

October 2020



# Highway Safety Office Traffic Safety Grants

## Applicant Training

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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



Section 1

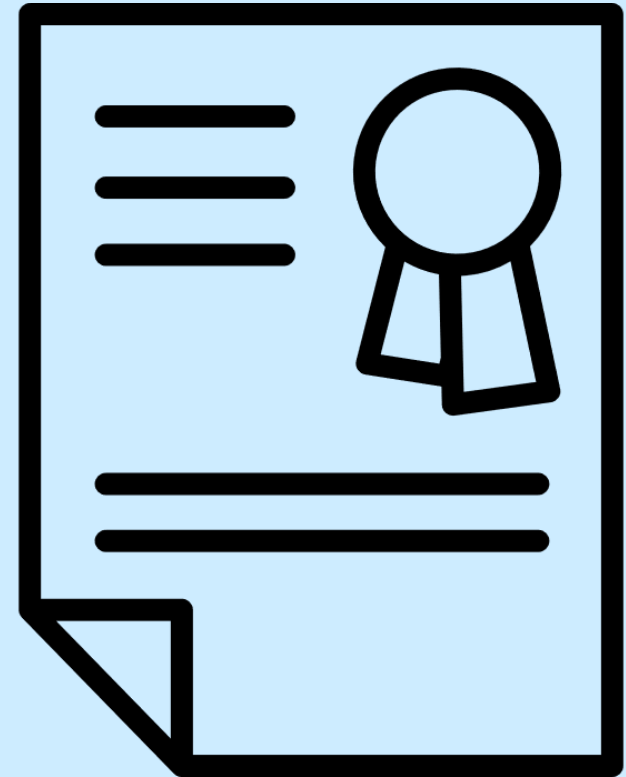
# Salesforce Basics Overview

- 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:

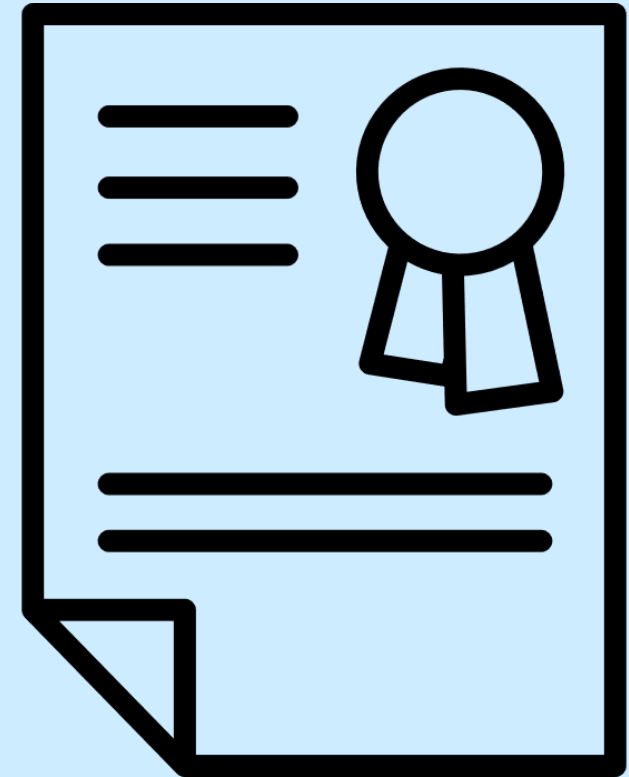
- Easy to maintain and update as needed
- No specialized software is required
- You can log in from any computer/device with Internet access
- Data is updated in real-time
- 24/7 availability



# 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.



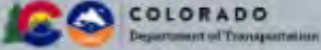
# Login to the Community

## 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*

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To access this page, you have to log in to HSO E-Grant.

Username

Password

[Log In to Sandbox](#)

Remember me

[Forgot Your Password?](#)

Colorado Department of Transportation employee? [Log In](#)

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.

The screenshot displays a web interface for the Community. At the top, a navigation bar contains five tabs: Home, Available RFPs, My Grants, My Claims, and Agency Info, all enclosed in a red box labeled '1'. To the right of these tabs is a search and user icon area, also enclosed in a red box labeled '4'. Below the navigation bar is a large blue banner with the text 'Now Accepting 2021 Applications' and a 'Learn More' button, which is highlighted with a red box labeled '2'. Underneath the banner is a section titled 'Transportation Safety Grants' with a brief description and a red link: 'Manage your Agency Grant information by clicking a tile below.' Below this text is a row of four interactive tiles, each with a title and an icon, all enclosed in a red box labeled '3'. The tiles are: 'Available RFPs' with a document icon, 'My Grants' with a globe icon, 'My Claims' with a folder icon, and 'Agency Info' with a user profile icon. At the bottom of the page, contact information is provided: 'P 303.757.9069', 'brittany.janes@state.co.us | www.codot.gov | www.cotrip.org'.



# 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.

Home Available RFPs My Grants My Claims Agency Info

## Now Accepting 2021 Applications

Learn More

### Transportation Safety Grants

agencies, organizations, and tribal governments within the State of Colorado that provide programs, projects, services, and strategies that are intended to reduce serious injuries resulting from traffic crashes on Colorado roads.

