

Texas Department of Transportation



TxDOT Admin Manual
Version 1.1
eGrants System

Public Transportation Division

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1. System Requirements

The eGrants System was designed so that the vast majority of computer users will be able to use the system with little or no changes to their computer environment. The four requirements that are mentioned below are common computer elements that should be already present on most machines.

The eGrants System requirements listed below can also be viewed on the system itself by clicking the "System Requirements" link from the system homepage.

1.a. Operating System

The eGrants System was designed for both of the most common computer operating systems - Windows and Macintosh. It has not been tested and is not supported on other operating systems such as Linux and Unix. Users accessing the system from a Macintosh environment are required to have MacOS 7.5 or higher running on a PowerPC processor. Windows users are required to have an operating system that is Windows 95 or higher.

1.b. World Wide Web Connection

The eGrants System is an Internet application. It is accessed via the Internet and was specifically designed for Internet usage. The Internet is the more general term that is typically used to refer to the World Wide Web. The World Wide Web consists of a vast array of content that is accessible via a web browser. For the purpose of accessing the eGrants System, the standard Internet connection is via a modem connection. A modem is a piece of hardware that connects to the computer to send data through a phone line to and from the computer. Internet connections that are "faster" than a modem connection, such as cable and DSL, will improve the speed at which the system operates, but are not necessary in order to use the system. If you are in an office environment, you may already have an Internet connection, but if you are unsure, please contact your organization's network administrator.

For those using a dial-up connection over a modem, it is highly recommended that you have a modem connection speed of at least 33.6 kbps (kilobits per second).

1.c. Web Browser

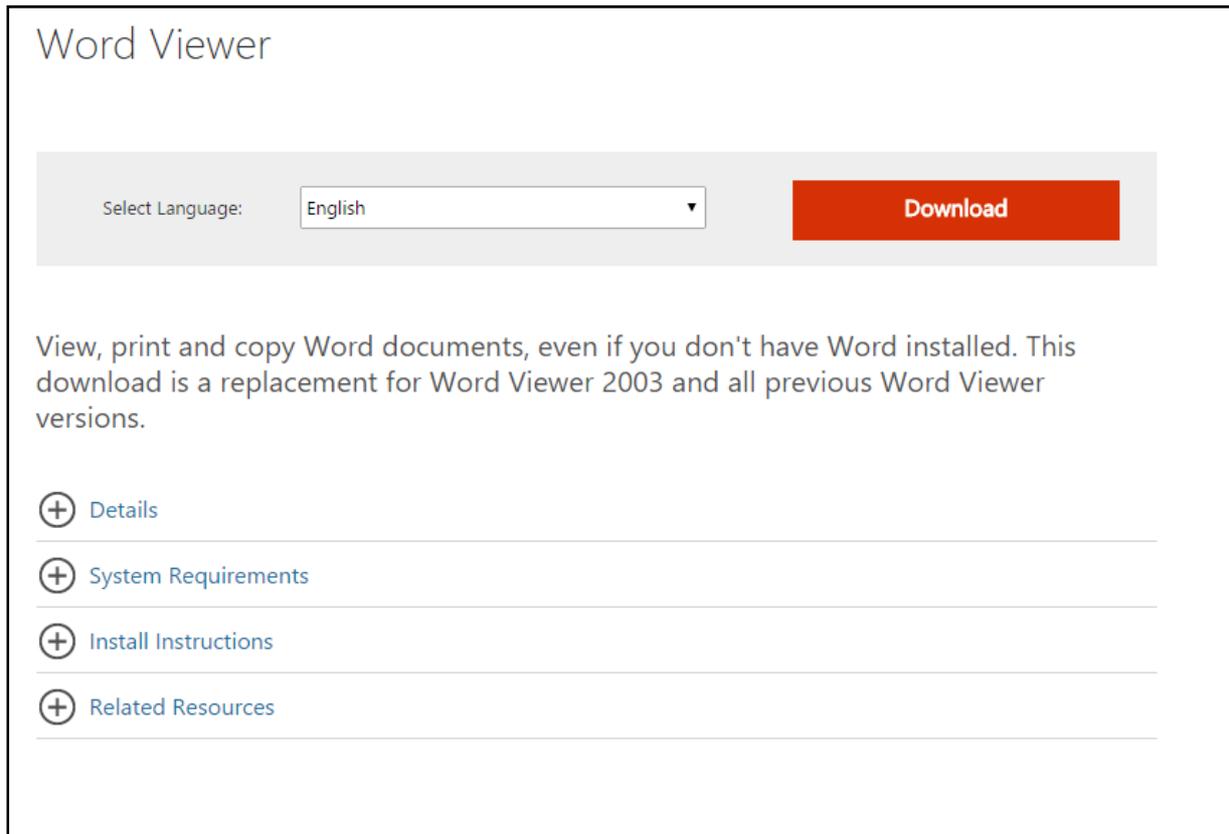
This system was designed to be compatible with common up-to-date web browsers including Internet Explorer, Firefox, Safari, and Opera.

1.d. Adobe Acrobat Reader

Adobe Acrobat Reader is used to view PDF (Portable Document Format) documents. The system will automatically generate grant documents in PDF format using information that has been saved into the various narrative and budget pages. Using Adobe Acrobat Reader you may choose to view, print, or save these documents. If your computer is not equipped with Adobe Acrobat Reader, simply go to <https://get.adobe.com/reader/> and download (this is a free download!).

1.e. Microsoft Word Viewer

Since 2009, eGrants has transitioned to HTML code that displays in Microsoft Word instead of the Adobe PDFs. Using Microsoft Word increases eGrants formatting options and reduces the amount of empty space on the printed pages. There are no extra steps needed to use this new functionality, except you will need to have Microsoft Word or Microsoft Word viewer installed on your computer. Microsoft Word viewer can be downloaded and installed for free by navigating to <https://www.microsoft.com/en-us/download/details.aspx?id=4>. Once you have selected the appropriate language, hit the 'Download' button.



Word Viewer

Select Language: ▼ [Download](#)

View, print and copy Word documents, even if you don't have Word installed. This download is a replacement for Word Viewer 2003 and all previous Word Viewer versions.

- + Details
- + System Requirements
- + Install Instructions
- + Related Resources

1.f. Microsoft Excel Viewer

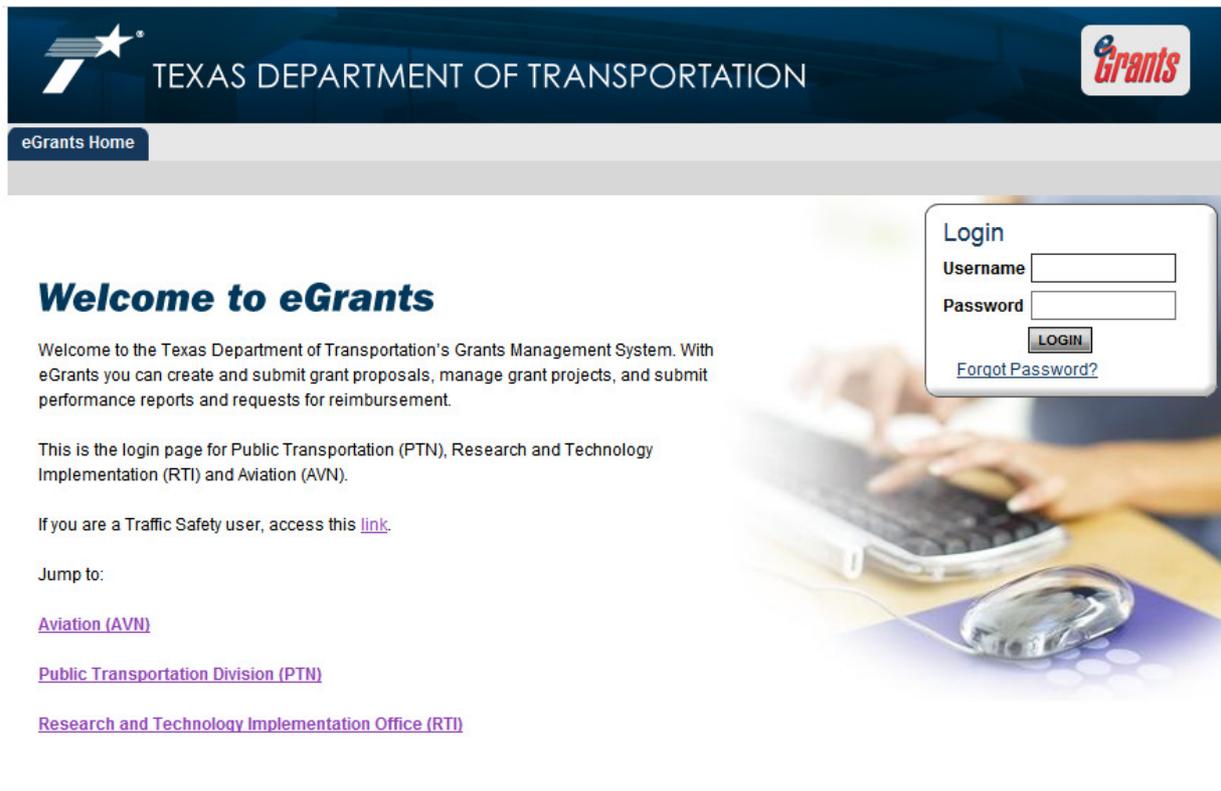
Certain functions within the eGrants, such as Management Reports, will output documents in Excel format. If you do not currently have a version of Microsoft Excel installed on your computer, you may want to download the Microsoft Excel Viewer to view these generated reports. Microsoft Excel Viewer can be downloaded and installed directly from Microsoft in similar fashion as the Microsoft Word Viewer. If you have need to view these type of documents please navigate to the hyperlink below to download and install the program.

<https://www.microsoft.com/en-us/download/details.aspx?id=10>

2. eGrants System Homepage

To access the eGrants System, type https://apps2.dot.state.tx.us/apps/egrants2/Login2.aspx?APPTHEME=TXDOT_Global&ReturnURL=/apps/egrants2/logout2.aspx into the address bar of your web browser and hit "Enter".

The page you see should look like the image shown below.



2.a. View Available Opportunities

In the "View Available Opportunities" section of your homepage, you will find any document that meets the following criteria:

- Document(s) which your current security role has permission to initiate.
- Document(s) which are set as available for initiation as per the document instance availability dates.



NOTE: Documents that are considered sub-documents to other documents (e.g. Request for Reimbursement) will not be located in the "View Available Opportunities" section, and will instead be available through the "Examine Related Items" section of the parent document.

