



# Partner Portal User Guide

## eGrants

## Document History

The table below serves as a document history log to track the version number, date, and description of each change/revision applied to this document.

Version	Date	Version / Revision Description
1.0	12/9/2021	Draft version delivered
1.1	12/16/2022	Updated based on release changes/enhancements
1.2	3/14/2023	Updated based on release changes/enhancements
2.0	June 2023	Updated version published
3.0	August 2023	Updated version published
3.1	9/29/2023	Added FEIN Partner Filter for Bulk Assign & Profile Edit revision
3.2	12/15/2023	Removed old Route Sheet references Added bulk Partner Portal revoke access
3.3	3/29/2024	Added SSRS Reports in External User section

*Table 1. Document History*

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## 1.0 Introduction

The Partner Portal is an external-facing module used by the program office for collecting and/or sharing information with an applicant or grantee after an application has been submitted. Features include application review, document upload, invoice submission, etc. Partner portal access is assigned individually to a user for single or multiple applications.

Types of partner portal access include the following categories:

- **PTS Grant Coordinator:** It allows users to access the highway safety enforcement tracking and enforcement reimbursement report for the PTS program.
- **PTS Officer:** It allows users to access the highway safety *officer* enforcement tracking and enforcement reimbursement report for the PTS program.
- **Read only:** It allows users to view the submitted applications and invoices. Users won't be able to edit or upload documents in the Partner Portal.
- **Show Reports:** It allows users to view/generate the SSRS reports from the partner portal.
- **Tracking:** It allows users to access the tracking module and submit information.
- **Upload Comments Documents:** It allows users to upload documents as requested by program staff.
- **Viewer:** It allows users to view the entire application at any point within the workflow and be Read-Only.
- **Workflow:** It allows users access to ESA workflow. It is the only option for the user to be able to 'push' the application review back to the program staff.

Production Partner Portal Link: <https://apps.dced.pa.gov/esa-partner/>

## 2.0 Partner Portal – External Users

If users don't have an account to Keystone Login, click Register highlighted on the main login page and the system will take the user to Keystone

 **ESA-Partner Application** [Log In](#)

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**General Facts:**

- Create a new Keystone Login account – [Registration](#)
  - Click Register and enter all of the information into the fields with a red asterisk (\*) next to them.
    - You will be asked to create your profile, login information and security questions.
  - If you have already created an account with another agency whose application uses the Keystone Login Service, you do not need to register another account with us.
  - If you create a Keystone Login account with us, you will be able to use this account with other agencies that use Keystone Login.
    - Some additional information may be required for those agencies.
- Keystone Login Services
  - There are many account options that can be configured for your Keystone Login account. Please see the help documents provided by the [Keystone Login Service](#)
  - Keystone Login account assistance or password resets, please contact the Keystone Global Help Desk at 877-328-0995
- If you need application technical assistance, please contact the DCED Customer Service Center Monday-Friday 8:30AM-5PM at 800-379-7448

**Username\***

**Password\***

[Log in](#)

Powered by

  
[Register](#)

**NOTE:** If registering for the first time with Keystone Login, please include an email address with your account. It will be needed to successfully complete grant applications and grant processing.

[Forgot Password](#)

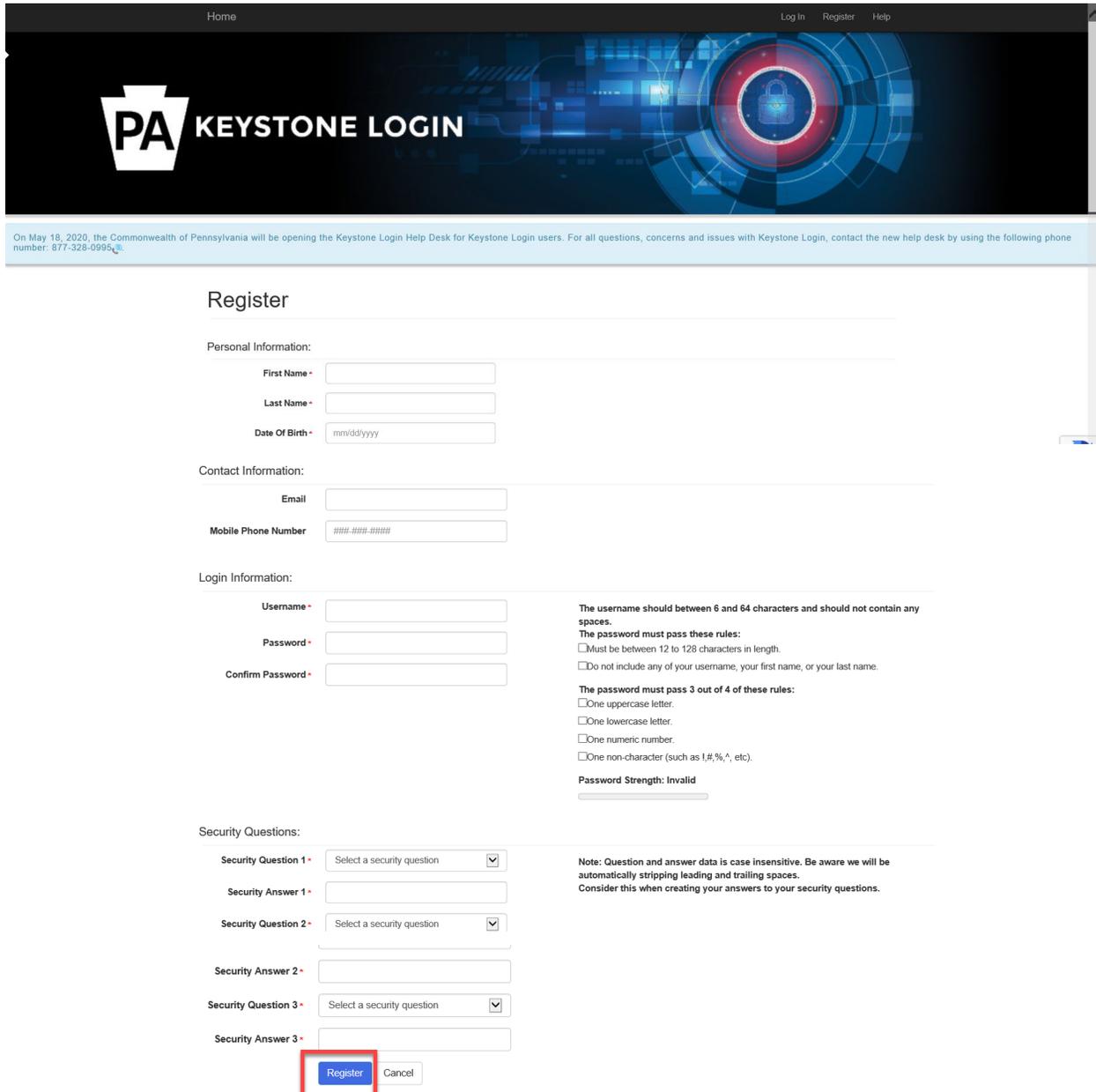
[Forgot Username](#)

[Learn more about Keystone Login](#)

[Having Trouble Registering](#)

## 2.1 New User Registration

Enter all the information in the fields marked in the right margin by a red asterisk and click Register. *These are required fields.* The rest of the fields are optional.



Home Log In Register Help

**PA KEYSTONE LOGIN**

On May 18, 2020, the Commonwealth of Pennsylvania will be opening the Keystone Login Help Desk for Keystone Login users. For all questions, concerns and issues with Keystone Login, contact the new help desk by using the following phone number: 877-328-0995.

### Register

Personal Information:

First Name \*

Last Name \*

Date Of Birth \* mm/dd/yyyy

Contact Information:

Email

Mobile Phone Number #####-####

Login Information:

Username \*

Password \*

Confirm Password \*

The username should be between 6 and 64 characters and should not contain any spaces.  
The password must pass these rules:  
 Must be between 12 to 128 characters in length.  
 Do not include any of your username, your first name, or your last name.

The password must pass 3 out of 4 of these rules:  
 One uppercase letter.  
 One lowercase letter.  
 One numeric number.  
 One non-character (such as !, #, %, ^, etc).

Password Strength: Invalid

Security Questions:

Security Question 1 \*

Security Answer 1 \*

Security Question 2 \*

Security Answer 2 \*

Security Question 3 \*

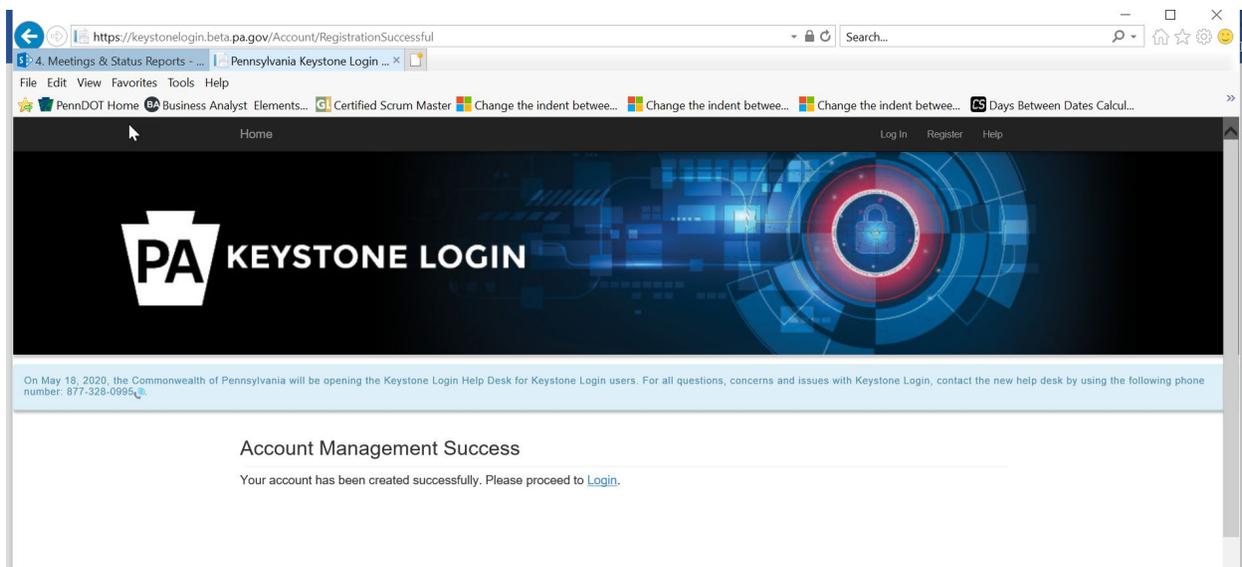
Security Answer 3 \*

Note: Question and answer data is case insensitive. Be aware we will be automatically stripping leading and trailing spaces. Consider this when creating your answers to your security questions.

- **First Name:** Enter your first name.
- **Last Name:** Enter your last name.
- **Date of Birth:** Enter your date of birth.
- **Email:** Enter your email address.  
**Note:** The user must enter a valid email address during the registration process.
- **Mobile Phone Number:** Enter your Mobile Phone Number. This field is optional.

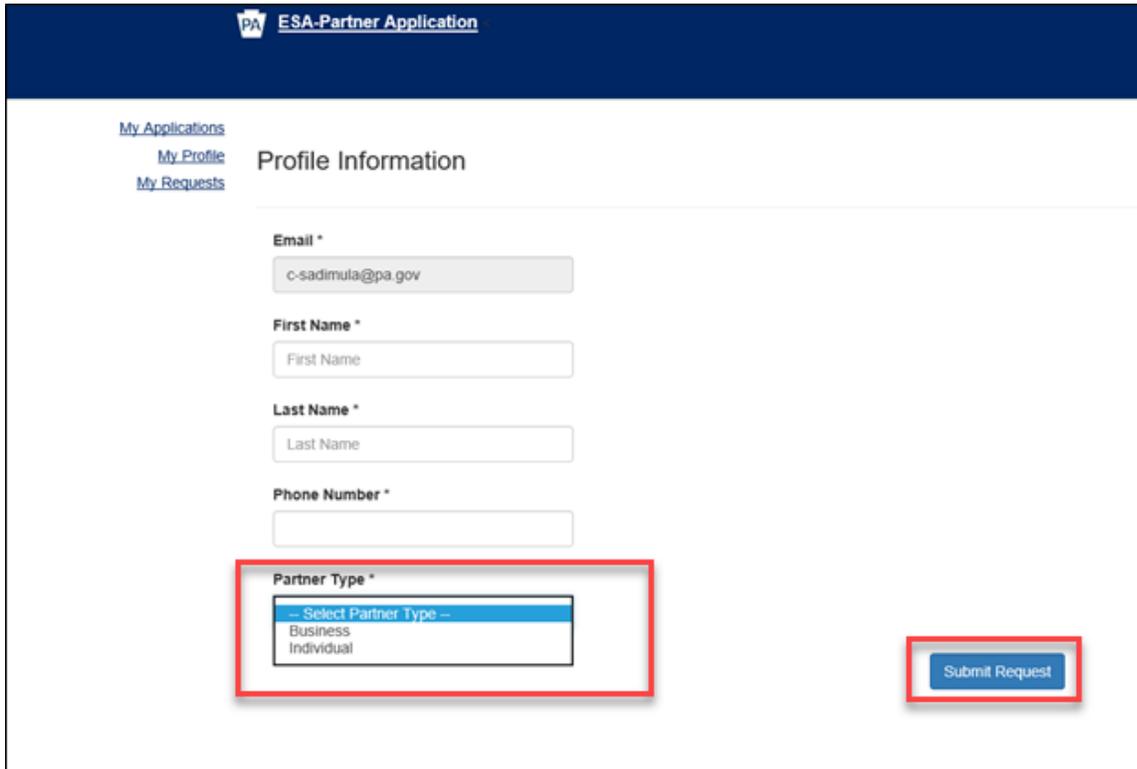
- **Username:** Create a user name. The username must be between 6 and 64 characters without any spaces.
- **Password:** Create your password here. The password must be between 12 and 128 characters and should follow 3 out of 4 rules as listed below:
  - One uppercase letter
  - One lowercase letter
  - One numeric number
  - One non-character (such as ! #, %, ^, etc.).
- **Confirm Password:** Re-enter your password. This field has the same restrictions as the Password field.
- **Security Questions:** This is a security question in case the user loses or forgets their username or password. It helps to confirm the user's identity since it will be a unique question.

### 2.1.1 Registration Complete and Continue



After the user logs in back to the Partner Portal with the new Username and Password, the system will take the user to the page where the partner profile needs to be set up. The next section shows the required steps to create a user profile in the Partner Portal.

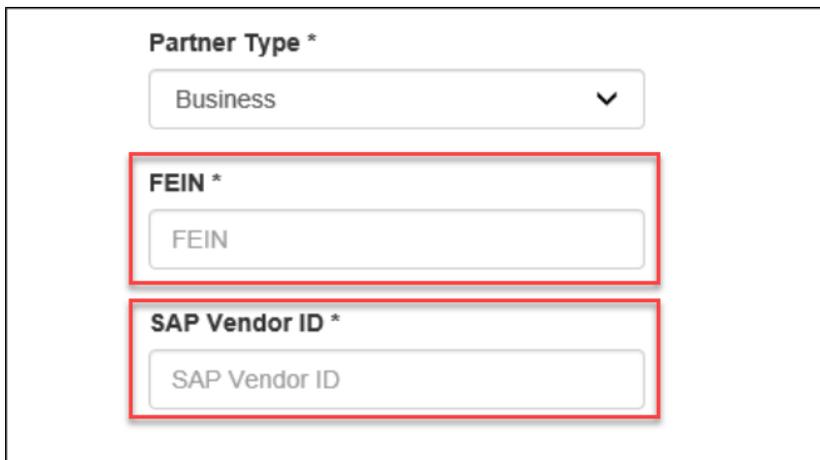
### 2.1.2 Creating a User Profile



The screenshot shows the 'Profile Information' form in the 'ESA-Partner Application'. The form has a dark blue header with the application name. On the left, there are navigation links: 'My Applications', 'My Profile', and 'My Requests'. The main form area contains several input fields: 'Email \*' (with the value 'c-sadimula@pa.gov'), 'First Name \*', 'Last Name \*', and 'Phone Number \*'. Below these is a 'Partner Type \*' dropdown menu, which is currently open and shows three options: 'Select Partner Type --', 'Business', and 'Individual'. The 'Business' option is highlighted. To the right of the dropdown is a blue 'Submit Request' button. Red boxes highlight the 'Partner Type' dropdown and the 'Submit Request' button.

- Enter your First and Last Name in the field.
- Enter the Phone Number in the field.
- Select **Business** in the Partner Type dropdown option.
- Enter your business's FEIN and SAP Vendor ID and click "Submit Request."

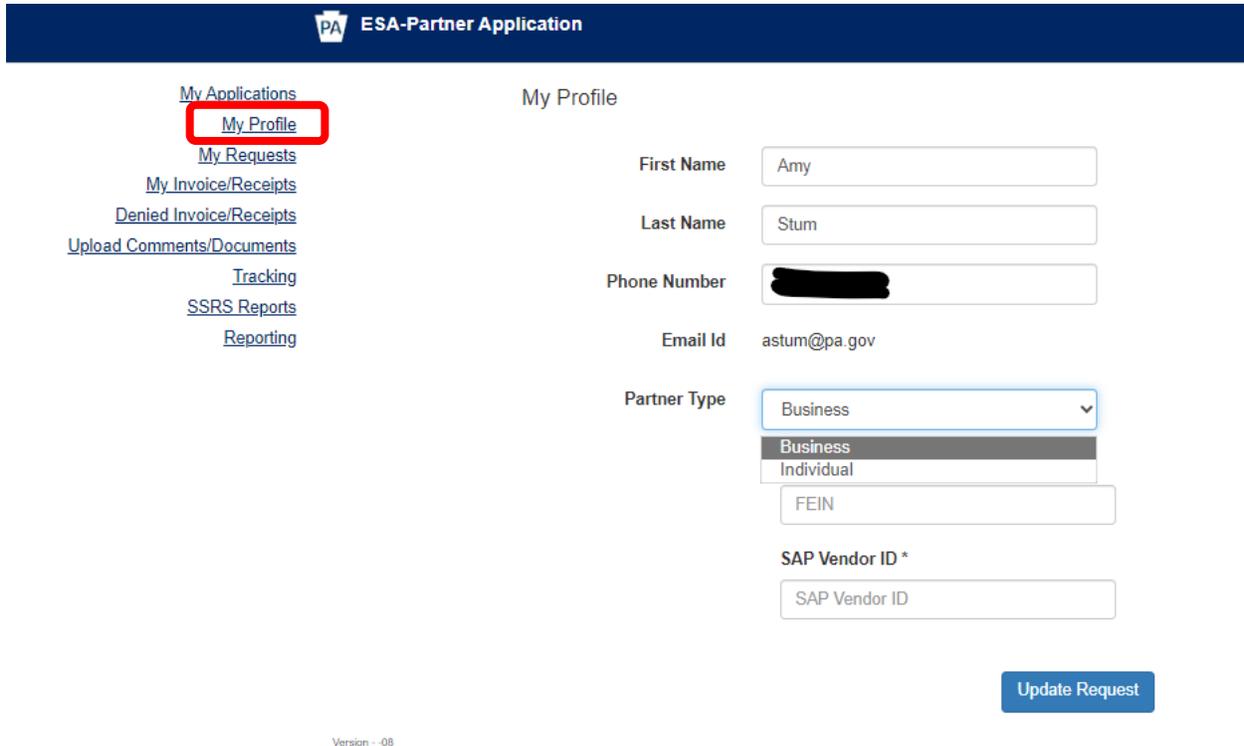
**Note: The user must select the "Business" partner type in the partner type dropdown option.**



This close-up screenshot shows the 'Partner Type \*' dropdown menu with 'Business' selected. Below the dropdown are two input fields: 'FEIN \*' and 'SAP Vendor ID \*'. Both of these input fields are highlighted with red boxes.

## 2.2 Add or Change a Profile

To add or change user information in the user profile, Click on “My Profile.” The partner type may be changed by the dropdown.



