2025 CALL FOR PROJECTS

OCFundtracker Training Manual







Table of Contents

	/
IntroductionOCFundtracker	
SECTION 1: Step by Step Guide	3
Creating a New User Account	
Existing User Login	
Database Menu	
Main Menu	
Creating New Application	
Project Information Page	
Project Information Page – Clearing Errors	
Marking Project on the Map	
Entering Scoring Data	
Project Information Page – TSSP	
Entering Scoring Data – TSSP	
Projects In Progress	
Verifying Submittal of Applications	
SECTION 2: Call Information	26
Call Ouestions / Contact	∠0 26



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 at smooney@octa.net or by calling Stephanie Mooney at (714) 560-5312.



SECTION 1: STEP BY STEP GUIDE

Creating a New User Account



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

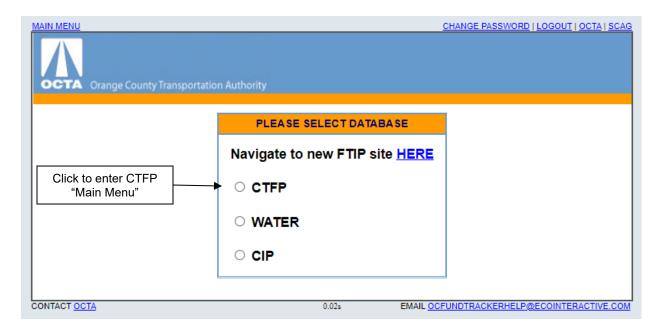
Direct your browser to: http://OCFundtracker.octa.net

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

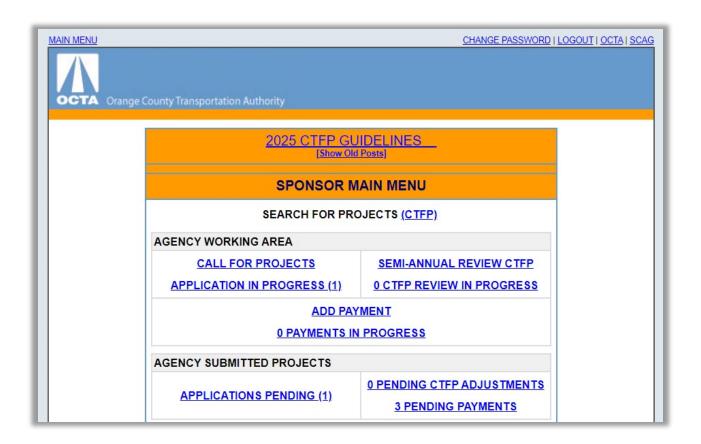


OCFundtracker is a portal that enables tracking and input for a variety of grant programs. Depending on your roles, responsibilities, and system rights, you may see one or more of the options shown above.

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 (1)" 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 (1)" 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.

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



Step 2 - Access New Application Form

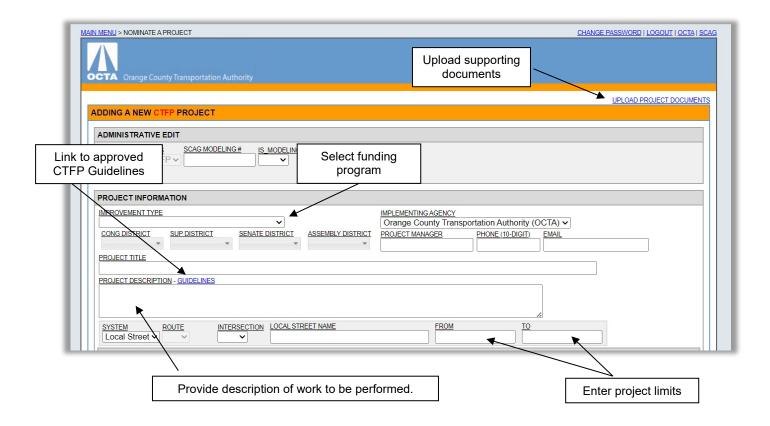
• Click on the "CREATE NEW APPLICATION" link.