Some documents also have specific settings for how many are allowed per organization. If instances are set to only allow one document per organization, and one has already been initiated for a given organization, they will not be able to locate the opportunity in this section.

The screenshot below is a representation of the "Opportunities" menu.

The screenshot shows the 'Opportunities' page. At the top, it says 'To apply for an item listed below, select the Apply Now button below each description.' Below this are filter fields: 'Provider' (a dropdown menu), 'Document Instance' (a text field with a search icon), and 'Due Date (From - To):' (two text fields). A 'FILTER' button is below these fields. A red arrow points from a red-bordered box containing the text 'Filters are available at the top of the page to narrow down the list of opportunities!' to the filter fields. Below the filters is an example opportunity: '5310 Application for New Age Testing', 'Offered By: TxDOT - Public Transportation', 'Application/PGA Availability Dates: 10/01/2015-01/01/2018', 'Application/PGA Period: 10/01/2015-12/31/2015', 'Application/PGA Due Date: 01/01/2018', and 'Description:'. A red-bordered box contains the text 'Information for the opportunity will be listed below the title such as :', followed by a bulleted list: '• Document Availability Dates', '• Document Period Dates', '• Document Due Dates', and '• Opportunity Description'. Below the list, it says 'When you have located the appropriate opportunity, simply click the 'APPLY NOW' button!'. A red-bordered box highlights the 'APPLY NOW' button at the bottom of the opportunity description.

2.b. My Inbox

The "My Inbox" section of the homepage will display all system notifications that have been sent to you. Typically, these notifications will be messages sent based on another user's actions. To expand the "My Inbox" section, click on the "Open Inbox" button.

The screenshot shows the 'My Inbox' section. It features an envelope icon and the text 'My Inbox'. Below this, it says 'You have 5 new messages.' and 'Select the Open Inbox button below to open your system message inbox.' A red-bordered box highlights the 'OPEN INBOX' button.

To read the full message, click on the subject line of the target message, as displayed in the screenshot below.

My Inbox

Sort inbox messages by: -- Select -- | [View All System Messages](#)

Priority	Sender	Subject	Date/Time
<input type="checkbox"/>	System Grant	Budget Revision IB-2016-NATO-00005 Approved	1/7/2016 9:02:09 AM

You can also select to either mark messages as 'read' or archive them, based on the checkbox selection!

2.c. My Tasks

The "My Tasks" section of the homepage will display all documents that require your attention. Typically, unfinished applications or documents that require your attention for the next step in the process will display here. These documents will remain here until you have completed your task and changed the status of the document.

My Tasks

You have 7 new tasks.
You have 1 tasks that are critical.
Select the **Open Tasks** button below to view your active tasks.

To navigate to the document menu of a task, click on the name of the target task, as displayed in the picture below.

My Tasks

Export Results to Screen Sort by: -- Select --

Info	Document Type	Organization	Name	Current Status	Date Received	Date Due
	MGA/Certs and Assurances	New Age Testing	C&A-2016-NATO-00021	MGA / Certs and Assurances Initiated	3/16/2016	

3. eGrants Registration and Access Management

3.a. Requesting Access to eGrants

Subgrantee agencies seeking to request access to eGrants can choose to either contact their Public Transportation Coordinator (PTC) or e-mail the Help Desk for initial consultation regarding eGrants access.

- PTN eGrants Help Desk:
 - Hours of Operation : 8:00 AM – 4:00 PM CST
 - E-Mail: ptn-egrantshelp@txdot.gov
 - Phone Number: (512) 374 – 5220

Once a subgrantee agency has formally requested access to eGrants via e-mail, a Public Transportation Coordinator will provide follow-up contact regarding access information.

3.b. Adding Members to Your Organization

Once TxDOT has provided the subgrantee with eGrants access, the subgrantee may now login to eGrants and begin the process of managing their organization. Any adding of additional members to a subgrantee organization will be coordinated and executed by the initial Subgrantee Administrator given access to eGrants by TxDOT. A Subgrantee Administrator possesses permission to assign other Subgrantee Administrators, as well as Subgrantee Staff members to an organization. Please visit the "[Security Role Assignment](#)" section of this manual for detailed information regarding the different subgrantee security roles.

To begin adding members to a subgrantee organization in eGrants, first navigate to "Organization(s)", located in the top right corner of the page as pictured below.



Next, click the purple link in the middle of the page that reads "Organization Members"



Once you have clicked the "Organization Members" hyperlink you will be brought to "Organization Members" page, where you will be presented with a summarized view of all the current organization members. From here, to continue with adding a new member to the organization, select the "Add Members" hyperlink located in the middle of the page.

Organization - New Age Testing
Follow the instructions listed below to add/remove/modify organization members.

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#)

Organization Members

Administrators with the authority to add members to your organization can follow these steps:

- 1. To add a member to your organization, select the **Add Members** link below.
- 2. If a member has already added his/her information in the system, you can search for the member.
- 3. If you need to add a member's information into the system, select **New Member**.
- For more detailed instructions, select the **Show Help** button above.

[Current Members](#) | [Add Members](#)

You will then be presented with a "Person Search" textbox where you can perform a search of other subgrantee users within the system that already exist. If the person you are attempting to add to your organization already possesses eGrants access, you can locate that user via the search box and affiliate them with your organization. However, if the person you are attempting to add to your organization DOES NOT currently have eGrants access, you will need to add them by clicking the "New Member" button, located to the right of the "Person Search" textbox, as pictured below.

Organization - New Age Testing
Follow the instructions listed below to add/remove/modify organization members.

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#)

Organization Members

Administrators with the authority to add members to your organization can follow these steps:

- 1. To add a member to your organization, select the **Add Members** link below.
- 2. If a member has already added his/her information in the system, you can search for the member.
- 3. If you need to add a member's information into the system, select **New Member**.
- For more detailed instructions, select the **Show Help** button above.

[Current Members](#) | [Add Members](#)

Person Search

For users that already have eGrants access, use this field to locate and affiliate them with your organization

For users that do not currently have eGrants access, we would click the "New Member" button.

Once the "New Member" button has been clicked, the subgrantee user will be brought to the "Add/Edit Members" page where they will need to enter the information of the member they intend to add. When selecting "Role", please refer to the "[Security Role Definitions \(Grantee\)](#)" section of this manual. Once all appropriate information has been entered, to complete the new member addition process the Subgrantee Administrator will select the "Save & Add to Organization" button, located in the top right of the page.

SAVE & ADD TO ORGANIZATION

Organization - New Age Testing

Follow the instructions listed below to add/remove/modify organization members.

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#)

Add/Edit Members

Administrators with the authority to add members to your organization can follow these steps:
Please complete the information below. All required fields are marked with an *.

	Prefix	First	Middle	Last	Suffix
Name	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Title	<input type="text"/>				
Email	<input type="text" value="pmatakevich@agatesoftware.com"/>				
Username	<input type="text"/>				
Password	<input type="text"/>		Confirm Password	<input type="text"/>	
Date Active	<input type="text" value="4/19/2016"/>		Date Inactive	<input type="text"/>	
Role	<input type="text" value="-- Select --"/>				

Once the new member has been added to the organization, the Subgrantee Administrator will relay this information to the new user.

The fields below are populated with the Organization information by default. However, you may edit the information in any of the fields. This information may also be edited by the person you are creating the profile for from their Profile page.

Address	<input type="text" value="555 Testing Ave"/>				
City	<input type="text" value="Verify"/>	State	<input type="text" value="Texas"/>	Zipcode	<input type="text" value="55555"/>
County	<input type="text" value="Andrews County"/>				
Phone #1	<input type="text" value="(555) 555-1234"/>	Phone #2	<input type="text"/>		
Fax	<input type="text" value="(555) 555-4567"/>	Cell Phone	<input type="text"/>		
Website	<input type="text"/>				

Information located in the bottom section has been prepopulated using the Organization Information. These fields can be modified if needed.

Once the Subgrantee Administrator has completed adding the new member to the organization, the Subgrantee Administrator user will need to communicate the appropriate login information to the newly added member.

3.c. Changing an Organization Member's Security Role

To change the security role of a member belonging to a subgrantee organization, first navigate to the "Organization(s)" page.





Next, click the purple hyperlink “Organization Members” located in the middle of the page.

Once you have successfully navigated to the “Organization Members” page, locate the member of the organization which you intend to modify. Once you have located the intended member, select the appropriate role for that member via the “Role” drop-down-list. When you have finished all modifications, click the “Save” button in the top right of the page.

Person	Role	Active Dates	Active Documents	Assigned By	Modified By
<input checked="" type="checkbox"/> Doe, Jane	Subgrantee Administrator	1/4/2016 -	24	SysAdmin, PTN 1/4/2016	
<input checked="" type="checkbox"/> Manual Sr. Making	Subgrantee Administrator	3/7/2016 -	23	SysAdmin, PTN 3/7/2016	

3.d. Deactivating Members in Your Organization

For varying reasons, there may be need to deactivate one or more members of your organization within eGrants. To do this, first navigate to the “Organization Members” section, as done in the previous sections.

Among the list of current organization members, locate the member which you intend to deactivate. Once you have located the intended member, set an ending date for that member’s “Active Dates”. To instantly set a member to inactive, set the ending date for that member to a date in the past. Otherwise, enter a date in the future which the user will become inactive.

Person	Role	Active Dates	Active Documents	Assigned By	Modified By
<input checked="" type="checkbox"/> Doe, Jane	Subgrantee Administrator	1/4/2016 -	24	SysAdmin, PTN 1/4/2016	
<input checked="" type="checkbox"/> Manual Sr. Making	Subgrantee Administrator	3/7/2016 - 4/15/2016	23	SysAdmin, PTN 3/7/2016	

When you have completed adjusting active dates, click the “Save” button in the top right of the page to finalize all of the edits.

3.e. Requesting a Password Change

In the event that you forget your password and are unable to access the system, you may request a new password by clicking the [Forgot Password?](#) hyperlink. This will redirect you to the password change page, titled "Forgot Your Password?" Enter in your username and e-mail address, then click the "Reset My Password and Email Me the New One" button.

Forgot Your Password?

Please enter the following information to reset your password.

You will be emailed a new password if a matching email address is found.

Note: When requesting a password reset, you must enter the username and email that are associated with your account!

Please enter your login *

Please enter your email address *

RESET MY PASSWORD AND EMAIL ME THE NEW ONE

This will e-mail you a new password that could be used to log into the system. You may then change your password via your "Profile".

