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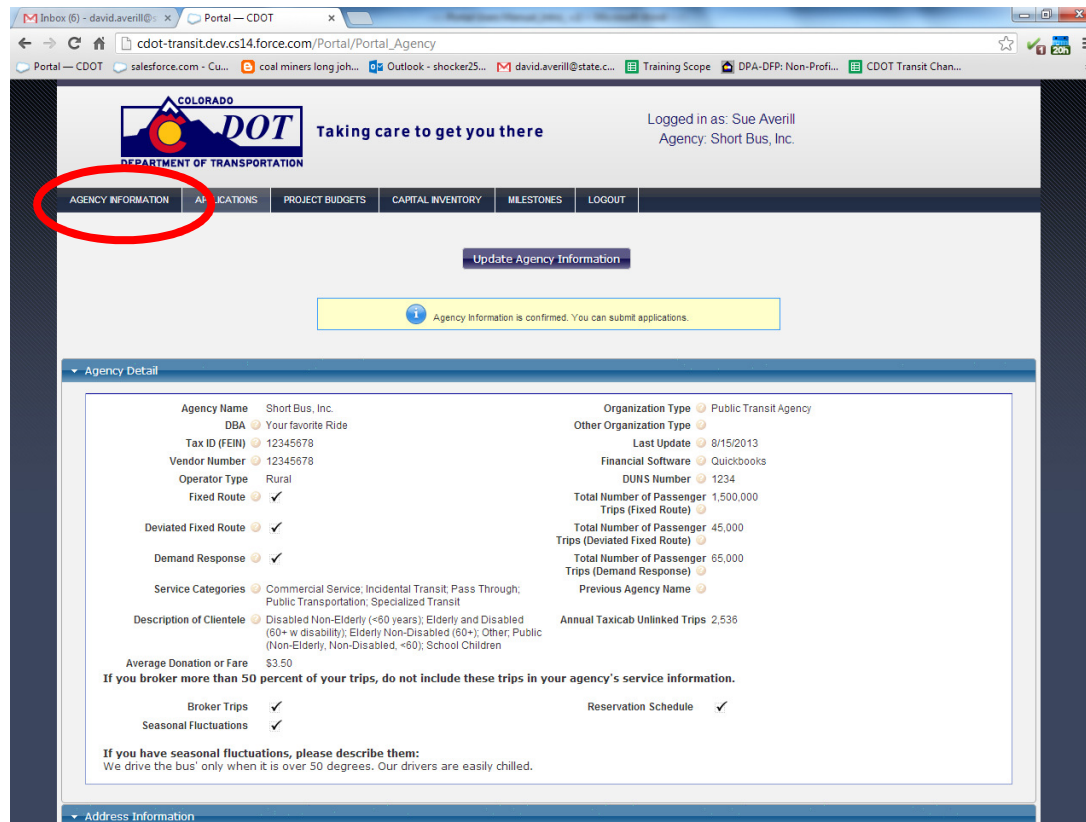
Step 2: Click the "Update Agency Information" located just below the navigation bar in the middle of your screen.

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.

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.