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



Project Information Page

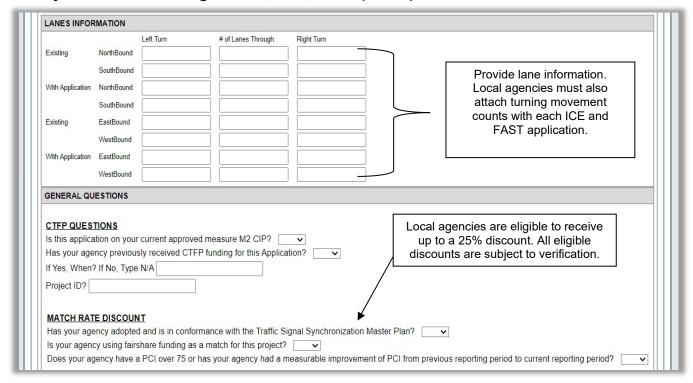


Step 3 - Enter in Corresponding Project Information

- 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.
- Enter the congressional and supervisorial district information, at minimum.
- 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. The link will appear after saving the application.



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



Step 4 - Enter Lane Information

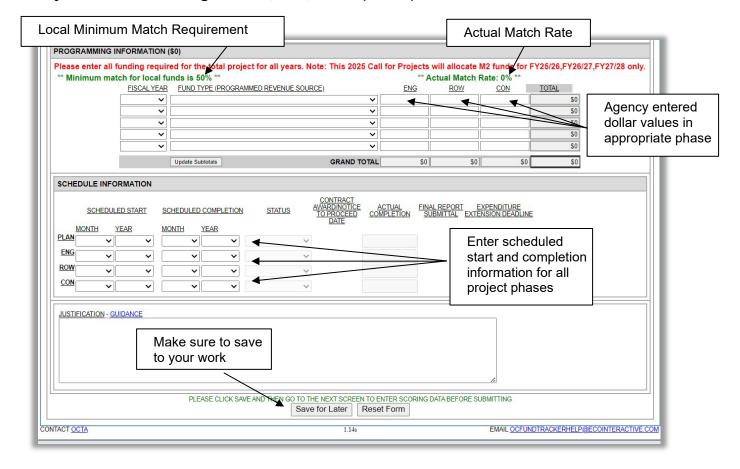
- Provide line information as applicable
- Also provide turning movement counts as appropriate with each application.

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)



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

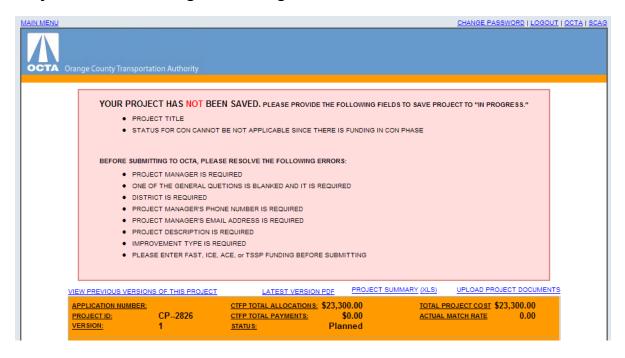
- Enter schedule data for all project phases.
- Include completed and in process phases.
- Indicate the status of each phase in the Justification field, whether "Planned", "Started", "Pending", or "Complete". OCTA staff will update the status if project is approved for programming.