TEXAS DEPARTMENT OF TRANSPORTATION

[Home](#) | [Application/PGA](#) | [RFR](#) | [MPR](#) | [Scholarships](#) | [Supplementals](#)

[Training Materials](#) | [Organization\(s\)](#) | [Profile](#) | [Logout](#)

Don't forget to click SAVE when finished!

Profile

Please complete all the required fields below. Required fields are marked with an *.

Contact Information

Name	Prefix <input type="text" value="Jane"/> *	First <input type="text" value="Jane"/> *	Middle <input type="text"/>	Last <input type="text" value="Doe"/> *	Suffix <input type="text"/>
Organization	<input style="width: 100%;" type="text" value="New Age Testing"/> *				
Title	<input style="width: 100%;" type="text" value="Subgrantee Admin"/> *				
Address	<input style="width: 100%;" type="text" value="555 Testing Ave"/> *				
City	<input style="width: 50%;" type="text" value="Verify"/> *	State	<input type="text" value="Texas"/>	Zipcode	<input style="width: 50%;" type="text" value="55555"/> *
County	<input type="text" value="Andrews County"/> *				
Phone #1	<input style="width: 50%;" type="text" value="(555) 555-1234"/> *	Phone #2	<input type="text"/>		
Fax	<input style="width: 50%;" type="text" value="(555) 555-4567"/>	Cell Phone	<input type="text"/>		
Email	<input style="width: 100%;" type="text" value="pmatakevich@agatesoftware.com"/>				
Website	<input type="text"/>				
Username	<input style="width: 100%;" type="text" value="JaneNATO"/> *				
Password	<input style="width: 50%;" type="text"/>	Confirm Password	<input style="width: 50%;" type="text"/>		

- Enter the desired new password
- Confirm the new password

3.f. User & Organization Management

3.f.1 Profile

The "Profile" page can be utilized to keep your user information up to date. To navigate to the "Profile" page, click on the "Profile" hyperlink located in the second navigation bar. Once you click this hyperlink, you will be redirected to the "Profile" page, as indicated below.

Profile

Please complete all the required fields below. Required fields are marked with an *.

Contact Information

	Prefix	First	Middle	Last	Suffix
Name	<input type="text" value=""/>	<input type="text" value="Jane"/>	<input type="text" value=""/>	<input type="text" value="Doe"/>	<input type="text" value=""/>

Organization

Title

Address

City **State** **Zipcode**

County

Phone #1 **Phone #2**

Fax **Cell Phone**

Email

Website

Username

Password **Confirm Password**

Organization Information

Organization	Role	Active Dates	Assigned By
New Age Testing	Subgrantee Administrator	01/04/2016 - open ended	SysAdmin, PTN

Associated Organization information is summarized at the bottom of the 'My Profile' page!

It is important that the information on your "Profile" page is accurate. As you will read in various sections of this manual, various eGrants features operate based off this information. Failing to keep this information accurate may result in important communications being missed.

Particular application forms have also been configured to utilize the information on your "Profile" page. If you encounter a scenario in which pre-populated data on a form is inaccurate, please be sure to check the "Profile" page and verify all of the information listed is up-to-date.

3.f.2 Organization(s)

The "Organizations(s)" page can be utilized to keep your organizations' information up to date. To navigate to the "Organization(s)" page, click on the "Organization(s)" hyperlink located in the second navigation bar.

If you are a member of two or more organizations, you will be redirected to the "Organization(s)" page with a table of available organizations. Click on the name of the organization that you would like to modify. This will redirect you to the "Organization Information" page for that organization. If you are a member of only one organization, you will be redirected to the "Organization Information" page for that organization.

You can modify your organization's contact information by entering data into the fields, then click the **SAVE** button.

The screenshot shows a web form titled "Organization - New Age Testing". At the top, there are three tabs: "Organization Information" (highlighted in red), "Organization Members", and "Organization Documents". Below the tabs, the form contains various input fields for organization details. At the bottom of the form, there are three expandable sections: "Mailing Address (if different than above)", "Legal Name", and "Aviation Details". Three callout boxes with arrows point to these sections: a blue box for "Mailing Address", a green box for "Legal Name", and a purple box for "Aviation Details".

Organization Information

Name: New Age Testing *

Identifier: NATO *

Identifier 2: [Empty]

DUNS #: 12345678

Comp. Number: 17560513347003

Address: 555 Testing Ave *

City: Austin * State: Texas * Zipcode: 55555 *

County: Andrews County *

Phone: (555) 555-1234 * Fax: (555) 555-4567

Email: testing@test.com

Website: [Empty]

Type: [Dropdown]

Callouts:

- Click the "Mailing Address" link to enter a mailing address different from the organization's physical address.
- Click the "Legal Name" link to enter the legal name of the organization, or to set a Payee Identification Number.
- Click the "Aviation Details" link to enter any aviation specific organization details.

By clicking the links at the bottom of the "Organization Information" page, you can edit your mailing Address, legal name (and Payee Identification Number), and any Aviation specific details you may have.

Please refer to the [eGrants Registration and Access Management](#) section of this manual for more details regarding how to manually add a user to an organization through the "Organization Members" menu.

The "Organization Documents" section will display a list of documents that are associated with a given organization.

4. Security Role Assignment

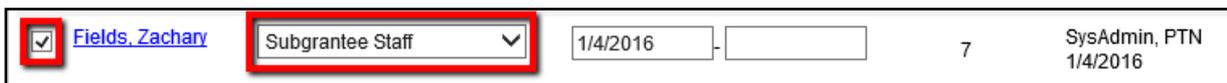
The subgrantee should now have an account which is activated and affiliated with an appropriate organization. Please refer to Section 3 [eGrants Registration and Access Management](#) if this is not the case.

4.a. Subgrantee Security Role Assignment

Now that an organization has been created, and a Subgrantee Administrator assigned to said organization, Subgrantee Staff members can now be also be added by the Subgrantee Administrator. This can be accomplished by following these steps:



- 1) After logging in as a Subgrantee Administrator, click the "Organization(s)" link.
- 2) Click the link for "Organization Members"
- 3) Locate the member who's security role you intend to modify
- 4) Select the appropriate "Role" in the drop down list
- 5) Check the box next to the user you who's role you intend to modify
- 6) Finally, click the "Save" button.



NOTE: Subgrantee Administrators can only set the following role assignments:

- **Subgrantee Administrator**
- **Subgrantee Staff**

4.b. TxDOT Staff Security Role Assignment

The following security roles have been identified and created for use in the eGrants system, all of which have different levels of permission and access within eGrants:

- **System Administrator**
- **Project Manager**
- **Director**
- **Public Transportation Coordinator (PTC)**
- **RFR Signatory**
- **Financial Manager**
- **External Reviewer**
- **Program Staff**

4.c. Security Role Definitions (TxDOT)

4.c.1 System Administrator

TxDOT staff authorized to fully administer and edit documents, change document status, and change personnel security roles.

4.c.2 Project Manager

TxDOT staff responsible for administering specific programs or documents. Usually a program manager or a member of the compliance section.

4.c.3 Director

TxDOT Public Transportation Division Director or Section Director.

4.c.4 Public Transportation Coordinator

TxDOT staff who manages the grant and related documents between TxDOT and the Subgrantee.

4.c.5 RFR Signatory

TxDOT staff authorized to approve requests for reimbursements over \$250,000.

4.c.6 Financial Manager

TxDOT staff who monitor budget and expenditure information reported and can edit financial information as appropriate.

4.c.7 External Reviewer

A person who is not a member of TxDOT staff who has been tasked with reviewing an application.

4.c.8 Program Staff

TxDOT staff that has been tasked with reviewing an application.

4.d. Security Role Definitions (Grantee)

4.d.1 Subgrantee Administrator

A member of the subgrantee agency who is allowed to create and submit all documents on behalf of the agency.

4.d.2 Subgrantee Staff

A member of the subgrantee agency who can create documents but is limited in what they can submit directly to TxDOT.

4.e. eGrants Security Matrix

		Role Being Assigned									
		<u>PTNSA</u>	<u>ER</u>	<u>PM</u>	<u>PS</u>	<u>FM</u>	<u>DIR</u>	<u>PTC</u>	<u>RFRS</u>	<u>SA</u>	<u>SS</u>
Assignor Role	<u>PTNSA</u>	[Redacted]								<u>X</u>	<u>X</u>
	<u>ER</u>	[Redacted]									
	<u>PM</u>	[Redacted]								<u>X</u>	<u>X</u>
	<u>PS</u>	[Redacted]									
	<u>FM</u>	[Redacted]									
	<u>DIR</u>	[Redacted]									
	<u>PTC</u>	[Redacted]									
	<u>RFRS</u>	[Redacted]									
	<u>SA</u>									<u>X</u>	<u>X</u>
	<u>SS</u>										

5. Document Navigation

5.a. Document Main Menu

In this section, we will discuss how to navigate throughout documents within eGrants. There are four main areas of the document we will discuss in detail:

- 1) View, Edit, and Complete Forms
- 2) Change the Status
- 3) Access Management Tools
- 4) Examine Related Items

TEXAS DEPARTMENT OF TRANSPORTATION **eGrants**

Home | Application/PGA | RFR | MPR | Scholarships | Supplementals

Training Materials | Organization(s) | Profile | Logout

Application/PGA Menu

Document Information: [5310-2016-NATO-00032](#)

[Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Application/PGA	New Age Testing	Subgrantee Administrator	Application In Process	10/01/2015 - 12/31/2015 01/01/2018 12:00PM EST

View, Edit and Complete Forms

Select the **View Forms** button below to view, edit, and complete forms.

VIEW FORMS

View, Edit and Complete Forms is where you will locate all the forms you must complete for the current Application/Proposal.

Change the Status

Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.

VIEW STATUS OPTIONS

In this section, you will be able to submit, or cancel your document.

Access Management Tools

Select the **View Management Tools** button below to perform actions such as adding people to this document or viewing the document history.

