

## Section 1: AGENCY INFORMATION INSTRUCTIONS FOR GRANTEES

The Agency Information tab in the portal is where grantees enter key pieces of data that describe their agency, the services they provide, and the clients that they serve. Information entered here is tied directly to other information in the overall database (Capital Inventory, Accident Reporting, Grant Applications, the Reimbursement Process, etc.) and is essential to CDOT's overall grant management and required reporting. Therefore it is critical that the information contained in this form is up to date and accurate.

DTR staff has done their best in migrating data from the old database and recent surveys to this new tool. However, in some cases we were not able to complete the forms, either because of incompatible data formats or because we are asking for information that hasn't been requested yet. In either case, it is incumbent on the grantee to review and verify the data that was migrated and to correct it where necessary.

The first time you access the portal, you should review and verify any information that is contained on the Agency Information form.

To update and verify Agency Information:

Step 1: After logging into the portal, click on the Agency Information tab at the top of the screen

The screenshot shows a web browser window with the URL [cdot-transit.dev.cs14.force.com/Portal/Portal\\_Agency](http://cdot-transit.dev.cs14.force.com/Portal/Portal_Agency). The page is titled "Colorado DOT Taking care to get you there" and shows the user is logged in as "Sue Averill" for the agency "Short Bus, Inc.". The "AGENCY INFORMATION" tab is highlighted with a red circle in the top navigation bar. Below the navigation bar, there is a "Update Agency Information" button and a confirmation message: "Agency Information is confirmed. You can submit applications." The main content area displays the "Agency Detail" form, which is divided into two columns of fields. The left column includes fields for Agency Name, DBA, Tax ID (FEIN), Vendor Number, Operator Type, Fixed Route, Deviated Fixed Route, Demand Response, Service Categories, Description of Clientele, Average Donation or Fare, Broker Trips, and Seasonal Fluctuations. The right column includes fields for Organization Type, Other Organization Type, Last Update, Financial Software, DUNS Number, Total Number of Passenger Trips (Fixed Route), Total Number of Passenger Trips (Deviated Fixed Route), Total Number of Passenger Trips (Demand Response), Previous Agency Name, Annual Taxicab Unlinked Trips, and Reservation Schedule. The form is partially filled out with data for "Short Bus, Inc." and includes checkboxes for various options.

Field	Value
Agency Name	Short Bus, Inc.
DBA	Your favorite Ride
Tax ID (FEIN)	12345678
Vendor Number	12345678
Operator Type	Rural
Fixed Route	<input checked="" type="checkbox"/>
Deviated Fixed Route	<input checked="" type="checkbox"/>
Demand Response	<input checked="" type="checkbox"/>
Service Categories	Commercial Service; Incidental Transit; Pass Through; Public Transportation; Specialized Transit
Description of Clientele	Disabled Non-Elderly (<60 years); Elderly and Disabled (60+ w/ disability); Elderly Non-Disabled (60+); Other; Public (Non-Elderly, Non-Disabled, <60); School Children
Average Donation or Fare	\$3.50
Broker Trips	<input checked="" type="checkbox"/>
Seasonal Fluctuations	<input checked="" type="checkbox"/>
Organization Type	Public Transit Agency
Other Organization Type	
Last Update	8/15/2013
Financial Software	Quickbooks
DUNS Number	1234
Total Number of Passenger Trips (Fixed Route)	1,500,000
Total Number of Passenger Trips (Deviated Fixed Route)	45,000
Total Number of Passenger Trips (Demand Response)	65,000
Previous Agency Name	
Annual Taxicab Unlinked Trips	2,536
Reservation Schedule	<input checked="" type="checkbox"/>

If you have seasonal fluctuations, please describe them:  
We drive the bus' only when it is over 50 degrees. Our drivers are easily chilled.

Step 2: Click the “Update Agency Information” located just below the navigation bar in the middle of your screen.

Colorado DOT  
Taking care to get you there

Logged in as: Sue Averill  
Agency: Short Bus, Inc.

AGENCY INFORMATION | APPLICATIONS | PROJECT BUDGETS | CAPITAL INVENTORY | MILESTONES | LOGOUT

**Update Agency Information**

Agency Information is confirmed. You can submit applications.