Step 8 – Save Application Information

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

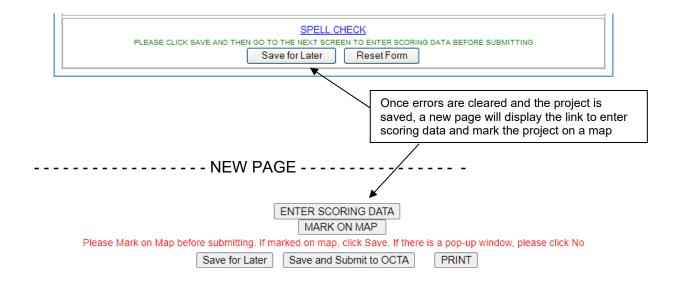


Project Information Page – Clearing Errors



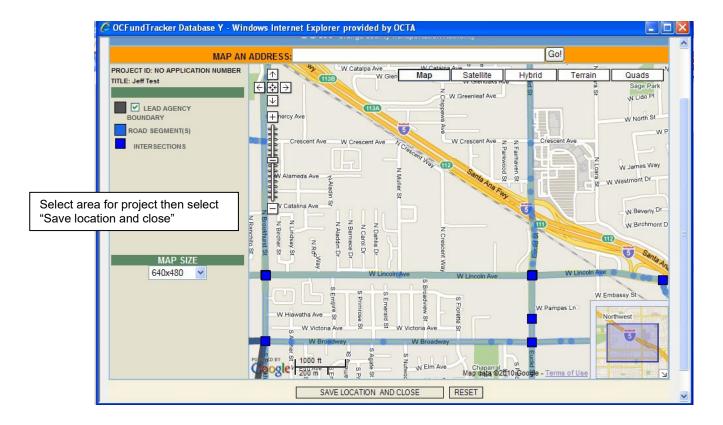
Step 9 - Resolve System Errors

- 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

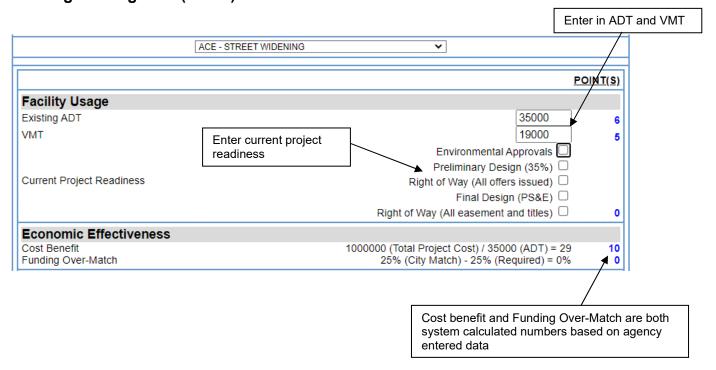


Step 1 - Enter Mapping Data

- 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)



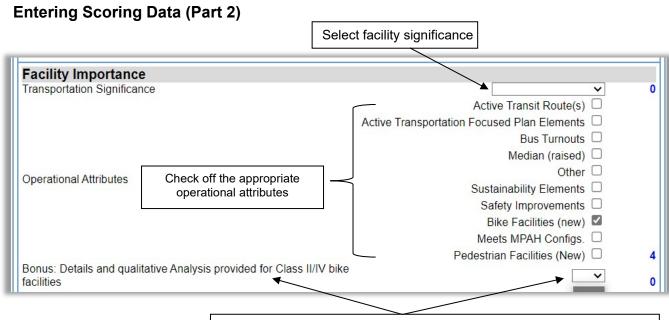
Step 1 - Enter Facility Usage Data

- 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.





For projects with bike improvements complementary to the MPAH project, there is an opportunity for bonus points if further details and analysis describing the benefits to the MPAH are included in the application.

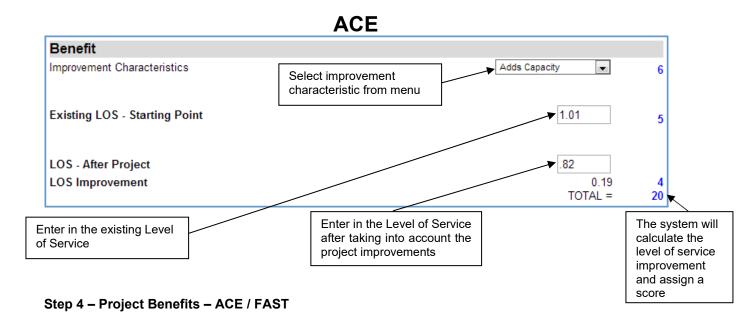
Select YES or NO if optional information is provided.

Step 3 – Enter Facility Importance

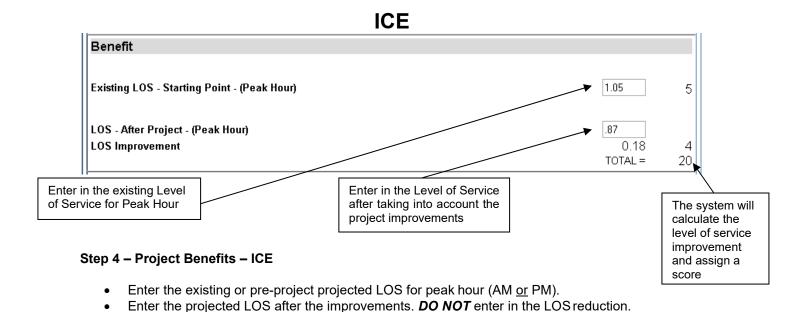
- Select from the drop-down menu the facility significance.
- Check off operational attributes that will be provided by the project.
- Available attributes differ between ACE, ICE and FAST. Attributes shown are for the ACE program.



Entering Scoring Data (Part 3)



- 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.



The system will calculate the total LOS improvement and score the project accordingly.



FAST Benefit Existing LOS - Starting Point - (Peak Hour) 1.05 8 LOS - After Project - (Peak Hour) 84 0.21 10 LOS Improvement TOTAL = 18 8 Improvement Characteristics New Facility (partial interchange) 💌 Enter in the Level of Service Enter in the existing Level The system will of Service for Peak Hour after taking into account the calculate the project improvements level of service improvement and assign a score

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.