VIEW MANAGEMENT TOOLS

Here, you can add/edit document permissions, as well as several other useful tools such as 'Create Full Print Version'

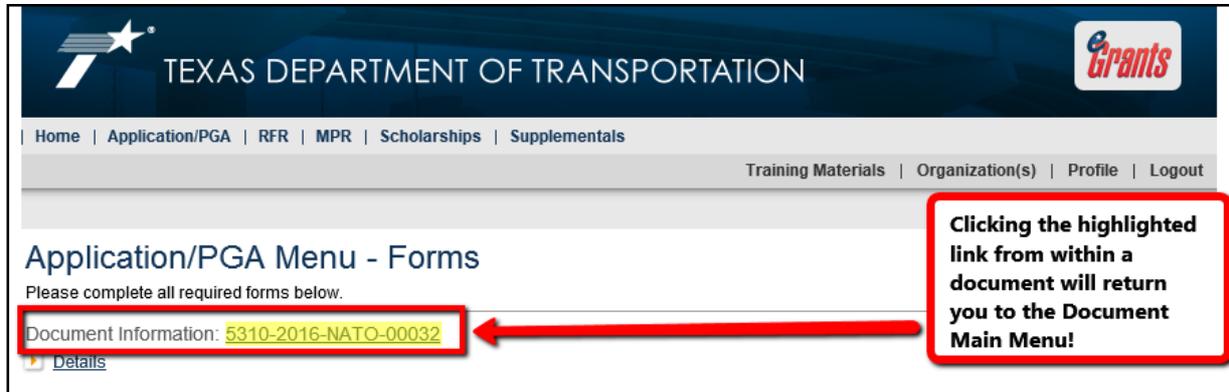
Examine Related Items

Select the **View Related Items** button below to view related items such as claims, messages, etc.

VIEW RELATED ITEMS

Within 'Examine Related Items' at the appropriate steps can be initiated sub-documents. (e.g: a request for reimbursement, invoicing, etc.)

NOTE: Whenever you are within a document, towards the top of the page will be the "Document Identifier". Clicking the "Document Identifier" hyperlink will return you to the document main menu at any point! Please reference the screenshot below for the location of the "Document Identifier".



5.b. View, Edit and Complete Forms

In this section of the document, accessible by clicking the "View Forms" button, you will find the document "Forms" menu. Within the "Forms" menu will be the relevant forms you will need to complete in order to submit the document you are working on.

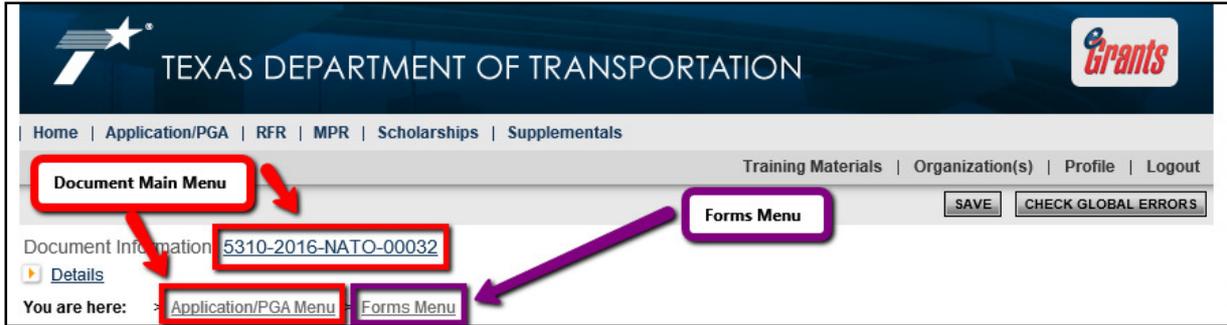
The screenshot below is an example of an "Applications Forms" menu.



To view any form, simply click the link within the "Forms" menu for that form. Forms that are related to each other will appear in the "Navigational Links" at the bottom of the page from within a particular form.

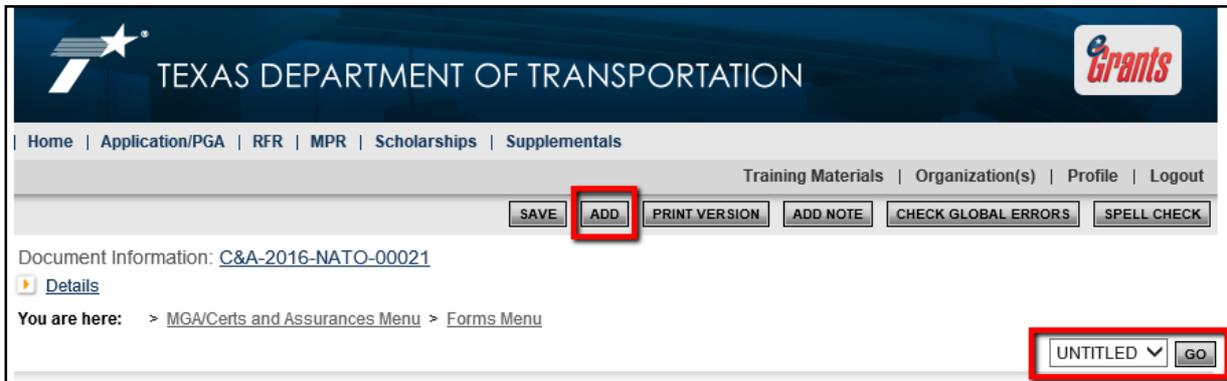
E.G. in the above screenshot, the forms within the "Application Forms" section would appear at the bottom of the screen in the "Navigational Links" when viewing one another. The "Budget and Milestones" would not have any other forms in the "Navigational Links", because it is in a section all its own.

Located towards the top of all forms will be a "You are here:" line with links available that will take you back to the document main menu, and the "Forms" menu, respectively.



5.b.1 Multi-Page Forms

In certain circumstances, forms will have the ability to be created more than once. We call this a multi-narrative form. To create multiple versions of a form, first complete the form as you normally would, by entering information in the required fields. Once complete, if the form is multi-narrative, you will then have the option to click the "Add" button, and by doing so it will redirect you to a new version of the form. Once again, you must successfully complete this form. Once two or more forms are complete, you will have the ability to navigate between them using the drop down list that has appeared on the right hand side of the form



The "Forms" menu will also now reflect the fact that we have a multi-narrative form by displaying a parenthesis next to our form, with a number indicating how many have been created, as displayed below.

Status	Page Name	Note	Created By	Last Modified By
	Certifications and Assurances (2)			

5.b.2 Repeatable Rows

In certain circumstances, forms will have fields that are repeatable. This means that once you have filled in the field and clicked the "Save" button, another field for that information will appear underneath the first field. You may also see this functionality arise in a table, where entering information into a row of a table will then cause the table to display a new row after save.

To fully utilize a repeatable row, enter data into the fields available and then click the "Save" button. This will display a new field/row underneath the ones with entered data, as displayed in the image representation below.

The screenshot shows the Texas Department of Transportation Grants system interface. At the top, there is a navigation bar with the TxDOT logo and the text "TEXAS DEPARTMENT OF TRANSPORTATION". To the right is the "Grants" logo. Below the navigation bar are several menu items: "Home", "Application/PGA", "RFR", "MPR", "Scholarships", "Supplementals", "Training Materials", "Organization(s)", "Profile", and "Logout". There are also buttons for "SAVE", "PRINT VERSION", "ADD NOTE", "CHECK GLOBAL ERRORS", and "SPELL CHECK".

A "Page Information" box indicates "The information has been saved." Below this, "Document Information: C&A-2016-NATO-00021" is shown with a "Details" link. The breadcrumb trail reads "You are here: > MGA/Certs and Assurances Menu > Forms Menu".

The main section is titled "CERTIFICATIONS AND ASSURANCES". Under "Instructions:", there are two bullet points: "Attach signed copy of Certifications and Assurances" and "Click Save". A link "Click here for Certifications and Assurances" is provided. Below the instructions is a file upload area with a "Browse..." button and a "DELETE*" checkbox. The filename "604754-Test2.txt" is displayed.

A table with two columns, "Entered by:" and "Comment:", is shown. The first row contains "Person1" and "Since there is data entered into the first row of fields, we will have another row after we click the 'SAVE' button!". A second row is highlighted with a red border, indicating it has been added after saving. The table footer shows "0 of 2000" rows.

NOTE: On some forms, you will be presented with a pre-determined available number of rows, which may repeat with another set of available rows once the page is saved. This functions the same as regular repeatable fields, with the exception that it has been configured to repeat more than one row at a time for convenience.

5.b.3 Form Dependencies

Some forms may utilize what is known as dependency functionality. This means that other sections of the form will appear and become required based on selections you have previously made. In the example pictured below, we are presented with a question which happens to be a dependency question. This means that the answer we provide here will determine which sections of this form we will need to complete.

MOBILITY MANAGEMENT, OPERATING, ABOVE AND BEYOND ADA

Mobility Management
Mobility Management consists of short-range planning and management activities and projects for improving coordination among public transportation and other transportation service providers carried out by a recipient or subrecipient through an agreement entered into with a person, including a government entity, under 49 U.S.C. chapter 53 (other than section 5309). Mobility management does not include operating public transportation services.

1. Is Mobility Management part of the proposed project? *

Yes No

Upon answering "Yes" additional fields have appeared on the page and have become required. If "No" was selected, the page would allow us to continue without answering those questions.

1. Is Mobility Management part of the proposed project? *

Yes No

2. What Mobility management activities are included in this grant (i.e. Service Coordination, Travel Training, and/or Public Education/Marketing)? *

3. Describe the scope of the Mobility Management project in detail. *

0 of 2000

Some form dependencies will present entirely new sections, while others will simply flag another field already displayed on the page as required. An example of the latter would be select "Other" as an answer to a question and then being required to describe what "Other" is in another available field.

These dependencies have been implemented in such a way that the user is not required to know that a field is a dependency question. It is only important to note that answers to particular fields that ARE dependencies may require that you complete additional fields.

5.b.4 Scrollable Forms

Various forms within eGrants have been configured using horizontal tables, which at times, will require the user to scroll the page to enter all required information.

An example of this would be the "Budget and Milestones" form, utilized in various Application/PGA templates. As pictured below, the horizontal table used to capture the budget information on this page is wider than our current view. To complete all the required fields we will need to scroll our page appropriately so we have view of the fields.

Description	Scope	Fuel Type	Cost Per Unit	# of Uni
Acquisition - Fare Collection (Mobile) - 11.42.10			\$1,000	10
				Subtotal:

TIP: Using the "TAB" key on your keyboard will automatically bring you to the next available field after the one you are currently in. You can also accomplish this with most PC mice by holding down the middle scroll wheel and moving the mouse in the direction you intend to scroll. Otherwise, you can simply use your mouse to drag the scroll bar located at the bottom of the form.

5.b.5 Form Field-Level Permissions

Various forms configured within eGrants may use what is referred to as field-level-permissions. This means that certain fields on forms have been defined to only allow designated security roles the permission to edit. In some cases, this may be based on system security role, process status, or both.