**PA ESA-Partner Application**

[My Applications](#)  
**[My Profile](#)**  
[My Requests](#)  
[My Invoice/Receipts](#)  
[Denied Invoice/Receipts](#)  
[Upload Comments/Documents](#)  
[Tracking](#)  
[SSRS Reports](#)  
[Reporting](#)

**My Profile**

First Name: Amy

Last Name: Stum

Phone Number: [REDACTED]

Email Id: astum@pa.gov

Partner Type: Business (dropdown menu showing Business and Individual options)

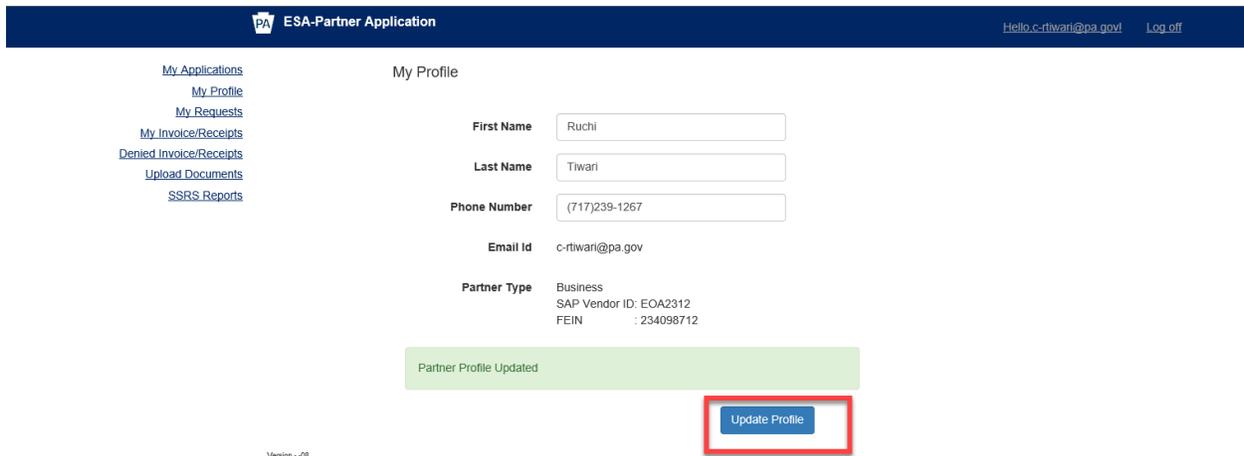
FEIN: [REDACTED]

SAP Vendor ID \*  
SAP Vendor ID: [REDACTED]

**Update Request**

Version - 08

After updating the profile information, click “Update Profile.” The system displays the message, **Partner Profile Updated**, at the bottom of the screen as shown below:



**PA ESA-Partner Application** Hello c.rtiwari@pa.gov! [Log off](#)

[My Applications](#)  
[My Profile](#)  
[My Requests](#)  
[My Invoice/Receipts](#)  
[Denied Invoice/Receipts](#)  
[Upload Documents](#)  
[SSRS Reports](#)

**My Profile**

First Name: Ruchi

Last Name: Tiwari

Phone Number: (717)239-1267

Email Id: c.rtiwari@pa.gov

Partner Type: Business  
SAP Vendor ID: EOA2312  
FEIN : 234098712

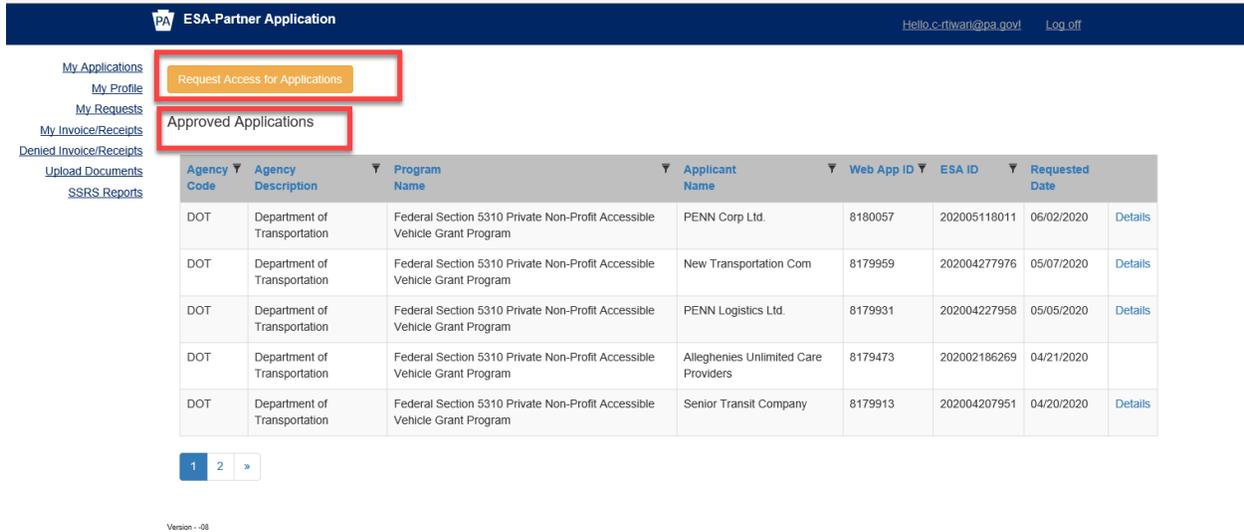
**Partner Profile Updated**

**Update Profile**

Version - 08

## 2.3 Request Access for Applications

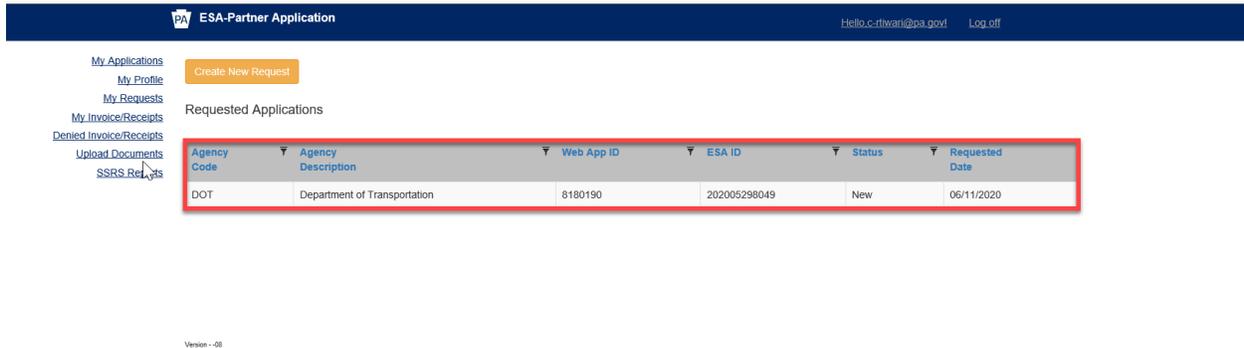
When the Partner completes their profile in the Partner Portal, the Approved Applications appear as shown below.



Version --08

Click Details in the rightmost column to view the Electronic Single Application (ESA) application details.

To request access to a new application, Partner clicks “Request Access for Application.” When the partner clicks “Request Access for Application “in the *Approved Applications* screen, the *Requested Applications* screen is displayed with all applications requested by the Partner.



Version --08

To request a new application, click Create New Request. Enter the required fields in the **Enter Request Details** screen as shown in the below screenshot:

ESA-Partner Application Hello.c.fiwani@pa.gov | Log off

[My Applications](#) | [My Profile](#) | [My Requests](#) | [My Invoice/Receipts](#) | [Denied Invoice/Receipts](#) | [Upload Documents](#) | [SSRS Reports](#)

[Create New Request](#)

Requested Applications

Agency Code	Agency Description	Web App ID	ESA ID	Status	Requested Date
DOT	Department of Transportation	8180179	202005288047	New	06/11/2020
DOT	Department of Transportation	8180190	202005298049	New	06/11/2020

### Enter Request Details

[Submit Request](#)

- Enter ESA ID. ESA ID is a 12-digit number that is auto-populated when the Web App ID is entered. This is the ID assigned when the application was submitted as shown below.

Home | Help | Save | Print | Contact Us | Logout

Program: Addenda | Certification

Agency: Pennsylvania Department of Transportation  
Applicant: Ruchi T  
Program: Pennsylvania Intermodal Cargo Growth Incentive Program (PICGIP) Web Application #: 8181522

**Application Certification**

Single Application ID #: 20201222223

The web application has been successfully submitted for processing.

I hereby certify that all information contained in the single application and supporting materials submitted via the Internet, Single Application # 20201222223 and its attachments are true and correct and accurately represent the status and economic condition of the Applicant, and I also certify that, if applying on behalf of the applicant, I have verified with an authorized representative of the Applicant that such information is true and correct and accurately represents the status and economic condition of the Applicant. I also understand that if I knowingly make a false statement or overstate a security to obtain a grant and/or loan from the Commonwealth of Pennsylvania, I may be subject to criminal prosecution in accordance with 18 Pa.C.S. § 4904 (relating to unsworn falsification to authorities) and 31 U.S.C. §§ 3729 and 3802 (relating to false claims and statements).

The signature page may also be printed now. You may also print submitted applications from the Home page. Click the link labeled "Submitted Applications" in the top toolbar.

[Print Signature Page only](#)  
[Print Entire Application with Signature Page](#)

The signature page along with any paper supporting documents can be mailed to the following address:

Pennsylvania Department of Transportation  
Commonwealth Keystone Building  
ATTN: Bureau of State, Freight, Ports, & Waterways, 7th floor, Multimodal Admin Services Office  
400 North Street  
Harrisburg, PA 17120

- Enter Web App ID. Web App ID is a 7-digit application ID number that is auto-populated when the ESA ID is entered. This is the ID assigned when the application was started as shown below.

Home | Help | Save | Print | Contact Us | Logout

Program: Requirements | Applicant | Project Site | Narrative | Budget | Addenda | Certification

Agency: Pennsylvania Department of Transportation  
Applicant: Ruchi T  
Program: Pennsylvania Intermodal Cargo Growth Incentive Program (PICGIP) Web Application #: 8181522

**Project Narrative**

Adequate answers to the Project Narrative questions below are required. Uploaded attachments or mailed documents are no longer permitted in this section of the application. If a more detailed narrative is required for the Program selected, instructions will either be provided in the Program Addenda section or the Program Guidelines.

**Project Description**

Description of Proposed Project. \*  
Character Count: 1012/2000 characters.

Application for participation in the Pennsylvania Intermodal Cargo Growth Incentive Program (PICGIP).

- For applications previously submitted, the IDs can be located under “Submitted Applications”



The screenshot shows the 'Submitted Applications' page with a search bar and a table of application records. The table has columns for ID, Single Application ID, Applicant/Company, Project Name, Program, Status, and Uid.

ID	Single Application ID	Applicant/Company	Project Name	Program	Status	Uid
8179450	202102192345	Amy's Company	Amy	DOT Federal Section 5310 Private Non-Profit Accessible Vehicle Grant Program	UNDER REVIEW	0179450

- Enter FEIN.
- The SAP Vendor ID is optional.

**Notes:**

- Fields marked with an asterisk (\*) are required. The Agency name will automatically populate in the Agency field on the right side of the screen.
- The FEIN and SAP vendor numbers combination should be based on what was submitted with the application. If the SAP vendor number was not included in the application, this field should be left blank when users are requesting access to the partner portal.

The user can enter either one of these – ESA ID or Web App ID. The number that is not manually entered will be auto-populated in the blank field.

- FEIN is a 9-digit number Federal Employer Identification Number
- SAP Vendor ID is a 6-digit number provided by the Commonwealth to receive payment.
- Click Submit Request. The new application appears at the top of the table with New Status. To create further requests, click Create New Request.



The screenshot shows the 'Requested Applications' page with a navigation menu on the left and a table of requested applications. The table has columns for Agency Code, Agency Description, Web App ID, ESA ID, Status, and Requested Date.

Agency Code	Agency Description	Web App ID	ESA ID	Status	Requested Date
DOT	Department of Transportation	8180179	202005288047	New	06/11/2020
DOT	Department of Transportation	8180190	202005298049	New	06/11/2020

## 2.4 Review the Submitted Applications

Click the My Applications link on the left side of the screen.

My Applications  
My Profile  
My Requests  
My Invoice/Receipts  
Denied Invoice/Receipts  
Upload Documents  
SSRS Reports

Request Access for Applications

Approved Applications

Agency Code	Agency Description	Program Name	Applicant Name	Web App ID	ESA ID	Requested Date	Details
DOT	Department of Transportation	Federal Section 5310 Private Non-Profit Accessible Vehicle Grant Program	PENN Logistics Ltd.	8179931	202004227958	05/05/2020	<a href="#">Details</a>
DOT	Department of Transportation	Federal Section 5310 Private Non-Profit Accessible Vehicle Grant Program	Alleghenies Unlimited Care Providers	8179473	202002186269	04/21/2020	<a href="#">Details</a>
DOT	Department of Transportation	Federal Section 5310 Private Non-Profit Accessible Vehicle Grant Program	Senior Transit Company	8179913	202004207951	04/20/2020	<a href="#">Details</a>
DOT	Department of Transportation	Federal Section 5310 Private Non-Profit Accessible Vehicle Grant Program	Alleghenies Unlimited Care Providers	8179910	202004177950	04/20/2020	<a href="#">Details</a>

Click on the details link at the rightmost column of the table to open the ESA application details. The Partner will be able to see the application details in ESA. The Partner will only be able to see information based on access provided by program users in the ESA module. The below section describes the ESA application details.

**Note:** The Details link takes control of ESA application details for applications with “Approved” and “Under Review” Status. The Detail link will not open the ESA for applications that are in “In Legal Process,” “Legal Process Complete,” “Void,” “Withdrawn,” “Rescind,” and “Denied” Status.

### 2.4.1 ESA Application Details

202005138019 - Single Application for Assistance - Internet Explorer

Single Application For Partners

**Alleghenies Unlimited Care Providers**  
Program: Federal Section 5310 Private Non-Profit Accessible Vehicle Grant Program Status: Approved  
Appl ID: 202005138019 SAP Contract #: C920001192 Approved Amt: \$40,000.00

Required fields

Approval  
Summary  
Comments

Application Details  
Profile  
Site Locations  
Budget  
Project Narrative

Funding

Miscellaneous

Document Management

PROFILE

Applicant/Sponsor

Name: Alleghenies Unlimited Care Providers CEO: Maria Nagy  
CEO Title: Transportation Manager Address: 119 Jani Dr  
City: Johnstown State: PA  
Zip: 15904-6953 FEIN: 000567912  
NAICS Code: 8134 Find Code SAP Vendor #: 000001

For-Profit Corporation Limited Liability Partnership Partnership  
Government Non-Profit Corporation Sole Proprietorship  
Limited Liability Corporation

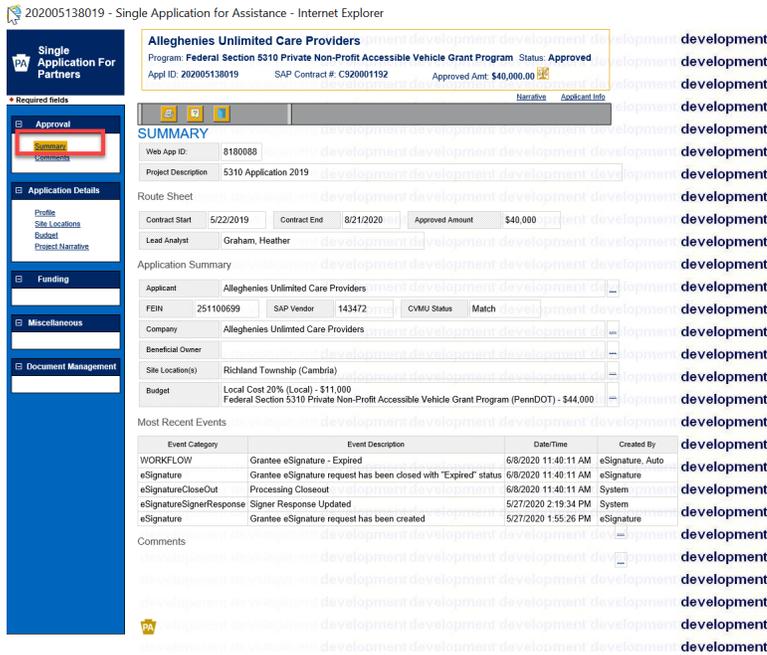
Incorporated in PA: No Registered to do Business in PA: No Charitable Organization: No

Contact Name: Maria Nagy Phone: (814) 867-5309  
Title: Transportation Manager PA Revenue Tax Box #:  
Internet Access: Yes

Business Specifics  
Current # of Full-Time Employees: Pennsylvania: 0 World Wide: 0  
Company Ownership: Minorly Owned Woman Owned:

- Summary Under the Approval Section provides the project description, Application Summary, and recent activities as shown in the below screenshot.

202005138019 - Single Application for Assistance - Internet Explorer



**Alleghenies Unlimited Care Providers**  
Program: Federal Section 5310 Private Non-Profit Accessible Vehicle Grant Program Status: Approved  
App ID: 202005138019 SAP Contract #: CS20001192 Approved Amt: \$40,000.00

**SUMMARY**  
Web App ID: 8180088  
Project Description: 5310 Application 2019

**Route Sheet**  
Contract Start: 5/22/2019 Contract End: 8/21/2020 Approved Amount: \$40,000  
Lead Analyst: Graham, Heather

**Application Summary**  
Applicant: Alleghenies Unlimited Care Providers  
FEIN: 251100699 SAP Vendor: 143472 CVMU Status: Match  
Company: Alleghenies Unlimited Care Providers  
Beneficial Owner: [Redacted]  
Site Location(s): Richland Township (Cambria)  
Budget: Local Cost 20% (Local) - \$11,000  
Federal Section 5310 Private Non-Profit Accessible Vehicle Grant Program (PennDOT) - \$44,000

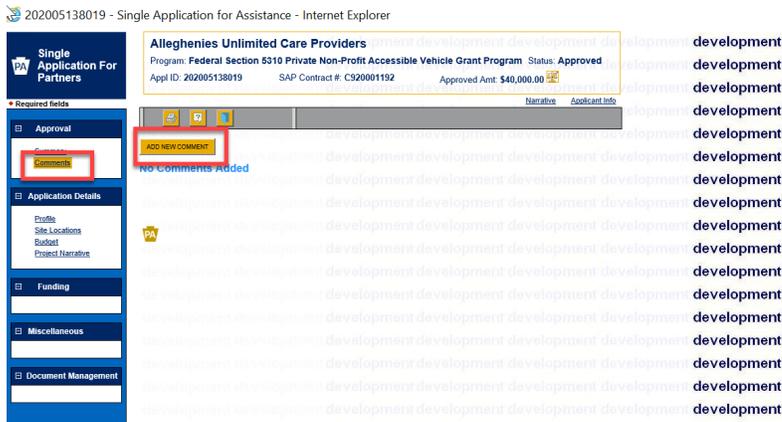
**Most Recent Events**

Event Category	Event Description	Date/Time	Created By
WORKFLOW	Grantee eSignature - Expired	6/8/2020 11:40:11 AM	eSignature, Auto
eSignature	Grantee eSignature request has been closed with "Expired" status	6/8/2020 11:40:11 AM	eSignature
eSignatureCloseOut	Processing Closeout	6/8/2020 11:40:11 AM	System
eSignatureSignerResponse	Signer Response Updated	5/27/2020 2:19:34 PM	System
eSignature	Grantee eSignature request has been created	5/27/2020 1:55:26 PM	eSignature

Comments

- Comments under the Approval Section display any entered comments by the program area.

