



**NORTH CAROLINA**  
Department of Transportation



# EBS Application Process for Locally Administered Projects

January 29, 2025

Connecting people, products and places safely and efficiently with customer focus, accountability and environmental sensitivity to enhance the economy and vitality of North Carolina



## Welcome!

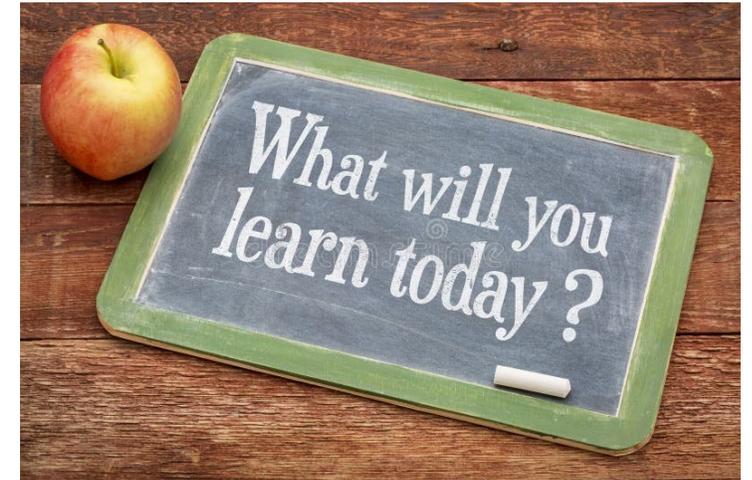
- Introduction
  
- What is a Locally Administered Project (LAP)?
  - Planned, Developed, and Delivered by a Local Government Agency (LGA), which can be a Municipality, County, or State Agency
  - NCDOT provides oversight of local projects to ensure compliance with applicable Federal and State laws and regulations
  
- What is the EBS Portal?
  - On-line project management tool – locals can request agreements and supplemental agreements, submit documents for review, and request reimbursement of approved funding
  
- What resources are available?
  - This training
  - LPMO Website on NCDOT Connect
  - Program Consultants in our office



## Locally Administered Projects Application Process

# What will you learn from this presentation?

- How to Complete the Application Form
- Saving the Application and attaching documents
- What happens after submittal



# Overview of Agreements

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## Important Reminders

- Federal reimbursement for any phase of work generally constitutes a commitment to complete the project in its entirety
- Application is for a new project (Supplemental Agreements are requested through a Change Request)
- Federal Funding Accountability and Transparency Act (FFATA) form must be on file – not project specific, specific to municipality
- Project is not in EBS until you request an Agreement through portal



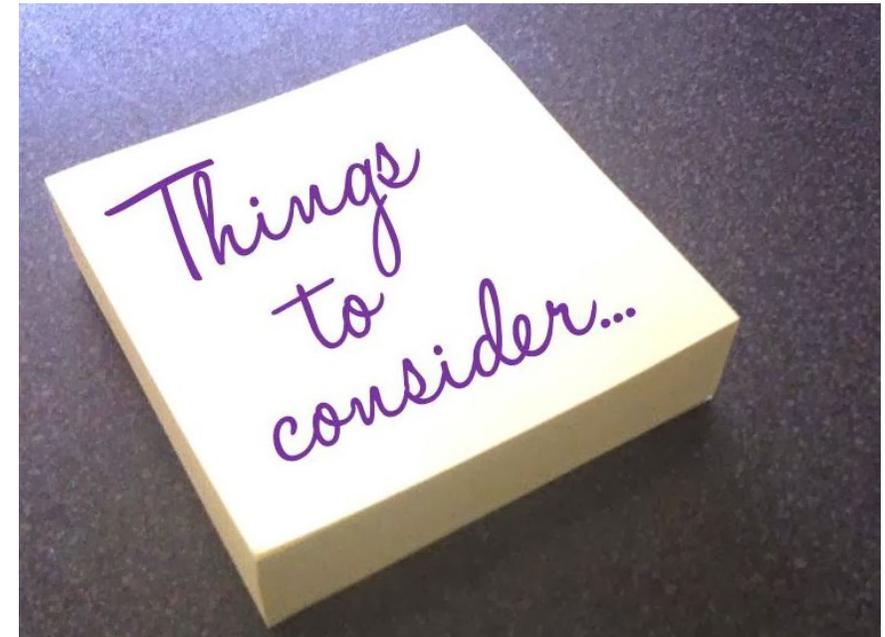
**Funding authorizations cannot occur until a fully executed agreement is in place**



