2023 CALL FOR PROJECTS OCFundtracker Training Manual

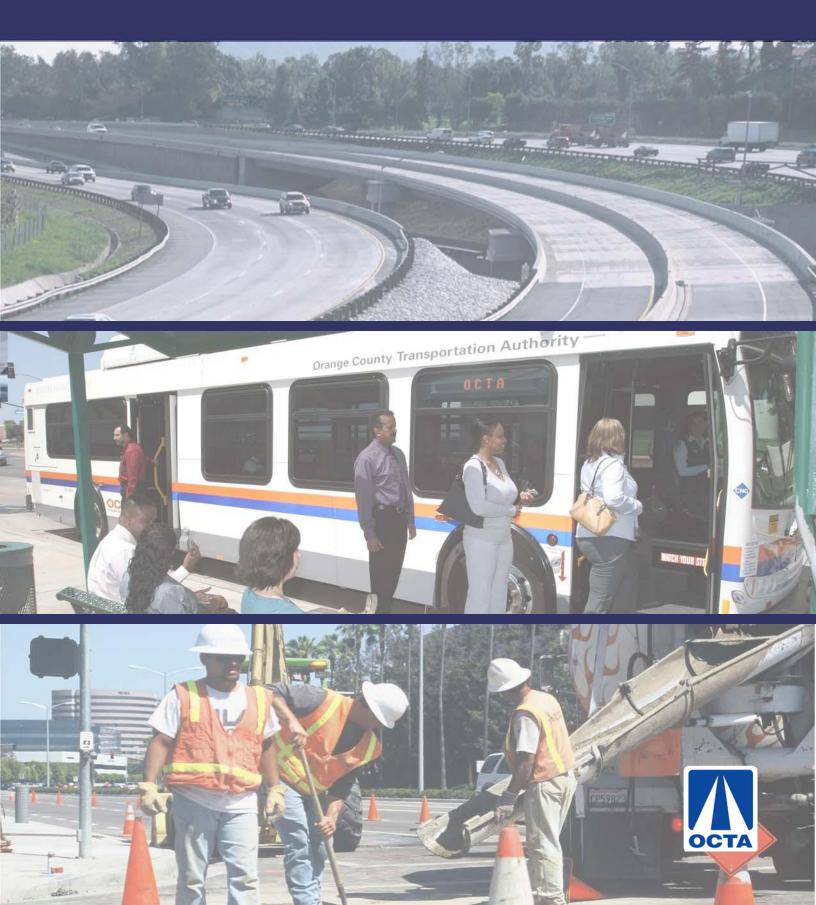


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Introduction

OCFundtracker

Orange County's Comprehensive Transportation Funding Programs (CTFP) management system was produced and released in January 2009. OCFundtracker offers a comprehensive project and programming system that can be accessed via the internet. This guide explains the basic steps involved in accessing the database and submitting a project application in response to the Regional Capacity Program (Project O) and the Regional Traffic Signal Synchronization Program (Project P) Call for Projects.

To access the OCFundtracker, visit: OCFundtracker.octa.net. Existing registered users log in with their Username and Password. The sign in page includes a link for new users to request login credentials Instructions are provided in Section 1 of this Manual.

Please address questions or comments to OCTA staff at <u>asalazar@octa.net</u> or by calling Adrian Salazar at 714-560-5363.



SECTION 1: STEP BY STEP GUIDE

Creating a New User Account

OCTA Orange County	CHANGE PASSWORD LOGOUT OCTA SCAG
	Existing OCfundTrAcker users Enter your username and password to sign in USERNAME: PASSWORD: Remember my username on this computer LOGIN
CONTACT OCTA	16,772.98s EMAIL OCFUNDTRACKERHELP@ECOINTERACTIVE.COM

Step 1 – Access the OCFundtracker Webpage

- Direct your browser to: http://OCFundtracker.octa.net
- If you are a new user authorized to complete an application on behalf of a local agency, click the "Click Here" link located under the "Existing OCFundtracker users" box.

Step 2 – Creating a New User

- Fill in the appropriate contact information Please fill this information out as thoroughly as possible, it is important for OCTA staff to contact users during the call process.
- Make sure you hold onto your username and password information. You will need this every time you log in.
- Please use your name, or a combination of your name and last name as your username.