Manage your Agency Grant information by clicking a tile below.

Home Available RFPs My Grants My Claims More

### New Application

Apply to application here

Launch

RFP Name	FY 2020	Status	Published
Start Date	7/1/2020	End Date	12/31/2020
RFP Fiscal Years	FY 19-21		

Additional Detail

Description

#### Who's Eligible

- Local law enforcement agencies
- Local government entities
- Community coalitions
- Community businesses
- Community for-profit and nonprofit agencies
- Other entities involved in traffic safety

#### Funding

Funding must be used for resources, support, training and materials. The funds enable traffic safety professionals to execute and support:

- Local and statewide occupant protection;
- Child passenger safety\*;
- Teen driving safety;
- Distracted driving prevention;
- Motorcycle safety;
- Bicycle and pedestrian safety; and
- Impaired driving prevention initiatives.

\*Child Passenger Safety seats cannot be purchased with these funds.

#### Requirements

- Applicants must be able to identify a traffic issue supported by data, establish

#### How to apply

The NHTSA Countermeasures That Work document rates the effectiveness of different strategies. Priority will be given to proposals that use strategies rated with three, four, or five stars. Projects that use "one star" are not acceptable.

Priority will be given to strategies that involve improving policies or systems that promote safe driving or supporting the enforcement of existing laws. Activities related to policy, systems, or environmental (PSE) changes may include: identifying and building partnerships with key stakeholders to assess support of any PSE changes, presenting data to inform PSE decisions, and educating decision-makers on best practice policy countermeasures.

Please keep in mind that community education efforts must include appropriate dosing and must be targeted at the appropriate populations to influence behaviors. One time events and presentations are not as effective and will receive low scores unless accompanied by additional, long-term recurring activities to impact the same target population.

# 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.

Home **Available RFPs** My Grants My Claims More ▾

Click on a RFP name below to learn more.

**AVAILABLE RFP**

RFP Name	Status	Created Date
FY 22 -24	Published	9/22/2020 10:40 AM

View All

P 303.757.9069  
dot\_highwaysafetyoffice@state.co.us | www.codot.g

Home Available RFPs My Grants My Claims **More ^**

Agency Info

+ Follow Edit

**Agency**  
City of Pueblo

Type	Phone	Website	Agency Address
Highway Safety	(719)553-2418		200 S. Main Pueblo, CO 81003

**DETAILS** RELATED

Agency Name City of Pueblo	Phone (719)553-2418
Parent Account	Website

Address Information

Agency Address 200 S. Main Pueblo, CO 81003	Vendor Number 2000036
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# 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.

Home Available RFPs **My Grants** My Claims More ▾

*This is a list of all your Agency Applications and Grants.*

1. Tab 1 **Needs Attention** - these are Applications or Grants that need your attention. Click the "Needs Attention Tab" and view the comments field. Click the "Name" to open and make necessary updates. Remember to resubmit.
2. Tab 2 **All Applications** - these are your Agencies master list of Applicants. Click the "All Applications" tab to view all Applications regardless of status.
3. Tab 3 **My Active Grants** - these are Applications that have been awarded a grant. Click the "My Grants" tab to view current and past applicants that have become a grant.
4. Tab 4 **Closed Grants** - these are previously awarded Grants from past cycles that are now closed. Click the 'Closed Grants' tab to view closed Grants.

Needs Attention **All Applications** My Active Grants Closed Grants

**ALL APPLICATIONS**

Name	Project Title	Year	Status
APP - 000113	Title	Year 1	Submitted

View All

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**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.

The image shows two screenshots of a web application interface. The top screenshot shows the 'My Claims' tab selected in a navigation menu. Below the navigation, there is a section titled 'MY ACTIVE GRANTS WITH CLAIMS' with a table. The first row of the table has 'APP - 000107' in the 'Grant Name' column, which is highlighted with a red box. A red arrow points from this box to the 'Claims' section in the bottom screenshot. The bottom screenshot shows the 'Claims' page for grant APP-000107, displaying a table with 12 items. The table has columns for Claim Name, Claim Number, Month, Status, Total Claim Cost, and Claim Paid Date. The first row shows Claim Name CM-0000148, Claim Number 1, Month October, Status In Progress, Total Claim Cost \$0.00, and Claim Paid Date. The table is sorted by Claim Name. At the bottom of the page, there is contact information: P 303.757.9069, brittany.janes@state.co.us | www.codot.gov | www.cotrip.org.

Click Here, to view the 'Claims' screen.