## Federal Grants

### BUILD, RAISE, etc.

- Signed Agreement
  - Grant agreement process can take up to 18-24 months after award announcement
  - Costs incurred before signed grant award is not eligible for reimbursement
  - LGA will enter two agreements – one with the Federal entity and one with NCDOT.
- Fixed Deadlines
  - Obligation of funds, expenditures and/or start of construction
- Project Costs
  - Grant is fixed amount
  - Match rate is set with grant award
  - Any additional funding required to complete project are responsibility of municipality





## **NEXT STEPS TO COMPLETE APPLICATION**

We have reviewed the requirements for the different types of federal agreements.

Now let's jump into how to complete an application!





# Completing the Application in EBS

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## EBS Portal

- The Project Management Tool on the EBS Portal will be used to:
  - Request New Agreements and Supplemental Agreements
  - Submit Documents for review by the Department
  - Request Funding Authorizations for each phase of work
  - Submit Reimbursement Requests for work performed

EBS Portal is the electronic filing cabinet for projects



## LPMO Security Form

- Must have user id and password to access the EBS Portal and Local Projects
- Form is on the Connect Website
- If you already have access to EBS Portal, then indicate that in Section 2 of the form

**Local Programs Management System Access Authorization Form**

The new Local Programs Management System requires a User ID and Password for access in the system. Complete Sections 1 -3 for a User ID and password, if you are going to perform work within the System (i.e. submit a PID application, submit a Reimbursement claim, request changes to an agreement, or view documentation). Scan, attach and email the form to the LPMO Security Coordinator at [LPMO@ncdot.gov](mailto:LPMO@ncdot.gov).

**Section 1 – User ID Information**

First: \_\_\_\_\_ Last: \_\_\_\_\_

Agency Name: (LGA/MPO/RPO): \_\_\_\_\_

Agency Address: \_\_\_\_\_

Title: \_\_\_\_\_ Email: \_\_\_\_\_

Telephone: (\_\_\_\_) \_\_\_\_\_ Fax: (\_\_\_\_) \_\_\_\_\_

Remittance Address: \_\_\_\_\_

**Note:** Remittance address is the official location for payment. Invoices and backup documentation will need to match the remittance address. Error in identifying the correct location will result in delayed payments.

**Section 2 – Username or Secure 8-Digit Number**

If you are a Current User of the NCDOT GRANTS System (Powell Bill, GHSP, PTD, etc.), please enter your username:  
**Username:** \_\_\_\_\_. There is no need to create a Secure 8-digit number below.

If you are a New User, you must create an 8-digit #. We recommend using the last 4 digits of your SSN & birthday (MMDD). If you forget your password, you will need this 8-digit # to retrieve your information. Once cleared, you will receive an email with your personal User ID and a temporary password. You must create a new password prior to logging into the Grants System for the first time.

**Secure 8-digit number:** \_\_\_\_\_.

**Section 3 – Access Request Information**

ALL ROLES (includes the following):

- Submit PID Application (*allows you to request an agreement*)
- View Agreement & Submit Documentation (ex: Plans & Specifications, Cost Proposals)
- Create/Submit Reimbursement Request/Claims
- Create/Submit Change Request (Amendment/Revision) (*used to request funding authorizations or a supplemental agreement*)

Display/View Roles Only (*for staff who do not need to submit documents and only want to review information available. This role will not allow any workflow activities*)



## Access to EBS

- Receive an e-mail from the NCDOT Service Account
- Check your junk or spam folders

