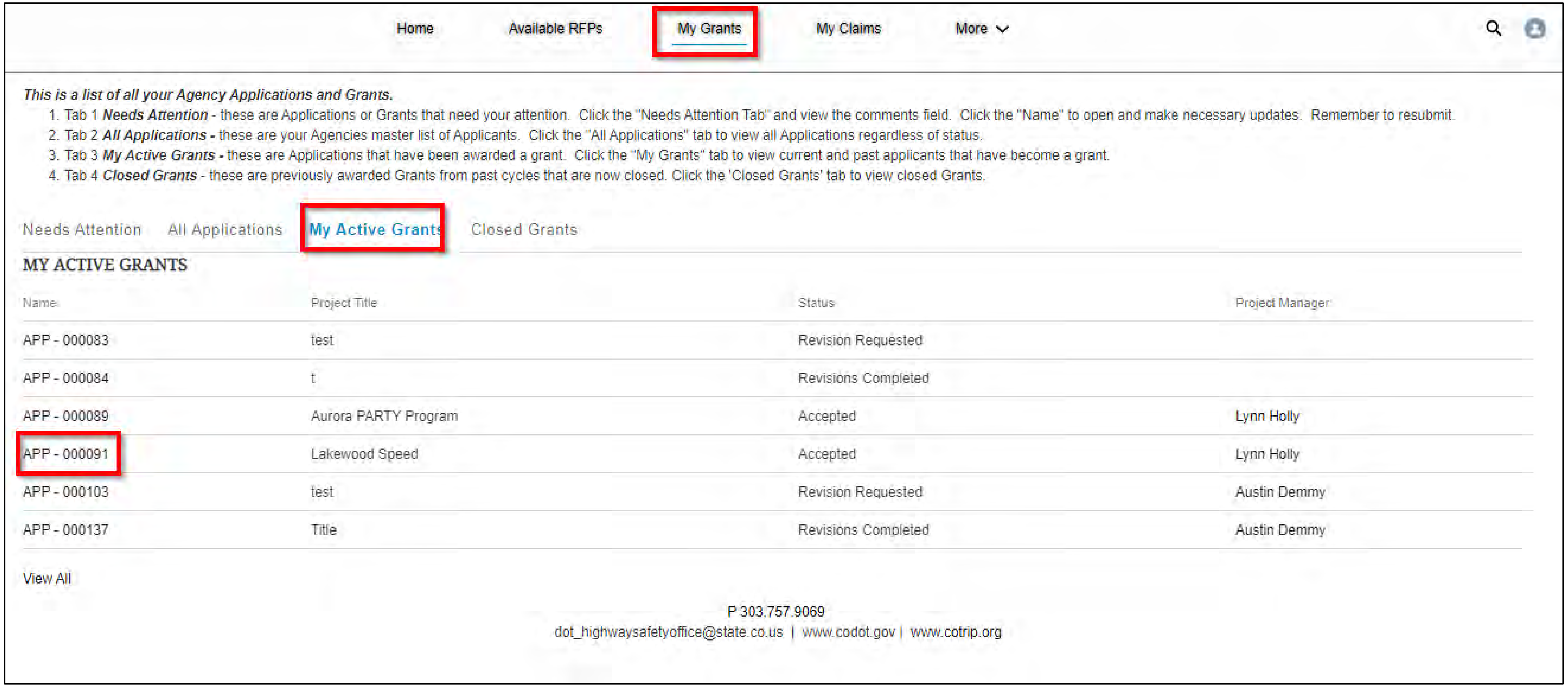
1. **In Progress** – Claim has not been submitted.
2. **Submitted** – Claim has been Submitted but not processed.
3. **Ready for Processing** – Claim has been submitted and reviewed by a PM but has not been processed.
4. **Paid** – Claim has been paid out.