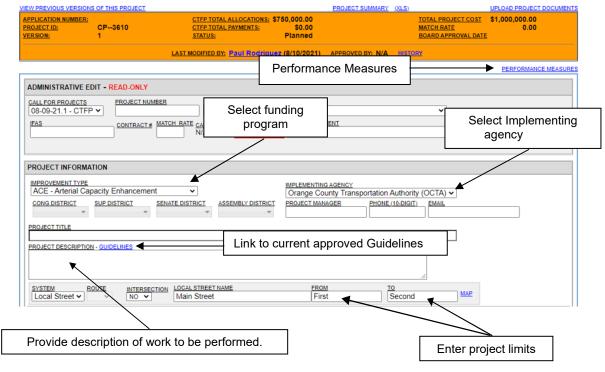


Step 5 - Save and Print

- 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)

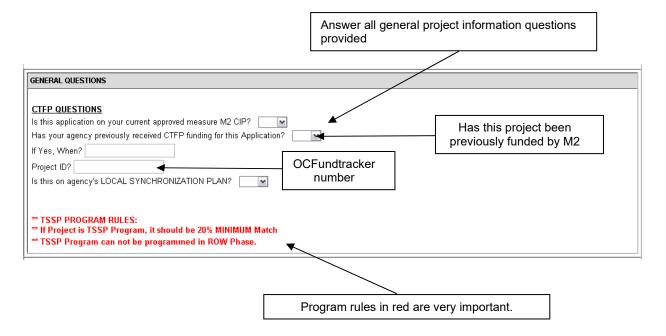


Step 1 - Enter in Corresponding Project Information

- 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)

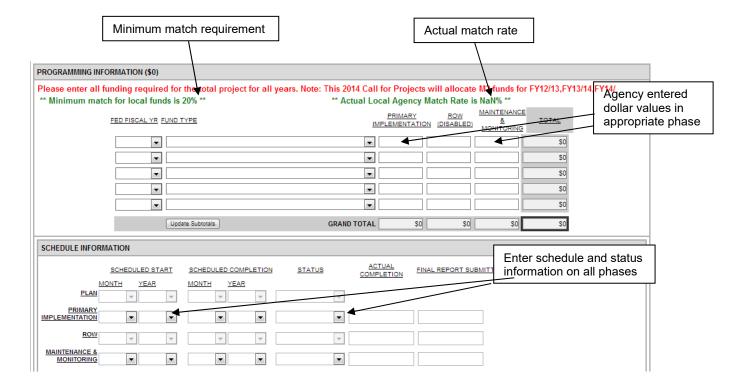


Step 2 - General Questions

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



Project information Page – TSSP (Part 3)



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

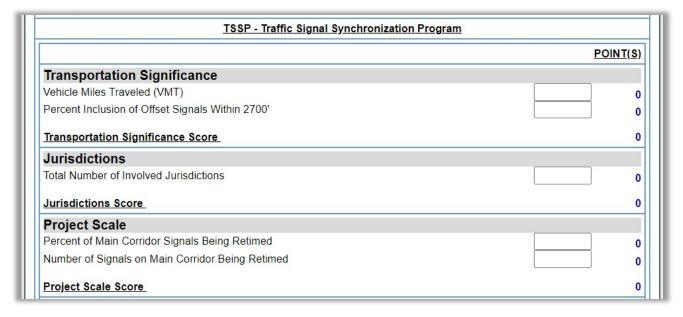
Step 5 - Save Application Information

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.



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. It is *highly recommended* that applicants consult with OCTA for offset signal data prior to submittal.

Step 2 - Enter Local Jurisdiction Information

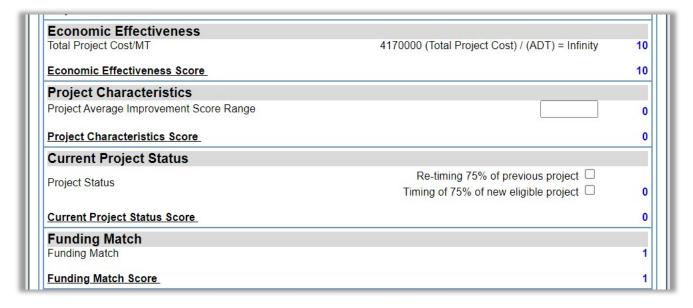
Enter the total number of jurisdictions participating in the project. Do not include OCTA. Caltrans
can only be counted if all participating agencies with Caltrans signals agree to execute a
cooperative agreement with Caltrans.