Welcome to the LPMO Enterprise Business System Portal

 Service Account - SAP Acct  
To: [Redacted]  
Cc: LPMO

☺ Reply Reply All Forward [Share] [More]

Fri 1/24/2025 2:14 PM

[Welcome to the Enterprise Business \(EBS\) Portal](#)

You have been given access to the EBS Portal's Local Programs Management Office (LPMO). Your logon EBS credentials are as follows:

**EBS User ID:** [Redacted]

**Temporary Password:** gm#XXXXXXXX (where XXXXXXXX represents the 8-digit secure code you submitted when requesting your account)

For example, if your 8-digit secure code is 45678124 then your temporary password would be gm#45678124. If you do not remember your 8-digit secure code, it is found on your Access Authorization form. Alternatively, you may contact your LPMO coordinator for assistance.



## LPMO Login Screen

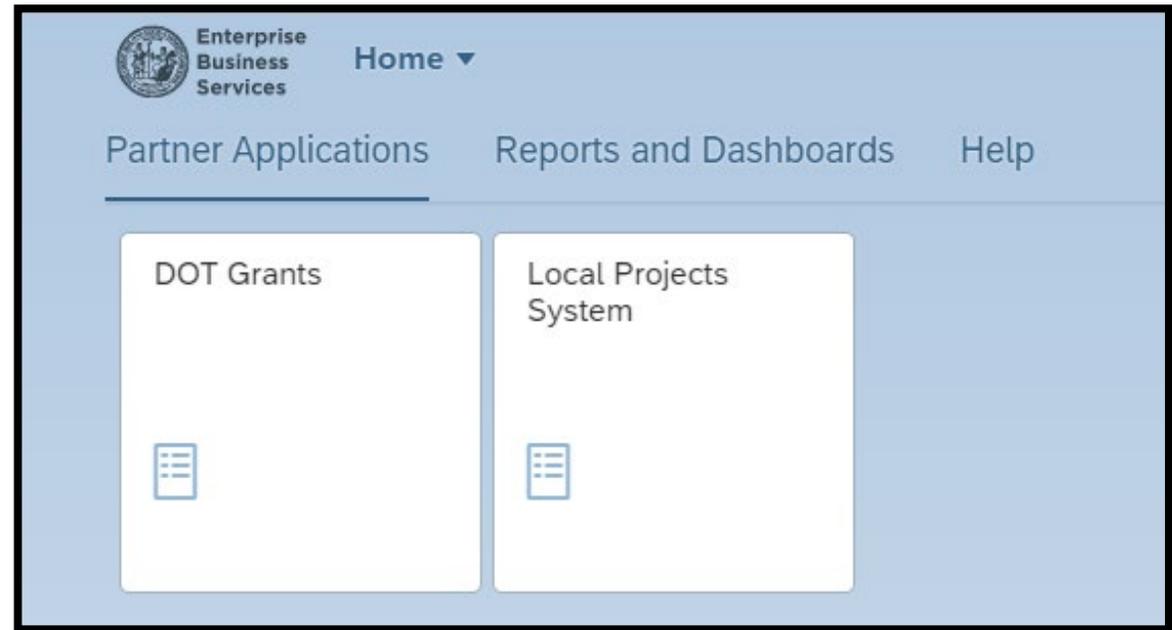
- This is the login screen for EBS access