Grant Name	Project Title	Award Amount	Status
APP - 000107	Project Title from Josh		

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	

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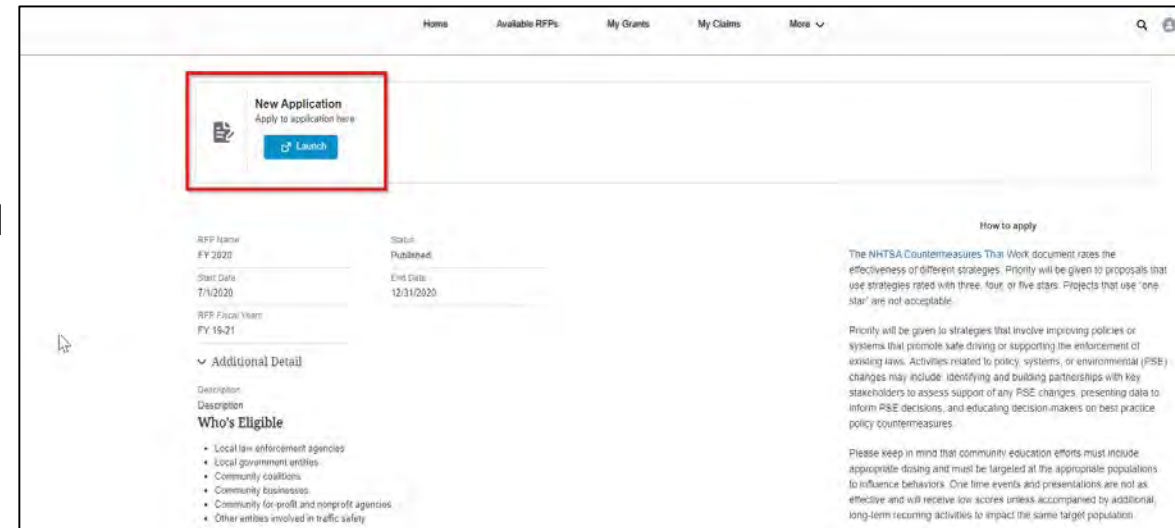
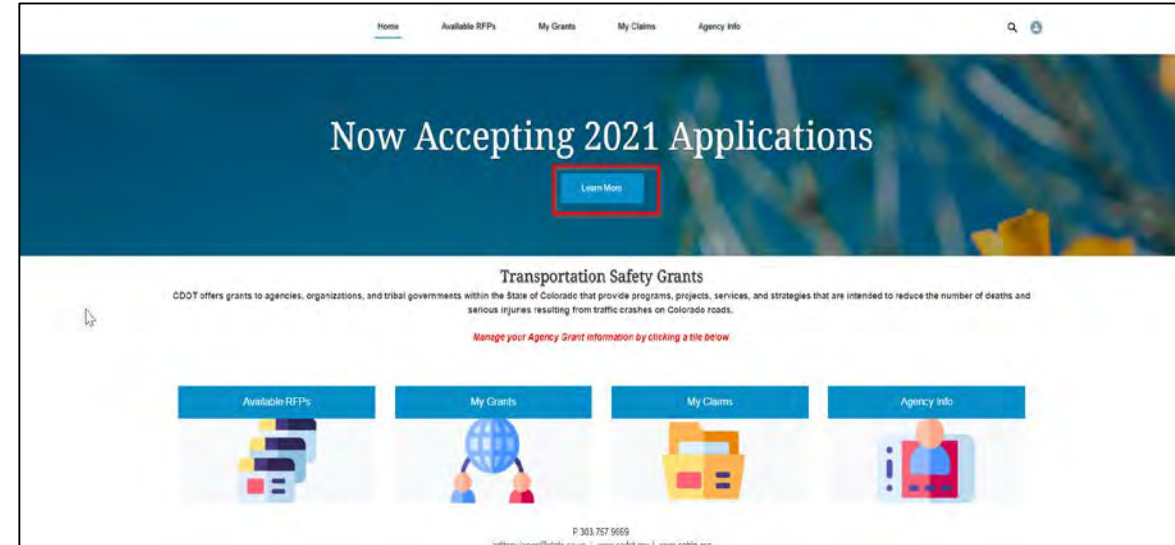
### Section 3