202005138019 - Single Application for Assistance - Internet Explorer

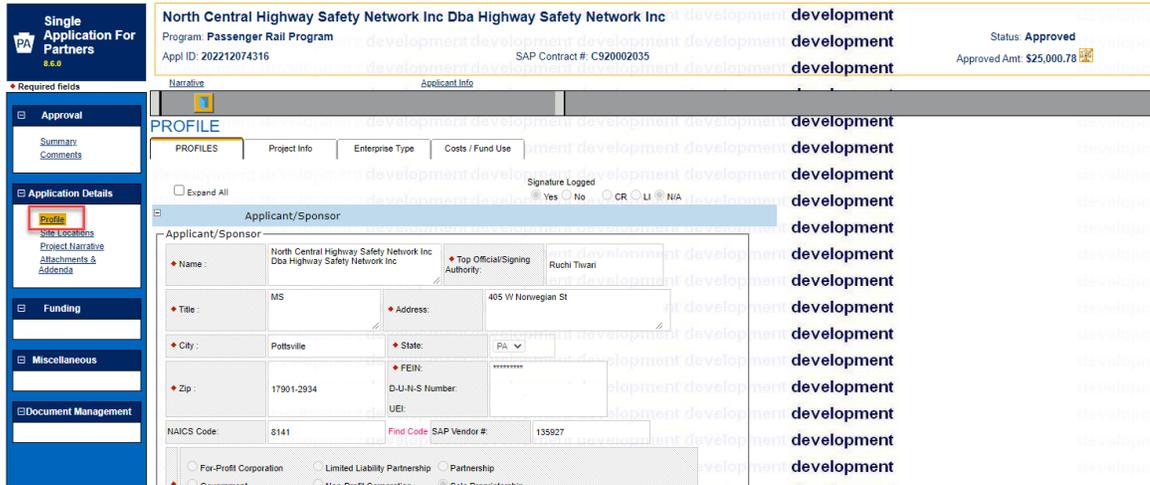


**Alleghenies Unlimited Care Providers**  
Program: Federal Section 5310 Private Non-Profit Accessible Vehicle Grant Program Status: Approved  
App ID: 202005138019 SAP Contract #: CS20001192 Approved Amt: \$40,000.00

**ADD NEW COMMENT**  
No Comments Added

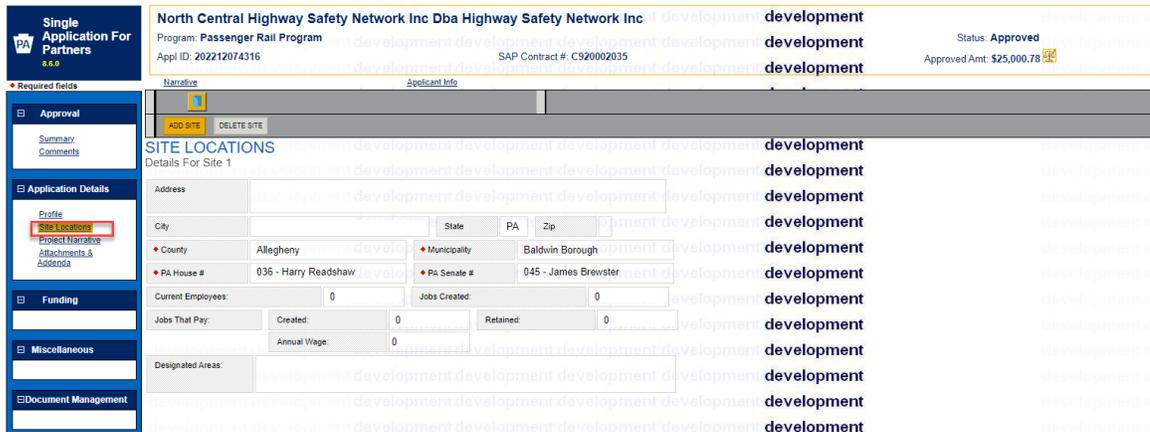
The application details section displays information submitted by the applicant on the Electronic Single Application Web (ESAW)

- Profile under the Application Details Section displays information about the Applicant’s profile and their organization.



The screenshot shows the 'PROFILE' section of the application details. The header includes the applicant name 'North Central Highway Safety Network Inc Db a Highway Safety Network Inc', program 'Passenger Rail Program', and application ID '202212074316'. The status is 'Approved' with an approved amount of '\$25,000.78'. The 'PROFILE' section includes tabs for 'PROFILES', 'Project Info', 'Enterprise Type', and 'Costs / Fund Use'. The 'Applicant/Sponsor' information is displayed, including the name 'North Central Highway Safety Network Inc', title 'MS', address '405 W Nonwegian St', city 'Pottsville', state 'PA', zip '17901-2934', and NAICS code '8141'. There are also fields for 'Top Official/Signing Authority' (Ruchi Tiwari), 'FEIN', 'D-U-I-S Number', 'UET', and 'SAP Vendor #' (135927).

- Site Locations under the Application Details Section display information about Project Site location (s).



The screenshot shows the 'SITE LOCATIONS' section of the application details. The header information is the same as the previous screenshot. The 'SITE LOCATIONS' section includes tabs for 'ADD SITE' and 'DELETE SITE'. The 'Details For Site 1' are displayed, including the address, city, state 'PA', and zip. Other fields include 'County' (Allegheny), 'Municipality' (Baldwin Borough), 'PA House #' (036 - Harry Readshaw), and 'PA Senate #' (045 - James Brewster). There are also fields for 'Current Employees', 'Jobs That Pay', 'Created', 'Annual Wage', 'Jobs Created', and 'Retained'.

- Budget (if applicable) under the Application Details Section displays Project Budget details.

**Note:** The user will only see the ‘budget tab’ if it was added by the program area to the user’s access.

202005138019 - Single Application for Assistance - Internet Explorer

**Single Application For Partners**

- Approval
- Application Details
- Funding
- Miscellaneous
- Document Management

**Alleghenies Unlimited Care Providers**

Program: **Federal Section 5310 Private Non-Profit Accessible Vehicle Grant Program** Status: **Approved**

App'l ID: 202005138019      SAP Contract #: C920001192      Approved Amt: \$40,000.00

Narrative      Applicant Info

---

**BUDGET**

	Federal Section 5310 Private Non-Profit Accessible Vehicle Grant Program	Local Cost 20% Local	Total
Local Match Anticipated - Collapse	\$44,000.00	\$11,000.00	
Bus 25 Foot	\$0.00	\$0.00	\$0.00
Bus 23 Foot	\$0.00	\$0.00	\$0.00
Bus 22 Foot	\$0.00	\$0.00	\$0.00
Bus 22 Foot (NB)	\$0.00	\$0.00	\$0.00
Accessible Vans	\$44,000.00	\$11,000.00	\$55,000.00
Ford Transit Van	\$0.00	\$0.00	\$0.00
<b>Total</b>	<b>\$44,000.00</b>	<b>\$11,000.00</b>	<b>\$55,000.00</b>
		<b>Budget Total:</b>	<b>\$55,000.00</b>

Basis of Cost / Use of Funds

Basis of Cost: Budget Justification

Use of Funds: Community Development/Revitalization, Economic Development/Revitalization

Budget Narrative

The purpose of the requested vehicle is to replace an existing handicap accessible minivan (#115) that was past its useful life at over four (4) years old and sitting at 106,359 miles. Recently this minivan was involved in a major accident which, due to its age and miles, deemed it totaled.

- Project Narrative under Application Details Section displays information about Project Narrative provided by Applicant.

**Single Application For Partners**

- Approval
- Application Details
- Funding

**North Central Highway Safety Network Inc Db a Highway Safety Network Inc**

Program: **Passenger Rail Program** Status: **Approved**

App'l ID: 202212074316      SAP Contract #: C920002035      Approved Amt: \$25,000.78

Narrative      Applicant Info

---

**PROJECT NARRATIVE**

Attachments related to the Project Narrative should be uploaded in the Attachments & Addenda section of the Application.

**Project Description**

Please provide a short description of your project and the purpose of using intercity passenger rail funding. Required Field  
Minimum 100 characters required.  
Character Count: 0/3000 characters.

**Project Location**

Please provide a short description of your project and the purpose of using intercity passenger rail funding. Required Field  
Minimum 100 characters required.  
Character Count: 0/3000 characters.

- Attachments & Addenda under the Application Details section provides the information and attachments requested by the program staff at the time of the application process.

**Single Application For Partners**

- Approval
- Application Details
- Funding
- Miscellaneous
- Document Management

**North Central Highway Safety Network Inc Db a Highway Safety Network Inc**

Program: **Passenger Rail Program** Status: **Approved**

App'l ID: 202212074316      SAP Contract #: C920002035      Approved Amt: \$25,000.78

Narrative      Applicant Info

---

**ATTACHMENTS**

Attach any documentation pertinent to the application in the section provided below. Documents may be up to 40 MB large.

Uploaded Documents

**PROGRAM REQUIREMENTS**

This program is intended to provide funding to support intercity passenger rail service in the Commonwealth of Pennsylvania. Are you applying for funding to support intercity passenger rail service?  
Yes

**PASSENGER RAIL PROGRAM ADDENDAV2**

**Organization Information**

1. Please briefly describe your organization and how it will support intercity passenger rail in Pennsylvania.  
Project Description Please provide a short description of your project and the purpose of using intercity passenger rail funding. Required Field Minimum 100 characters required. Character Count: 0/3000 characters.

2. Please briefly describe the intercity passenger rail service that this application will support.  
Project Description Please provide a short description of your project and the purpose of using intercity passenger rail funding. Required Field Minimum 100 characters required. Character Count: 0/3000 characters.

**Budget Information**

**Note:** The multi-tab addenda feature is enabled for a few programs. Below is an example:

- The RouteSheet (if access is provided by the program area) link under the Funding section displays the “Project(s)” and “Activity(s)” tabs OR the “Activity(s)” tab. To review the “project and activity” or click “RouteSheet.” Below are two sample examples.

**Note:** The project and activity tabs do not apply to all PennDOT programs. Ignore this step if you don’t see them in your application.

View	Workflow	Active	Adjustment	Requested Amount	Recommended Amount	Approved Amount	Start Date	End Date	Status
			Original Contract	\$15,429.00					Grantee Review
Page Total				\$15,429.00	\$0.00	\$0.00			
Grand Total				\$15,429.00	\$0.00	\$0.00			

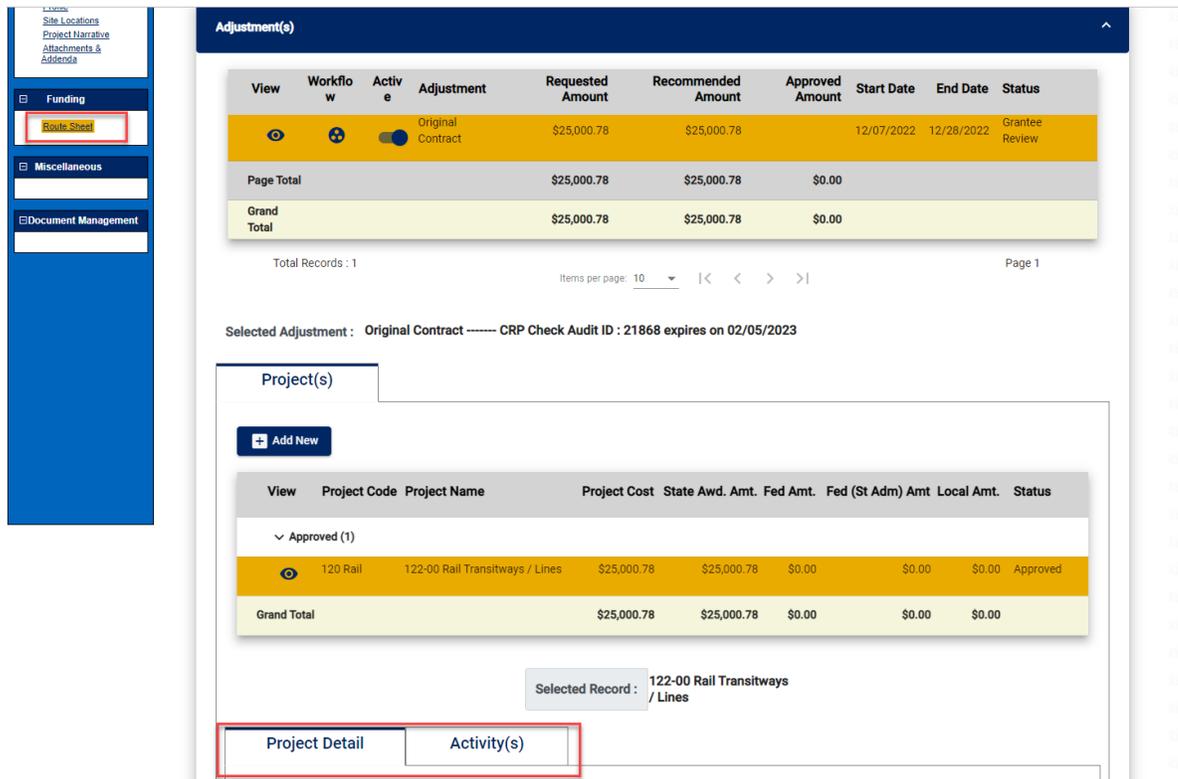
Total Records : 1      Items per page: 10      Page 1

Selected Adjustment : Original Contract

Activity(s)

View	Activity Name	Position	Hours	Name
	Salaries		0.00	
	Salaries	Assistant Coordinator	131.00	Ruchi Tiwari
	Travel			
	Contractual Services			
	Equipment			
	Goods and Services			
	Indirect Cost			

Budget Summary	Year 1	Year 2	Year 3	Grand Total
1. Salaries	\$1,288.00	\$3,015.00	\$2,670.00	\$6,973.00
2. Fringe Benefits	\$3,000.00	\$2,000.00	\$1,000.00	\$6,000.00
3. Travel	\$1,000.00	\$200.00	\$0.00	\$1,200.00
4. Contractual Services	\$0.00	\$0.00	\$0.00	\$0.00
5. Equipment	\$1,000.00	\$200.00	\$56.00	\$1,256.00
6. Goods and Services	\$0.00	\$0.00	\$0.00	\$0.00
7. Indirect Cost	\$0.00	\$0.00	\$0.00	\$0.00



**Adjustment(s)**

View	Workflow	Active	Adjustment	Requested Amount	Recommended Amount	Approved Amount	Start Date	End Date	Status
			Original Contract	\$25,000.78	\$25,000.78		12/07/2022	12/28/2022	Grantee Review
<b>Page Total</b>				\$25,000.78	\$25,000.78	\$0.00			
<b>Grand Total</b>				\$25,000.78	\$25,000.78	\$0.00			

Total Records : 1      Items per page: 10      Page 1

Selected Adjustment : Original Contract ----- CRP Check Audit ID : 21868 expires on 02/05/2023

**Project(s)**

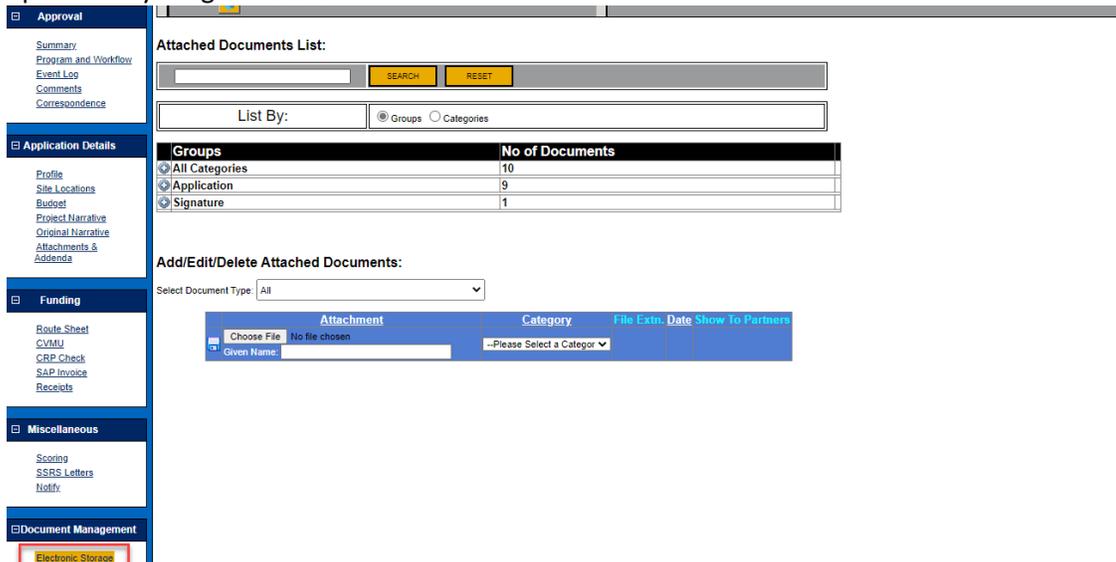
[Add New](#)

View	Project Code	Project Name	Project Cost	State Awd. Amt.	Fed Amt.	Fed (St Adm) Amt	Local Amt.	Status
Approved (1)								
	120 Rail	122-00 Rail Transitways / Lines	\$25,000.78	\$25,000.78	\$0.00	\$0.00	\$0.00	Approved
<b>Grand Total</b>			\$25,000.78	\$25,000.78	\$0.00	\$0.00	\$0.00	

Selected Record : 122-00 Rail Transitways / Lines

[Project Detail](#)      [Activity\(s\)](#)

- Electronic Storage (if access is provided by the program area) link under the Document Management section displays documents submitted by Partner via Partner Portal or documents uploaded by Program users.



**Approval**

Summary  
Program and Workflow  
Event Log  
Comments  
Correspondence

**Application Details**

Profile  
Site Locations  
Budget  
Project Narrative  
Original Narrative  
Attachments & Addenda

**Funding**

Route Sheet  
CVMU  
CRP Check  
SAP Invoice  
Receipts

**Miscellaneous**

Scoring  
SSRS Letters  
Utility

**Document Management**

[Electronic Storage](#)

**Attached Documents List:**

SEARCH      RESET

List By:  Groups  Categories

Groups	No of Documents
<input checked="" type="radio"/> All Categories	10
<input checked="" type="radio"/> Application	9
<input checked="" type="radio"/> Signature	1

**Add/Edit/Delete Attached Documents:**

Select Document Type: All

Attachment	Category	File Extn	Date	Show To Partners
Choose File      No file chosen Given Name: _____	--Please Select a Categor--			



Partner Portal  
Application Update:

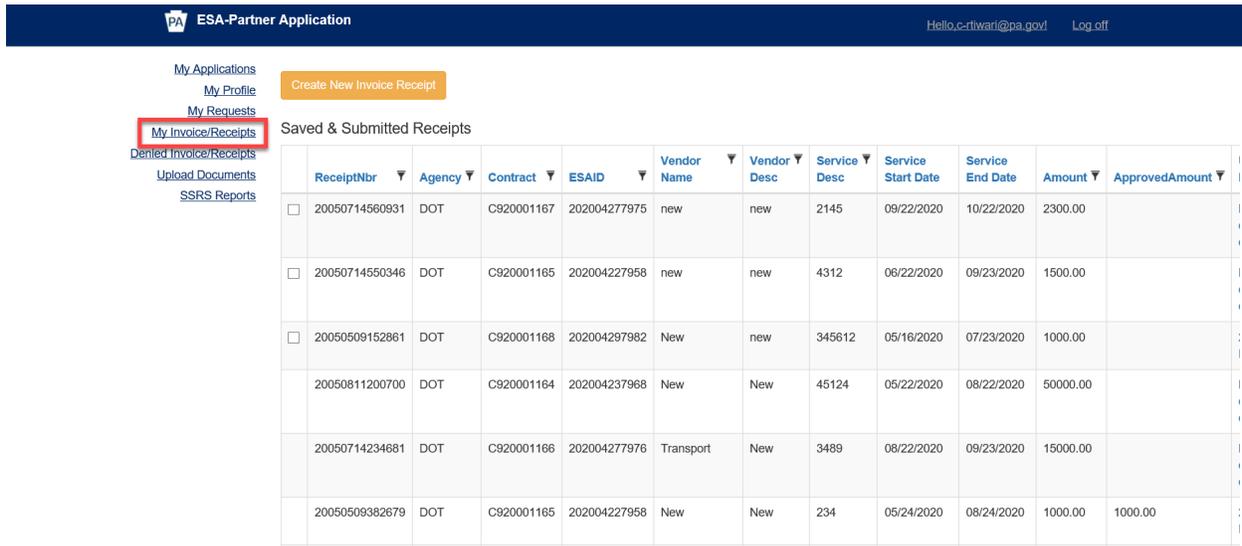
Please refer to the [Partner Portal Application Update](#) to review the steps for updating the submitted application when it is reworked from the program area.

## 2.5 Invoices

The grantee can submit a receipt for an executed contract using the Partner Portal. For the grantee to access the Partner Portal, the Program area needs to assign the application to the grantee, for which the legal process is completed and the executed contract is received. One application can have multiple invoice receipts associated with it.