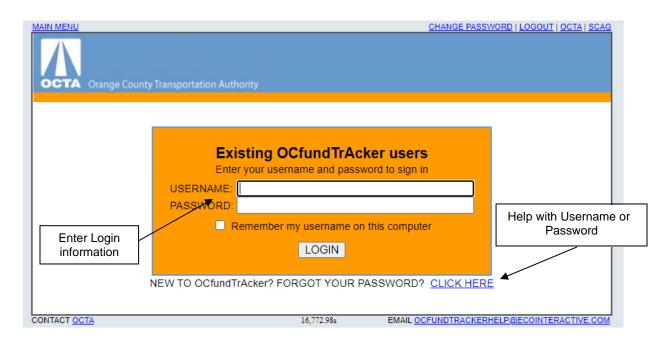
Step 3 – Approval E-mail

Once you have submitted your request, OCTA staff will review and approve or deny access to the OCFundtracker. If approved, you will receive an e-mail noting your account approval.

To ensure consistency, please do not share user accounts.



Existing User Login



Step 1 – Access the OCFundtracker Webpage

Direct your browser to: <u>http://OCFundtracker.octa.net</u>

Step 2 – Enter User Information

- Fill in your assigned username and password information.
- If it has been a while since your last login, and you have forgotten either your username or password, click on the link for assistance.



Database Menu

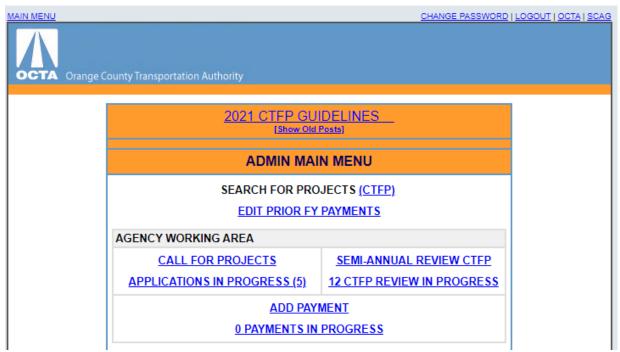
MAIN MENU OCTA Orange County Transportatio	n Authority	CHANGE PASSWORD LOGOUT OCTA SCAG
Click to enter CTFP "Main Menu"	PLEASE SELECT DATABASE Navigate to new FTIP site HERE CTFP WATER CIP	FUNDTRACKERHELP@ECOINTERACTIVE.COM

OCFundtracker is a portal that enables tracking and input for a variety of grant programs. Depending on your roles, responsibilities, and system rights, you may see one or more of the options shown above.

Select "CTFP" to create, review, edit, and submit your project application.



Main Menu



The Main Menu is where all call application related access is found. The applicable links are:

"CALL FOR PROJECTS" – This link will enable you to begin the creation of a new project application submittal.

"APPLICATIONS IN PROGRESS (0)" – This denotes how many applications are currently being worked on by the local agency. This link will take you to a listing of the applications in process so that they can be accessed and the work continued.

"APPLICATIONS PENDING (0)" – This denotes how many applications have been completed and submitted to OCTA for review. Once an application is submitted, it can no longer be accessed by the local agency.

"CTFP GUIDELINES" – Link goes to the latest Board approved version of the guidelines.



Creating a New Application



Step 1 – Access the Agency Working Area

- Click on the "CALL FOR PROJECTS" link.

MAIN MENU	<u>C</u>	HANGE PASSWORD LOGOUT OCTA SCAG
Orange County Transportation	n Authority	
	CTFP CALL FOR PROJECTS	
	<u>CREATE NEW APPLICATION</u>	
CONTACT OCTA	0.39s EMAIL OCF	UNDTRACKERHELP@ECOINTERACTIVE.COM

Step 2 – Access New Application Form

• Click on the "CREATE NEW APPLICATION" link.

----- NEW PAGE -----



Project Information Page

VIEW PREVIOUS VERSIONS OF THIS PROJECT		PR	OJECT SUMMARY (XLS)	UPLOAD PROJECT DOCUMENTS
APPLICATION NUMBER: PROJECTID: CP3610 VERSION: 1	CTFP TOTAL ALLOCATIONS: CTFP TOTAL PAYMENTS: STATUS:	\$750,000.00 \$0.00 Planned	TOTAL PROJ MATCH RATE BOARD APPR	0.00
	LAST MODIFIED BY: Paul Rodrig	uez (8/10/2021) APP	Upload suppor documents	
ADMINISTRATIVE EDIT - READ-ONLY				
CALL FOR PROJECTS PROJECT NUM 08-09-21.1 - CTFP CONTRACT# Link to approved CTFP Guidelines	MATCH RATE CALC STATL Sele	PROGRAM ID ect funding program	`	Input Performance
PROJECTINFORMATION				Measures
MPROVEMENT TYPE ACE - Arterial Capacity Enhancemen CONG DISTRICT PROJECT TITLE PROJECT DESCRIPTION - GUIDELINES	SENATE DISTRICT		Transportation Authority (OCTA) ~]]
SYSTEM ROUTE INTERSEC	TION LOCK STREET NAME	FROM	<u>TO</u>	7 1448
Local Street V V NO V	Main Street	First	Second	
			* *	
Provide description of work	to be performed.			Enter project limits