# Application Creation & Submission

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

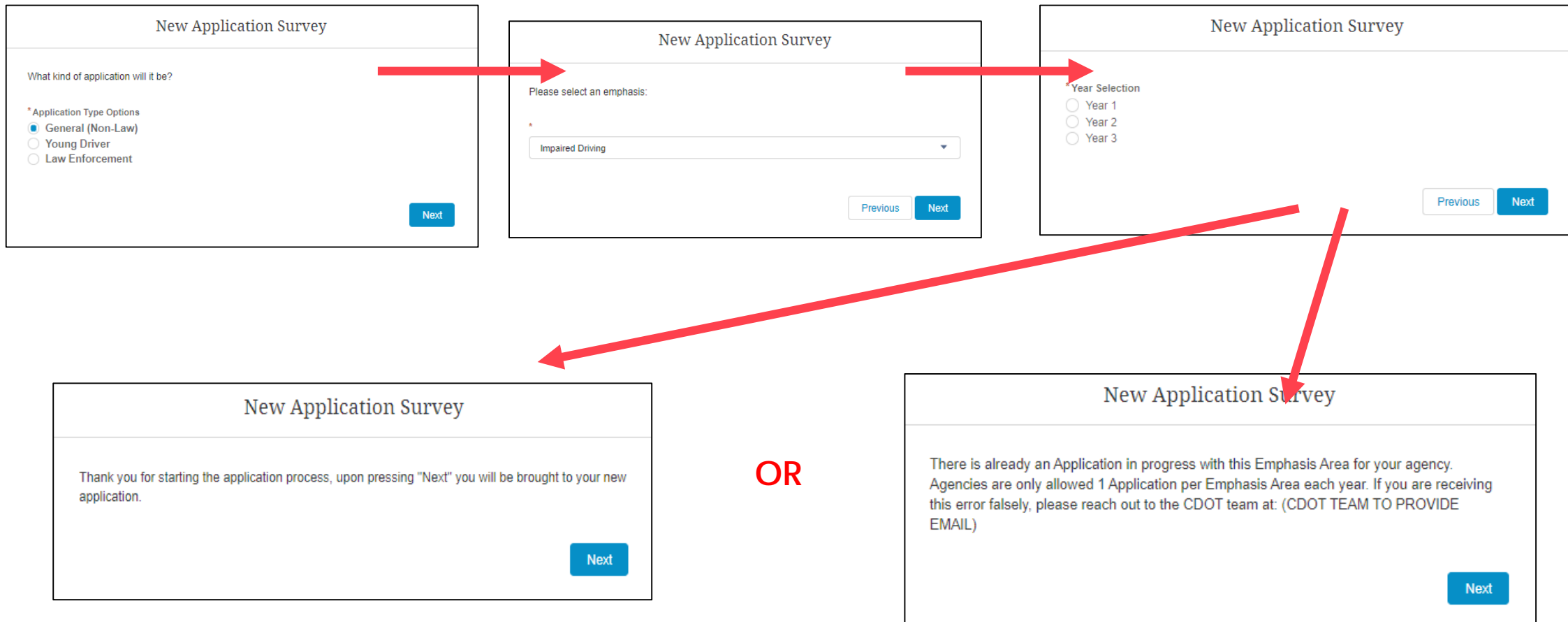
# Creating an Application

- **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

**COLORADO** Department of Transportation

CDOT GENERAL APPLICATION FORM

Chuck Norris

**1** In Progress

**2** Project Information

**3** Next ▶

Save & Exit Save Print PDF

**4**

**\* Project Title**

Emphasis Area

Impaired Driving

**\* Project Abstract**



# 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.

 Save & Exit

 Save

 Print PDF

# 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.

The screenshot displays the CDOT General Application Form interface. At the top, navigation links include Home, Available RFPs, My Grants, My Claims, and More. The user's name, Chuck Norris, is visible in the top right. The sidebar on the left lists the following sections with their status:

- Project Information: Completed (highlighted with a green box)
- Problem Identification: Missing Required Data
- Project Description and Rationale: In Progress
- Action Plan: Goals
- Action Plan: Objectives
- Action Plan: Activities

The main content area shows the 'Project Description and Rationale' section, which is currently 'In Progress'. A green arrow points to this section with the label 'Completed Section'. Below this, the 'Project Description and Rationale Information' section is highlighted with a red arrow and the label 'Incomplete Sections'. The text in this section reads: 'The NHTSA Countermeasures That Work document rates the effectiveness of different strategies. Priority will be given to proposals that use strategies rated with three, four, or five stars. Projects that use "one star" are not acceptable.' Below this, another paragraph states: 'Priority will be given to strategies that involve improving policies or systems that promote safe driving or supporting the enforcement of existing laws. Activities related to policy, systems, or environmental (PSE) changes may include: identifying and building partnerships with key stakeholders to assess support of any PSE changes, presenting data to inform PSE decisions, and educating decision-makers on best practice policy countermeasures.' A final paragraph notes: 'Please keep in mind that community education efforts must include appropriate dosing and must be targeted at the appropriate populations to influence behaviors. One time events and presentations are not as effective and will receive low scores unless accompanied by additional, long-term recurring activities to impact the same target population.'

# 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

**COLORADO**  
Department of Transportation

CDOT GENERAL APPLICATION FORM

Chuck Norris

Project Information  
Completed

Problem Identification  
Missing Required Data

Project Description and Rationale  
Missing Required Data

**Action Plan: Goals**  
In Progress

Action Plan: Objectives

Action Plan: Activities

Project Evaluation

Agency Qualifications/Past Performance

In Progress

Action Plan: Goals

Save & Exit Save Print PDF

Previous Next

### Action Plan Information

In the following 3 'Action Plan' sections of this form you will provide the outline and evaluation structure for your project.

In the 'Action Plan: Goals' section, identify the three-year goal or goals your project aims to achieve. Afterwards, in the 'Action Plan: Objectives' section, outline at least one annual project objective that describes how you will make progress toward your three-year goal in the first 12-month budget period. Finally, in the 'Action Plan: Activities' section, list Year 1 activities that you will perform under each Objective in order to help you meet that Objective.

In each section there are examples and instructions for creating Goals, Objectives, and Activities. Please read each section's instructions carefully in order to complete your Action Plan.

### Goal Information

**Goals** - A broad statement about what the program expects to achieve. The goal is the description of the final anticipated outcome or result (e.g. reductions in deaths or injuries due to motor vehicle crashes for a particular population). For this project, you are writing three-year goals. Goals need to be related to one or more of the performance measures listed above.