### 2.5.1 My Invoice/Receipts

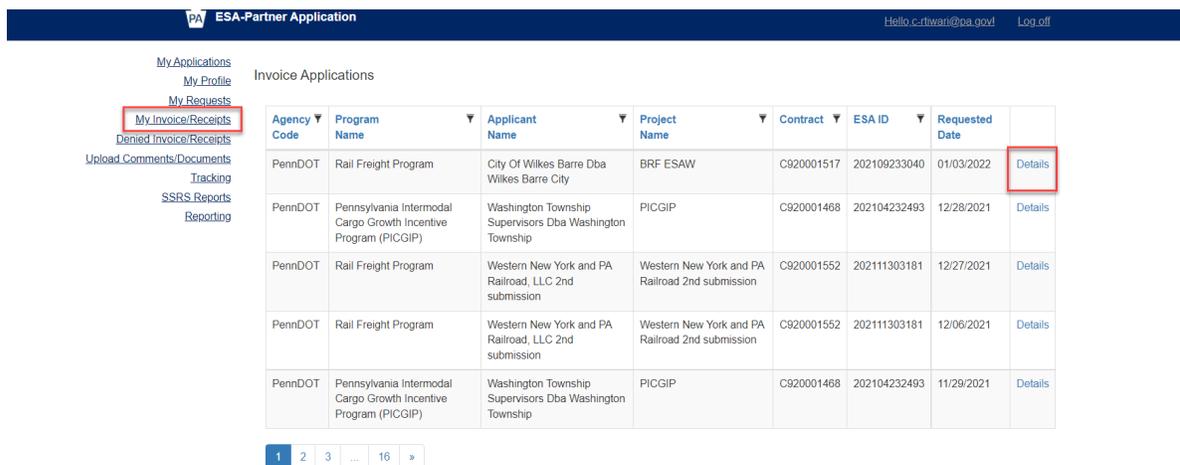
My Invoice/Receipts grid shows the invoice/receipts created by the Grantee logged into the Partner Portal.



ReceiptNbr	Agency	Contract	ESAID	Vendor Name	Vendor Desc	Service Desc	Service Start Date	Service End Date	Amount	ApprovedAmount
20050714560931	DOT	C920001167	202004277975	new	new	2145	09/22/2020	10/22/2020	2300.00	
20050714550346	DOT	C920001165	202004227958	new	new	4312	06/22/2020	09/23/2020	1500.00	
20050509152861	DOT	C920001168	202004297982	New	new	345612	05/16/2020	07/23/2020	1000.00	
20050811200700	DOT	C920001164	202004237968	New	New	45124	05/22/2020	08/22/2020	50000.00	
20050714234681	DOT	C920001166	202004277976	Transport	New	3489	08/22/2020	09/23/2020	15000.00	
20050509382679	DOT	C920001165	202004227958	New	New	234	05/24/2020	08/24/2020	1000.00	1000.00

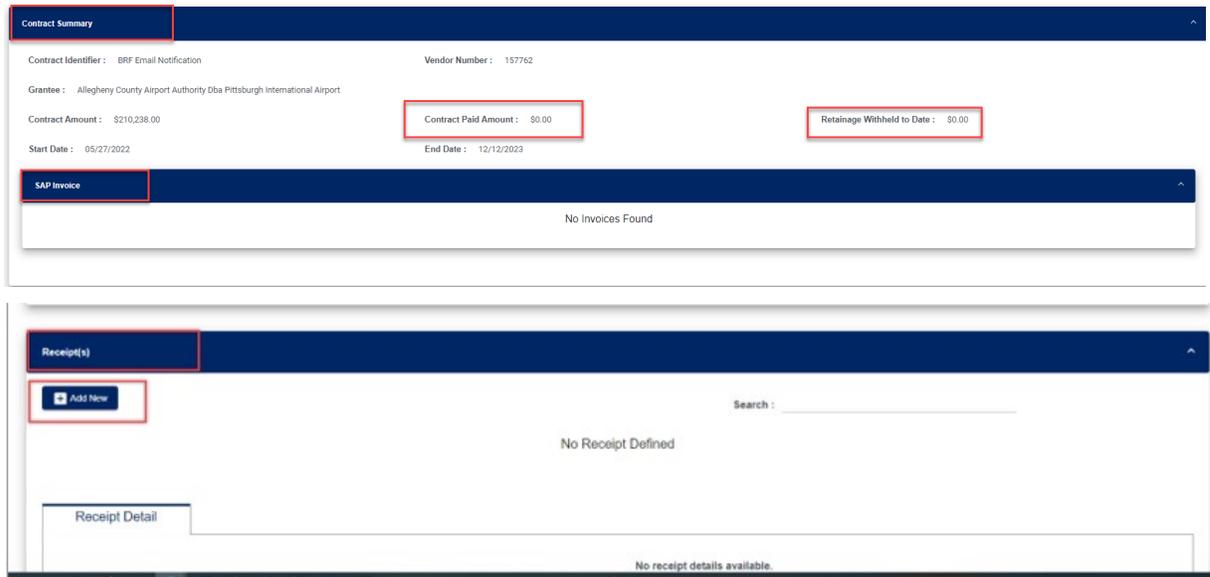
### 2.5.2 Receipt Submission

1. Click the “My Invoice/Receipts” link that shows the invoice/receipts created by the Grantee via the Partner Portal. Click the “Details” link as shown below.



Agency Code	Program Name	Applicant Name	Project Name	Contract	ESA ID	Requested Date	Details
PennDOT	Rail Freight Program	City Of Wilkes Barre Dba Wilkes Barre City	BRF ESAW	C920001517	202109233040	01/03/2022	Details
PennDOT	Pennsylvania Intermodal Cargo Growth Incentive Program (PICGIP)	Washington Township Supervisors Dba Washington Township	PICGIP	C920001468	202104232493	12/28/2021	Details
PennDOT	Rail Freight Program	Western New York and PA Railroad, LLC 2nd submission	Western New York and PA Railroad 2nd submission	C920001552	202111303181	12/27/2021	Details
PennDOT	Rail Freight Program	Western New York and PA Railroad, LLC 2nd submission	Western New York and PA Railroad 2nd submission	C920001552	202111303181	12/06/2021	Details
PennDOT	Pennsylvania Intermodal Cargo Growth Incentive Program (PICGIP)	Washington Township Supervisors Dba Washington Township	PICGIP	C920001468	202104232493	11/29/2021	Details

2. The system will display the screen as shown below. Expand the “Contract Summary,” “SAP Invoice,” and “Receipt” tabs to review the information.



**Contract Summary**

Contract Identifier : BRF Email Notification      Vendor Number : 157762

Grantee : Allegheny County Airport Authority Dba Pittsburgh International Airport

Contract Amount : \$210,238.00      Contract Paid Amount : \$0.00      Retainage Withheld to Date : \$0.00

Start Date : 05/27/2022      End Date : 12/12/2023

**SAP Invoice**

No Invoices Found

---

**Receipt(s)**

**Add New**      Search : \_\_\_\_\_

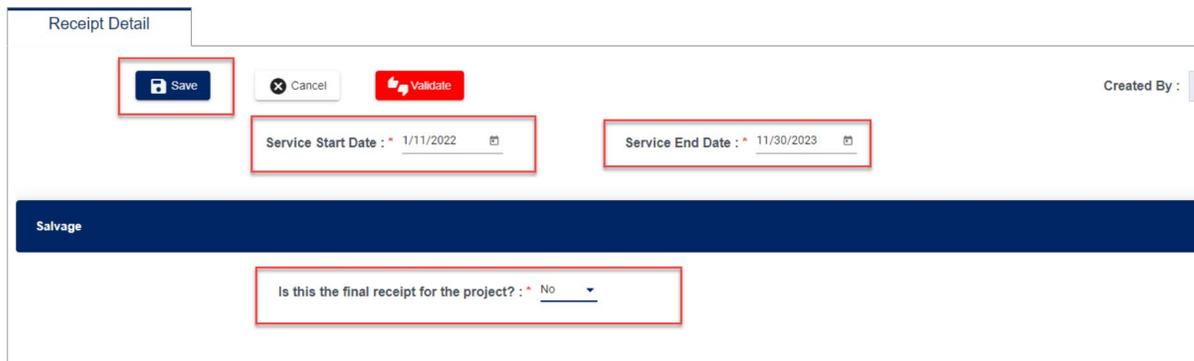
No Receipt Defined

Receipt Detail

No receipt details available.

**Notes:**

- The “Contract Summary” and “SAP Invoice” tabs also list a few program-specific fields (for example, "Retainage Withheld to Date," "Retainage Held, etc.).
  - The field in the “SAP Invoice Section” will display all in-progress and stopped invoices (amounts will be \$0 if the invoice is stopped).
3. To initiate a new receipt, the user clicks the “Add New” under the “Receipt(s)” tab.
  4. Enter all required fields (indicated with red \*) such as “Service Start Date” and “Service End Date.”
  5. Click Save.



Receipt Detail

**Save**      **Cancel**      **Validate**      Created By : \_\_\_\_\_

Service Start Date : \* 1/11/2022      Service End Date : \* 11/30/2023

**Salvage**

Is this the final receipt for the project? : \* No

**Notes:**

- The “Receipt Detail” tab also lists a few program-specific fields (for example, Salvage, etc.).
- The receipt status will remain “Incomplete” and won’t allow the user to submit the receipt until the user provides all required information.
- Click the eye icon to preview the respective receipt in case of multiple receipts.
- User can create multiple receipts using the “Add New” option as shown below.
- Click “Validate” to verify any error message(s) in case all required information is not entered.

Select	View	Receipt No	Invoice Number	Receipt Amount	Approved Amount	Retainage Amount	Payment Amount
<div style="display: flex; justify-content: space-between;"> <span>&gt; Approved (1)</span> <span>▼ Incomplete (1)</span> </div>							
<input type="checkbox"/>		C920001783 - 297250002		\$0.00	\$0.00	\$0.00	\$0.00
Page Total				\$1,200.00	\$2,000.00	\$200.00	\$1,800.00
Grand Total				\$1,200.00	\$2,000.00	\$200.00	\$1,800.00

Total Records : 2    Items per page : 3    Page 1

Selected Receipt : C920001783 - 297250002      Selected Receipt Status : Incomplete

- Click Edit to enter the amount, upload document (s), check the certification, and enter any comments (optional).

Selected Receipt : C920001783 - 297250002      Selected Receipt Status : Incomplete

**Receipt Detail**

Created By : c-rtiwari@pa.gov

Service Start Date : 05/31/2022

Service End Date : 12/29/2023

**Receipt Type**

Is this the final receipt ? : \* No

- The “Claimed Amount(s)” tab varies by program, an example is shown below.

**Claimed Amount(s)**

Vendor Details :

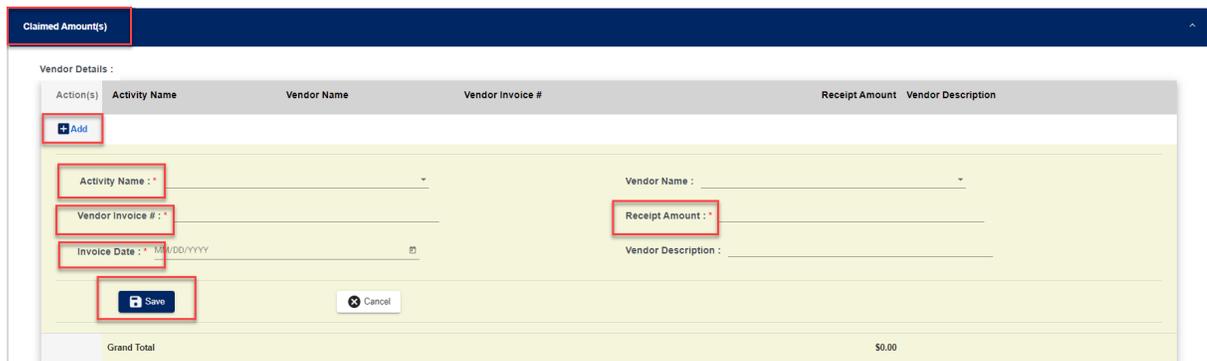
View	Vendor Name	Vendor Invoice #	Invoice Date	Project Invoiced Amt	Is Partial Invoice ?	Invoice Amt
<input type="checkbox"/>	PR Vendor	Test #1	06/09/2022	\$0.00	<input type="checkbox"/>	\$34,000.00
Grand Total				\$0.00		\$34,000.00

Activity Details :

View	Activity Line Item	Requested Amt.	Payment Amt.	Funding	State Invoiced	Funding	Fed Invoiced	Local Invoiced
▼ 11.32.05 Ferry Terminal (1)								
<input type="checkbox"/>	11.32.05 Ferry Terminal	\$340,000.00	\$0.00	1513	\$0.00	NVS	\$0.00	\$0.00
▼ 11.33.05 Ferry Terminal (1)								
<input type="checkbox"/>	11.33.05 Ferry Terminal	\$0.00	\$0.00	1513	\$0.00	NVS	\$0.00	\$0.00
Grand Total		\$340,000.00	\$0.00		\$0.00		\$0.00	\$0.00

\*\* Activity Requested amount does not match Vendor Invoice amount.

- Click “Add” to enter the required information (indicated with red \*) in the “Claimed Amount(s)” tab.
  - Choose the Activity Name and the appropriate vendor based on the approved bid(s). Enter other required information in the Claimed Amount tab.

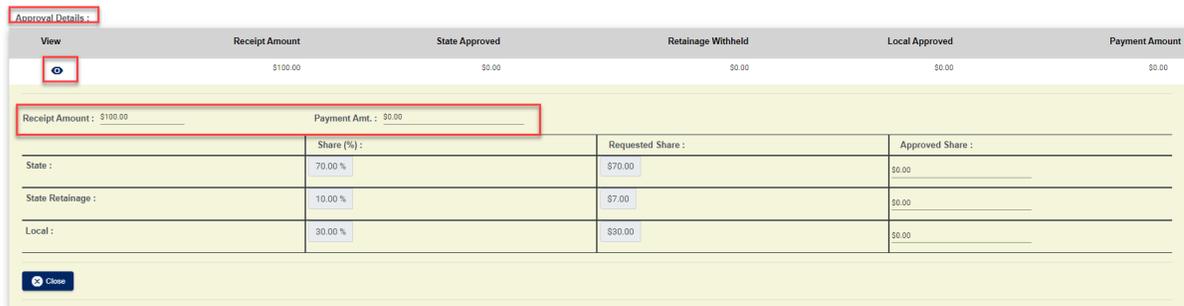


**Note:** This tab has program-specific validations.

- The “Approval Details” section automatically populates the “Receipt Amount” based on the entered information in the “Claimed Amount(s)” tab. Click the eye icon to view the information.

**Notes:**

- This section lists a few program-specific fields and validations.
- Grantees will have “Read-Only” access to the “Approval Details” section, and they won’t be able to edit it. Amounts are estimates only until PennDOT has reviewed and approved the request.

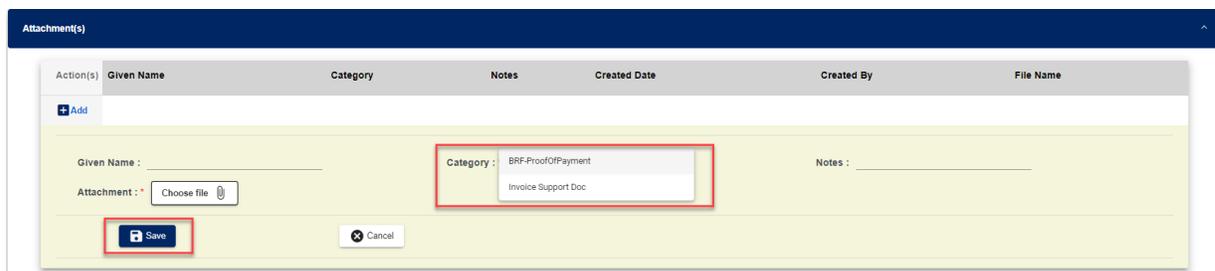


View	Receipt Amount	State Approved	Retainage Withheld	Local Approved	Payment Amount
	\$100.00	\$0.00	\$0.00	\$0.00	\$0.00

Receipt Amount : \$100.00		Payment Amt. : \$0.00	
	Share (%) :	Requested Share :	Approved Share :
State :	70.00 %	\$70.00	\$0.00
State Retainage :	10.00 %	\$7.00	\$0.00
Local :	30.00 %	\$30.00	\$0.00

- Expand “Attachment(s)” tab. Click “Add” to enter the required information (indicated with red \*) in the “Attachment(s)” tab.



- Choose the category, attach the document, and click “Save.”

**Notes:**

- The “Given Name” and “Notes” fields are optional.
- Multiple documents can be uploaded in the Attachment using the “Add Record” option.

- The size limit per upload is 30 MB.
11. Expand “Comment(s) tab. Click “Add Record” to enter the comment in the “Comment(s)” tab. Enter a comment and click “Save.”

**Notes:**

- The Comment tab is optional unless otherwise noted; it’s required in the case of a partial invoice.
- All grantee comments will remain public.

The screenshot shows the 'Add Record' form. At the top, it says 'Add Record' with a plus icon. Below that, there's a header with 'Incorrect Receipt Amount ...', the date '12/29/2021 04:06 PM', and the user 'Tiwari, Ruchi'. The main form area has a section for 'Is Public? :'. A red box highlights the 'Is Public?' checkbox, which is checked. To the right of this is a 'Comment:' field with a rich text editor containing the text 'Incorrect Receipt Amount.'. At the bottom of the form, there are 'Save' and 'Cancel' buttons.

12. Expand “Certification(s)” tab. Click the checkbox in the “Certification(s)” tab.

The screenshot shows the 'Certification(s)' tab. A red box highlights a checkbox that is checked. Below the checkbox is a small text block: 'certify that the invoices being submitted are eligible expenses and meet all of the requirements as indicated in the grant agreement. Please note, any invoices submitted for payment are subject to auditing and verification procedures.'

13. If all required information is provided, the system will change the receipt status from “Incomplete” to “Ready” as shown below.

**Note:** The system will only display the “Submit” option for receipts with “Ready” status. The receipt has to be selected (checkbox) as well for the ‘Submit’ option to appear

The screenshot shows the 'Receipt(s)' table. The table has columns: Select, View, Receipt No, Invoice Number, Receipt Amount, Approved Amount, Retainage Amount, and Payment Amount. The 'Ready (1)' status is highlighted with a red box. Below the table, there is a 'Selected Receipt' field with the value 'CS20001783 - 297250002' and a 'Selected Receipt Status' field with the value 'Ready'.

Select	View	Receipt No	Invoice Number	Receipt Amount	Approved Amount	Retainage Amount	Payment Amount
Approved (1)							
<input checked="" type="checkbox"/>							
<input type="checkbox"/>		CS20001783 - 297250002		\$100.00	\$0.00	\$0.00	\$0.00
Page Total				\$1,300.00	\$2,000.00	\$200.00	\$1,800.00
Grand Total				\$1,300.00	\$2,000.00	\$200.00	\$1,800.00

Total Records : 2 Items per page : 5 Page 1

Selected Receipt : CS20001783 - 297250002 Selected Receipt Status : Ready

14. Click “Add New” to submit multiple receipts.

The screenshot shows the 'Receipt(s)' tab. A red box highlights the 'Add New' button.

15. Select multiple receipts with “Ready” status and click “Submit” as shown below.

Select	View	Receipt No	Invoice Number	Receipt Amount	Approved Amount	Retainage Amount	Payment Amount
<div style="display: flex; justify-content: space-between;"> <span>&gt; Approved (1)</span> <span>&lt; &gt;</span> </div>							
<div style="display: flex; justify-content: space-between;"> <span>&lt; &gt;</span> <span>▼ Ready (2) <input checked="" type="checkbox"/></span> </div>							
<input checked="" type="checkbox"/>		C920001783 - 297250003		\$100.00	\$0.00	\$0.00	\$0.00
<input checked="" type="checkbox"/>		C920001783 - 297250002		\$100.00	\$0.00	\$0.00	\$0.00
Page Total				\$1,400.00	\$2,000.00	\$200.00	\$1,800.00
Grand Total				\$1,400.00	\$2,000.00	\$200.00	\$1,800.00

Total Records : 3 Items per page : 5 | < > | Page 1

Selected Receipt : C920001783 - 297250003 Selected Receipt Status : Ready

16. The receipt status will be changed to “Submitted” as shown below. The user won’t be able to make any changes to submitted receipts.