Step 3 – Enter in Corresponding Project Information

- Select the improvement type (funding program) from the drop-down box. The choices for this call for projects are ACE, ICE, FAST, or TSSP.
- Enter information into all fields that are applicable.
- Ensure that a detailed scope of work is included.
- Ensure accurate project limits are entered.
- A link to the latest guidelines is provided if any questions arise.
- Upload project documents refer to application Checklists in the CTFP Manual.
- Provide Performance Measures data by clicking the link for all projects requesting construction phase funding



ANES INFOR	MATION			
		Left Turn	# of Lanes Through	Right Turn
xisting	NorthBound			
	SouthBound			Provide lane information.
Vith Application	NorthBound			Local agencies must also
	SouthBound			attach turning movement
xisting	EastBound			counts with each ICE and
	WestBound			FAST application.
Vith Application	EastBound			
	WestBound			
las your age f Yes, When	tion on your	·	measure M2 CIP?	Local agencies are eligible to receive up to a 25% discount. All eligible discounts are subject to verification.
oject ID?				

Project Information Page – ACE, ICE, FAST (Part 1)

Step 4 – Enter Lane Information

- Provide line information as applicable
- Also provide turning movement counts as appropriate with each application.

Step 5 – Enter General Information

- Answer all questions provided.
- Pay special attention to questions related to the match rate reductions.



Project Information Page – ACE, ICE, FAST (Part 2)

imum Match Requiremer	nt	A	ctual Match Rate]	
PROGRAMMING INFORMATION (\$0)					
** Minimum match for local funds is	the total project for all years. Note: This 2022 (50% ** > TYPE (PROGRAMMED REVENUE SOURCE)	Call for Projects will alloca ** Actual Mate ENG ROW	te th2 funds for FY22/23,FY23/7 cov TOTAL 50 50 50 50 50 50 50 50	14,FY24/25 only.	Agency entered dollar values in appropriate phase
Upda	ate Subtotals GRAND TO	S0	S0 S0 S0		
SCHEDULE INFORMATION					
NONTH YEAR MONTH PLAN V V ENG V V ROW V V	ED COMPLETION STATUS Interaction interaction YEAR V V VICAR V V				Enter schedule and status information for all phases
JUSTIFICATION - GUIDANCE					
P	PLEASE CLICK SAVE AND THEN GO TO THE NEXT SCREEN T	O ENTER SCORING DATA BEFOR	E SUBMITTING		
	Save for later				

Step 6 – Enter Funding Information

- Select the fiscal year of the appropriate phase. [Note: Prior funded and/or phases underway should not be included.]
- Select the type of funds.
- Enter dollar value into the phase.
- System automatically will calculate a match rate based on information provided.
- Minimum Match Requirement and actual Agency Match based upon information provided in Match Rate Discount section and Programming section.

Step 7 – Enter Schedule Information

- Enter schedule data for all project phases.
- Include completed and in process phases.
- Indicate the status of each phase, whether "Planned", "Started", "Pending", or "Complete".

Step 8 – Save Application Information

• Once all project, funding, and schedule information has been entered, click "Save for Later".