The screenshot below is an example of a field that has been configured with field-level-permissions.

Sub-Recipient Signature

* By checking this box, I agree to use electronic signatures. Furthermore, I confirm that I have signature authority to execute this document and it is an electronic representation of my signature for all purposes when I use it on documents, including legally binding contracts—just the same as a pen-and-paper signature.

Name: Jane Doe Title: Subgrantee Admin Date: Mar 24 2016 8:24AM

PTC Signature

* By checking this box, I agree to use electronic signatures. Furthermore, I confirm that I have signature authority to execute this document and it is an electronic representation of my signature for all purposes when I use it on documents, including legally binding contracts—just the same as a pen-and-paper signature.

In this example ("PGA Signature" form) only the Subgrantee Administrator and Public Transportation Coordinator have permission to electronically sign their respective signature checkbox.

5.b.6 Electronic Signatures

Several forms within eGrants have been implemented with electronic signature functionality. Typically these forms will only be necessary when finalizing a PGA, or when executing an amendment. To execute an electronic signature the following criteria must be true:

- Must have a Subgrantee Administrator security level
- Must possess signature authority
- Must agree to the use of electronic signatures within eGrants

Whenever subgrantee signatures are required on a form in eGrants, the subgrantee will first receive a notification in their inbox detailing which document requires signatures. The subgrantee will then enter the document and provide electronic signature on the appropriate form. To execute an electronic signature, check the box that corresponds with "Sub-Recipient Signature".

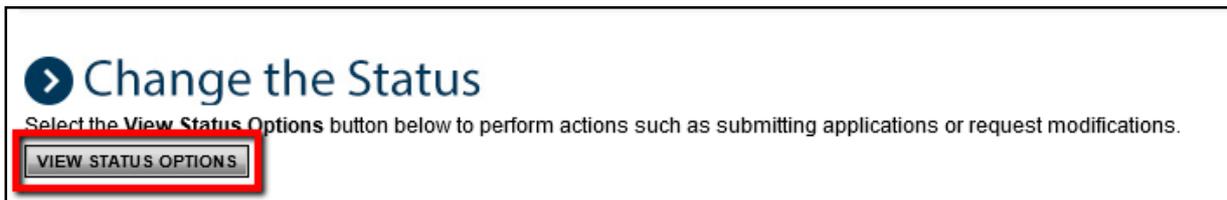
PGA SIGNATURE		
<i>Project Grant Agreement</i>		
Sub-Recipient Signature		
<input checked="" type="checkbox"/>	By checking this box, I agree to use electronic signatures. Furthermore, I confirm that I have signature authority to execute this document and it is an electronic representation of my signature for all purposes when I use it on documents, including legally binding contracts—just the same as a pen-and-paper signature.	
Name Jane Doe	Title Subgrantee Admin	Date Mar 24 2016 8:24AM

Once you have checked the box and saved the page "Name", "Title", and "Date" will populate automatically. The "Name" and "Title" fields will populate utilizing the information entered in "My Profile". The "Date" field will automatically populate with the current date and time that the signature was provided.

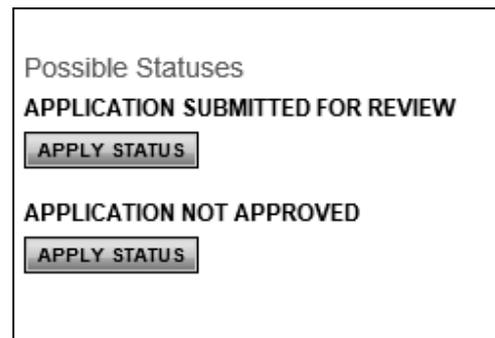
5.c. Change the Status

Once you have completed all of the forms available, you can submit and/or change the status of the document. By doing so, you will inform the next user in the process that you are complete with your task. From the document menu, click on the "View Status Options" button to navigate to the "Status Options" page.

It is important to note that once an application is submitted it will enter into a read-only status and cannot be changed!



Here, you will find the available status change options. In our example screenshot we can choose to either submit the application for review or we can cancel the document.



NOTE: If you believe there is a missing status option, most likely this is a result of security role mis-match. Who can change the status at a particular point is determined by security role.

5.d. Access Management Tools

The “Management Tools” page will list additional tools that are available to the user. These tools have different functions and are used to either view additional data specific to the document, or to complete additional tasks.

To navigate to the “Management Tools” page, click the “View Management Tools” button that is located on document menu. This will redirect you to the “Management Tools” page.

Management Tools

 [CREATE FULL PRINT VERSION](#)
Select the link above to create a printable version of the document.

 [CREATE FULL BLANK PRINT VERSION](#)
Select the link above to create a blank printable version of the document.

 [ADD/EDIT PEOPLE](#)
Select the link above to perform actions such as adding people, changing a security role, or altering people's active dates on this document.

 [STATUS HISTORY](#)
Select the link above to view the status history of this document.

 [CHECK FOR ERRORS](#)
Select the link above to check the entire document for errors.

 [VIEW MODIFICATION HISTORY](#)
Select the link above to view various modifications that people have made to specific pages in the document.

 [ATTACHMENT REPOSITORY](#)
Select the link above to view all attachments in this document.

The add/edit people “Management Tools” is particularly useful, as it will control who has access to the document, what document-level security role they are given, and the dates which they are permitted access on the document. Listed below are some common uses of the “Management Tools” available on this page.

- **Create Full Print Version** – Creates a full copy of the document in a printable .pdf
- **Create Full Blank Print Version** – Creates a full-blank copy of the document in .pdf
- **Add/Edit People** – Controls document security-level, user access.
- **Status History** – Detailed view of previous status history of the document
- **Check for Errors** – Used to determine if any document errors exist on any forms.
- **View Modification History** – Detail of who has modified document, and when.
- **Attachment Repository** – Detail of files attached to the document.

5.e. Examine Related Items

The "Examine Related Items" menu is of great importance. In this section, from an executed grant or an approved scholarship, you will be able to "Initiate a Request for Reimbursement". You would also come to this location to view any related system messages there were sent in association with this document.

Application/PGA Menu - Related Items
The various sections below can link to items that are associated with this document.

Document Information: [IB-2016-NATO-00005](#)
[Details](#)

Related Documents
 Sort search results by: -- Select -- Filter by Document Type:

Document Type	Name	Current Status	Period Date / Date Due	Created By	Last Modified By
Request for Reimbursement	Initiate a/an Request for Reimbursement				

Related Messages
 Sort search results by: -- Select --

Priority	Sender	Subject	Date/Time	Status
	Grant System	Amendment IB-2016-NATO-00005 Ready for Internal review	1/7/2016 11:20:22 AM	Read
	Grant System	Budget Revision IB-2016-NATO-00005 Approved	1/7/2016 9:02:09 AM	Unread
	Grant System	Amendment IB-2016-NATO-00005 Ready for Internal review	1/6/2016 3:17:56 PM	Unread
	Grant System	IB-2016-NATO-00005 PGA Fully Executed	1/6/2016 10:16:47 AM	Unread
	Grant System	IB-2016-NATO-00005 PGA Ready for Execution	1/6/2016 8:56:24 AM	Read
	Grant System	IB-2016-NATO-00005 Ready for Internal Review	1/5/2016 4:16:06 PM	Unread
	Grant System	IB-2016-NATO-00005 Revisions Required	1/5/2016 4:14:05 PM	Read

In the above screenshot, we have an application that has reached the appropriate status to initiate RFR documents.

In the screenshot below, we have the view of the initiated RFR document's "Examine Related Items" menu. Please note the "Parent Document Identifier" is present (boxed in blue) and our parent application document tied to our RFR is viewable.

Request for Reimbursement Menu - Related Items
The various sections below can link to items that are associated with this document.

Document Information: [RFR-2016-NATO-00044](#)
 Parent Information: [IB-2016-NATO-00005](#)
[Details](#)

Related Documents
 Sort search results by: -- Select -- Filter by Document Type:

Document Type	Name	Current Status	Period Date / Date Due	Created By	Last Modified By
Application/PGA	IB-2016-NATO-00005	Grant Executed	12/01/2015 - 12/31/2016 12/31/2016 12:00PM	Jane Doe 1/5/2016 11:17:08 AM	PTC Coordinator 1/7/2016 11:49:53 AM

5.f. Document Navigation Summary

5.f.1 View, Edit and Complete Forms

The "Forms" menu will allow for you to view a list of navigational links that lead to PDF documents, and forms that are within this application. It will also provide additional information, such as an icon that displays a visual representation of the forms status. PDF documents either display an Adobe Acrobat Reader symbol, or an Internet Explorer symbol. Hyperlinks to external locations will display an Internet Explorer symbol. The "Forms" menu will also display the name of the PDF/form, an icon if notes exists on the page, the name of the user whom created the page and when, and the name of the last user to modify the page and when.

5.f.2 Change the Status

Once you have completed all of the forms available, you can submit and/or change the status of the document. By doing so, you will inform the next user in the process that you are complete with your task. From the document menu, click on the "View Status Options" button to navigate to the "Status Options" page.

5.f.3 Access Management Tools

The "Management Tools" page will list additional tools that are available to the user. These tools have different functions and are used to either view additional data specific to the document, or to complete additional tasks. To navigate to the "Management Tools" page, click the "View Management Tools" button that is located on document menu.

5.f.4 Examine Related Items

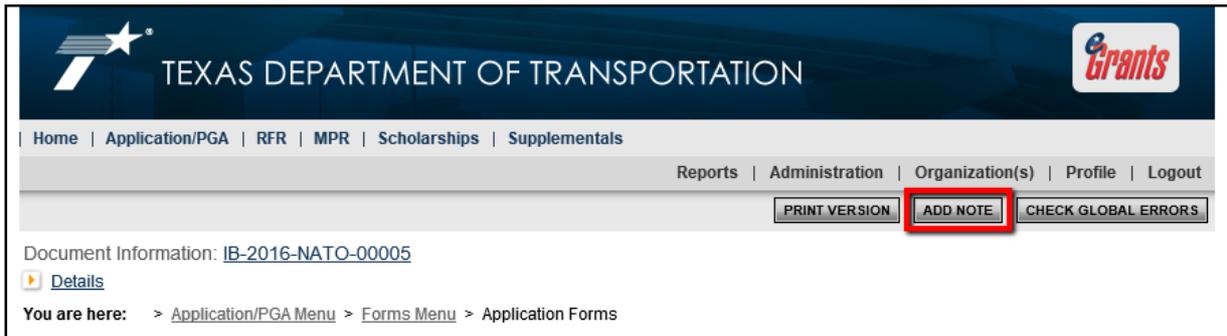
The "Examine Related Items" menu is of great importance. In this section, from an executed grant or an approved scholarship, you will be able to "Initiate a Request for Reimbursement". You will also be able to view any system messages related to the document or any other documents that have an existing relationship to that document.