Select	View	Receipt No	Invoice Number	Receipt Amount	Approved Amount	Retainage Amount	Payment Amount
<div style="display: flex; justify-content: space-between;"> <span>&gt; Approved (1)</span> <span>&lt; &gt;</span> </div>							
<div style="display: flex; justify-content: space-between;"> <span>&gt; Denied (1)</span> <span>&lt; &gt;</span> </div>							
<div style="display: flex; justify-content: space-between;"> <span>&lt; &gt;</span> <span>▼ Submitted (1)</span> </div>							
		C920001783 - 297250003		\$100.00	\$0.00	\$0.00	\$0.00
Page Total				\$1,400.00	\$2,000.00	\$200.00	\$1,800.00
Grand Total				\$1,400.00	\$2,000.00	\$200.00	\$1,800.00

Total Records : 3 Items per page : 5 | < > | Page 1

C920001783 - 297250003 Selected Receipt Status : Submitted

17. The receipt status can be tracked via the partner portal as shown below.

Select	View	Receipt No	Invoice Number	Receipt Amount	Approved Amount	Retainage Amount	Payment Amount
<div style="display: flex; justify-content: space-between;"> <span>▼ Approved (1)</span> <span>&lt; &gt;</span> </div>							
		C920001783 - 297250001		\$1,200.00	\$2,000.00	\$200.00	\$1,800.00
<div style="display: flex; justify-content: space-between;"> <span>&gt; Denied (1)</span> <span>&lt; &gt;</span> </div>							
<div style="display: flex; justify-content: space-between;"> <span>&gt; Submitted (1)</span> <span>&lt; &gt;</span> </div>							
Page Total				\$1,400.00	\$2,000.00	\$200.00	\$1,800.00
Grand Total				\$1,400.00	\$2,000.00	\$200.00	\$1,800.00

Total Records : 3 Items per page : 5 | < > | Page 1

C920001783 - 297250001 Selected Receipt Status : Approved

### 2.5.3 Edit and Delete Receipt

1. To edit/delete a receipt, click the "Details" link for the assigned contract ID as shown below.

My Applications  
My Profile  
My Requests  
My Invoice/Receipts  
Denied Invoice/Receipts  
Comments/Documents  
Tracking  
SSRS Reports  
Reporting

Invoice Applications

Agency Code	Program Name	Applicant Name	Project Name	Contract	ESA ID	Requested Date	
PennDOT	Multimodal Transportation Fund (MTF) Program	Reading Regional Airport Authority	MTF invoice test - Stum	C920001755	202205043644	07/06/2022	Details
PennDOT	Multimodal Transportation Fund (MTF) Program	Reading Regional Airport Authority	Test MTF - Stum	C920001763	202205053650	07/06/2022	Details
PennDOT	Passenger Rail Program	Allegheny County Airport Authority Dba Pittsburgh International Airport	Ruchi PR Capital Screenshots	C920001806	202206093754	06/09/2022	Details
PennDOT	Passenger Rail Program	Allegheny County Airport Authority Dba Pittsburgh International Airport	Ruchi PR Operating 2	C920001794	202206023738	06/09/2022	Details
PennDOT	Passenger Rail Program	Reading Regional Airport Authority	Test - PROGRAM AREA TESTING	C920001764	202205053652	05/31/2022	Details

« 1 2 3 4 ... 22 »

2. Click “Edit” to modify the receipt details.

Select	View	Receipt No	Invoice Number	Project Name	Receipt Amount	State Invoiced	Fed Invoiced	Fed (St Adm) Invd	Local Invoiced	Approved Amount	Advance Payment	Payment Amount
Incomplete (1)												
<input checked="" type="checkbox"/>		C920001806 - 297338003		113-00 Bus Stations/ Stops / Terminals	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Invoice Created (1)												
Ready (1) <input checked="" type="checkbox"/>												
Grand Total					\$689,000.00	\$45,000.00	\$0.00	\$304,000.00	\$0.00	\$349,000.00	\$5,400.00	\$343,600.00

Selected Receipt : C920001806 - 297338003      Selected Receipt Status : Incomplete

Receipt Detail

Edit Created By : c-rtiwari@pa.gov

Service Start Date :  08/05/2022

Service End Date :  06/13/2023

3. After making the required changes, click “Save” as shown below.

Selected Receipt : C920001806 - 297338003      Selected Receipt Status : Incomplete

Receipt Detail

Save  Cancel  Validate  Delete Created By : c-rtiwari@pa.gov

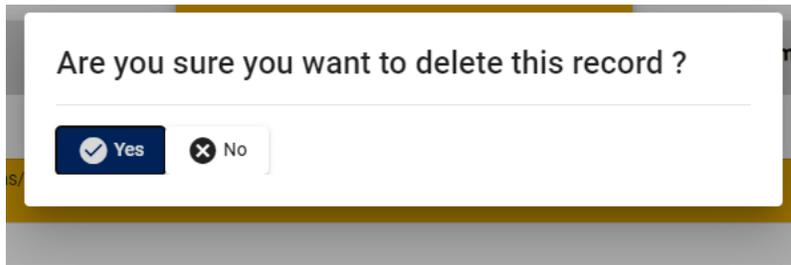
Service Start Date :  08/05/2022

Service End Date :  06/13/2023

Receipt Type

4. To delete a receipt, click “Delete” as shown below.

5. The system displays the message below. Click “Yes” to delete the receipt.



#### 2.5.4 Denied Partner Receipt

1. An email notification will be sent to the grantee when the program area denies a receipt submission. Below is a sample text for the email notification.

**Subject:** PennDOT, PROGRAM NAME Receipt C92000XXXX - XXXXX Returned.

**Program Name:**

**ESAID:**

**Contract:**

**Project Name:**

**Receipt Number:**

The above-mentioned receipt has been returned. Please click on the following link to access the Partner Portal: <https://apps.dced.pa.gov/esa-partner>

Under My Invoice/Receipts, click the "Details" link for the above-listed ESAID and view the comment(s) section for further information for receipts in "Denied" or "Rework" status. Receipts in "Rework" status may be revised and resubmitted. Receipts in "Denied" status cannot be revised.

Below is a sample example of the email notification.

**Subject:** PennDOT, BOA Federal Aviation Block Grant (ABG) eGrants Receipt C920001968 - 298049013 Returned.

**Program Name:** BOA Federal Aviation Block Grant (ABG)

**ESAID:** 202210184134

**Contract:** C920001968

**Project Name:** Runway Rehab 01-19

**Receipt Number:** C920001968 - 298049013

Above mentioned receipt has been returned.

Please click on the following link to access the Partner Portal: <https://apps.uat.dced.pa.gov/esa-partner>

Under My Invoice/Receipts, click the "Details" link for the above-listed ESAID and view the comment(s) section for further information for receipts in "Denied" or "Rework" status.

Receipts in "Rework" status may be revised and resubmitted. Receipts in "Denied" status cannot be revised.

**Note:** The email notification will be sent to the application contact email and the email address for the Keystone login user who submitted the receipt.

2. Click the "Details" link for the assigned contract id as shown below.

My Applications  
My Profile  
My Requests  
My Invoice/Receipts  
Denied Invoice/Receipts  
Comments/Documents  
Tracking  
SSRS Reports  
Reporting

Invoice Applications

Agency Code	Program Name	Applicant Name	Project Name	Contract	ESA ID	Requested Date	
PennDOT	Multimodal Transportation Fund (MTF) Program	Reading Regional Airport Authority	MTF invoice test - Stum	C920001755	202205043644	07/06/2022	<a href="#">Details</a>
PennDOT	Multimodal Transportation Fund (MTF) Program	Reading Regional Airport Authority	Test MTF - Stum	C920001763	202205053650	07/06/2022	<a href="#">Details</a>
PennDOT	Passenger Rail Program	Allegheny County Airport Authority Dba Pittsburgh International Airport	Ruchi PR Capital Screenshots	C920001806	202206093754	06/09/2022	<a href="#">Details</a>
PennDOT	Passenger Rail Program	Allegheny County Airport Authority Dba Pittsburgh International Airport	Ruchi PR Operating 2	C920001794	202206023738	06/09/2022	<a href="#">Details</a>
PennDOT	Passenger Rail Program	Reading Regional Airport Authority	Test - PROGRAM AREA TESTING	C920001764	202205053652	05/31/2022	<a href="#">Details</a>

< 1 2 3 4 ... 22 >

3. The Denied Receipts can be seen in the Partner Portal with the “Denied” status.

Select	View	Receipt No	Invoice Number	Receipt Amount	Approved Amount	Retainage Amount	Payment Amount
<div style="border: 1px solid red; padding: 2px;"> <span style="font-size: 0.8em;">▼ Denied (1)</span> </div>							
<input type="checkbox"/>	<input type="checkbox"/>	C920001647 - 296721001		\$20.00	\$0.00	\$0.00	\$0.00
<div style="border: 1px solid red; padding: 2px;"> <span style="font-size: 0.8em;">&gt; Invoice Created (2)</span> </div>							
<div style="border: 1px solid red; padding: 2px;"> <span style="font-size: 0.8em;">&gt; Submitted (2)</span> </div>							
<b>Page Total</b>				\$520.00	\$110.00	\$11.00	\$99.00
<b>Grand Total</b>				\$520.00	\$110.00	\$11.00	\$99.00

Total Records : 5 Items per page: 5 < > >> Page 1

Receipt : C920001647 - 296721001

Selected Receipt Status : Denied

**Note:** The ‘Comments’ tab for the denied receipt lists the reason for the denial as shown below.

Attachment(s) ▼

Comment(s) ▲

View	Is Public ?	Comment	Created Date	Created By
<input type="checkbox"/>	<input checked="" type="checkbox"/>	202201193319, 202201203348 ...	05/10/2022 01:41 PM	Tiwar, Ruchi
	<input checked="" type="checkbox"/>	Comment : 202201193319 , 202201203348		

### 2.5.5 Rework Partner Receipt

1. An email notification will be sent to the grantee when the program area sends the receipt for the rework. Below is a sample text for the email notification.

**Subject:** PennDOT, PROGRAM NAME Receipt C92000XXXX - XXXX Returned.

**Program Name:**  
**ESAID:**  
**Contract:**  
**Project Name:**  
**Receipt Number:**

The above-mentioned receipt has been returned. Please click on the following link to access the Partner Portal: <https://apps.dced.pa.gov/esa-partner>

Under My Invoice/Receipts, click the "Details" link for the above-listed ESAID and view the comment(s) section for further information for receipts in "Denied" or "Rework" status. Receipts in "Rework" status may be revised and resubmitted. Receipts in "Denied" status cannot be revised.

Below is a sample example of the email notification using the BOA ABG program.

**Subject:** PennDOT, BOA Federal Aviation Block Grant (ABG) eGrants Receipt C920001968 - 298049013 Returned.

**Program Name:** BOA Federal Aviation Block Grant (ABG)  
**ESAID:** 202210184134  
**Contract:** C920001968  
**Project Name:** Runway Rehab 01-19  
**Receipt Number:** C920001968 - 298049013

Above mentioned receipt has been returned.

Please click on the following link to access the Partner Portal: <https://apps.uat.dced.pa.gov/esa-partner>

Under My Invoice/Receipts, click the "Details" link for the above-listed ESAID and view the comment(s) section for further information for receipts in "Denied" or "Rework" status.

Receipts in "Rework" status may be revised and resubmitted. Receipts in "Denied" status cannot be revised.

**Note:** The email notification will be sent to the application contact email and the email address for the Keystone login user who submitted the receipt.

- Click the "Details" link for the assigned contract id as shown below.

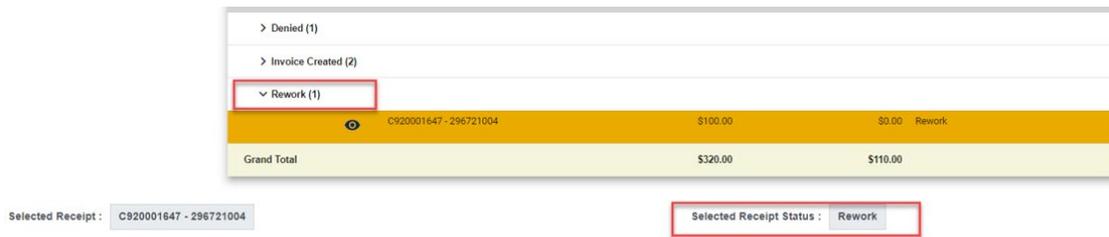
My Applications  
My Profile  
My Requests  
My Invoice/Receipts  
Denied Invoice/Receipts  
Comments/Documents  
Tracking  
SSRS Reports  
Reporting

Invoice Applications

Agency Code	Program Name	Applicant Name	Project Name	Contract	ESA ID	Requested Date	
PennDOT	Multimodal Transportation Fund (MTF) Program	Reading Regional Airport Authority	MTF invoice test - Stum	C920001755	202205043644	07/06/2022	Details
PennDOT	Multimodal Transportation Fund (MTF) Program	Reading Regional Airport Authority	Test MTF - Stum	C920001763	202205053650	07/06/2022	Details
PennDOT	Passenger Rail Program	Allegheny County Airport Authority Dba Pittsburgh International Airport	Ruchi PR Capital Screenshots	C920001806	202206093754	06/09/2022	Details
PennDOT	Passenger Rail Program	Allegheny County Airport Authority Dba Pittsburgh International Airport	Ruchi PR Operating 2	C920001794	202206023738	06/09/2022	Details
PennDOT	Passenger Rail Program	Reading Regional Airport Authority	Test - PROGRAM AREA TESTING	C920001764	202205053652	05/31/2022	Details

« 1 2 3 4 ... 22 »

- The rework receipts can be seen in the Partner Portal under the "Rework" tab as shown in the below screenshot.



The screenshot shows a summary table with columns for status, receipt number, amount, and status. The 'Rework (1)' row is highlighted in yellow. Below the table, the 'Selected Receipt' is 'C920001647 - 296721004' and the 'Selected Receipt Status' is 'Rework'.

Status	Receipt No	Amount	Status
> Denied (1)			
> Invoice Created (2)			
▼ Rework (1)	C920001647 - 296721004	\$100.00	Rework
Grand Total		\$320.00	\$110.00

Selected Receipt : C920001647 - 296721004

Selected Receipt Status : Rework

4. Users can see the comments entered by internal users under the “Comment(s)” tab as shown below.



The screenshot shows the 'Comment(s)' tab with a table of comments. A comment entry form is open, showing a text area with 'ruchi test' entered. The form includes a rich text editor toolbar and a 'Close' button.

View	Is Public ?	Comment	Created Date	Created By
<input type="checkbox"/>	<input type="checkbox"/>	ruchi test ...	12/29/2021 09:20 PM	Tiwari, Ruchi

Comment : ruchi test

5. Based on the provided comment, the user clicks “Edit” to make the required changes such as amount, attachment, etc., and submits it back to the program area as shown below. After making the required changes, when the user clicks “Save” the system changes the receipt status to “Ready.”

6. To submit the receipt again, the user selects the receipt no and clicks “Submit.”



The screenshot shows the summary table with the 'Ready (1)' row highlighted in yellow. Below the table, the 'Submit' button is highlighted, and the 'Selected Receipt Status' is 'Ready'.

Status	Receipt No	Amount	Status
> Denied (1)			
> Invoice Created (2)			
▼ Ready (1)	C920001647 - 296721004	\$100.00	Ready
Grand Total		\$320.00	\$110.00

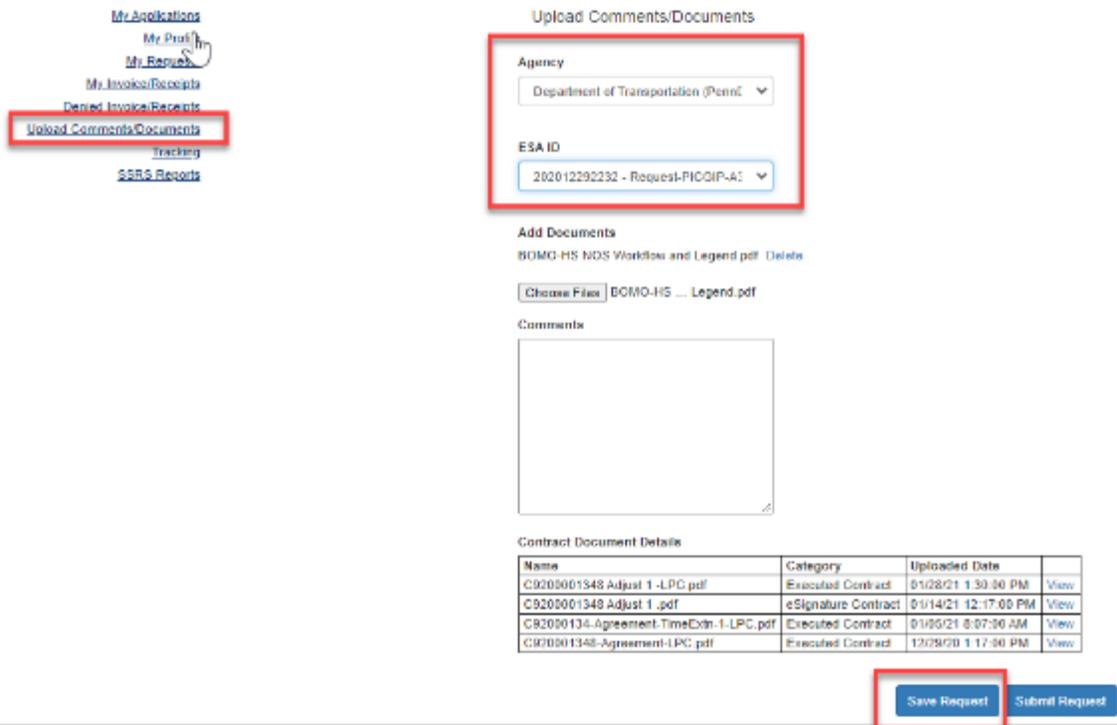
Selected Receipt : C920001647 - 296721004

Selected Receipt Status : Ready

## 2.6 Upload Comments Documents

This option allows users to upload documents as requested by the program area.

1. To upload documents, Grantee clicks on the Upload Comments/Documents button.
2. Select the Agency and ESA ID.
3. Click Browse to upload documents.
4. Enter a text under the Comments field and click “Save Request” to save the request or “Submit Request” to submit the request to the Program area.



**Upload Comments/Documents**

Agency  
Department of Transportation (Penn)

ESA ID  
202012292232 - Request-PICOP-A1

Add Documents  
BOMO-HS NDS Workflow and Legend.pdf [Delete](#)

[Choose Files](#) BOMO-HS ... Legend.pdf

Comments

Contract Document Details

Name	Category	Uploaded Date	
C920001348 Adjust 1 -LPC.pdf	Executed Contract	01/28/21 1:30:00 PM	<a href="#">View</a>
C920001348 Adjust 1 .pdf	eSignature Contract	01/14/21 12:17:00 PM	<a href="#">View</a>
C8200134-Agreement-TimeCntr-1-LPC.pdf	Executed Contract	01/05/21 8:07:00 AM	<a href="#">View</a>
C92001348-Agreement-LPC.pdf	Executed Contract	12/29/20 1:17:00 PM	<a href="#">View</a>

[Save Request](#) [Submit Request](#)

- a. If the user clicks Save Request, the system will display the saved request under “Saved & Submitted Document Details” as shown below. Users can submit the saved request by clicking on the “Submit Request” button.

[My Applications](#)  
[My Profile](#)  
[My Requests](#)  
[My Invoice/Receipts](#)  
[Denied Invoice/Receipts](#)  
[Upload Comments/Documents](#)  
[Tracking](#)  
[SSRS Reports](#)

Department of Transportation (Pennl) ▼

ESA ID  
202012292232 - Request-PICGIP-A: ▼

Add Documents  
Choose Files No file chosen

Comments

Contract Document Details

Name	Category	Uploaded Date	
C9200001348 Adjust 1 -LPC.pdf	Executed Contract	01/28/21 1:30:00 PM	<a href="#">View</a>
C9200001348 Adjust 1 .pdf	eSignature Contract	01/14/21 12:17:00 PM	<a href="#">View</a>
C92000134-Agreement-TimeExtn-1-LPC.pdf	Executed Contract	01/05/21 8:07:00 AM	<a href="#">View</a>
C920001348-Agreement-LPC.pdf	Executed Contract	12/29/20 1:17:00 PM	<a href="#">View</a>

Saved/Submitted Document Details

Name	Type	Status	Uploaded Date	Uploaded By	
BOMO-HS NOS Workflow and Legend.pdf	All	Saved	03/23/21 5:21:47 PM	c-rtivari	<a href="#">View</a> <a href="#">Delete</a>

Save Request Submit Request

- b. If the user clicks Submit Request, the system will display the pop-up message “Request Submission is successful!”