Strong goals have the following characteristics:

- Specify expected program effect
- Identify a target population

# 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'.

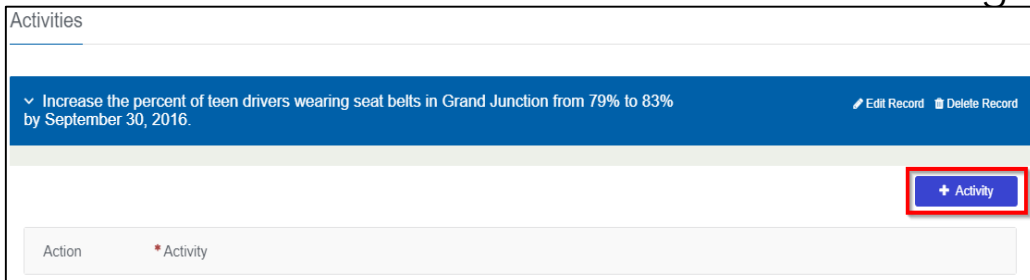


- After creating Goals, Applicants can create Objectives under each individual Goal by clicking the '+Objective' button in the 'Action Plan: Objectives' section and filling out the 'Objective' field, then clicking 'Save'.



**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.

CDOT YOUNG DRIVER APPLICATION FORM

Austin Dornier

Budget (Section 1 of 3)

Save & Exit Save Print PDF

Personnel Services

**PERSONNEL SERVICES:** Enter the monthly full-time or part-time salary amount and the number of months to be charged to the grant. **NOTE:** Contract employees or independent contractors should be shown under Contractual Services, not Personnel Services.

Action	Name of Position	Salary Type	Monthly Salary Amount	Number of Months	Total
	Line Item	Full-Time	\$10,000.00	1.00	\$10,000.00

+ Personnel Service

Hourly Employee

**HOURLY EMPLOYEE:** Enter hourly paid employees and the applicable pay rate (straight time or overtime) and the number of months to be charged to the grant.

Action	Name of Position	Hourly Employee Rate Type	Pay Rate	Time Hours per Month	Total Pay per Month (Time Rate * Time Hours per Month)	Number of Months	Total
--------	------------------	---------------------------	----------	----------------------	--	------------------	-------

+ Hourly Employee



# 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.

CDOT GENERAL APPLICATION FORM

Chuck Norris

← Previous Next →

Action Plan: Activities Completed

Project Evaluation

Agency Qualifications/Past Performance

Community Collaboration and Support

Long-Term Sustainability

Budget

Save & Exit Save Print PDF

Budget Summary

<b>Personnel Services Totals</b>	<b>Operating Expenses Totals</b>	<b>Hourly Employee Totals</b>
\$10,000.00	\$0.00	\$0.00
<b>Contractor Services Totals</b>	<b>Fringe Benefit Costs Totals</b>	<b>Travel Expenses Totals</b>
\$0.00	\$0.00	\$0.00
<b>Capital Equipment Totals</b>		
\$0.00		
<b>Subtotal Before Indirect Costs</b>		
\$10,000.00		

+ Personnel Service Edit All

Action	Name of Position	Salary Type	Monthly Salary Amount	Number of Months	Total
	Line Item	Full-Time	\$1,000.00	10.00	\$10,000.00

Upload Files

Signature & Submit

**Budget Total**

\$10,000.00

# Submitting an Application

**COLORADO** Department of Transportation  
**CDOT LAW ENFORCEMENT APPLICATION** Chuck Norris

Signature & Submit Previous

Save & Exit Save Print PDF

If you do not have authorization to sign this application, please check this box to signify that a signature will eventually be provided to CDOT by a member of your Agency. You can then submit the Application.