**Agency Detail**

Agency Name	Short Bus, Inc.	Organization Type	Public Transit Agency
DBA	Your favorite Ride	Other Organization Type	
Tax ID (FEIN)	12345678	Last Update	8/15/2013
Vendor Number	12345678	Financial Software	Quickbooks
Operator Type	Rural	DUNS Number	1234
Fixed Route	<input checked="" type="checkbox"/>	Total Number of Passenger Trips (Fixed Route)	1,500,000
Deviated Fixed Route	<input checked="" type="checkbox"/>	Total Number of Passenger Trips (Deviated Fixed Route)	45,000
Demand Response	<input checked="" type="checkbox"/>	Total Number of Passenger Trips (Demand Response)	65,000
Service Categories	Commercial Service; Incidental Transit Pass Through; Public Transportation; Specialized Transit	Previous Agency Name	
Description of Clientele	Disabled Non-Elderly (<60 years); Elderly and Disabled (60+ w disability); Elderly Non-Disabled (60+); Other, Public (Non-Elderly, Non-Disabled, <60); School Children	Annual Taxicab Unlinked Trips	2,536
Average Donation or Fare	\$3.50		
If you broker more than 50 percent of your trips, do not include these trips in your agency's service information.			
Broker Trips	<input checked="" type="checkbox"/>	Reservation Schedule	<input checked="" type="checkbox"/>
Seasonal Fluctuations	<input checked="" type="checkbox"/>		
If you have seasonal fluctuations, please describe them: We drive the bus' only when it is over 50 degrees. Our drivers are easily chilled.			

**Address Information**

**Hint:** One thing you will immediately notice throughout the platform are the small question mark icons next to many of the fields. If you hover your mouse over these, help text appears. The help text is there to assist you in understanding what information to include in the adjacent field. In some cases, the field names themselves serve as enough of a “clue” to help you enter correct information, but in many cases we thought that including help text would be beneficial. We can add help text to about any field in the portal, so if you feel like we’ve missed something or something isn’t clear please don’t hesitate to let us know.

Once you have clicked on the “Update Agency Information” update and edit the information as necessary. You can also save your changes at any time by hitting the “Save” button at the center-top of the form.

The screenshot shows a web browser window with the URL `cdot-transit.dev.cs14.force.com/Portal/portal_agencyedit`. The page header includes the Colorado Department of Transportation (CDOT) logo and the tagline "Taking care to get you there". The user is logged in as Sue Averill, Agency: Short Bus, Inc. The navigation bar includes links for AGENCY INFORMATION, APPLICATIONS, PROJECT BUDGETS, CAPITAL INVENTORY, MILESTONES, and LOGOUT. The main form is titled "Agency Detail" and contains various fields for agency information. The "Save" button is circled in red. Below the "Save" button, a yellow message box states: "Agency information is confirmed. You can submit applications." The form fields include:

- Agency Name: Short Bus, Inc.
- DBA: Your favorite Ride
- Tax ID (FEIN): 12345678
- Vendor Number: 12345678
- Operator Type: Rural
- Fixed Route: ☒
- Deviated Fixed Route: ☒
- Demand Response: ☒
- Service Categories: Available, Chosen (Commercial Service, Incidental Transit, Pass Through)
- Description of Clientele: Available (Workforce (employment-specific)), Chosen (Disabled Non-Elderly (<60 years), Elderly and Disabled (60+ w disability), Elderly Non-Disabled (60+))
- Average Donation or Fare: 3.50
- If you broker more than 50 percent of your trips, do not include these trips in your agency's service information.
  - Broker Trips: ☒
  - Seasonal Fluctuations: ☒
- If you have seasonal fluctuations, please describe them: We drive the bus only when it is over 50 degrees. Our drivers are easily chilled.
- Organization Type: Public Transit Agency
- Other Organization Type:
- Last Update: 8/15/2013
- Financial Software: Quickbooks
- DUNS Number: 1234
- Total Number of Passenger Trips (Fixed Route): 1,500,000
- Total Number of Passenger Trips (Deviated Fixed Route): 45,000
- Total Number of Passenger Trips (Demand Response): 65,000
- Previous Agency Name:
- Annual Taxicab Unlinked Trips: 2,536
- Reservation Schedule: ☒
- Billing Street: 1918 Corriedale St.
- Billing City: Fort Collins
- Billing State/Province: 1918 Corriedale Stree
- Billing Zip/Postal Code: 80526
- Billing Country: US of A
- Phone: (970) 416-2258
- Shipping Street: 1918 Corriedale St.
- Shipping City: Fort Collins
- Shipping State/Province: 1918 Corriedale Stree
- Shipping Zip/Postal Code: 80526
- Shipping Country: US of A
- Fax: (970) 416-2258

*Note: The Safety Data section of this form is edited from the Capital Inventory item forms, and cannot be edited from this view. This is because Safety and accident reporting functions are tied directly to the Capital Inventory forms. For instructions on how to update Safety and accident information, please refer to the Capital Inventory instruction section of this users manual.*

Most of the Sections and fields in the Agency Information form are self explanatory, and where there might be confusion we hope that the help text provided serves its purpose. If you have any questions about what we are looking for there please don't hesitate to contact us.