6. Notes

eGrants allows for various documents to have notes attached to them. These notes may be used to communicate to other organization staff members or to TxDOT staff who are assigned to the document.

6.a. Adding and Editing Notes

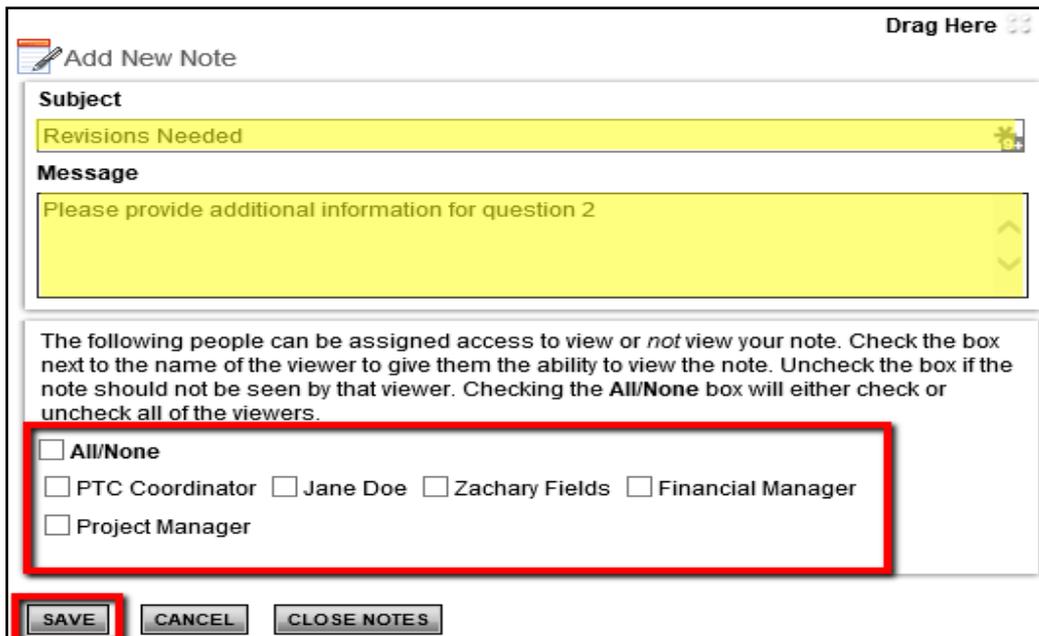
First you will navigate to the form where you intend to place your note.



- 1) As depicted in the above screenshot, on the form you wish to place your notation on click the "Add Note" button.



- 2) Next, you will click the "Add a New Note" button.



- 3) As depicted in the above screenshot:
 - a. Highlighted in yellow are the subject and body of the notation.
 - b. You can be selective as to who has access to view the note you create:
 - i. Check the box next to the people who CAN view the note.
 - ii. Leave unchecked the people who should NOT be able to view.
 - c. Lastly, click the "Save" button to finish adding your notation.

Once you have successfully added your note, it will be displayed in two locations. First, it will now display on the "Forms" menu that a particular form has viewable notes, as pictured below.

Forms				
Status	Page Name	Note	Created By	Last Modified By
Application Forms				
	Applicant Information		Zachary Fields	1/5/2016 11:21:24 AM

Secondly, the note will be displayed in the actual form itself.

TEXAS DEPARTMENT OF TRANSPORTATION

[Home](#) | [Application/PGA](#) | [RFR](#) | [MPR](#) | [Scholarships](#) | [Supplementals](#)

[Reports](#) | [Administration](#) | [Organization\(s\)](#) | [Profile](#) | [Logout](#)

Document Information: [IB-2016-NATO-00005](#)

[Details](#)

You are here: > [Application/PGA Menu](#) > [Forms Menu](#) > [Application Forms](#)

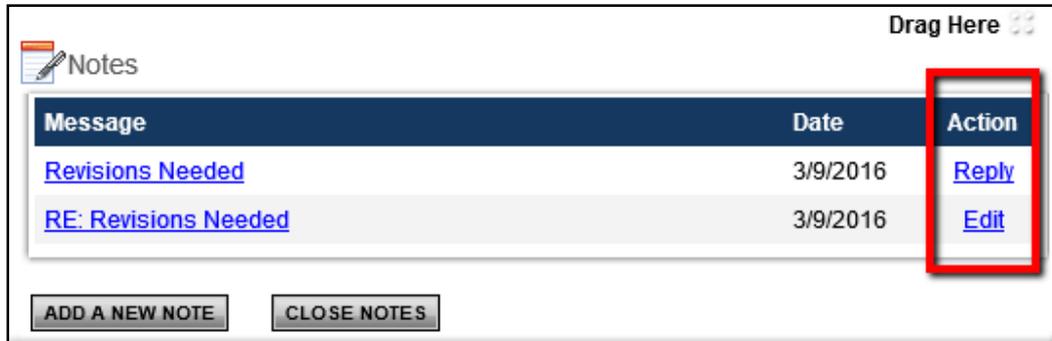
Recipients of your notes will be able to view the date which the note was created, the author of the note, and also have the ability to reply to the note itself.

Notes

Drag Here

Message	Date	Action
<p>Revisions Needed</p> <p>Please provide additional information for question 2</p> <p>Submitted: 3/9/2016 1:58:24 PM</p> <p>Author: PTN SysAdmin</p>	3/9/2016	Reply

Just as the recipient of a note has the ability to reply, the author of a note has the ability to edit the note(s) they leave. To edit a note you have previously saved, simply view the note, and click the "Edit" button.



In the above screenshot, we can either reply to a note left by another user, or we can edit the reply we gave.

The same steps for creating a note apply to editing a note. Once "Edit" has been clicked, the note will open with the current subject and body. Once you have finished making the adjustments, click the "Save" button.

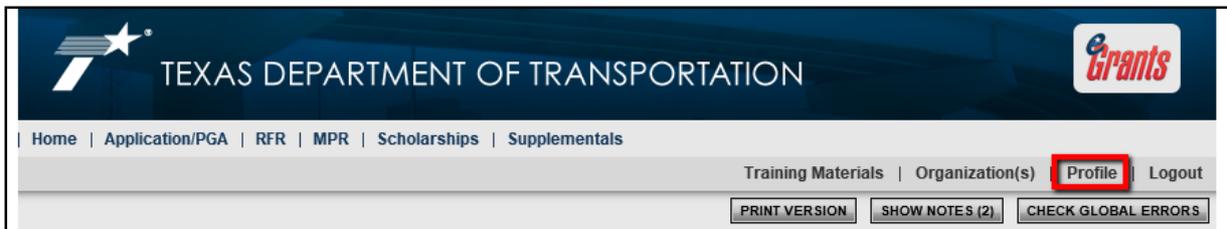
7. Automatic E-Mail Notifications

7.a. Automatic E-Mail Notifications

Automatic e-mail notifications may be sent to you periodically throughout the grant year. These messages will be sent via the system according to an automatic process or as the result of a user triggered event. These messages might accompany the creation of a document, the submission of a document, or a pending due date that is approaching. These messages are intended to help you know what is occurring in the system that pertains to you or your organization. These messages may also be sent by TxDOT personnel.

In order to receive these messages it is important that you include an active, frequently used e-mail address when creating your contact record in the system. If you provide an incorrect e-mail address or an address to an account that is either inactive or full, you will not be able to receive these important messages.

Keeping your profile information accurate is key to not missing important communications. To update your profile information, click "Profile" in the menu selections at the top of the page.



Profile

Please complete all the required fields below. Required fields are marked with an *.

Contact Information

Name	Prefix	First	Middle	Last	Suffix
	▼	Jane		Doe	▼
Organization	New Age Testing *				
Title	Subgrantee Admin *				
Address	555 Testing Ave *				
City	Verify *	State	Texas ▼ *	Zipcode	55555 *
County	Andrews County ▼ *				
Phone #1	(555) 555-1234 *	Phone #2			
Fax	(555) 555-4567 *	Cell Phone			
Email	pmakevich@agatesoftware.com *				
Website					
Username	JaneNATO *				
Password			Confirm Password		

In order to receive important communications from TxDOT staff and system notifications, it is imperative that the E-mail address associated with your eGrants account be kept up-to-date with an E-mail you check regularly!

8. Completing MGA/Certs and Assurances Documents

8.a. Initiating the Document

There are two types of documents which belong to this category and process-flow. They are the "Certifications and Assurances" documents and the "Master Grant Agreement (MGA)" documents. Both templates will be initiated by a member of TxDOT staff with the "Project Manager" role on behalf of the subgrantee agency. Once initiated, the Subgrantee Administrator has permission to either cancel the document, or complete and submit to TxDOT. To navigate to the initiated document, first navigate to the "My Tasks" section of your homepage.

Info	Document Type	Organization	Name	Current Status	Date Received	Date Due
	MGA/Certs and Assurances	New Age Testing	MGA-2016-NATO-00033	MGA / Certs and Assurances Initiated	3/22/2016	1/1/2018

Once you have located the initiated document in your "My Tasks" section, click the Document Identifier (boxed in red) of the target task to be taken to the document main menu.

Next, navigate into the "View, Edit, and Complete Forms" section by clicking the "View Forms" button to be taken to the "Forms menu". Now you will complete any and all required fields. When you have finished entering any data, click the "Save" button. Once all forms and requirements have been completed, the document may be moved to the following status steps:

- MGA/Certs and Assurances in Review **(SA)** *submit to PM for review*
- MGA/Certs and Assurances Cancelled **(SA)** *cancellation of document*

8.b. Master Grant Agreement (MGA)

To complete a Master Grant Agreement (MGA) document, the subgrantee will click the link to generate the "Master Grant Agreement" document, as pictured below.

Upon clicking the link, a file will be generated. The subgrantee will need to open/save and print this document. Once they have signed the MGA, it is required to be uploaded by the subgrantee to the available file upload field on the page.