**3**

Reset Accept & Save Signature

**2**

**1**

Submit

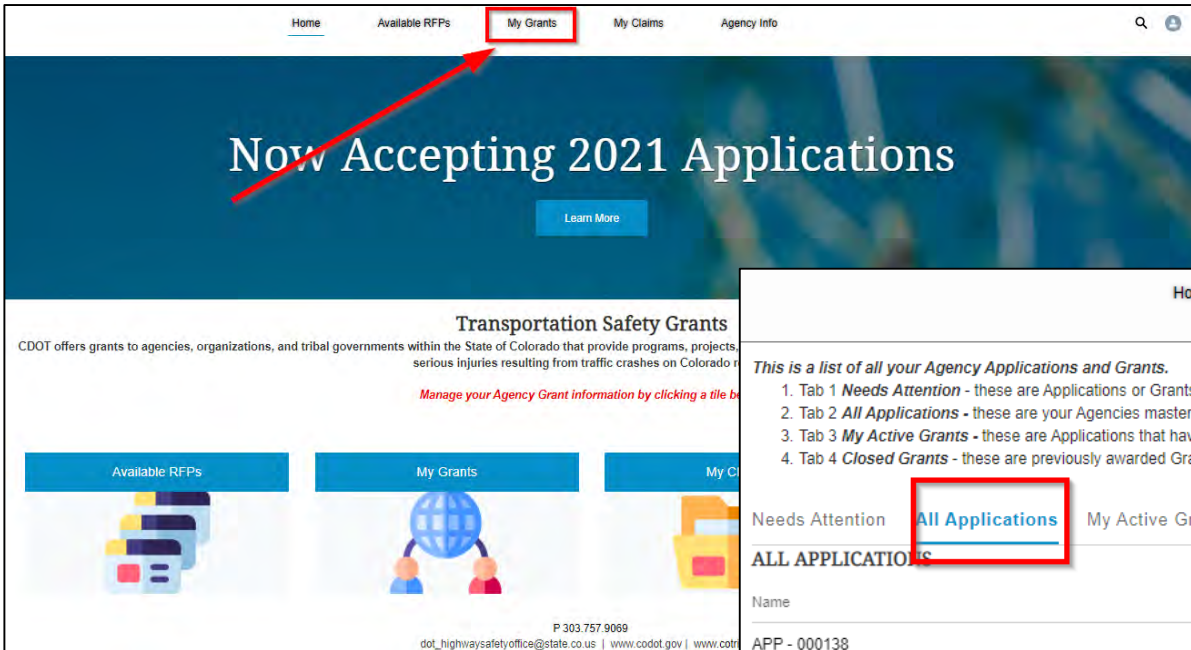
Signature & Submit

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.

*This is a list of all your Agency Applications and Grants.*

1. Tab 1 **Needs Attention** - these are Applications or Grants that need your attention. Click the "Needs Attention Tab" and view the comments field. Click the "Name" to open and make necessary updates. Remember to resubmit.
2. Tab 2 **All Applications** - these are your Agencies master list of Applicants. Click the "All Applications" tab to view all Applications regardless of status.
3. Tab 3 **My Active Grants** - these are Applications that have been awarded a grant. Click the "My Grants" tab to view current and past applicants that have become a grant.
4. Tab 4 **Closed Grants** - these are previously awarded Grants from past cycles that are now closed. Click the "Closed Grants" tab to view closed Grants.

Name	Project Title	Year	Status
APP - 000138		Year 1	In Progress
APP - 000139	test	Year 1	Submitted

View All

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# 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.

The screenshot shows the 'My Grants' tab selected in a navigation menu. Below the navigation, there is a list of tabs: 'Needs Attention', 'All Applications', 'My Active Grants', and 'Closed Grants'. The 'Needs Attention' tab is active and highlighted. Below the tabs, there is a table with the following data:

Name	Project Title	Status	Comments
APP - 000083	test	Revision Requested	test
APP - 000103	test	Revision Requested	
APP - 000139	test	Revision Requested	Please update your Budget section.

At the bottom of the page, there is a 'View All' link and contact information: P 303.757.9069, dot\_highwaysafetyoffice@state.co.us | www.codot.gov | www.cotrip.org.

# 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.

The screenshot displays the 'CDOT LAW ENFORCEMENT APPLICATION' interface. The top navigation bar includes 'Home', 'Available RFPs', 'My Grants', 'My Claims', and 'More'. The user 'Chuck Norris' is logged in. On the left sidebar, a list of sections is shown, with 'Revision Requested' highlighted in orange and 'In Progress'. The main content area features a 'Revision Requested' header with 'In Progress' status and a 'Next' button. Below this are 'Save & Exit', 'Save', and 'Print PDF' buttons. A message states: 'The following Revisions have been requested for this application from your Project Manager. Please read the comments below carefully and make the updates to your application. When complete, please navigate to the 'Signature & Submit' section of this application and click the blue 'Submit' button to submit your revisions.' A text box contains the instruction: 'Please update your Budget section..'. At the bottom, there are 'Save & Exit', 'Save', 'Print PDF', and 'Next' buttons.

# 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'.

The screenshot shows a web interface with a navigation bar at the top containing 'Home', 'Available RFPs', 'My Grants' (highlighted with a red box), 'My Claims', and 'More'. Below the navigation bar is a section titled 'This is a list of all your Agency Applications and Grants.' with four numbered instructions. Underneath are four tabs: 'Needs Attention', 'All Applications' (highlighted with a red box), 'My Active Grants', and 'Closed Grants'. Below the tabs is a table titled 'ALL APPLICATIONS' with columns for Name, Project Title, Year, and Status. The table contains two rows: one with 'APP - 000138' and 'Year 1' with status 'In Progress', and another with 'APP - 000139', 'test', 'Year 1', and 'Revisions Completed' (highlighted with a red box). At the bottom left is a 'View All' link, and at the bottom center is contact information: 'P 303.757.9069', 'dot\_highwaysafetyoffice@state.co.us', 'www.codot.gov', and 'www.cotrip.org'.

Home Available RFPs **My Grants** My Claims More

*This is a list of all your Agency Applications and Grants.*

1. Tab 1 **Needs Attention** - these are Applications or Grants that need your attention. Click the "Needs Attention Tab" and view the comments field. Click the "Name" to open and make necessary updates. Remember to resubmit.
2. Tab 2 **All Applications** - these are your Agencies master list of Applicants. Click the "All Applications" tab to view all Applications regardless of status.
3. Tab 3 **My Active Grants** - these are Applications that have been awarded a grant. Click the "My Grants" tab to view current and past applicants that have become a grant.
4. Tab 4 **Closed Grants** - these are previously awarded Grants from past cycles that are now closed. Click the 'Closed Grants' tab to view closed Grants.