### Step 3: Saving and Confirming Agency Information

When you are done editing and updating data in the Agency Information form, hit Save. The screen will change and a “Confirm Agency Information” button will appear near the top-middle of the screen (see screen shot below). Click on the button. Now you’re done: Your Agency Information is updated and confirmed.

The screenshot shows a web browser window with the URL `cdot-transit.dev.cs14.force.com/Portal/portal_agency`. The page is titled "Taking care to get you there" and is logged in as Sue Averill, Agency: Short Bus, Inc. The "Confirm Agency Information" button is circled in red. Below the button is a message: "Please check Agency Information and confirm if the data are correct or update the incorrect data and confirm. Please note that you can't submit applications if the Agency information is not confirmed." The form is divided into sections: Agency Detail, Address Information, and Passenger Information. The Agency Detail section includes fields for Agency Name, DBA, Tax ID, Vendor Number, Operator Type, Fixed Route, Deviated Fixed Route, Demand Response, Service Categories, Description of Clientele, Average Donation or Fare, and Reservation Schedule. The Address Information section includes fields for Billing Street, Billing City, Billing State/Province, Billing Zip/Postal Code, Billing Country, Phone, Website, Shipping Street, Shipping City, Shipping State/Province, Shipping Zip/Postal Code, Shipping Country, and Fax. The Passenger Information section is partially visible at the bottom.

**Agency Detail**

Agency Name	Short Bus, Inc.	Organization Type	Public Transit Agency
DBA	Your favorite Ride	Other Organization Type	
Tax ID (FEIN)	12345678	Last Update	10/3/2013
Vendor Number	12345678	Financial Software	Quickbooks
Operator Type	Rural	DUNS Number	1234
Fixed Route	<input checked="" type="checkbox"/>	Total Number of Passenger Trips (Fixed Route)	1,500,000
Deviated Fixed Route	<input checked="" type="checkbox"/>	Total Number of Passenger Trips (Deviated Fixed Route)	45,000
Demand Response	<input checked="" type="checkbox"/>	Total Number of Passenger Trips (Demand Response)	65,000
Service Categories	Commercial Service; Incidental Transit; Pass Through; Public Transportation; Specialized Transit	Previous Agency Name	
Description of Clientele	Disabled Non-Elderly (<60 years); Elderly and Disabled (60+ w disability); Elderly Non-Disabled (60+); Other: Public (Non-Elderly, Non-Disabled, <60); School Children	Annual Taxicab Unlinked Trips	2,538
Average Donation or Fare	\$3.00		
If you broker more than 50 percent of your trips, do not include these trips in your agency's service information.			
Broker Trips	<input checked="" type="checkbox"/>	Reservation Schedule	<input checked="" type="checkbox"/>
Seasonal Fluctuations	<input checked="" type="checkbox"/>		
If you have seasonal fluctuations, please describe them: We drive the bus' only when it is over 50 degrees. Our drivers are easily chilled.			

**Address Information**

Billing Street	1918 Cornedale St.	Shipping Street	1918 Cornedale St.
Billing City	Fort Collins	Shipping City	Fort Collins
Billing State/Province	1918 Cornedale Street	Shipping State/Province	1918 Cornedale Street
Billing Zip/Postal Code	80525	Shipping Zip/Postal Code	80525
Billing Country	US of A	Shipping Country	US of A
Phone	(970) 416-2259	Fax	(970) 416-2259
Website	<a href="http://www.coalminerslongjohns.blogspot.com">http://www.coalminerslongjohns.blogspot.com</a>		

**Passenger Information**

Aggregate all your passenger information and provide the numbers below. Enter percentages in whole number format (i.e. 70, not .70). Each category (Americans with Disabilities Act, Trip Purpose, Race/Ethnicity) should equal 100%. Please provide information that reflects your overall program data, not specific trip/project data.