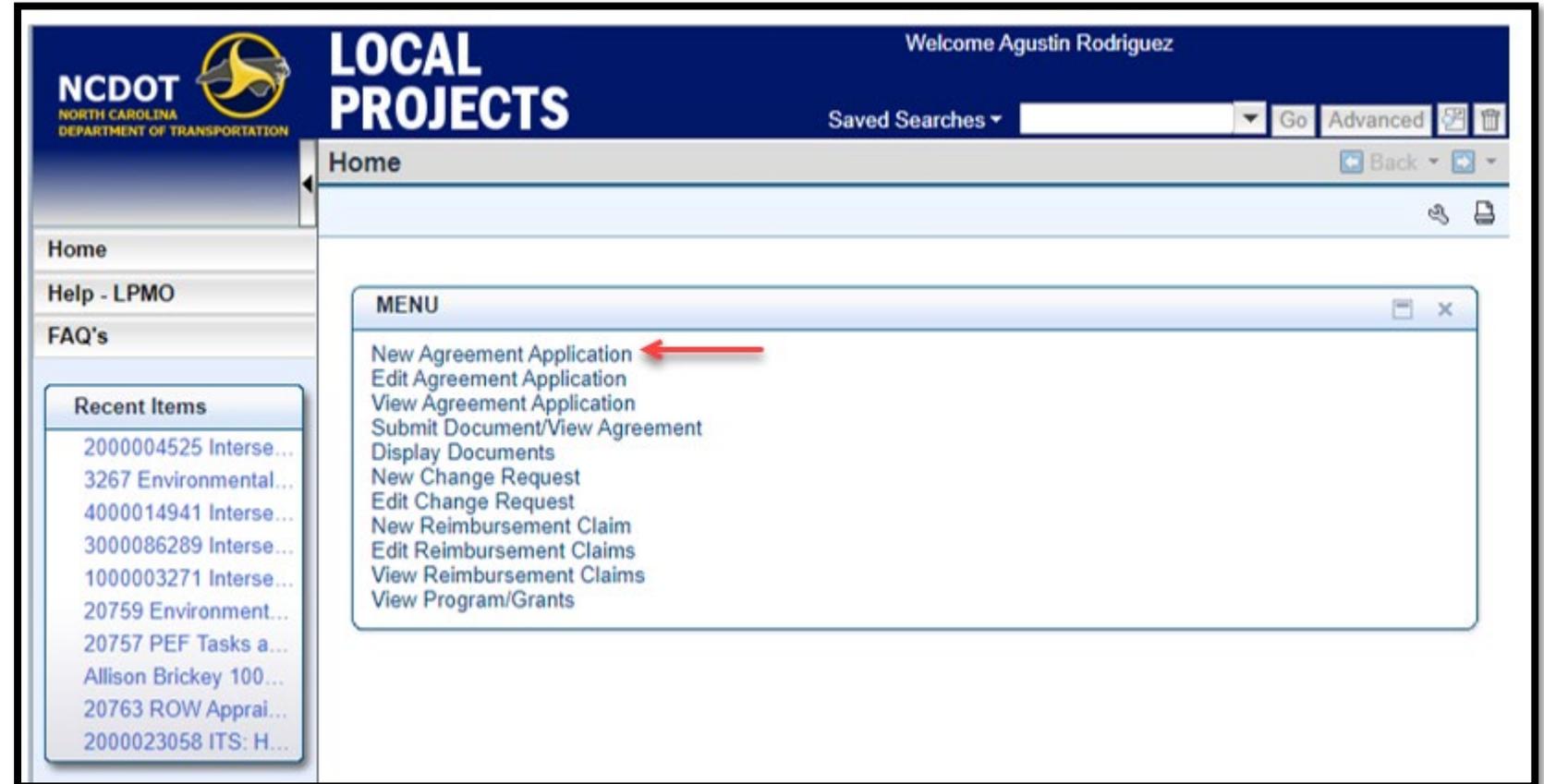
## Local Project Management Tool

- Once you have logged in you will see this screen with tiles.
- You can select either tile to begin.