MASTER GRANT AGREEMENT

Instructions

- Attach copy of signed Master Grant Agreement
- Click Save

[Click here for Master Grant Agreement](#)

Once the MGA has been reviewed and approved by a Project Manager, the MGA will move to the PTN Director to review and sign. Once the Director has signed the MGA it is required that the document be uploaded in the "PTN Upload" field.

MASTER GRANT AGREEMENT

Instructions

- Attach copy of signed Master Grant Agreement
- Click **Save**

[Click here for Master Grant Agreement](#)

Subgrantee Upload Browse...

PTN Upload Browse...

Entered By

Comment

0 of 2000

Subgrantee Uploads signed copy to 'Subgrantee Upload'

PTN Director Uploads signed copy to 'PTN Upload'

Comments can be added to the form by either the Subgrantee or PTN staff

8.c. Certifications and Assurances

Certifications and Assurances documents follow the same process-flow as the MGA documents, with the exception that they do not require Director Signature/Approval and can be approved by the Project Manager. There is a link available on the form which directs the subgrantee to a section of the TxDOT site which contains various certification/assurance documents that are available for download.

CERTIFICATIONS AND ASSURANCES

Instructions:

- Attach signed copy of Certifications and Assurances
- Click **Save**

[Click here for Certifications and Assurances](#)

Browse... DELETE*

605485-test.txt

Entered By	Comments
John Doe	Certifications and assurances uploaded.

9. Completing an Application

9.a. Initiating/Submitting an Application

Applications within eGrants can be initiated by either the Subgrantee Administrator or Subgrantee Staff roles provided that the application is currently in cycle and available. The subgrantee user will enter the initiated application and navigate to the forms menu. Once all forms and requirements have been completed, the document may be moved to the following status steps:

- Application Subgrantee Review (**SS**) *internal review step*
- Application Submitted for Review (**SA**) *submit document to PM for review*
- Application Not Approved (**SA, SS**) *cancellation of document.*

9.b. Executing a PGA

Once TxDOT staff have received a completed application, the document will go through a review process before the application is ultimately approved and awarded. Once a submitted application has been approved and an agreement has been finalized between TxDOT and the subgrantee organization, the document will move to the "Grant Subgrantee Signature Required" process step.

At which point, the Subgrantee Administrator user will receive a notification and enter the document to electronically sign the PGA by selecting the checkbox and clicking the "Save" button on the "PGA Signatures" form. For more information regarding electronic signatures within eGrants, please refer to the "[Electronic Signatures](#)" section of this manual.

Sub-Recipient Signature

* By checking this box, I agree to use electronic signatures. Furthermore, I confirm that I have signature authority to execute this document and it is an electronic representation of my signature for all purposes when I use it on documents, including legally binding contracts—just the same as a pen-and-paper signature.

Name	Title	Date
Jane Doe	Subgrantee Admin	Mar 24 2016 8:06AM

Once the checkbox has been selected and you have saved the page, the "Name", "Title", and "Date" fields will populate with the information of the person who electronically signed. This information comes directly from the information stored in your "[Profile](#)".

When the "[Project Grant Agreement](#)" hyperlink is clicked, it will generate the PGA document. If anyone has provided an electronic signature, that signature will be represented on the generated PGA document.

Once the Subgrantee Administrator has provided electronic signature for the PGA, the subgrantee will then visit the "[Change the Status](#)" section and change the status to "Grant PTC Signature Required".

In the same fashion as the Subgrantee Administrator, the Public Transportation Coordinator (PTC) role will enter the document and provide an electronic signature. Once the PTC has signed the PGA electronically, their signature will also be represented on the PGA document if generated via the "[Project Grant Agreement](#)" hyperlink.

The PTC role will then change the status of the document to "Grant Executed". Once the document has reached this status, Subgrantee Users will be notified and will be able to initiate and complete Request for Reimbursement documents, and [Milestone Progress Report documents](#).

9.c. Executing an Amendment

Once an application document has reached the "Grant Executed" process status, Subgrantee Administrator and Subgrantee Staff roles will have the ability to request an amendment to the application/grant. To do this, either role will navigate to the "[Change the Status](#)" section of any application/grant currently in the "Grant Executed" status and change the status to "Amendment in Process".

The subgrantee user will then navigate to the "Budget and Milestones" form within the application and adjust/edit the items that require revision/amendment. If the a user with the Subgrantee Staff role is completing the requested amendment, they will be able to change the status to "Amendment Sub-Grantee Review" wherein the Subgrantee Administrator will be able to perform an internal review of the request before submitting the request to TxDOT. When all adjustments made to the form have been saved, the Subgrantee Administrator will submit the document to the PTC user for review by changing the status to "Amendment in PTC Review".

When finished with their review, the PTC can choose to do one of three things:

- Deny the amendment
- Return the document to the subgrantee agency for modifications
- Submit the document to a Project Manager for further review

The subgrantee agency will receive a notification if any modifications to a document are necessary as a result of a TxDOT review. If the submitted amendment requires any further action from the subgrantee agency, the agency will receive a notification detailing which document requires attention.

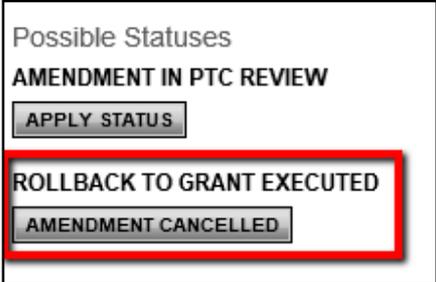
9.d. Amendment Rollback (Denial/Cancellation)

The amendment functionality within eGrants has been designed and implemented with "rollback" functionality. This means that at designated steps within the Amendment process-flow, we will have the ability to perform what is known as a rollback. A rollback will return the document to the state it was before the Amendment process had begun, meaning that any changes to forms within the document will revert back to their state prior to the Amendment being initiated. Common uses for this functionality include (but not limited to):

- Denying an amendment
- Cancellation of an amendment
- Accidental initiation of an amendment

As pictured below, rolling back a document is as simple as changing the status via the "Change the Status" section of the document.

We can either change the status to "Amendment in PTC Review" or we can select to "Rollback to Grant Executed". "Grant Executed" is the step where we began the Amendment process and we will be returning the document to the exact state which it was in at that status, prior to any edits or adjustments during the Amendment process. Note that the button for this status change is "Amendment Cancelled".



Possible Statuses

AMENDMENT IN PTC REVIEW

APPLY STATUS

ROLLBACK TO GRANT EXECUTED

AMENDMENT CANCELLED

The image shows a screenshot of a software interface. It features a list of possible statuses under the heading "Possible Statuses". The first status is "AMENDMENT IN PTC REVIEW", which has a button labeled "APPLY STATUS" next to it. The second status is "ROLLBACK TO GRANT EXECUTED", which is highlighted with a red rectangular border. Below this status is a button labeled "AMENDMENT CANCELLED".

10. Completing a Scholarship Application

10.a. Initiating a Scholarship Application

Scholarship applications can be initiated by either a Subgrantee Administrator or Subgrantee Staff role user so long as the document is available for initiation.

To initiate, navigate to the "[View Available Opportunities](#)" section of your homepage. Locate the appropriate opportunity and click the "Apply Now" button. Once initiated, you can navigate to and from the document via the "[My Tasks](#)" section of your homepage.

Scholarship for New Age Testing
Offered By:
 TxDOT - Public Transportation

Scholarships Availability Dates:
 01/01/2016-01/01/2018

Scholarships Period:
 01/01/2016-01/01/2018

Scholarships Due Date:
 01/01/2018

Description:

APPLY NOW

10.b. Completing a Scholarship Application

Once initiated, navigate to the "Forms" menu of the scholarship application.

Forms

Status	Page Name	Note	Created By	Last Modified By
Scholarship Forms				
	Transit Scholarship Application			

Once you have completed all required fields and satisfied all requirements on the "Transit Scholarship Application" form, you will navigate to the "[Change the Status](#)" section of the document menu and move the application to one of the following status options:

- Scholarship Subgrantee Review (**SS**) *internal subgrantee review status*
- Scholarship Submitted for Review (**SA**) *submission to Project Manager for review*
- Scholarship Cancelled (**SA, SS**) *cancellation of scholarship application*

The application will then move through a series of review statuses, and if approved by the PTN Director, will eventually reach the "Scholarship Approved" status step. Once the scholarship application has reached this approval status, the subgrantee will receive a notification and also have the ability to "Initiate Scholarship Request for Reimbursement" documents.

11. Completing Administrative Requirements

11.a. Types of Administrative Requirements Documents

There are currently three (3) different types of documents that reside in this category. They are as follows:

- Administrative Requirements
- Charter Reports
- DBE Reports

All three of these documents have been designed to be accommodated by the same process-flow in eGrants.

11.b. Administrative Requirements

Administrative Requirements documents will be initiated in the traditional method, through the "[View Available Opportunities](#)" section of the homepage.

Once initiated, you can navigate back and forth to the document through the "[My Tasks](#)" section of your homepage.

NOTE: There are several forms within the "Forms" menu of the "Administrative Requirements" document that do NOT require subgrantee attention. On forms where subgrantee input is not needed and not allowed per form design, there will be red text at the top of the form indicating this, as pictured below.

The screenshot shows the Texas Department of Transportation eGrants interface. At the top, there is a navigation bar with links for Home, RFR, Application/PGA, MPR, Scholarships, and Supplementals. Below this, there are links for Training Materials, Organization(s), Profile, and Logout. A 'CHECK GLOBAL ERRORS' and 'SPELL CHECK' button are also visible. The main content area shows 'Document Information: AR-2016-NATO-00014' and a 'Details' link. A breadcrumb trail indicates 'You are here: > Administrative Requirements Menu > Forms Menu'. The form title is 'MONITORING FORMS'. A red box highlights the text 'This form to be completed by TxDOT Staff!'. Below this, the form lists '1. Drug & Alcohol Testing/Monitoring' with a question 'Drug & Alcohol Testing required?' and radio buttons for 'Yes' and 'No'.

Once the subgrantee has completed the required forms, they will change the document status to "Administrative Requirements in Review".

11.c. Charter Reports

Charter Reports are to be completed quarterly, and will auto-initiate for subgrantee users, assuming the following criteria is met:

- Organization is defined as an eligible organization for this document.
- The document is available per the instance availability dates.