ESA-Partner Application

Request Submission is successful!!

OK Cancel

Department

ESA ID  
202012292232 - Request-PICGIP-A: ▼

Add Documents  
Choose Files No file chosen

Comments

Contract Document Details

Name	Category	Uploaded Date	
C9200001348 Adjust 1 -LPC.pdf	Executed Contract	01/28/21 1:30:00 PM	<a href="#">View</a>
C9200001348 Adjust 1 .pdf	eSignature Contract	01/14/21 12:17:00 PM	<a href="#">View</a>
C92000134-Agreement-TimeExtn-1-LPC.pdf	Executed Contract	01/05/21 8:07:00 AM	<a href="#">View</a>
C920001348-Agreement-LPC.pdf	Executed Contract	12/29/20 1:17:00 PM	<a href="#">View</a>

Saved/Submitted Document Details

Name	Type	Status	Uploaded Date	Uploaded By	
BOMO-HS NOS Workflow and Legend.pdf	All	Saved	03/23/21 5:21:47 PM	c-rtivari	<a href="#">View</a> <a href="#">Delete</a>

Save Request Submit Request

- c. Click OK and this will submit the request to the Program Area. The system will display the submitted request under “Saved & Submitted Document Details” as shown below.
- Partner can view documents shared by the program area, such as Executed Contracts, Addenda/Attachment (application attachments), Correspondence, Financial Documents, etc., under the Upload Comments/Documents section in the Partner Portal.

- [My Applications](#)
- [My Profile](#)
- [My Requests](#)
- [My Invoice/Receipts](#)
- [Denied Invoice/Receipts](#)
- [Upload Comments/Documents](#)
- [Tracking](#)
- [SSRS Reports](#)



Upload Comments/Documents

Agency

Department of Transportation (PennD) ▼

ESA ID

202012111493 - BPT 5310 ECS Testi ▼

Add Documents

No file chosen

Comments

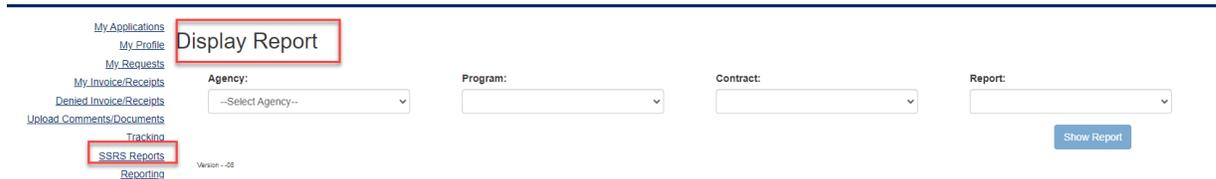
Contract Document Details

Name	Category	Uploaded Date	
C920001330 Adj 5 Agreement-LPC.pdf	Executed Contract	02/22/21 7:42:00 AM	<a href="#">View</a>
C920001330 Adj 5 Agreement.pdf	eSignature Contract	02/09/21 6:55:00 PM	<a href="#">View</a>
C920001330_GA-LPC.pdf	Executed Contract	02/05/21 5:32:00 PM	<a href="#">View</a>
Test Doc for Partner Portal.pdf	Correspondence	01/04/21 9:50:00 AM	<a href="#">View</a>
C920001330_GA-LPC.pdf	Executed Contract	12/17/20 9:41:00 AM	<a href="#">View</a>
C920001330_GA-LPC.pdf	Executed Contract	12/16/20 2:01:00 PM	<a href="#">View</a>
FinalInspectionForm(ESA).pdf	Addenda/Attachment	12/11/20 2:48:00 PM	<a href="#">View</a>
FinalInspectionForm(ESA).pdf	Addenda/Attachment	12/11/20 2:48:00 PM	<a href="#">View</a>

## 2.7 SSRS Reports

Users with the “Show Reports” role and access to the grant can view/generate the SSRS reports from the partner portal **for reports configured with external access**. The reports are grant-level only, for any grants assigned to the user. Below is an example of the configured SSRS reports for the Highway Safety programs.

- To access the SSRS report, click the “SSRS Reports” link in the partner portal.



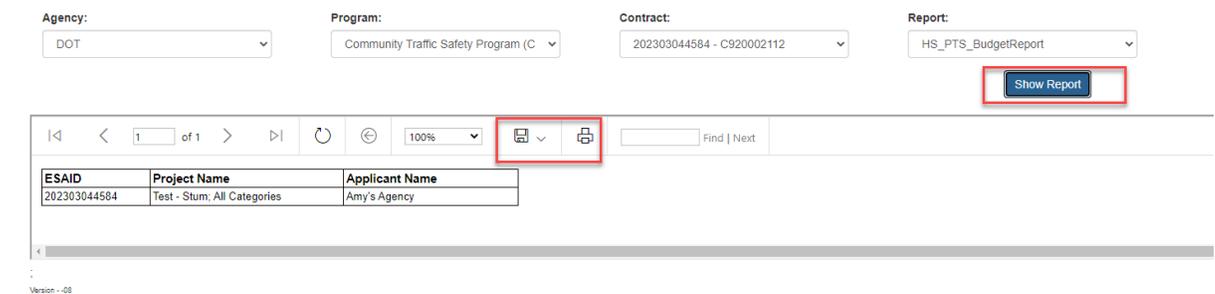
- Select “Agency,” “Program,” “Contract,” and “Report.” Click “Show Report” as shown below.  
**Note:** Currently, all configured reports for the program show, regardless of the selected program.

### Display Report



The screenshot shows the 'Display Report' form. The Agency dropdown is set to 'PennDOT', Program to 'Police Traffic Services (PTS)', and Contract to '202301194421 - C920002087'. The Report dropdown is open, showing a list of reports including 'HS\_ProposalReview\_Report', 'HS\_PTS\_BudgetReport', 'HS\_PTS\_EnforcementDataGrantRpt', 'HS\_PTS\_EnforcementPersonnelGrantRpt', 'HS\_PTS\_FinancialReport', and 'HS\_PTS\_ProposalReview\_Report'. The 'Show Report' button is highlighted with a red box.

### Display Report

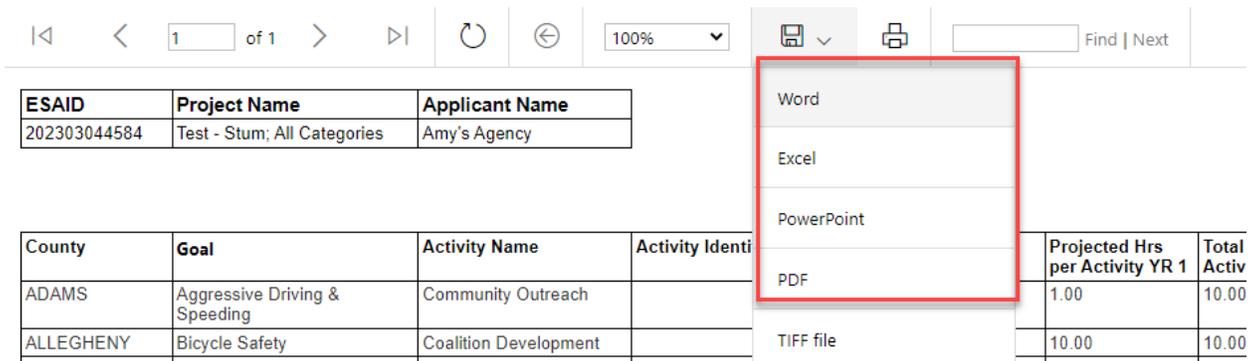


The screenshot shows the 'Display Report' form with Agency set to 'DOT', Program to 'Community Traffic Safety Program (C)', and Contract to '202303044584 - C920002112'. The Report dropdown is set to 'HS\_PTS\_BudgetReport'. The 'Show Report' button is highlighted with a red box. Below the form is a table with the following data:

ESAIID	Project Name	Applicant Name
202303044584	Test - Stum: All Categories	Amy's Agency

Below the table is a toolbar with navigation and export options. The export options are highlighted with a red box.

- Report can be exported to Word, Excel, PDF, etc. using the option highlighted below.



The screenshot shows the 'Display Report' form with Agency set to 'DOT', Program to 'Community Traffic Safety Program (C)', and Contract to '202303044584 - C920002112'. The Report dropdown is set to 'HS\_PTS\_BudgetReport'. The 'Show Report' button is highlighted with a red box. Below the form is a table with the following data:

ESAIID	Project Name	Applicant Name
202303044584	Test - Stum: All Categories	Amy's Agency

Below the table is a toolbar with navigation and export options. The export options are highlighted with a red box, showing a dropdown menu with the following options: Word, Excel, PowerPoint, PDF, and TIFF file.

Programs with SSRS reports configured include:

- Highway Safety Grant Program (HSGP)
- Highway Safety Community Traffic Safety Program (CSTP)
- Highway Safety Police Traffic Services (PTS)
- Ports Operating and Capital

### 3.0 Manage Access Requests/Roles in ESA – Internal Users

Program user logs into ESA Internal. The Partner Tools section is used to manage access requests/roles in ESA. The below sub-sections describe all areas under Partner Tools in ESA.

Types of partner portal access include the following categories:

- **PTS Grant Coordinator:** It allows users to access the highway safety enforcement tracking and enforcement reimbursement report for the PTS program.
- **PTS Officer:** It allows users to access the highway safety *officer* enforcement tracking and enforcement reimbursement report for the PTS program.
- **Read only:** It allows users to view the submitted applications until “In Legal Process” status and process invoices. Users won’t be able to edit applications or upload documents/comments in the Partner Portal. Users will be able to create and submit receipts.
- **Show Reports:** It allows users to view/generate the SSRS reports from the partner portal.
- **Tracking:** It allows users to access the tracking module and submit information.
- **Upload Comments Documents:** It allows users to upload documents as requested by program staff. Documents will be viewable in Electronic Storage and Comments will be viewable in Comments.
- **Viewer:** It allows users to view the application at any point within the workflow and be Read-Only.
- **Workflow:** It allows users access to ESA workflow. It is the only option for the user to be able to ‘resubmit’ the application review back to the program staff when it has been sent for Grantee Review/Stop 4.

#### 3.1 Approve Partner

When the Partner submits a request for access to a new application, the Program User will see the Partner’s request under the Approve Partner section in the Partner Tools.

To Approve the Partner’s request, click the checkbox, select the appropriate role(s), and click “Approve.”

**Note:** The user can bulk approve for the same role access.

**Approve / Deny Partner**

FirstName

SI	FirstNam	LastNam	ESAIID	WebAppID	P_Type	Status	Email	Phone	ProgramName	ApplicantName	ProjectName	
<input type="checkbox"/>	Thomas	Tomczyk	202210274179	8185946	Business	Revoked	TTOMCZYK@pa.gov	(717)705-1246	BOA Airport Improvement Program (AIP) Match	Lancaster Airport Authority	Rehabilitate Runway 8/26 (Construct), Phase VI (AIP 46-23)	
<input type="checkbox"/>	Amy	Stum	202205043644	8184715	Individual	Revoked	astum@pa.gov	(717)214-6164	Multimodal Transportation Fund (MTF)	Reading Regional Airport Authority	MTF Invoice test - Stum	
<input type="checkbox"/>	Amy	Stum	202205043643	8184622	Individual	Revoked	astum@pa.gov	(717)214-6164	Passenger Rail Program	Reading Regional Airport Authority	Invoice Test by Amy	
<input type="checkbox"/>	Amy	Stum	202207193858	8185210	Individual	Revoked	astum@pa.gov	(717)214-6164	Aviation Real Estate Tax Reimbursement Program - Agreement	Amy's Agency	Test - Stum	
<input type="checkbox"/>	Amy	Stum	202104122479	8182078	Individual	Revoked	astum@pa.gov	(717)214-6164	Master Planning Agreements Program	Lower Providence Township	Test - Stum	
<input type="checkbox"/>	Amy	Stum	202206073744	8184829	Individual	Revoked	astum@pa.gov	(717)214-6164	Master Planning Agreements Program	Invoice Training	Test - Stum for Invoice Training	
<input type="checkbox"/>	Amy	Stum	202203103487	184842	Individual	Revoked	astum@pa.gov	(717)214-6164	BOA Aviation Capital Budget (ACB) Grant	Beaver County Airport Authority	Construct 10 Unit T-Hanger including T-Hanger Taxiway and Ra	
<input type="checkbox"/>	Amy	Stum	202201063274	8183928	Individual	Revoked	astum@pa.gov	(717)214-6164	Multimodal Transportation Fund (MTF)	Sivatara Township	Eisenhower Blvd Road Improvement Project	
<input type="checkbox"/>	Amy	Stum	202207183845	8185182	Individual	Revoked	astum@pa.gov	(717)214-6164	Aviation Real Estate Tax Reimbursement Program - Agreement	Allegheny County Airport Authority Db	Pittsburgh International Airport	Aviation Agreement Ruzh Testing
<input type="checkbox"/>	Amy	Stum	202204293632	8184681	Individual	Revoked	astum@pa.gov	(717)214-6164	Highway Safety Grant Program (HSGP)	Amy's Agency	Test - Stum	

Roles:

- PTS Grant Coordinator
- PTS Officer
- Read Only
- ShowReports
- Tracking
- UploadCommentsDocuments
- Viewer
- Workflow

To deny the Partner’s request, click the checkbox and click the “Deny” option.

### 3.2 Manage Partner Role

To change a partner’s assigned role or to revoke the partner’s role, the Program User clicks on the Manage Partner Role link under the Partner Tools section.

**Single Application 8.6.0** **Manage Partner Roles**

FirstName

AppID	P_Type	P_Fein	P_SAPI	Status	Email	Phone	App_Fein	App_SAPI	ProgramName	ApplicantName	Roles	Change	Revoke
64	Individual	N/A	N/A	Approved	c-sadimula@pa.gov	(345)346-4564	238000402		Federal Section 5310 Private Non-Profit Accessible Vehicle Grant Program	Amy's Agency	Read Only Workflow	<input type="button" value="Change Role"/>	<input type="button" value="Revoke"/>
65	Business	234098712	EOA2312	Approved	c-rfwari@pa.gov	(717)239-1267	251239457		BOA Airport Improvement Program (AIP) Match	Westmoreland County Airport Authority	Workflow	<input type="button" value="Change Role"/>	<input type="button" value="Revoke"/>
29	Individual	N/A	N/A	Approved	RBETZ@pa.gov	(717)705-1242	251843496		BOA Federal Aviation Block Grant (ABG)	Bucks County Airport Authority	UploadDocuments Review Workflow	<input type="button" value="Change Role"/>	<input type="button" value="Revoke"/>
54	Business	800422103	000760351	Approved	TTOMCZYK@pa.gov	(717)705-1246	800422103	780351	BOA Federal Aviation Block Grant (ABG)	Beaver County Airport Authority	UploadDocuments Workflow	<input type="button" value="Change Role"/>	<input type="button" value="Revoke"/>
46	Business	234098712	EOA2312	Approved	c-rfwari@pa.gov	(717)239-1267	238005817		BOA Airport Improvement Program (AIP) Match	Lancaster Airport Authority	Workflow	<input type="button" value="Change Role"/>	<input type="button" value="Revoke"/>
97	Individual	N/A	N/A	Assigned	suheimerger@pa.gov	(717)265-7893			Multimodal Transportation Fund (MTF)	Delaware River City Corp Db	Read Only Review Workflow Tracking Viewer	<input type="button" value="Change Role"/>	<input type="button" value="Revoke"/>
75	Individual	N/A	N/A	Approved	astum@pa.gov	(717)214-6164			Rail Freight Program	City Of Wilkes Barre Db	Workflow Tracking Viewer	<input type="button" value="Change Role"/>	<input type="button" value="Revoke"/>
80	Individual	N/A	N/A	Approved	astum@pa.gov	(717)214-6164			Rail Freight Program	Alongton Township	Workflow Tracking Viewer	<input type="button" value="Change Role"/>	<input type="button" value="Revoke"/>
46	Business	234098712	EOA2312	Denied	c-rfwari@pa.gov	(717)239-1267	238005817		BOA Airport Improvement Program (AIP) Match	Lancaster Airport Authority			
63	Individual	N/A	N/A	Approved	astum@pa.gov	(717)214-6164			Traffic Signal Technologies	Amy's Agency	UploadDocuments	<input type="button" value="Change Role"/>	<input type="button" value="Revoke"/>

Partner Tools

-

- To revoke the partner’s access, click on the Revoke button. The system will revoke the partner’s access.
- To change a partner’s existing role, click on the Change Role button. The system will display the role(s) assigned to the partner. Check or Uncheck the role boxes to provide or remove the respective roles and click Save. Based on the action performed by the Program User, the system changes the partner’s role.

Manage Partner Roles

First Name

Filter

Clear

**Full Name:** Kyle Eckert

**ESA Id:** 202305034806

**Web App Id:** 53

PTS Grant Coordinator
  PTS Officer
  Read Only
  ShowReports
  Tracking
  UploadCommentsDocuments
  Viewer
  Workflow

SAVE

First Name	Last Name	ESAID	WebAppID	P_Type	P_Fein	P_SAPI	Status	Email	Phone	App_Fein	App_SAPI	ProgramName	ApplicantName	Role
Amy	Stum	202305024802	51	Individual	N/A	N/A	Assigned	astum@pa.gov	(717)214-6164			Public Transportation Consolidated Capital Grant (CCA)	Carbon County Commissioners	Read Workf
Kyle	Eckert	202305034806	53	Individual	N/A	N/A	Assigned	kyeckert@pa.gov	(717)772-5614			Public Transportation Consolidated Capital Grant (CCA)	City Of Hazleton	Uploa Workf

### 3.3 Assign Partner

The assign partner option is used to assign the Application to the external partner from Partner Tools in ESA-DOT Internal. Select Partner, Program, ESA Details, and Roles and click Assign as shown in the below screenshot.