## Local Project Management Tool

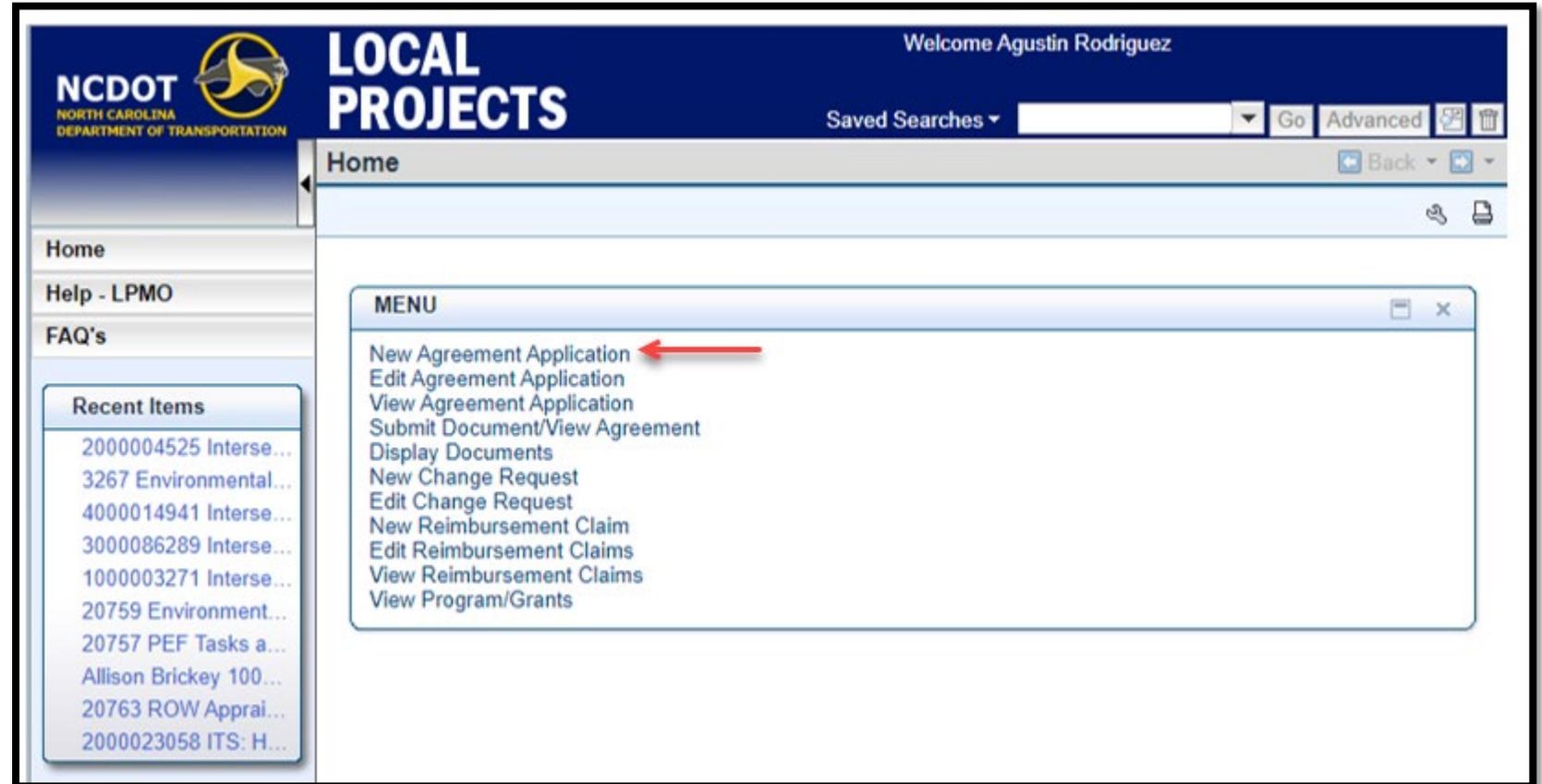
- When you login to EBS, this is a screenshot of your home page.
- If you are requesting a new agreement – your project will not be in here yet.
- You must select “New Agreement Application” first to create the Project in EBS.





## Local Project Management Tool

- Click on  
New Agreement  
Application



## Local Project Management Tool

- Your search criteria will show “Program ID” – do not change
- Click on “Search” – only one program will appear
- Click on “LPMO – Application BSP”

The screenshot shows the 'LOCAL PROJECTS' search interface. The search criteria are set to 'Program ID is'. A red 'X' is drawn over the search criteria. The search button is highlighted with a red arrow. The result list shows 'No result found'.