“Charter Reports” documents are configured to be completed quarterly. The period, availability, and due dates are specifically defined, according to the table below:

FTA (Federal) Quarters	Agency Report Due to PTC	PTC Report Due to PTN HQ
1st Qtr: Oct 1st–Dec 31st	January 20th	January 25th
2nd Qtr: Jan 1st–Mar 31st	April 20th	April 25th
3rd Qtr: Apr 1st–Jun 30th	July 20th	July 25th
4th Qtr: Jul 1st–Sep 30th	October 20th	October 25th

Similar to the “Administrative Requirements” documents, once the “Charter Report” document has become available and has been initiated, the subgrantee can navigate to the document through the [“My Tasks”](#) section of their homepage.

Once all required fields have been completed, the Subgrantee Administrator or Subgrantee Staff roles have the ability to move the document to the next step in the process “Administrative Requirements in Review”.

11.d. DBE Reports

Similar to the Charter Report documents, the Disadvantaged Business Enterprise (DBE) Report documents will utilize auto-initiation functionality based on the following criteria:

- Organization is defined as an eligible organization for this document.
- The document is available per the instance availability dates.

“DBE Report” documents are configured to be completed semi-annually. The period, availability and due dates are specifically defined, according to the table below:

Semi-Annual Period	Agency Report Due to PTC	PTC Report Due to PTN HQ
Oct. 1 - March 31	May 1	May 8
April 1 - Sep. 30	November 1	November 8

Once the “DBE Report” document has become available and has been initiated, the subgrantee can navigate to the document through the [“My Tasks”](#) section of their homepage.

Once all required fields have been completed, the Subgrantee Administrator or Subgrantee Staff roles have the ability to move the document to the next step in the process “Administrative Requirements in Review”.

12. Completing a Milestone Progress Report

12.a. Milestone Progress Report (MPR) Initiation

Milestone Progress Report (MPR) documents have been setup within eGrants with auto-initiate functionality. This means that the MPR documents will automatically become available in the "My Tasks" section for Subgrantee Administrator and Subgrantee Staff roles when the following criteria has been met:

- Application document has reached the "Grant Executed" status.
- Organization is defined as an eligible organization for this document.
- The document is available per the instance availability dates.

MPR documents are configured to be completed quarterly. The period, availability, and due dates are specifically defined, according to the table below.

FTA (Federal) Quarters	Agency Report Due to PTC
1st Qtr: Oct 1st–Dec 31st	January 15th
2nd Qtr: Jan 1st–Mar 31st	April 15th
3rd Qtr: Apr 1st–Jun 30th	July 15th
4th Qtr: Jul 1st–Sep 30th	October 15th

To summarize, the MPR documents will be available the first day after the end of a quarter, and will be due on the 15th of the following FTA Quarter.

E.G. The 1st Quarter MPR document will be auto initiated on January 1st, and will be due on January 15th.

12.b. Submitting and Completing MPR's

This document has been designed to utilize data entered on the executed grant, and also data from previously completed MPR documents.

When you begin completing multiple MPR documents, the dates that you had entered on your most recently completed MPR document will also populate so you can review and adjust the entered dates if necessary.

Once the subgrantee has completed their "Milestone Progress Report", they will change the status to "Milestone Progress Report PTC Review Required".

Once completed, the Project Manager will move the document to the "Milestone Progress Report Accepted" status.

13. Completing a Request for Reimbursement

13.a. Types of Request for Reimbursement (RFR) Documents

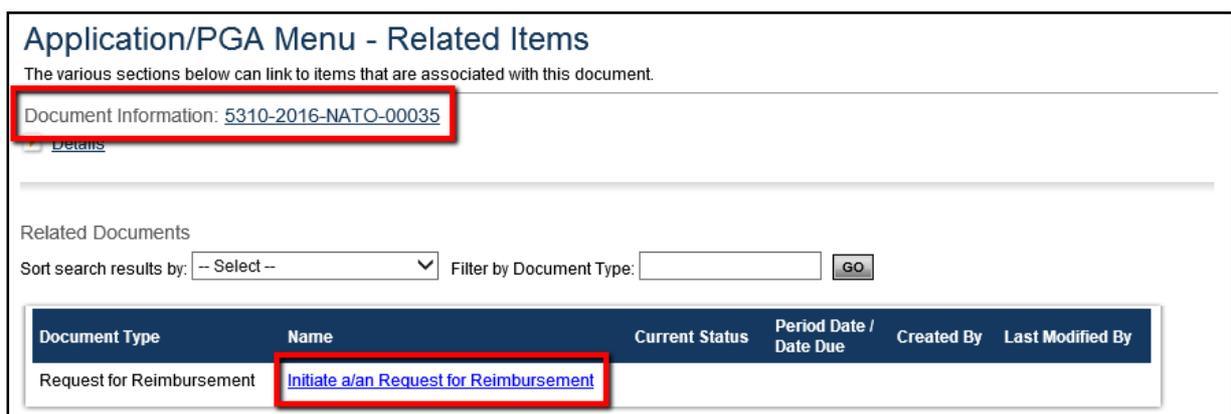
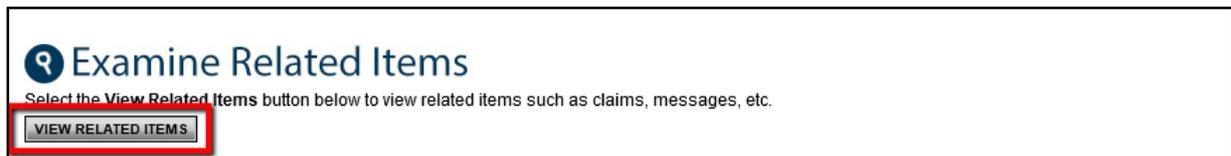
Currently, there are two different types of Request for Reimbursement (RFR) documents that have been defined, designed, and implemented within eGrants:

- Request for Reimbursements *initiated from regular Application/PGA's.*
- Scholarship Request for Reimbursements *initiated from scholarship applications.*

13.b. RFR Document Initiation

13.b.1 Request for Reimbursement Initiation

Request for Reimbursement documents can be initiated by either the Subgrantee Administrator or Subgrantee Staff security role users, through the "[Examine Related Items](#)" section of an application/grant document that is currently in the "Grant Executed" status.



Once initiated, you will be able to navigate back and forth to the RFR document through the "[My Tasks](#)" section of your homepage.

13.b.2 Scholarship Request for Reimbursement Initiation

Scholarship Request for Reimbursement documents can be initiated by either Subgrantee Administrator or Subgrantee Staff security role users, through the "Examine Related Items" section of the document menu on any scholarship application that is currently in the "Scholarship Approved" status.

Examine Related Items

Select the **View Related Items** button below to view related items such as claims, messages, etc.

VIEW RELATED ITEMS

Document Information: **SCHO-2016-NATO-00012**

[Details](#)

Related Documents

Sort search results by: Filter by Document Type:

Document Type	Name	Current Status	Period Date / Date Due	Created By	Last Modified By
Request for Reimbursement	Initiate a/an Scholarship RFR				

Once initiated, you will be able to navigate back and forth to the Scholarship RFR document through the "[My Tasks](#)" section of your homepage.

13.c. Completing Request for Reimbursement Documents

13.c.1 Completing a Request for Reimbursement Document

Upon initiating, or navigating back to, an RFR document you will be brought to the [document main menu](#). Notice that at the top of the page we have the "Document Information" for our newly created RFR document as well as the "Document Information" of the parent document it is associated with, as displayed below.

Request for Reimbursement Menu

RFR Document

Parent Application Document

Document Information: **RFR-2016-NATO-00045**

Parent Information: **5310-2016-NATO-00035**

[Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Request for Reimbursement	New Age Testing	Subgrantee Administrator	RFR in Process	01/01/2016 - 01/01/2017 01/01/2017 12:00PM EST

NOTE: Request for Reimbursement documents prepopulate upon initiation using data from the parent document application/grant. If you have need to review the parent document, you can do so by clicking the "Parent Document Information", which will direct you to the document main menu of the parent application/grant.

From the [document main menu](#), navigate to the "Forms" menu. Enter the "Request for Reimbursement" form and complete all required fields as either the Subgrantee Administrator or Subgrantee Staff security role. Once you have completed the form and have satisfied all requirements, change the status of the RFR document to one of the following:

- RFR Subgrantee Review (**SS**) *internal subgrantee review status loop*
- RFR PTC Review Required (**SA**) *submission of RFR document for review by PTC*
- RFR Cancelled (**SA, SS**) *cancellation of the RFR document.*

If a member of TxDOT staff determines that the submitted RFR document requires modifications from the subgrantee agency they may elect to return the document to the subgrantee for modifications. If this were to happen, the subgrantee agency will receive a notification indicating that modifications are required. Once the subgrantee has completed modifications the Subgrantee Administrator will re-submit the document to the "RFR PTC Review Required" status step.

13.c.2 Completing Scholarship Request for Reimbursement

Upon initiating, or navigating back to, an RFR document you will be brought to the [document main menu](#). Notice that at the top of the page we have the "Document Information" for our newly created RFR document as well as the "Parent Document Information" it is associated with, as displayed below.

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Request for Reimbursement	New Age Testing	Subgrantee Administrator	RFR in Process	01/01/2016 - 01/01/2017 01/01/2017 12:00PM EST

NOTE: Scholarship Request for Reimbursement documents prepopulate upon initiation using data from the parent document scholarship application. If you have need to review the parent document, you can do so by clicking the "Parent Document Information", which will direct you to the document main menu of the parent Scholarship Application.

From the [document main menu](#), navigate to the "Forms" menu. Enter the "Scholarship Request for Reimbursement" form and complete all required fields as either the Subgrantee Administrator or Subgrantee Staff security role. Once you have completed the form and have satisfied all requirements, change the status of the Scholarship RFR document to one of the following:

- RFR Subgrantee Review (**SS**) *internal subgrantee review status loop*
- RFR PM Review (**SA**) *submission of RFR document for review by PM*
- RFR Cancelled (**SA, SS**) *cancellation of the RFR document.*

If a member of TxDOT staff determines that the submitted RFR document requires modifications from the subgrantee agency they may elect to return the document to the subgrantee for modifications. If this were to happen, the subgrantee agency will receive a notification indicating that modifications are required. Once the subgrantee has completed modifications the Subgrantee Administrator will re-submit the document to the "RFR PTC Review Required" status step.

14. Additional Assistance

All members of subgrantee agencies are encouraged to contact a Subgrantee Administrator within your agency for additional assistance before contacting their PTC or the Help Desk.

14.a. Contacting TxDOT

For questions regarding eGrants or for additional assistance please contact us by e-mail at ptn-egrantshelp@txdot.gov or by phone at (512) 374-5220.

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