Needs Attention **All Applications** My Active Grants Closed Grants

**ALL APPLICATIONS**

Name	Project Title	Year	Status
APP - 000138		Year 1	In Progress
APP - 000139	test	Year 1	Revisions Completed

View All

P 303.757.9069  
dot\_highwaysafetyoffice@state.co.us | www.codot.gov | www.cotrip.org

# 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.

CDOT LAW ENFORCEMENT APPLICATION

Completed  
Upload Files

Save & Exit Save Print PDF

Upload Information & Instruction

Please select the 'Choose File' button below to begin uploading your file. Once you choose a file, select the blue 'Upload Document' link below to upload your file.

Choose File No file chosen

Upload document

Action	Document Name	Update Date/Time
	Receipt.xlsx	9/29/2020 3:31 PM

Save & Exit Save Print PDF

Previous Next

Agency Qualifications/Past Performance Completed

Long-Term Sustainability Completed

Budget (Section 1 of 3) Completed

Budget (Section 2 of 3) Completed

Budget (Section 3 of 3) Completed

Certifications and Assurances Completed

Upload Files Completed

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.

The screenshot shows the EGrants system interface. At the top, there is a navigation bar with tabs: Home, Available RFPs, My Grants, My Claims (highlighted with a red box), and More. Below this, the 'MY ACTIVE GRANTS WITH CLAIMS' section is visible. It contains a table with columns for Grant Name, Project Title, and a 'View All' link. The 'Grant Name' column shows 'APP - 000107' (highlighted with a red box). A red arrow points from this box to the 'Claims' tab in the second screenshot. The second screenshot shows the 'Claims' screen, which has a table with 12 items, sorted by Claim Name. The table columns are Claim Name, Claim Number, Month, Status, Total Claim Cost, and Claim Paid Date. The data rows show claims for each month from October to July, all with a status of 'In Progress' and a total claim cost of \$0.00. At the bottom of the page, there is contact information: P 303.757.9069, brittany.janes@state.co.us | www.codot.gov | www.cotrip.org.

**Click here to view the 'Claims' screen.**

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	



# 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'.

Home Available RFPs My Grants My Claims More

COLORADO Department of Transportation CDOT CLAIMS FORM - OCTOBER Chuck Norris

Claim Information Completed

Personnel Services Claims In Progress

Hourly Employee Claims

Fringe Benefit Claims

Travel Expenses Claims

Capital Equipment Claims

Upload Receipts

Signature & Submit

Personnel Services Claims In Progress

Save & Exit Save Print PDF

Personnel Services Instruction

In this section, you will be creating Claims against the Personnel Services category of your yearly Budget. If you do not have Claims for this section this month, you may leave this section blank and move on to the next.

In order to create Claims, please click the blue '+Personnel Services Claim' button below. You will then be prompted to enter in a Description of the Claim and the Amount. Once you click 'Save' you will see a new Claim record has been added to this section. You may edit or delete the Claim once it is created. As you add Personnel Services claims, the Personnel Services Yearly Budget, Personnel Services Yearly Balance Remaining, and Personnel Services Monthly Claim Total fields will update. (See 'Important Note' below)

**Important Note: In order to see the most updated values in the Yearly Budget, Yearly Balance Remaining, and Monthly Claim Total fields, please click the blue 'Save' button at the top of the section. (The page will then be refreshed with updated values)**

Personnel Services

Personnel Services Yearly Budget	Personnel Services Yearly Balance Remaining	Personnel Services Monthly Claim total
\$10,000.00	\$10,000.00	\$0.00

+ Personnel Service Claim

Action \* Claim Description \* Amount

# 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.

The screenshot displays a web-based claim form interface. On the left is a vertical navigation menu with the following items: Claim Information (Completed), Personnel Services Claims (Completed), Hourly Employee Claims, Operating Expense Claims, Contractual Services Claims, Travel Expenses Claims, Capital Equipment Claims, Indirect Cost Claims, Upload Receipts (Completed), and Signature & Submit. The main content area is titled 'Claim Information' and includes three buttons: 'Save & Exit', 'Save', and 'Print PDF'. Below this, the 'Claim Information' section contains a table with the following data:

Agency	Project Title	PI Invoicing Party Address
City Of Denver (Testing)	Title	123 Easy Street Denver, CO 80021
WBS #	Purchase Order Number	Purchase Order Date
77	555555	9/24/2020

Below the table is the 'Claim Summary' section, which includes the following fields:

- Claim Number: 1
- Month: October
- Claim Due Date: 12/15/2020
- Total Claim Cost: \$4,500.00

The 'Optional' section at the bottom contains a red-bordered input field labeled 'Invoice Number (optional)'.

# 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.

CDOT CLAIMS FORM - OCTOBER

Chuck Norris

Completed  
Personnel Services Claims

Save & Exit Save Print PDF

Personnel Services Instruction

In this section, you will be creating Claims against the Personnel Services category of your yearly Budget. If you do not have Claims for this section this month, you may leave this section blank and move on to the next.