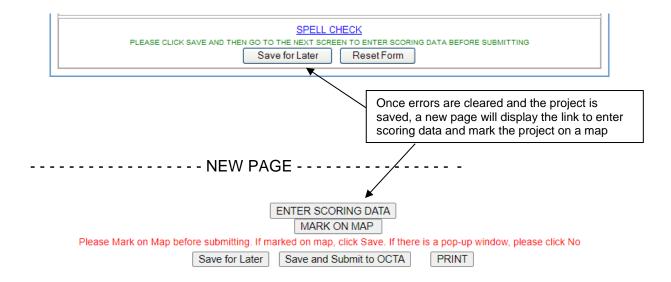


Project Information Page – Clearing Errors

ge County Transportation Authority		CHANGE PASSWORD LOGOUT	<u>OCTA SCAG</u>
PROJECT TITLE	SAVED. PLEASE PROVIDE THE FOLLOWING THE FOLLOWING APPLICABLE SINCE THERE IS FUNDING	NG FIELDS TO SAVE PROJECT TO "IN PROGRESS." NG IN CON PHASE	
DISTRICT IS REQUIRED PROJECT MANAGER'S PHON PROJECT MANAGER'S EMAIL PROJECT DESCRIPTION IS R IMPROVEMENT TYPE IS REC	JIRED TIONS IS BLANKED AND IT IS REQUIRED E NUMBER IS REQUIRED . ADDRESS IS REQUIRED EQUIRED	3	
V PREVIOUS VERSIONS OF THIS PROJECT PLICATION NUMBER: DJECT ID: CP2826 RSION: 1	LATEST VERSION PDF PRO CTFP TOTAL ALLOCATIONS: \$23,300.00 CTFP TOTAL PAYMENTS: \$0.00 STATUS: Planned	JECT SUMMARY (XLS) UPLOAD PROJECT DOCUMENTS TOTAL PROJECT COST \$23,300.00 ACTUAL MATCH RATE 0.00	

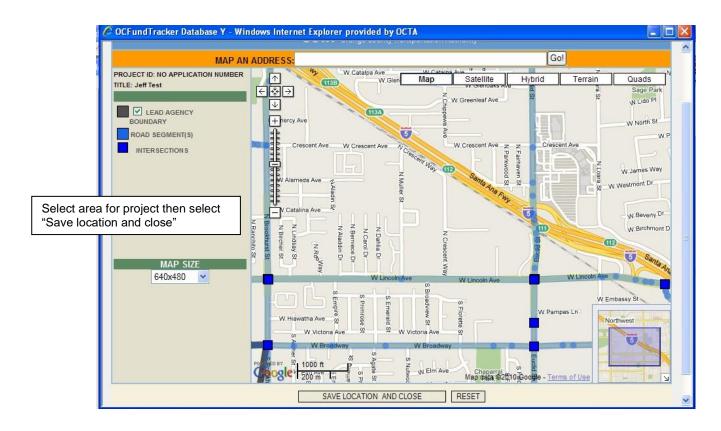
Step 9 – Resolve System Errors

- The OCFundtracker system will not allow you to continue with the "Save for Later" function until all errors have been addressed.
- Once errors have been cleared, the system will save the application as "In Progress".





Marking Project on the Map



Step 1 – Enter Mapping Data

- Select the area for the project.
- Click on the nodes that indicate the boundaries.
- Take the time to ensure that accurate segments/nodes are selected.
- Click on "SAVE LOCATION AND CLOSE".



Entering Scoring Data (Part 1)

				Enter in AD	T and VMT
	ACE - STREET WIDENING	~]	/	
				POINT(S)	
Facility Usage					
Existing ADT VMT	Enter current project readiness		35000 19000 nvironmental Approvals eliminary Design (35%)	_	
Current Project Readiness		Right of	Way (All offers issued) Final Design (PS&E) All easement and titles)		
Economic Effectiveness					
Cost Benefit Funding Over-Match			ct Cost) / 35000 (ADT) = tch) - 25% (Required) =		
		syste	t benefit and Funding em calculated numbe red data		

Step 1 – Enter Facility Usage Data

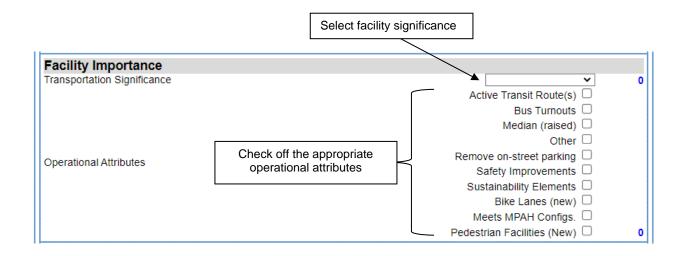
- Enter in the existing average daily trips. Project ADT for opening year may be permitted where counts are less than 12 months old.
 - ADT for ICE applications is based upon the average of north/south leg PLUS average of east/west leg.
- Enter in the existing vehicles mile traveled.
- Check off the current state of the project readiness.

Step 2 – Verify Economic Effectiveness

- Cost benefit and funding over-match are calculated by the system.
- For cost benefit, verify that total project cost and ADT are stated correctly.
- For funding over-match, verify that city match percentage is stated correctly.