Assign Partner

Show All partners
  Show Agency Subscribed partners

Partner Details:

--Select--

Program Details:

--Select--

ESA Submitted Date Range:

All

ESA Details:

Roles:

PTS Grant Coordinator  
 PTS Officer  
 Read Only  
 ShowReports  
 Tracking  
 UploadCommentsDocuments  
 Viewer  
 Workflow

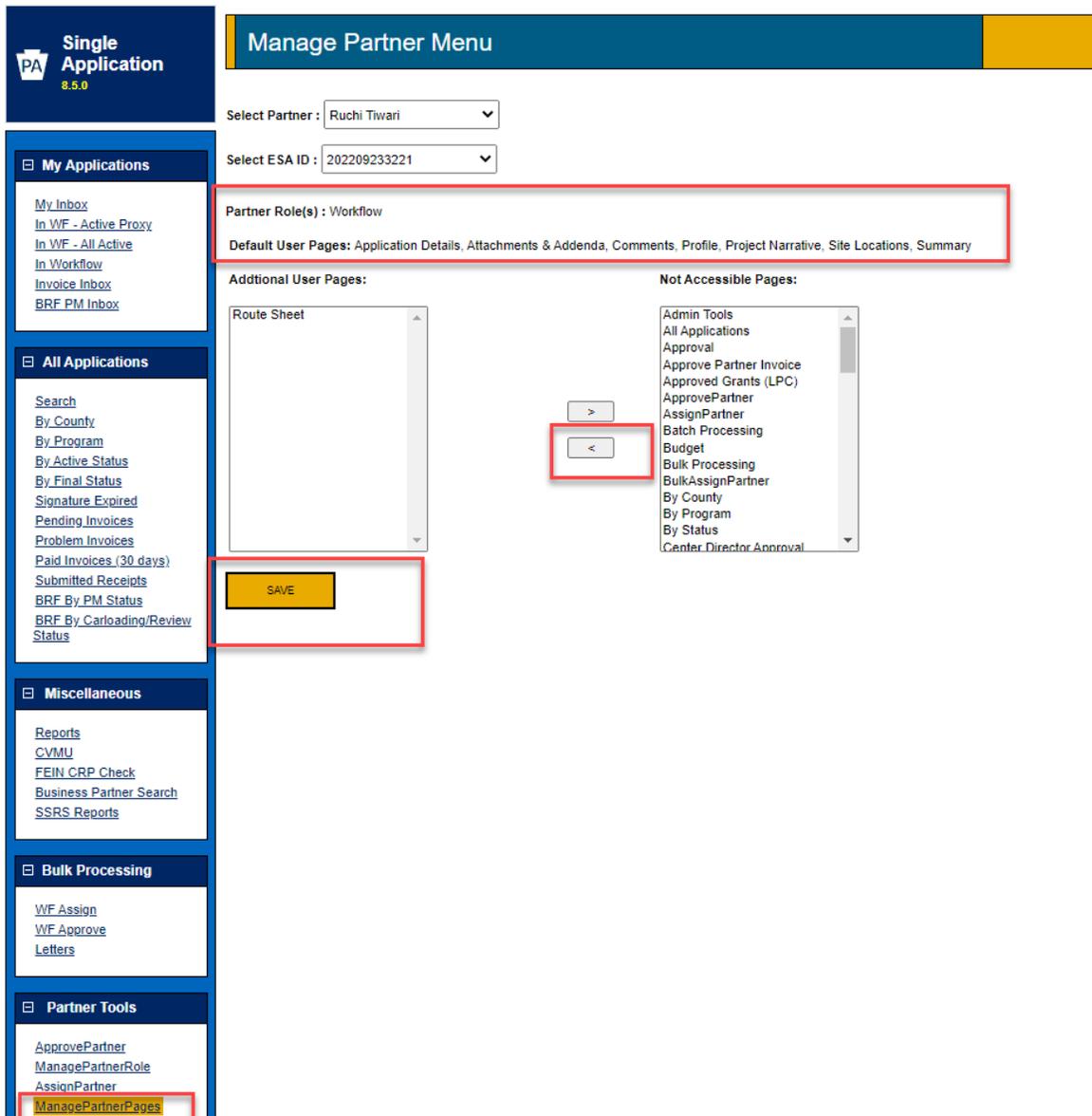
ASSIGN

**NOTE:** Anyone who is in the workflow can do the assignment for the applicant.

### 3.4 Manage Partner Pages

The “Manage Partner Pages” option is used to provide Partner access to additional pages in ESA. The default user pages for Read-Only and Upload Documents and Workflow role(s) are Application Details, Attachments & Addenda, Comments, Profile, Project Narrative, Site Locations, and Summary.

- Select Partner detail and ESA ID.
- Move the pages listed under “Not Accessible Pages (for example, RouteSheet)” to the “Additional User Pages” section using the left arrow as shown in the below screenshot.
- Click Save. The system displays the message “Preferences are saved successfully.”

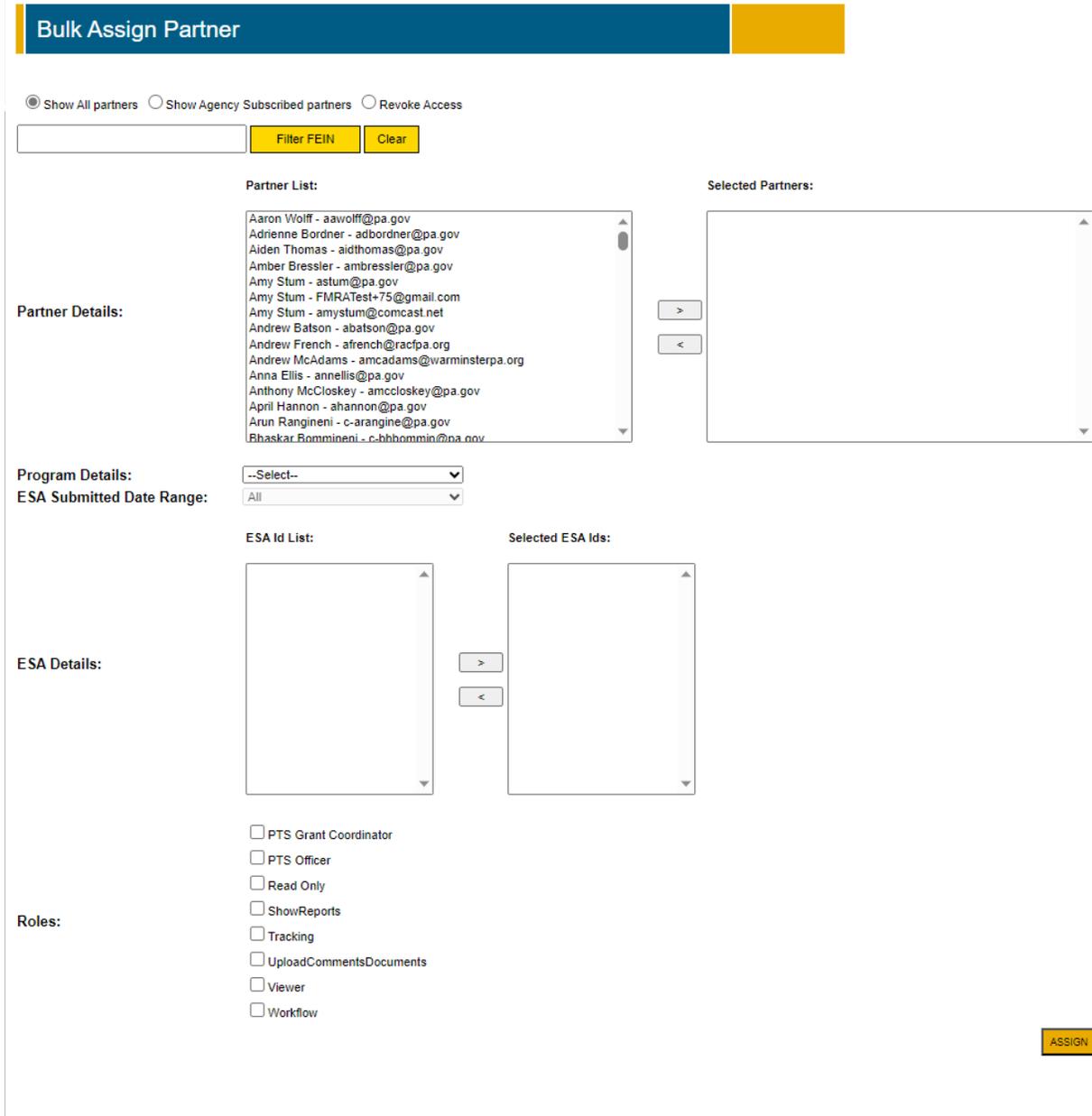


The screenshot displays the "Manage Partner Menu" interface. On the left is a navigation sidebar with sections: "My Applications", "All Applications", "Miscellaneous", "Bulk Processing", and "Partner Tools". The "Partner Tools" section includes "ManagePartnerPages", which is highlighted with a red box. The main content area shows a form for "Manage Partner Menu" with the following elements:

- Select Partner:** A dropdown menu with "Ruchi Tiwari" selected.
- Select ESA ID:** A dropdown menu with "202209233221" selected.
- Partner Role(s):** A text field containing "Workflow".
- Default User Pages:** A text field containing "Application Details, Attachments & Addenda, Comments, Profile, Project Narrative, Site Locations, Summary".
- Additional User Pages:** A list box containing "Route Sheet".
- Not Accessible Pages:** A list box containing "Admin Tools", "All Applications", "Approval", "Approve Partner Invoice", "Approved Grants (LPC)", "ApprovePartner", "AssignPartner", "Batch Processing", "Budget", "Bulk Processing", "BulkAssignPartner", "By County", "By Program", "By Status", and "Center Director Approval".
- Navigation:** Two arrow buttons (> and <) are positioned between the two list boxes. The left arrow (<) is highlighted with a red box, indicating the action to move "Route Sheet" to the "Additional User Pages" list.
- SAVE:** A yellow button with the text "SAVE" is located below the "Additional User Pages" list box and is also highlighted with a red box.

### 3.5 Bulk Assign Partner

This option is used to bulk assign applications to the external partner from Partner Tools in ESA-DOT Internal. Select applications, partner details, and required role(s), and click Assign as shown in the below screenshot.



**Bulk Assign Partner**

Show All partners
  Show Agency Subscribed partners
  Revoke Access

**Partner Details:**

**Partner List:**

- Aaron Wolff - aawolff@pa.gov
- Adrienne Bordner - adbordner@pa.gov
- Aiden Thomas - aidthomas@pa.gov
- Amber Bressler - ambressler@pa.gov
- Amy Stum - astum@pa.gov
- Amy Stum - FMRAtest+75@gmail.com
- Amy Stum - amystum@comcast.net
- Andrew Batson - abatson@pa.gov
- Andrew French - afrench@racfpa.org
- Andrew McAdams - amcadams@warminsterpa.org
- Anna Ellis - annellis@pa.gov
- Anthony McCloskey - amccloskey@pa.gov
- April Hannon - ahannon@pa.gov
- Arun Rangineni - c-arangine@pa.gov
- Rhaskar Bommineni - c-bhbommin@pa.gov

**Selected Partners:**

**Program Details:**

Program Details: --Select--  
 ESA Submitted Date Range: All

**ESA Details:**

**ESA Id List:**

**Selected ESA Ids:**

**Roles:**

- PTS Grant Coordinator
- PTS Officer
- Read Only
- ShowReports
- Tracking
- UploadCommentsDocuments
- Viewer
- Workflow

The below screenshots show the ESA screen when multiple users are assigned to multiple applications (ESA details).

**NOTES:**

- Applications can be filtered by ESA ID, Applicant Name, and Project Name.

- Partners can be filtered by FEIN

Show All partners  Show Agency Subscribed partners

**Partner List:**

Aaron Wolff - aawolff@pa.gov  
Adrienne Bordner - adbordner@pa.gov  
Aiden Thomas - aidthomas@pa.gov  
Amber Bressler - ambressler@pa.gov  
Amy Stum - astum@pa.gov  
Amy Stum - FMRATest+75@gmail.com  
Andrew Batson - abatson@pa.gov  
Andrew French - afrench@racfpa.org  
Andrew McAdams - amcadams@warminsterpa.org  
Anna Ellis - annellis@pa.gov  
Anthony McCloskey - amccloskey@pa.gov  
April Hannon - ahannon@pa.gov  
Arun Rangineni - c-arangine@pa.gov  
Bhaskar Bommineni - c-bhbommin@pa.gov  
Bill Callahan - wcallahan@pa.gov

**Selected Partners:**

**Partner Details:**

**Program Details:** Aviation Real Estate Tax Reimburse

**ESA Submitted Date Range:** All

ESA Id  **Filter** **Clear**

**ESA Details:**

ESA Id  
Applicant Name  
Project Name

202301254445-Abington Township-ARLE  
202304274790-Allegheny County Airport -Channeling  
202305154838-Allegheny County Airport -Ports Capital and Operati  
202305174857-Allegheny County Airport -Tax Rebate  
202207183845-Allegheny County Airport -Aviation Agreement Ruchi  
202209074009-Allegheny County Airport -RET - Agreement  
202209264070-Allegheny County Airport -Tax Rebate Agreement  
202210194141-Allegheny County Airport -Aviation Tax Rebate - Agr  
202210204144-Amy's Agency-Test  
202203073459-Amy's Agency-March Release Test  
202203183499-Amy's Agency-Test  
202205033642-Amy's Agency-Test  
202207193858-Amy's Agency-Test - Stum  
202207193873-Amy's Agency-Test - Stum  
202112233252-Amy's Agency-BOA Channeling Agreement

**Selected ESA Ids:**

202301194420-Allegheny County-NEVI  
202205113671-Allegheny County Airport -Tax Rebate

**Roles:**

PTS Grant Coordinator  
 PTS Officer  
 Read Only  
 ShowReports  
 Tracking  
 UploadCommentsDocuments  
 Viewer  
 Workflow

**ASSIGN**

**Notes:**

- A district filter functionality is enabled for ARLE, GLG, TST, and MTF programs as shown below.

**Program Details:**

**District**

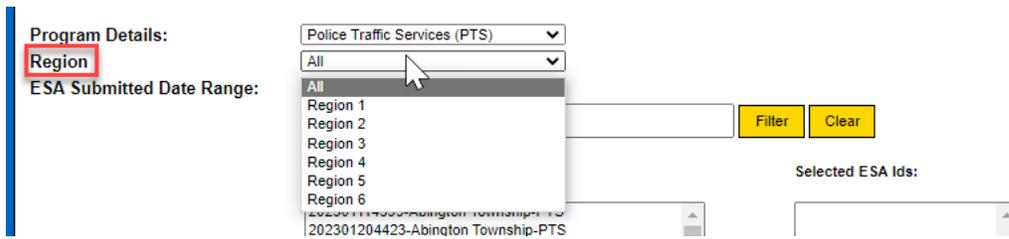
**ESA Submitted Date Range:**

Multimodal Transportation Fund (MT)  
All

All  
District 1  
District 10  
District 11  
District 12  
District 2  
District 3  
District 4  
District 5  
District 6  
District 8  
District 9

**Filter** **Clear**

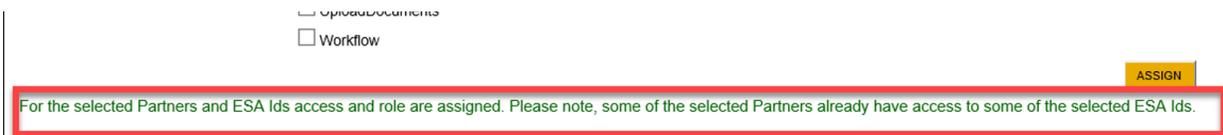
- A region filter functionality is enabled for CTSP and PTS programs.



The system displays the success message “For the selected Partners and ESA IDs access and role are assigned” when Program users click Assign after making all selections as shown below.



If the user was already assigned to selected applications, the system will display the message “For the selected Partners and ESA IDs access and role are assigned. Please note, some of the selected Partners already have access to some of the selected ESA IDs” as shown below.



### 3.6 Revoke Partner

This option is used to remove user access from multiple applications. When selecting ‘Revoke’, additional options will appear to filter the user list by PartnerID, Program, or ESAID

**Bulk Assign Partner**

- Show All partners  
  Show Agency Subscribed partners  
  **Revoke Access**
- Revoke By PartnerID  
  Revoke By Program  
  Revoke By ESAID

**Partner List:**

- Aaron Wolff - aawloff@pa.gov
- Adrienne Bordner - adbordner@pa.gov
- Aiden Thomas - aidthomas@pa.gov
- Amber Bressler - ambressler@pa.gov
- Amy Stum - astum@pa.gov
- Amy Stum - FMRAstest75@gmail.com
- Amy Stum - amystum@comcast.net
- Andrew Batson - abatson@pa.gov
- Andrew French - afrench@racfpa.org
- Andrew McAdams - amcadams@warminsterpa.org
- Anna Ellis - annellis@pa.gov
- Anthony McCloskey - amccloskey@pa.gov
- April Hannon - ahannon@pa.gov
- Arun Rangineni - c-arangine@pa.gov
- Bhaskar Bommineni - c-bhbommin@pa.gov

**Partner Details:**

**Selected Partners:**

**Program Details:**

--Select--  
 All

**ESA Submitted Date Range:**

--Select--  
 All

**ESA Id List:**

**Selected ESA Ids:**

**Roles:**

- PTS Grant Coordinator
- PTS Officer
- Read Only
- ShowReports
- Tracking
- UploadCommentsDocuments
- Viewer
- Workflow

After selecting the desired filter, the dropdown list will appear for PartnerID and Program options, enter the ESAID in the field for that filter.

**Bulk Assign Partner**

- Show All partners  
  Show Agency Subscribed partners  
  **Revoke Access**
- Revoke By PartnerID**  
  Revoke By Program  
  Revoke By ESAID

--Select--  

- Aaron Wolff - aawloff@pa.gov
- Adrienne Bordner - adbordner@pa.gov
- Aiden Thomas - aidthomas@pa.gov
- Amber Bressler - ambressler@pa.gov
- Amy Stum - astum@pa.gov
- Amy Stum - FMRAstest75@gmail.com
- Amy Stum - amystum@comcast.net
- Andrew Batson - abatson@pa.gov
- Andrew French - afrench@racfpa.org
- Andrew McAdams - amcadams@warminsterpa.org
- Anna Ellis - annellis@pa.gov
- Anthony McCloskey - amccloskey@pa.gov
- April Hannon - ahannon@pa.gov
- Arun Rangineni - c-arangine@pa.gov
- Bhaskar Bommineni - c-bhbommin@pa.gov
- Bill Callahan - wcallahan@pa.gov
- Brian Knipple - bknipple@pa.gov
- Bryan Van Sweden - bvansweden@pa.gov
- Carmen La Rosa - carminelr@hotmail.com

**Program Details:**

--Select--  
 All

**ESA Submitted Date Range:**

--Select--  
 All

**ESA Id List:**

**Selected ESA Ids:**

**Bulk Assign Partner**

Show All partners  
  Show Agency Subscribed partners  
  Revoke Access

Revoke By PartnerID  
  Revoke By Program  
  Revoke By ESAID

--Select-- Get List

--Select--

- ARLE Funding Program
- Aviation Channeling Agreement
- Aviation Real Estate Tax Reimbursement Program - Agreement
- Aviation Real Estate Tax Reimbursement Program - Reimbursement Request
- BOA Airport Improvement Program (AIP) Match
- BOA Aviation Capital Budget (ACB) Grant
- BOA Federal Aviation Block Grant (ABG)
- BOA State Aviation Development Program (ADP)
- Community Traffic Safety Program (CTSP)
- Federal Section 5310 Private Non-Profit Accessible Vehicle Grant Program
- Green Light-Go Program
- Highway Safety Grant Program (HSGP)
- Highway Safety Notice of Subgrants (NOS) Program
- Master Planning Agreements Program
- Multimodal Transportation Fund (MTF)
- Passenger Rail Program
- PennDOT National Electric Vehicle Infrastructure (NEVI) Grant Program
- Pennsylvania Infrastructure Bank (PIB)
- Pennsylvania Intermodal Cargo Growth Incentive Program (PICGIP)

Program Details: --Select--

ESA Submitted Date Range: All

Selected Partners:

>
<

**Bulk Assign Partner**

Show All partners  
  Show Agency Subscribed partners  
  Revoke Access

Revoke By PartnerID  
  Revoke By Program  
  Revoke By ESAID

202305024802 Get List

Partner List:

Partner Details:

Selected Partners:

>
<

Program Details: --Select--

ESA Submitted Date Range: All

### 3.7 Approve Partner Receipt

1. Program user clicks the "Submitted Receipts" link under the All Applications section. The "Submitted/Approved" column displays the sum of all submitted and approved receipts.

**Single Application**  
8.7.0

**My Applications**

- My Inbox
- In WF - Active Proxy
- In WF - All Active
- In Workflow
- Invoice Inbox
- BRF PM Inbox

**All Applications**

- Search
- By County
- By Program
- By Active Status
- By Final Status
- Signature Expired
- Pending Invoices
- BRF By PM Status
- Paid Invoices (30 days)
- Problem Invoices
- BRF By Carloading/Review Status
- Submitted Receipts**

### Submitted Receipts

SEARCH RESET

Current View: Total Records: 10 Current Page Records: 10

Program	No. of Applications						
ARLE Funding Program	3						
BOA Airport Improvement Program (AIP) Match	4						
BOA Aviation Capital Budget (ACB) Grant	5						
<b>BOA Federal Aviation Block Grant (ABG)</b>							
<b>APPID</b>	<b>APPLICANT</b>	<b>Contract</b>	<b>PROJECT</b>	<b>Lead Analyst</b>	<b>County</b>	<b>District</b>	<b>Submitted/Approved</b>
202211214290	North Central Highway Safety Network Inc Dba Highway Safety Network Inc	C920002024	BOA ABG COST Summary Report Changes - Ruchi - Please Do not Touch	Betz, Robert	Adams	8	1
202210184134	South Middleton Township	C920001968	Runway Rehab 01-19	Matlock, Mark	Cumberland	8	3
202210124109	Westmoreland County Airport Auth Rostraver Airport	C920001939	Test - Stum	Stum, Amy	Allegheny	11	2
202203093476	Bedford County Airport Dba Bedford County Airport Auth	C920001722	Construct East Apron (incl. Infrastructure )Amy Testing	Stum, Amy	Bedford	9	2
BOA State Aviation Development Program (ADP)							3
Multimodal Transportation Fund (MTF)							5
Passenger Rail Program							5
PennDOT National Electric Vehicle Infrastructure (NEVI) Grant Program							1
Rail Freight Program							4

- Select the appropriate ESA ID. The system displays the screen as below. Click “Receipts” under the Funding section.