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)

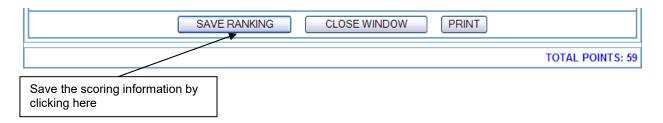


Step 4 - Enter Project Characteristics

- Enter in the project average improvement score calculated through the Supplemental Application.
- Refer to Supplemental Application Appendix B.3 Table III: Project Average Improvement Scores.
 For further details and guidance, see the <u>2025 Call for Projects Supplemental Application Guide</u>.

Step 5 - Enter Project Status

- Check off current status of the project development, if applicable. Only one option can be selected.
- The system will determine the funding over-match (if any) and assign points.



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.

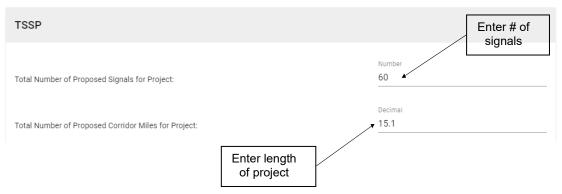


Performance Measures



Step 1 - Enter Project Information

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



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

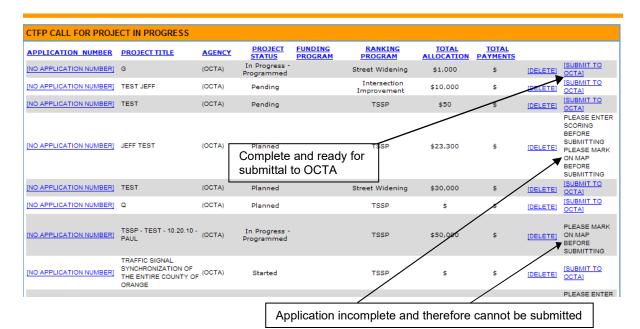


Step 1 – Editing Applications in Progress

 To edit previously submitted applications, or to submit completed applications to OCTA, click on the "APPLICATIONS IN PROGRESS (1)" link.



Projects in Progress (Part 2)



Step 2 – Selecting Incomplete Applications

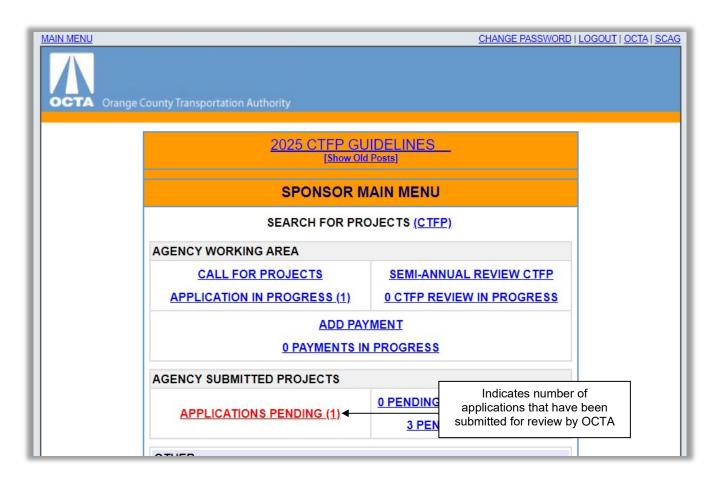
- The system will indicate if an application is complete and ready to be submitted to OCTA.
- To edit previously submitted applications, or add additional information, click on the **[NO APPLICATION NUMBER]** link.

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 (1)" 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 12, 2024	
Virtual Application Workshop and Q&A Session	September 4, 2024	
Local Agency One-on-One application Discussions	Upon Request	
Modeling/New facility Request Deadline	September 12, 2024	
Deadline to request OCTA to lead RTSSP	N/A for 2025 Call	
Draft "Route" Applications Due to OCTA	September 26, 2024	
Applications Due to OCTA (by 5:00 p.m.)	October 24, 2024	
Local Agency's Executed Governing Board Resolution	January, 2025	
Technical Steering/Technical Advisory Committee review	February/March 2025	
OCTA Board or Directors approval of recommended projects	Spring, 2025	
2025 Project O & P Funds Allocated*	July 1, 2025	
*This is the earliest date projects can be programmed for the 2025 call		

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 smooney@octa.net. Please direct all questions to this email address.