Entering Scoring Data (Part 2)

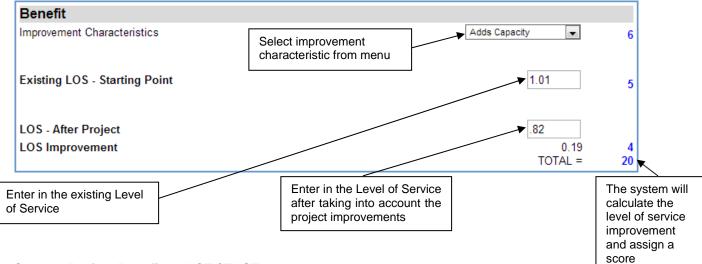


Step 3 – Enter Facility Importance

- Select from the drop down menu the facility significance.
- Check off operation attributes that will be provided by the project (maximum of 10 points).
- Available attributes differ between ACE, ICE and FAST. Attributes shown are for the ACE program.

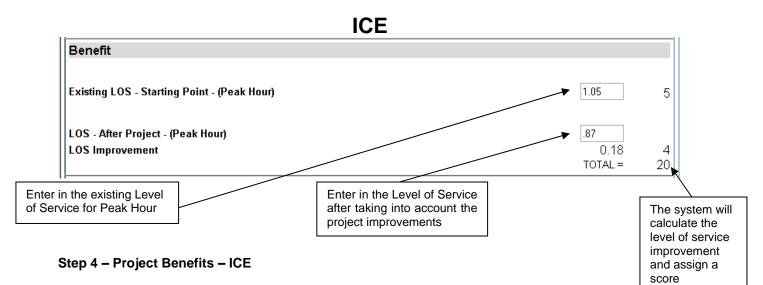


ACE



Step 4 – Project Benefits – ACE / FAST

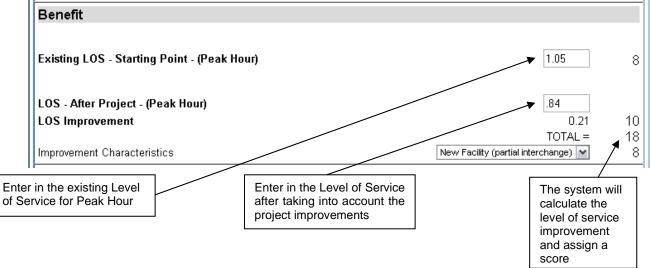
- Select from the drop down menu the improvement characteristics.
- Enter the existing or pre-project projected LOS.
- Enter the projected LOS after the improvements. **DO NOT** enter in the LOS reduction.
- The system will calculate the total LOS improvement and score the project accordingly.



- Enter the existing or pre-project projected LOS for peak hour (AM or PM).
- Enter the projected LOS after the improvements. **DO NOT** enter in the LOS reduction.
- The system will calculate the total LOS improvement and score the project accordingly.



FAST



Step 4 – Project Benefits – FAST

- Enter the existing or pre-project projected LOS for peak hour. Use LOS data for arterial-centric segments or ICU data for ramp intersection scope.
- Enter the projected LOS after the improvements. **DO NOT** enter in the LOS reduction.
- The system will calculate the total LOS improvement and score the project accordingly.
- Select from the drop-down menu the improvement characteristics.

	SAVE RANKING	CLOSE WINDOW	PRINT	
				TOTAL POINTS: 58
Save the scoring information by clicking here	, 			

Step 5 – Save and Print

- Save the scoring information by clicking "SAVE RANKING". This is very important. The system does not automatically save the information.
- Print out a copy of the score sheet for inclusion with the hard copy applications.
- Close the window.



Project Information Page – TSSP (Part 1)

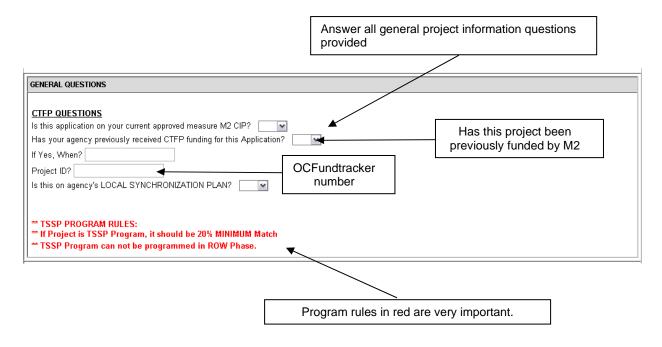
VIEW PREVIOUS VERSIONS	S OF THIS PROJECT			PROJECT SUMMARY (XLS)		UPLOAD PROJECT DOCUMENTS
APPLICATION NUMBER: PROJECT ID: VERSION:	CP3610 1	CTFP TOTAL ALLOCATIONS: CTFP TOTAL PAYMENTS: STATUS:	\$750,000.00 \$0.00 Planned		TOTAL PROJECT MATCH RATE BOARD APPROV	0.00
	LAS	T MODIFIED BY: Paul Rodrig	lez (8/10/2021)	APPROVED BY: N/A HIST	ORY	
			Performa	nce Measures		PERFORMANCE MEASURES
ADMINISTRATIVE ED	DIT - READ-ONLY	L_				
CALL FOR PROJECTS	PROJECT NUMBER	Coloct fi	unding]		
08-09-21.1 - CTFP	CONTRACT # MATCH R	ATE CA Progr	-	ENT		Select Implementing agency
PROJECT INFORMAT	TION					
ACE - Arterial Cap	acity Enhancement	×	IMPLEMENTIN	GAGENCY unty Transportation Author		
CONG DISTRICT	SUP DISTRICT SENATE D	ASSEMBLY DISTRIC				
PROJECT TITLE						
PROJECT DESCRIPTION	- GUIDELINES	Link to	current ap	proved Guidelin	es 🗖	
K					4	
SYSTEM Local Street V		ain Street	FRO First		id 🔨 🖡	
					\sim	
Provide desc	cription of work to	be performed.			Ente	r project limits