Section 6

Activity Reporting

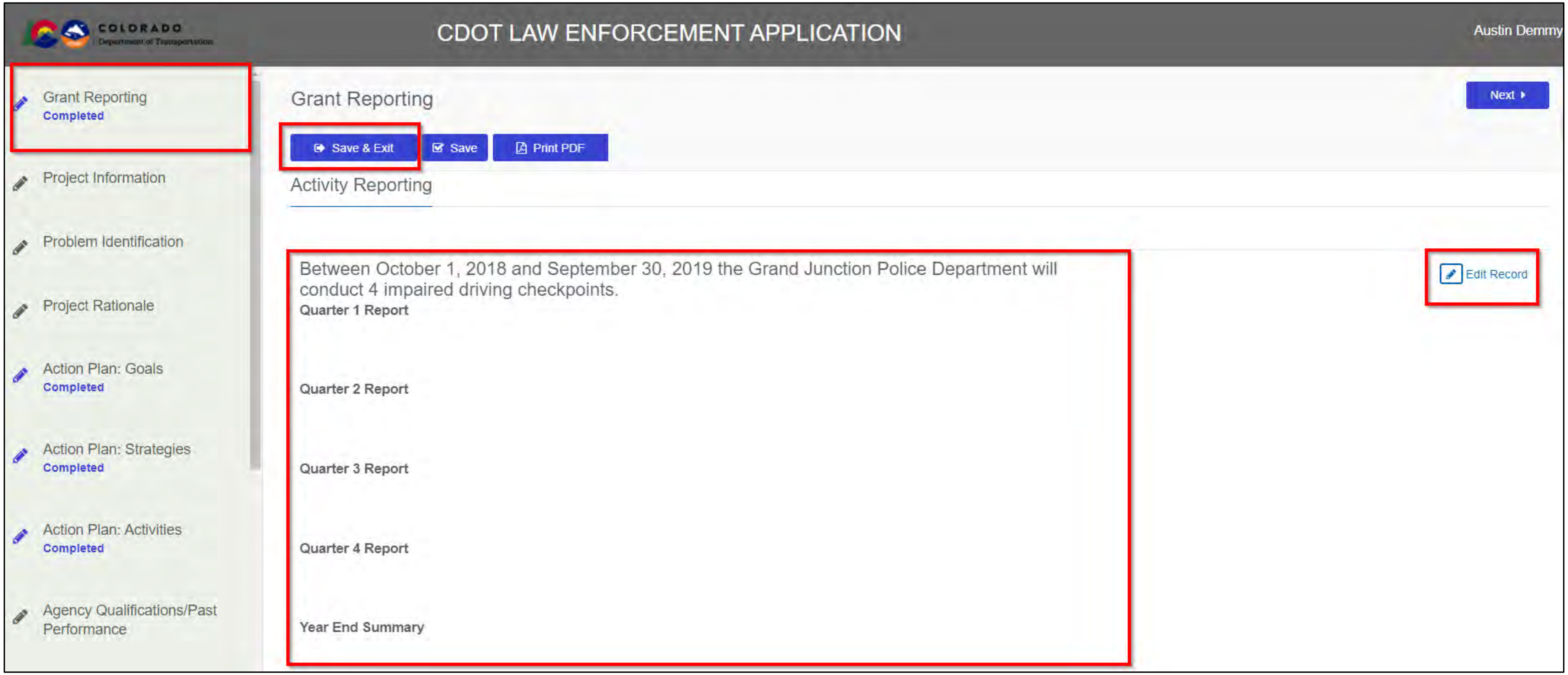
Activity Reporting

- Activities will need to be reported for each Quarter.
- To report on Activities, Grantees will navigate to the ‘My Grants’ tab and click the ‘My Active Grants’ list. They will then click into the Grant they want to report on using the ‘Name’ column.



Activity Reporting

- After an Application becomes an Awarded Grant, a new section appears on the Application form called ‘Grant Reporting’.
- This section will display all ‘Activities’ for the Grant.
- Applicants will click the ‘Edit Record’ for each activity to update the correct Quarterly report and click ‘Save’
- Afterwards, they will not need to re-submit the form, but can simply click ‘Save & Exit’ when finished.



thank you