**Application Details**

- Profile
- Site Locations
- Business
- Project Narrative
- Original Narrative
- Attachments & Address

**Funding**

- Route Sheet
- CVMTU
- CBP Check
- SAP Invoice
- Receipts**

**Miscellaneous**

- Scoring or Tracking
- SERS Letters

**Document Management**

- Electronic Storage
- Invoice Documents
- PDF Storage

### Receipt(s)

Search: \_\_\_\_\_

Select	View	Receipt No	Invoice Number	Receipt Amount	Approved Amount	Retainage Amount	Payment Amount
> Denied (1)							
> Invoice Created (2)							
v Submitted (2)							
<input type="checkbox"/>	<input type="checkbox"/>	C920001647 - 296721006		\$200.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	<input type="checkbox"/>	C920001647 - 296721004		\$100.00	\$0.00	\$0.00	\$0.00
<b>Page Total</b>				<b>\$520.00</b>	<b>\$110.00</b>	<b>\$11.00</b>	<b>\$99.00</b>
<b>Grand Total</b>				<b>\$520.00</b>	<b>\$110.00</b>	<b>\$11.00</b>	<b>\$99.00</b>

- In the case of multiple receipts, click the eye icon for a receipt. Click “Edit” to enter the approved amount(s)/share(s) based on the program-specific requirements as shown below.

v Submitted (2)

<input checked="" type="checkbox"/>	C920001664 - 296963002	\$200,020.00	Submitted
<input type="checkbox"/>	C920001664 - 296963001	\$550.00	Submitted
<b>Grand Total</b>		<b>\$200,570.00</b>	

Selected Receipt : C920001664 - 296963002      Selected Receipt Status : Submitted

Receipt Detail

Created By : c:rtwari@pa.gov

- Click “Edit Pencil” under the “Approval Details” section.

**Claimed Amount(s)**

Vendor Details :

View	Activity Name	Vendor Name	Vendor Invoice #	Receipt Amount	Vendor Description
<input type="radio"/>	New Construction Track	United Steel Corporation 10	Ruchi test	\$200.00	
<b>Grand Total</b>				<b>\$200.00</b>	

Approval Details :

View	Edit	Receipt Amount	State Approved	Retainage Withheld	Local Approved	Payment Amount
<input type="radio"/>	<input style="border: 1px solid red;" type="radio"/>	\$200.00	\$0.00	\$0.00	\$0.00	\$0.00

Receipt Amount : \$200.00      Payment Amt. : \$0.00

	Share (%) :	Requested Share :	Approved Share :
State :	70.00 %	\$140.00	\$0.00
State Retainage :	10.00 %	\$14.00	\$0.00
Local :	30.00 %	\$60.00	\$0.00

5. Enter the approved amount(s)/share(s) based on the program-specific requirements. Click “Save.”

**Notes:**

- The system calculates the requested share amount(s) based on program-defined requirements for Fund Share calculations.; The user can modify the amounts if needed. The below example applies to the Rail Freight program only.

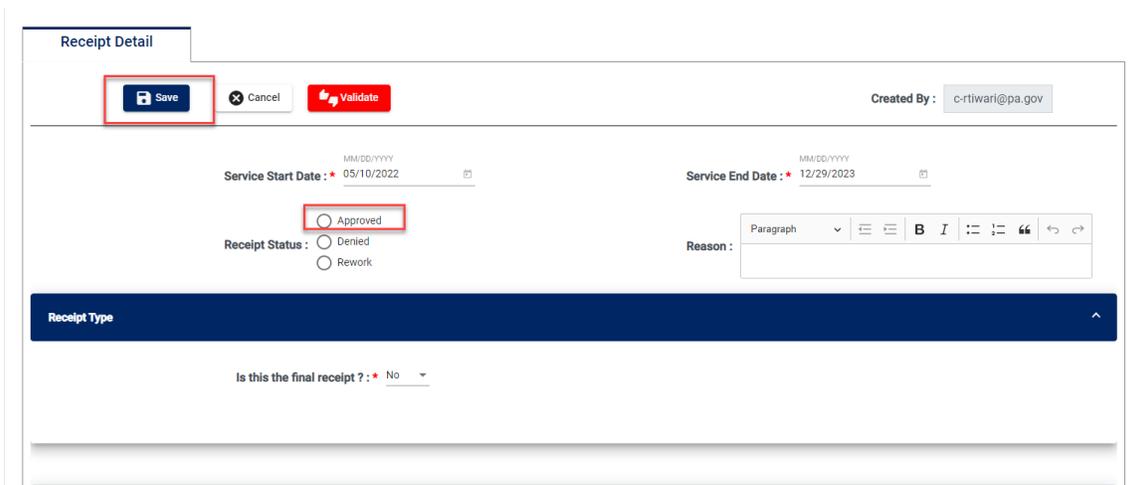
Receipt Amount : \$100.00      Payment Amt. : \$0.00

	Share (%) :	Requested Share :	Approved Share :
State :	70.00 %	\$70.00	0.00
State Retainage :	10.00 %	\$7.00	\$0.00
Local :	30.00 %	\$30.00	\$0.00

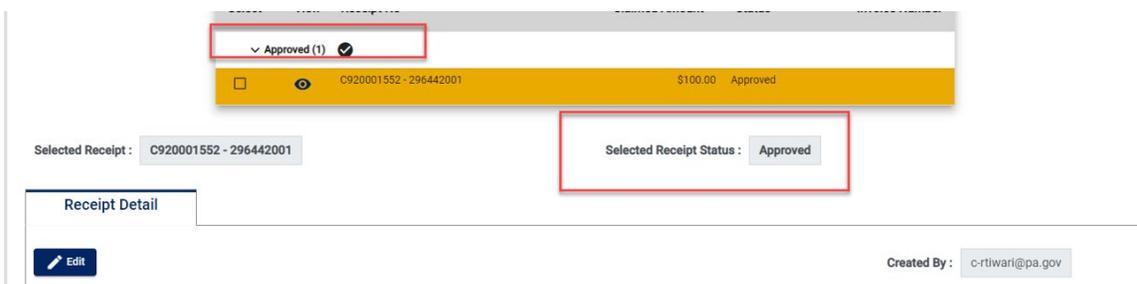
  

- The approval details section has program-specific fields and validations.

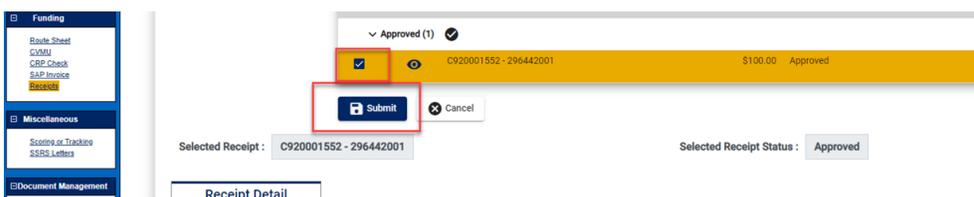
6. Click the “Approved” radio button and then click “Save.”



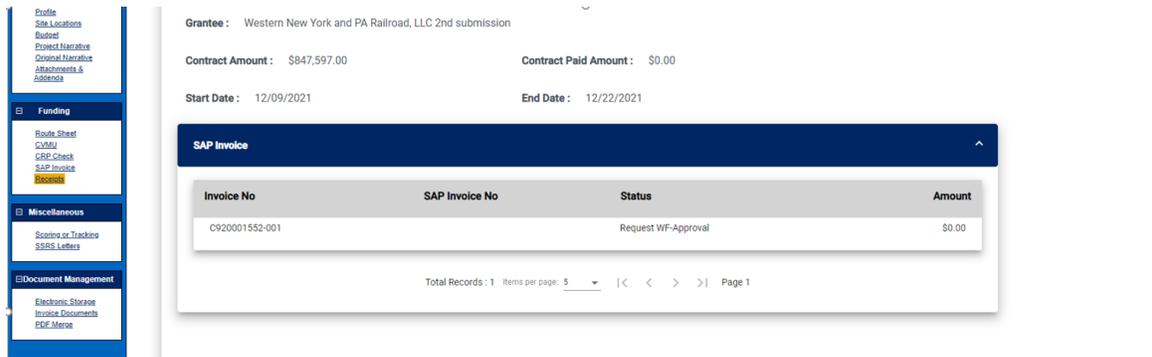
- The system will display the change of the receipt status from “Submitted” to “Approved” as shown below.



- The system displays the “Approved” status via the partner portal for the same receipt.
- To initiate the invoice workflow process, select the checkbox next to the eye icon and click “Submit” as shown below. To combine multiple receipts into a single invoice, select the checkbox for each receipt and click “Submit.”



- The system will display the change of the receipt status from “Approved” to “Invoice Created” as shown below. The “SAP Invoice” tab will display the invoice number and status as “Request WF-Approval.”



Select	View	Receipt No	Invoice Number	Receipt Amount	Approved Amount	Retainage Amount	Payment Amount
<ul style="list-style-type: none"> <li>&gt; Denied (1)</li> <li>Invoice Created (2)</li> </ul>							
<input type="radio"/>		C920001647 - 296721003	C920001647-001	\$100.00	\$60.00	\$6.00	\$54.00
<input type="radio"/>		C920001647 - 296721002	C920001647-002	\$100.00	\$50.00	\$5.00	\$45.00
<ul style="list-style-type: none"> <li>&gt; Submitted (2)</li> </ul>							
<b>Page Total</b>				<b>\$520.00</b>	<b>\$110.00</b>	<b>\$11.00</b>	<b>\$99.00</b>
<b>Grand Total</b>				<b>\$520.00</b>	<b>\$110.00</b>	<b>\$11.00</b>	<b>\$99.00</b>

Total Records : 5 Items per page: 5 |< < > >| Page 1

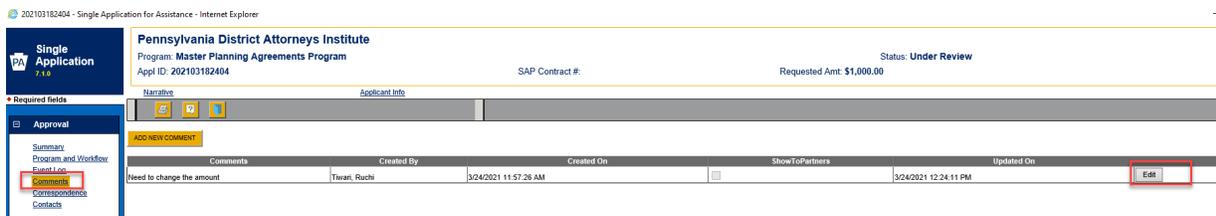
eipt : C920001647 - 296721003

Selected Receipt Status : Invoice Created

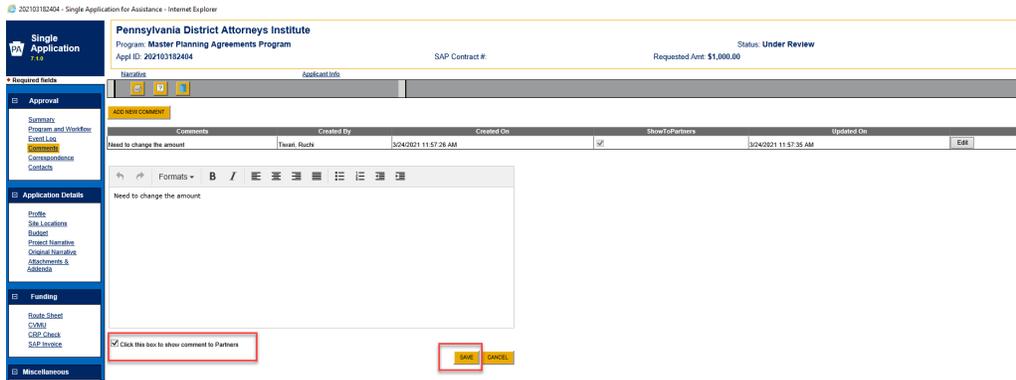
11. The system displays the “Invoice Created” status via the partner portal for the same receipt as shown below. The SAP Invoice” tab displays the invoice number and status as “Request WF-Approval” via the partner portal.

### 3.8 Comments and Documents to Share with Grantee

Internal users can select comments and share them with the grantee by clicking the “Edit” button below.



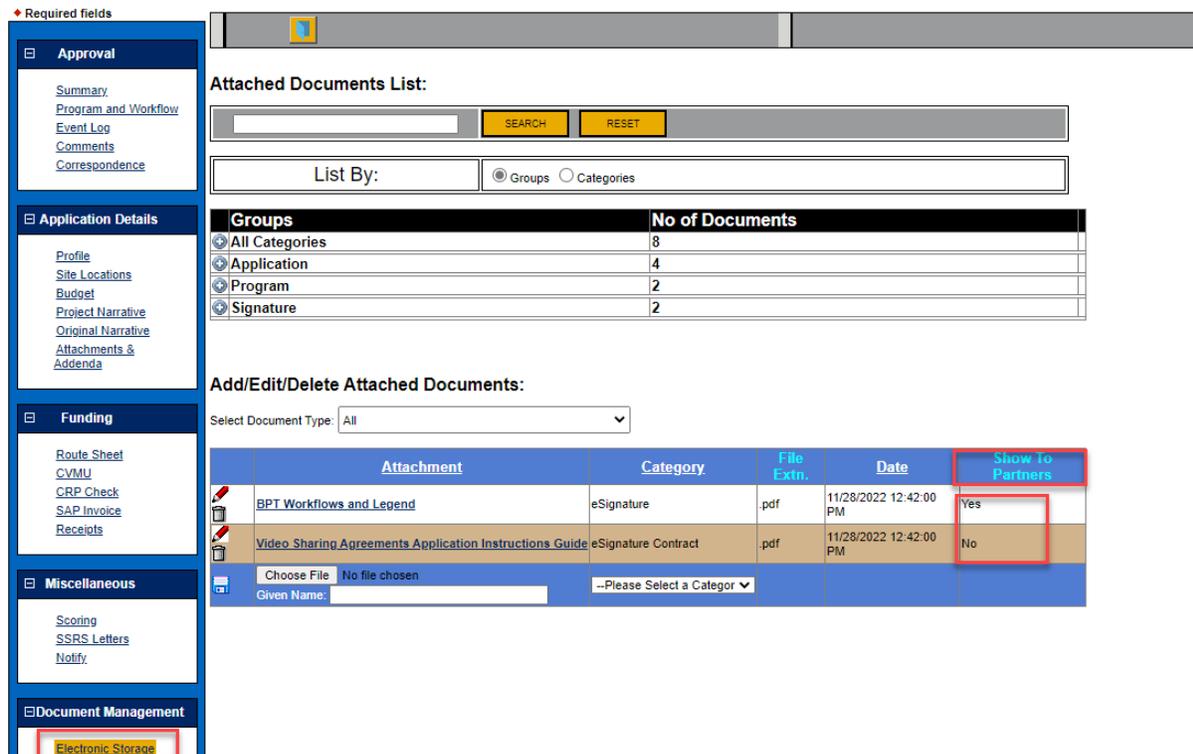
Click the checkbox “Click this box to show comments to Partners” and then click Save.



The system will display the “Show to Partners” flag checked as shown below.



Internal users can select documents [i.e., Addenda/Attachment (application attachments), Correspondence, Financial Documents] under the Electronic Storage section and share them with the grantee by setting the “Show to Partners” flag as “Yes” as shown below. Users can only share documents that are uploaded by them in Electronic Storage and users will only see the “Show to Partners” flag for those documents.



The internal user (lead analyst) will receive an email notification when items (comments/documents) are submitted by grantees via the partner portal. Below is a sample of the email notification:

**From:** ESA Application <noreply@pa.gov>  
**Sent:** Monday, September 26, 2022 11:01 AM  
**To:** Honasoge, Nataraj <c-nhonasog@pa.gov>; Gangam, Raghunath <c-rgangam@pa.gov>; Joshi, Girish <gjoshi@pa.gov>  
**Subject:** Aviation Channeling Agreement New eGrants Comments/Documents have been submitted. ESAID: 202209264069

**Program Name:** Aviation Channeling Agreement  
**Applicant:** North Central Highway Safety Network, Inc  
**ESAID:** 202209264069  
**Contract:** No Contract Number  
**Project Name:** Aviation Channeling Agreement

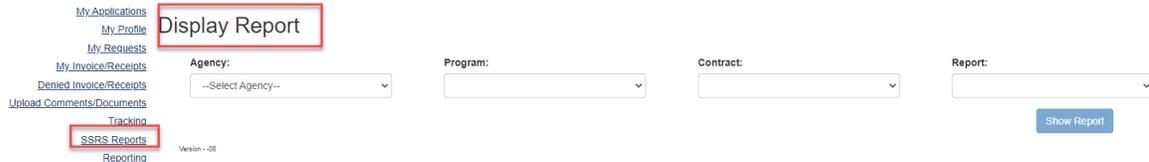
New Comments/Documents have been submitted.

[Click here to start the application.](#)

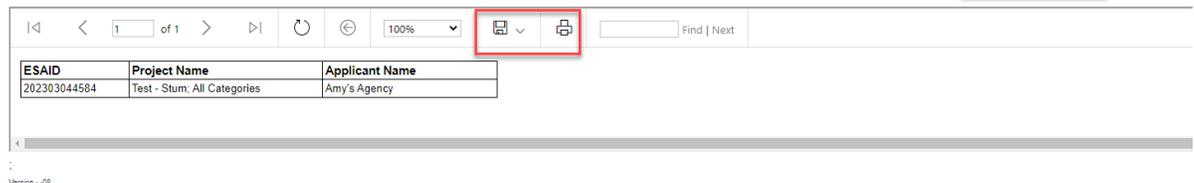
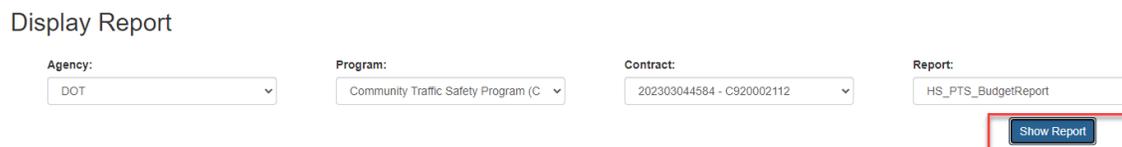
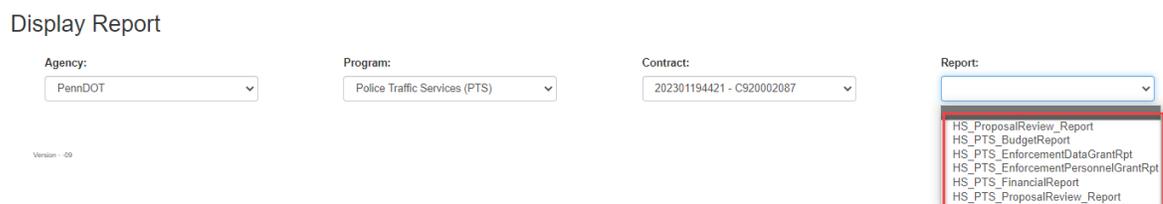
### 3.9 SSRS Reports

Users with the “Show Reports” role and access to the grant can view/generate the SSRS reports from the partner portal **for reports configured with external access**. The reports are grant-level only, for any grants assigned to the user. Below is an example of the configured SSRS reports for the Highway Safety programs.

- To access the SSRS report, click the “SSRS Reports” link in the partner portal.



- Select “Agency,” “Program,” “Contract,” and “Report.” Click “Show Report” as shown below.



- Report can be exported to Word, Excel, PDF, etc. using the option highlighted below.

Navigation: 1 of 1 | 100% | Find | Next

ESAIID	Project Name	Applicant Name
202303044584	Test - Stum; All Categories	Amy's Agency

County	Goal	Activity Name	Activity Ident	Projected Hrs per Activity YR 1	Total Activ
ADAMS	Aggressive Driving & Speeding	Community Outreach		1.00	10.00
ALLEGHENY	Bicycle Safety	Coalition Development		10.00	10.00

Download menu options: Word, Excel, PowerPoint, PDF, TIFF file

**Note:** Currently, all configured reports for the program show, regardless of the selected program.