Step 1 – Enter in Corresponding Project Information

- Select the improvement type (TSSP) from the drop-down box.
- Enter information into all fields that are applicable.
- Ensure that a detailed scope of work is included.
- Ensure accurate project limits are entered.
- A link to the latest CTFP guidelines is provided if any questions arise.
- Upload project documents refer to application Checklists in the CTFP Guidelines.
- Provide Performance Measures data by clicking the link Additional guidance provided in next section.



Project information Page – TSSP (Part 2)



Step 2 – General Questions

- Answer all questions provided.
- Pay special attention to program rules indicated in red.



Project information Page – TSSP (Part 3)

	Minimum match requirement	Actual match rate	
PROGRAMMING IN Please enter al ** Minimum ma	FORMATION (\$0) funding required for the total project for all tch for local funds is 20% ** FED FISCAL YR FUND TYPE	years. Note: This 2014 Call for Projects will allocate M2 funds for FY12/13,FY13/14 FY14/ ** Actual Local Agency Match Rate is NaN% ** PRIMARY ROW MAINTENANCE TOTAL MPLEMENTATION (DISABLED) WOHTOTING	
	Update Subtotals	Image: Solution of the soluti	
SCHEDULE INFO	MATION SCHEDULED START SCHEDULED COMPLETION MONTH YEAR V V V V V V V V V V V V	STATUS ACTUAL COMPLETION FINAL REPORT SUBMIT Enter schedule and status information on all phases	

Step 3 – Enter Funding Information

- Select the fiscal year of the fund type.
- Enter dollar value into the either implementation or operations and maintenance.
- Show O & M for each year it is planned for.
- System automatically will calculate a match rate based on information provided.

Step 4 – Enter Schedule Information

- Enter schedule data for all project phases.
- Indicate the status of each phase
 - "Planned": requesting for funding or funded, but not started
 - "Started": project has started, meaning a contract has been executed
 - "Pending": phase is complete, pending final report and/or payment
 - "Complete": phase allocation has been paid

Step 5 – Save Application Information

• Once all project, funding, and schedule information have been entered, click "Save for Later".



Entering Scoring Data – TSSP (Part 1)

A new button to "Enter Scoring Data" will appear after saving the application. Use information from Appendix C of the Supplemental Application to fill out this section.

	POINT(S
Transportation Significance	
Vehicle Miles Traveled (VMT)	
Percent Inclusion of Offset Signals Within 2700'	
Transportation Significance Score	
Jurisdictions	
Total Number of Involved Jurisdictions	
Jurisdictions Score	
Project Scale	
Percent of Main Corridor Signals Being Retimed	
Number of Signals on Main Corridor Being Retimed	

Step 1 – Enter Facility Usage Data

- Enter in the VMT based upon average daily trips for each segment.
- Enter the percentage of offset signals included (consult with OCTA for offset signal data prior to submittal).

Step 2 – Enter Local Jurisdiction Information

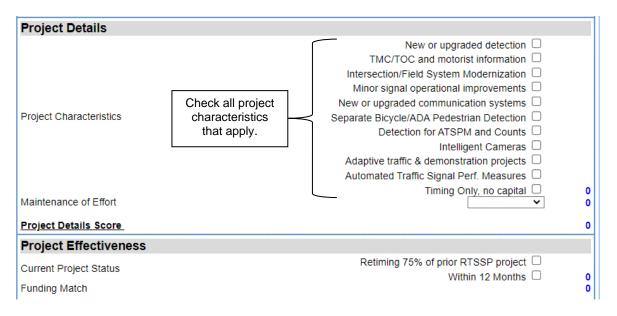
• Enter the total number of jurisdictions participating in the project. Do not include OCTA. Caltrans can only be counted if all participating agencies with Caltrans signals agree to execute a cooperative agreement with Caltrans.