In order to create Claims, please click the blue '+Personnel Services Claim' button below. You will then be prompted to enter in a Description of the Claim and the Amount. Once you click 'Save' you will see a new Claim record has been added to this section. You may edit or delete the Claim once it is created. As you add Personnel Services claims, the Personnel Services Yearly Budget, Personnel Services Yearly Balance Remaining, and Personnel Services Monthly Claim Total fields will update. (See 'Important Note' below)

**Important Note: In order to see the most updated values in the Yearly Budget, Yearly Balance Remaining, and Monthly Claim Total fields, please click the blue 'Save' button at the top of the section. (The page will then be refreshed with updated values)**

Personnel Services

Personnel Services Yearly Budget	Personnel Services Yearly Balance Remaining	Personnel Services Monthly Claim total
\$10,000.00	\$7,000.00	\$3,000.00

+ Personnel Service Claim

Action	* Claim Description	* Amount
	Test Claim 2	\$2,000.00
	Test Claim	\$1,000.00

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.

**In Progress** Upload Receipts ◀ Previous Next ▶


[Save & Exit](#) [Save](#) [Print PDF](#)


### Upload Receipts

**Instructions:** Please select the 'Choose File' button below to begin uploading your file/receipt. Once you choose a file, select the blue 'Upload Document' link below to upload your file.

[Choose File](#) No file chosen

[Upload document](#)

Action	Document Name	Update Date/Time
	Receipt.xlsx	9/14/2020 11:26 AM

 Upload Receipts  
In Progress



# 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.

CDOT CLAIMS FORM - OCTOBER

Chuck Norris

Signature & Submit

Save & Exit Save Print PDF

By signing this claim form electronically, I certify to the best of my knowledge and belief that the form is true, complete, and accurate, and the receipts are for the purposes and objectives set forth in the terms and conditions of the Federal award. I am aware that any false, fictitious, or fraudulent information or the omission of any material fact, may subject me to criminal, civil or administrative penalties for fraud, false statements, false claims or otherwise. (US Code Title 18, Section 1001 and Title 31 Sections 3729-3730 and 3801-3812)

Reset Sign above Accept & Save Signature

Submit

Submit

Personnel Services Claims Completed

Hourly Employee Claims

Operating Expense Claims

Contractual Services Claims

Travel Expenses Claims

Capital Equipment Claims

Indirect Cost Claims

Upload Receipts Completed

Signature & Submit

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	

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- In Progress** – Claim has not been submitted.
- Submitted** – Claim has been Submitted but not processed.
- Ready for Processing** – Claim has been submitted and reviewed by a PM but has not been processed.
- 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.

The screenshot displays a web application interface for managing grants. At the top, there is a navigation menu with tabs: 'Home', 'Available RFPs', 'My Grants' (highlighted with a red box), 'My Claims', and 'More'. Below the navigation, there is a section titled 'This is a list of all your Agency Applications and Grants.' followed by four numbered instructions. Below the instructions, there are four tabs: 'Needs Attention', 'All Applications', 'My Active Grants' (highlighted with a red box), and 'Closed Grants'. The main content area is titled 'MY ACTIVE GRANTS' and contains a table with the following columns: 'Name', 'Project Title', 'Status', and 'Project Manager'. The table lists several grants, with the first one 'APP - 000091' highlighted by a red box. At the bottom of the page, there is a footer with contact information and a 'View All' link.

Home Available RFPs **My Grants** My Claims More

*This is a list of all your Agency Applications and Grants.*

1. Tab 1 **Needs Attention** - these are Applications or Grants that need your attention. Click the "Needs Attention Tab" and view the comments field. Click the "Name" to open and make necessary updates. Remember to resubmit.
2. Tab 2 **All Applications** - these are your Agencies master list of Applicants. Click the "All Applications" tab to view all Applications regardless of status.
3. Tab 3 **My Active Grants** - these are Applications that have been awarded a grant. Click the "My Grants" tab to view current and past applicants that have become a grant.
4. Tab 4 **Closed Grants** - these are previously awarded Grants from past cycles that are now closed. Click the 'Closed Grants' tab to view closed Grants.

Needs Attention All Applications **My Active Grants** Closed Grants

### MY ACTIVE GRANTS

Name	Project Title	Status	Project Manager
APP - 000083	test	Revision Requested	
APP - 000084	t	Revisions Completed	
APP - 000089	Aurora PARTY Program	Accepted	Lynn Holly
<b>APP - 000091</b>	Lakewood Speed	Accepted	Lynn Holly
APP - 000103	test	Revision Requested	Austin Demmy
APP - 000137	Title	Revisions Completed	Austin Demmy

[View All](#)

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# 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.

The screenshot displays the 'CDOT LAW ENFORCEMENT APPLICATION' interface. The top navigation bar includes the Colorado Department of Transportation logo, the application title, and the user name 'Austin Demmy'. A left-hand sidebar lists various application sections, with 'Grant Reporting' highlighted as 'Completed'. The main content area is titled 'Grant Reporting' and features a 'Next' button. Below this, there are three buttons: 'Save & Exit', 'Save', and 'Print PDF'. The 'Activity Reporting' section is active, showing a text entry for 'Quarter 1 Report' with the content: 'Between October 1, 2018 and September 30, 2019 the Grand Junction Police Department will conduct 4 impaired driving checkpoints.' Below this are fields for 'Quarter 2 Report', 'Quarter 3 Report', 'Quarter 4 Report', and 'Year End Summary'. An 'Edit Record' button is located to the right of the text entry.

thank you