

Section 1: AGENCY INFORMATION INSTRUCTIONS FOR GRANTEES

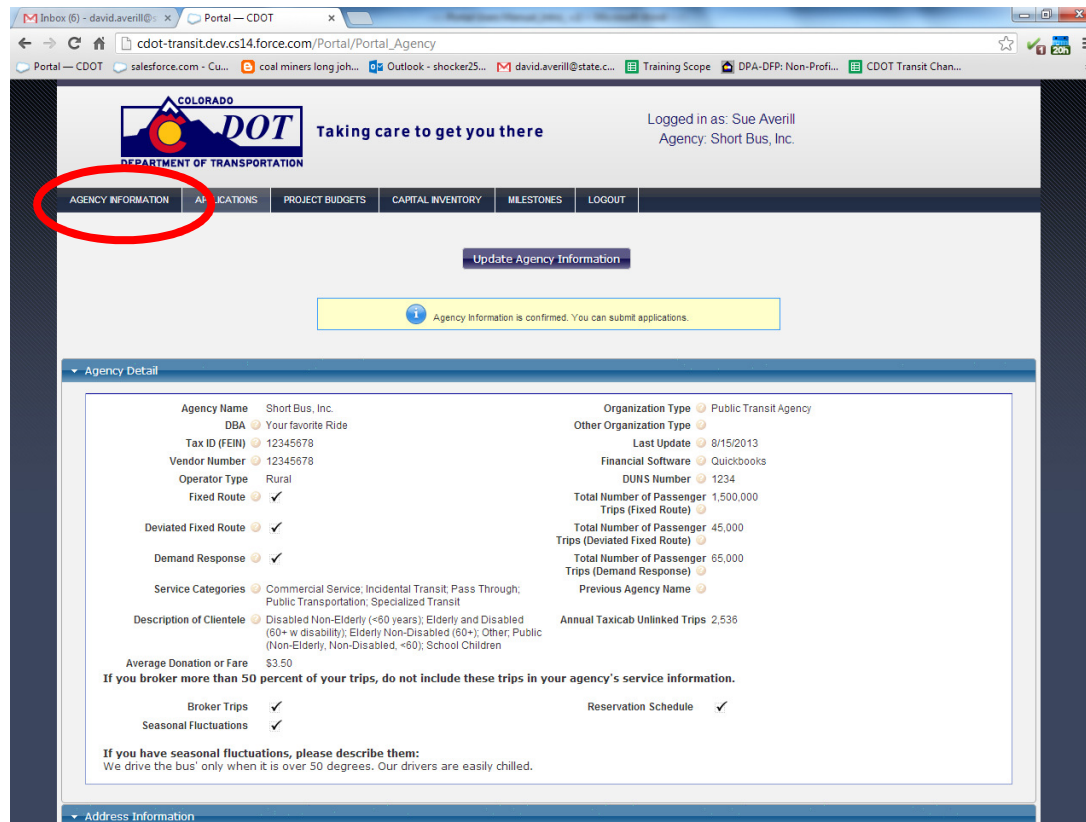
The Agency Information tab in the portal is where grantees enter key pieces of data that describe their agency, the services they provide, and the clients that they serve. Information entered here is tied directly to other information in the overall database (Capital Inventory, Accident Reporting, Grant 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.

The screenshot shows a web browser window with the URL cdot-transit.dev.cs14.force.com/Portal/Portal_Agency. The page header includes the Colorado DOT logo and the slogan "Taking care to get you there". The user is logged in as Sue Averill, Agency: Short Bus, Inc. A navigation bar contains links for AGENCY INFORMATION, APPLICATIONS, PROJECT BUDGETS, CAPITAL INVENTORY, MILESTONES, and LOGOUT. Below the navigation bar, a button labeled "Update Agency Information" is circled in red. A yellow message box below the button states: "Agency Information is confirmed. You can submit applications." The main content area is titled "Agency Detail" and displays various fields for "Short Bus, Inc.", including DBA, Tax ID, Vendor Number, Operator Type, Fixed Route, Deviated Fixed Route, Demand Response, Service Categories, Description of Clientele, Average Donation or Fare, Broker Trips, Seasonal Fluctuations, 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, and Annual Taxicab Unlinked Trips. A note at the bottom of the Agency Detail section reads: "If you have seasonal fluctuations, please describe them: We drive the bus' only when it is over 50 degrees. Our drivers are easily chilled."

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 displaying the CDOT Agency Information form. The browser's address bar shows the URL cdot-transit.dev.cs14.force.com/Portal/portal_agencyedit. The page header includes the CDOT logo and the slogan "Taking care to get you there". The user is logged in as Sue Averill, Agency: Short Bus, Inc. The navigation menu includes: AGENCY INFORMATION, APPLICATIONS, PROJECT BUDGETS, CAPITAL INVENTORY, MILESTONES, and LOGOUT. The main content area is titled "Agency Detail" and contains the following fields and sections:

- 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: [dropdown], 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:** [dropdown]
- Last Update:** 8/19/2013
- 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:** [dropdown]
- Annual Taxicab Unlinked Trips:** 2,336
- Reservation Schedule:**

The "Save" button is circled in red. Below the form, the "Address Information" section is visible, showing Billing and Shipping addresses for 1918 Corriedale St., Fort Collins, CO 80526, US of A. The phone number is (970) 416-2258 and the fax number is (970) 416-2259. The Windows taskbar at the bottom shows the date and time as 1:31 PM on 10/3/2013.

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.