Step 3 – Enter Project Scale

- Enter percentage of the main corridor signals being retimed as part of the project.
- Enter the number of signals on the main corridor being retimed.



Entering Scoring Data – TSSP (Part 2)



Step 4 – Enter Project Details

- Select the appropriate project characteristics. Refer to the CTFP Guidelines for the description of the characteristics and their requirements.
- Enter the number of years agency is committing to maintenance of effort beyond the 3-year grant period. No additional funding will be granted for effort beyond the 3-year grant.

Step 5 – Enter Project Effectiveness

- Select the current state of project readiness. [Projects proposed to be led by OCTA do not qualify for completing within 12-months.]
- The system will determine the funding over-match (if any) and assign points.

SAV	E RANKING	CLOSE WINDOW	PRINT	
				TOTAL POINTS: 59
Save the scoring information by clicking here				

Step 6 – Save and Print

- Save the scoring information by clicking "SAVE RANKING". This is very important. The system does not automatically save the information.
- Print out a copy of the score sheet for inclusion with the hard copy applications.
- Close the window.



Performance Measures

VIEW PREVIOUS VERSIONS	S OF THIS PROJECT		PROJECT SUMMARY	(XLS)	UPLOAD P	ROJECT DOCUMENTS
APPLICATION NUMBER: PROJECT ID: VERSION:	CP3610 1	<u>CTFP TOTAL ALLOCATIO CTFP TOTAL PAYMENTS STATUS:</u>			TOTAL PROJECT COST MATCH RATE BOARD APPROVAL DATE	\$0.00 0.00
		LAST MODIFIED BY: Amy Tran (8/	9/2021) <u>APPROVED BY:</u> N/A	HISTORY		
					PERF	ORMANCE MEASURES
		•	ick here to enter prmance Measures			

Step 1 – Enter Project Information

- Enter number of signals that will be synchronized on this project.
- Enter the length of the project.

TSSP		Enter # of signals
Total Number of Proposed Signals for Project:		Number 60
Total Number of Proposed Corridor Miles for Project:		Decimal
	Enter length of project	

Step 2 – Corridor Input

- Enter the name of the main corridor.
- Under "Streets", enter the limits (i.e., From Street A to Street B).
- Select all checkboxes that apply to this project.

Corridor Input		Enter Limits]				Select all that apply
Corridor Name	Street		Signal Synchronized Within Last Seven (7) Years	Adding Advanced Transportation Controllers	Adding Fiber Optic Communications	Adding Closed- Circuit Televisior	Adding Vehicle and/or Pedestrian Detection
		\downarrow					

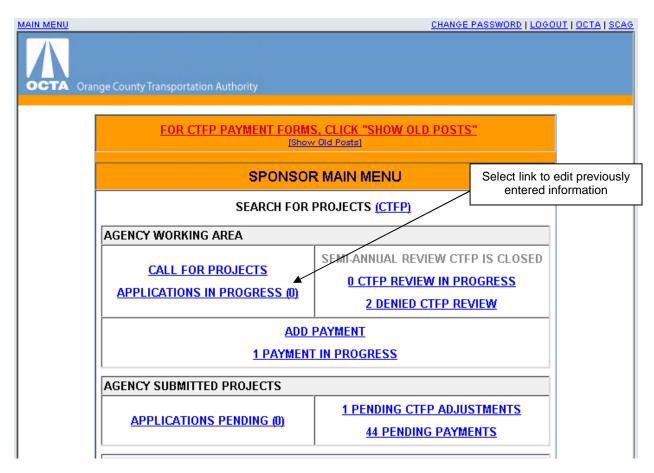
Step 3 – Save

- Click "Save"
- Click "Project Information" at the top of the page, under the orange header to return to the previous page.

Mark on Map: refer to page 12 for instructions



Projects in Progress



Step 1 – Editing Applications in Progress

• To edit previously submitted applications, or to submit completed applications to OCTA, click on the "APPLICATIONS IN PROGRESS (0)" link.