Search: Application Form

Search Criteria

Program ID is

Maximum Number of Results: 100

Search Clear Save Search As: Include View Save

Result List

Application Form Program ID

No result found

The screenshot shows the 'LOCAL PROJECTS' search interface. The search criteria are set to 'Program ID is' and 'Program Type is LPMO Standard Pr...'. The search button is highlighted with a red arrow. The result list shows 'LPMO - Application BSP'.

Search: Application Form

Search Criteria

Program ID is

Program Type is LPMO Standard Pr...

Maximum Number of Results: 9...

Search Clear Save Search As: Include View Save

Result List

Application Form Program ID

LPMO - Application BSP LOCAL PROJECTS - LPMO



## Local Project Management Tool

- Some information will automatically populate based on your user profile
- **MPO/RPO** are drop down options – select the appropriate PO
- **Type** is also drop down option – Municipality/County/Other
- **Contact Info – Agreements**
  - Contact person designated by municipality; this person should coordinate Agreement execution
- **Contact Info – Project Delivery**
  - Person designated to deliver project; this person should have responsibility for submitting activities for review in EBS. If they need access – they must complete a LPMO Security Form.

DEMOGRAPHIC INFO	
Name of Entity	TOWN OF FUQUAY VARINA
MPO/RPO*	Please Select
Type*	Please Select

CONTACT INFO - Agreements	
Name	John Doe
Title	
Address	,
Phone #1	(919) 555-1212
Phone #2	
Email	john DOE@fuquay-varina.org



## Local Project Management Tool

- **Contact Info – FFATA Reporting**
  - Person responsible for FFATA reporting for municipality; this is generally a finance position
- **Project Information**
  - Project Name is a short summary of project
  - Detail Description – full project scope. Must be in line with STIP
- **County**
  - County project is in / Division will automatically populate
- **Project Data**
  - TIP – required field – the TIP Number will be on your award letter or notification from PO.

Email		<input type="text"/>
<b>CONTACT INFO - FFATA Reporting</b>		<input type="checkbox"/> Same as Agreements <input type="checkbox"/> Same as Project Delivery
Name	<input type="text"/>	
Title	<input type="text"/>	
Address	<input type="text"/>	
Phone #1	<input type="text"/>	Phone #2 <input type="text"/>
Email	<input type="text"/>	
<b>PROJECT INFORMATION</b>		
Project Name*	<input type="text"/>	
Detail Description*	<input type="text"/>	
County*	<input type="text" value="Choose One"/>	Division <input type="text"/>
<b>PROJECT DATA</b>		
TIP*	<input type="text"/>	
WBS Element -PE	<input type="text"/>	
WBS Element -ROW	<input type="text"/>	
WBS Element - UTILITY RELOCATION	<input type="text"/>	
WRS Element -CON	<input type="text"/>	



## Local Project Management Tool

### Eligible Phases

- Enter fiscal year that the phase of work is programmed in the STIP
- Federal fiscal year runs from 10/01 to 09/30
- Funding must be authorized for the phase of work in that timeframe
- Deliverables – Responsible Party will always be the LGA.  
(exception could be maintenance).

ELIGIBLE PHASES	
PE	Year Programmed ▼
Pre-construction Activities	<input checked="" type="checkbox"/>
Implementation of a Program	<input type="checkbox"/>
Non-construction Purchases	<input type="checkbox"/>
ROW	Year Programmed ▼
Acquisition of ROW	<input checked="" type="checkbox"/>
UTIL	Year Programmed ▼
Utility Relocation	<input checked="" type="checkbox"/>
CON	Year Programmed ▼
Construction, CEI, Contract Admin	<input checked="" type="checkbox"/>