Projects in Progress (Part 2)

PPLICATION NUMBER	PROJECT TITLE	AGENCY	PROJECT STATUS	FUNDING PROGRAM	RANKING PROGRAM	TOTAL ALLOCATION	TOTAL PAYMENTS		
O APPLICATION NUMBER]	G	(OCTA)	In Progress - Programmed		Street Widening	\$1,000	\$		ISUBMIT TO OCTA]
O APPLICATION NUMBER]	TEST JEFF	(OCTA)	Pending		Intersection Improvement	\$10,000	\$	IDELETE	ISUBMIT TO OCTA]
O APPLICATION NUMBER]	TEST	(OCTA)	Pending		TSSP	\$50			ISUBMIT TO OCTAI
O APPLICATION NUMBER]	JEFF TEST	(OCTA)	Planned Complete submittal t		r for	\$23,300	\$		PLEASE ENTER SCORING BEFORE SUBMITTING PLEASE MARK ON MAP BEFORE SUBMITTING
O APPLICATION NUMBER]	TEST	(OCTA)	Planned		Street Widening	\$30,000	\$	IDELETEI	ISUBMIT TO OCTAI
O APPLICATION NUMBER]	Q	(OCTA)	Planned		TSSP	\$		[DELETE]	ISUBMIT TO OCTA]
O APPLICATION NUMBER]	TSSP - TEST - 10.20.10 - PAUL	(OCTA)	In Progress - Programmed		TSSP	\$50,020	\$		PLEASE MARK ON MAP BEFORE SUBMITTING
O APPLICATION NUMBER]	TRAFFIC SIGNAL SYNCHRONIZATION OF THE ENTIRE COUNTY OF	(OCTA)	Started		TSSP	\$	\$	(DELETE)	<u>(SUBMIT TO</u> OCTA]

Step 2 – Selecting Incomplete Applications

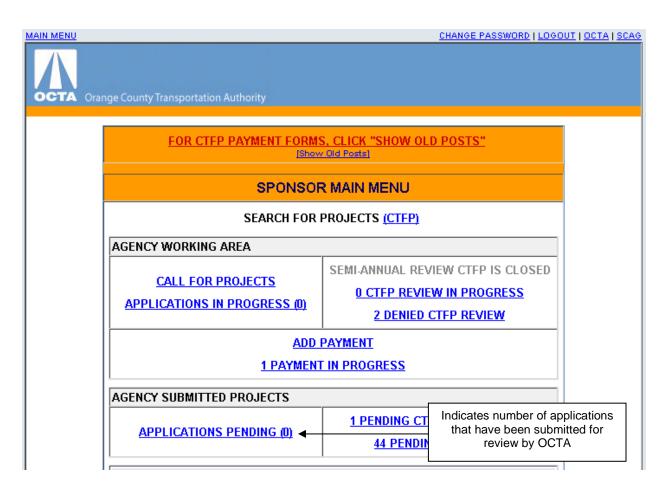
- The system will indicate if an application is complete and ready to be submitted to OCTA.
- To edit previously submitted applications, or add additional information, click on the [NO APPLICATION NUMBER] link.

Step 3 – Submitting Complete Applications

- Once an application is complete, the [SUBMIT TO OCTA] link will become active.
- Once an application is submitted *no further changes can be made!*
- Ensure that an application is complete/correct before submission. This includes upload of relevant supporting materials.



Verifying Submittal of Applications



Final Step – Application Verification

- Once an application is submitted to OCTA, it will appear in the "APPLICATIONS PENDING (0)" link total.
- This link can be clicked to review previously submitted applications, but no changes can be made at this point.



SECTION 2: CALL INFORMATION

Call Schedule

Below is a tentative schedule of the call for projects:

Call Released/Board Approval for Issuance	August 8, 2022
Virtual Application Workshop and Q&A Session	August 23, 2022
Local Agency one-on-one application discussions	Upon Request
Modeling/New facility Request Deadline	September 8, 2022
Deadline to request OCTA to lead RTSSP	N/A for 2023 Call
Brief Presentation at OC Traffic Forum	September, 2022
Applications Due to OCTA (by 5:00 p.m.)	October 20, 2022
Local Agency's Executed Governing Board Resolution	January, 2023
Technical Steering/Technical Advisory Committee review	February/March 2023
OCTA Board or Directors approval of recommended projects	Spring, 2023
2023 Project O & P Funds Allocated*	July 1, 2023
*This is the earliest date projects can be programmed for the 2023 cal	

Call Questions / Contact

If at any point during the call process, questions arise regarding the guidelines or the OCFundtracker database, application or scoring criteria, please contact OCTA at <u>asalazar@octa.net.</u> Please direct <u>all</u> questions to this email address.