DELIVERABLES - Responsible Party	
ENVIRONMENTAL DOCUMENTATION	<input type="radio"/> LGA <input type="radio"/> NCDOT
DESIGN	<input type="radio"/> LGA <input type="radio"/> NCDOT
CONTRACT PROPOSAL AND ESTIMATE	<input type="radio"/> LGA <input type="radio"/> NCDOT
RIGHT OF WAY DOCUMENTATION	<input type="radio"/> LGA <input type="radio"/> NCDOT
UTILITY RELOCATION	<input type="radio"/> LGA <input type="radio"/> NCDOT
FINAL ACCEPTANCE OF CONSTRUCTION	<input type="radio"/> LGA <input type="radio"/> NCDOT
CEI/CONSTRUCTION ADMINISTRATION	<input type="radio"/> LGA <input type="radio"/> NCDOT
MAINTENANCE	<input type="radio"/> LGA <input type="radio"/> NCDOT <input type="radio"/> BOTH



## Local Project Management Tool

- Funding – drop down options for funding source
- Federal amounts are based on what is in the award letter
- Delivery dates need to match program dates
  - If ROW is in FFY26, then start date will need to be between Oct 1, 2025 and Sept 30, 2026.
  - LET Date – this date is when the LGA receives and opens bids for construction

FUNDING						
FUNDING SOURCE	FEDERAL		NON-FEDERAL MATCH			
	Federal Amount	Fed %	State Amount	State %	Local Amount	Local %
Select One		%		%		%
Select One		%		%		%
Select One		%		%		%
Totals						

TOTAL PROJECT FUNDING	\$0
TOTAL ESTIMATED COST*	
DIFFERENCE B/W FUNDING AND COST	\$0
TOTAL LGA LIABILITY	\$0

Delivery Dates	LGA Proposed	Division Approved
Start of ROW Acquisition (MM/DD/YYYY)		
Let Date (MM/DD/YYYY)		
Completion Date (MM/DD/YYYY)		



## Local Project Management Tool

- Space for any additional comments
- Agency Authorizing
  - Confirmation that applicant has read and accepts terms and conditions of application
  - Must be checked to submit application

The screenshot displays a web form interface. At the top, there is a light blue header bar with the word "Comments" centered. Below this is a large, empty light blue rectangular input field. Underneath the input field is a light gray horizontal bar. At the bottom of the form, there is a section titled "AGENCY AUTHORIZING" in bold. To the left of this title is a small, empty square checkbox. To the right of the checkbox is the text: "I have read and accept the terms and conditions for funding and all the information and attachments supplied in this application are true to the best of my knowledge."



## Local Project Management Tool

- Selecting the **yellow Check button** on the application will highlight errors in **pink** and will show errors at the bottom of the screen



Delivery Dates	LGA Proposed	Division Approved
Start of ROW Acquisition (MM/DD/YYYY)		
Let Date (MM/DD/YYYY)		
Completion Date (MM/DD/YYYY)		



## Local Project Management Tool

- Selecting the yellow Check on the application will highlight errors in pink and will show errors at the bottom of the screen

### AGENCY AUTHORIZING

I have read and accept the terms and conditions for funding and all the information and attachments supplied in this application are true to the best of my knowledge.

Check

Save

Submit

Print Application

### Form Validation Errors

Please enter Project Information - Project Name.

Please enter Project Information - Detail Description.

Please enter Project Information - County.

Please enter Project Data - TIP.

Please enter Total Estimated Cost.



## Local Project Management Tool

- Fix your errors and select “CHECK” again.
- If the errors have been corrected, you will receive the following message:

### Check Complete!

The screenshot shows the EBS Application Form interface. A dark notification box at the top right displays the message: "qcr.ebs.nc.gov says Check complete!" with an "OK" button. Below the notification, a summary table is visible:

TOTAL PROJECT FUNDING	\$0
TOTAL ESTIMATED COST*	\$1,000,000
DIFFERENCE B/W FUNDING AND COST	\$1,000,000
TOTAL LGA LIABILITY	\$1,000,000

Below the summary table is a table with three columns: Delivery Dates, LGA Proposed, and Division Approved.

Delivery Dates	LGA Proposed	Division Approved
Start of ROW Acquisition (MM/DD/YYYY)	09/30/2027	
Let Date (MM/DD/YYYY)	09302028	
Completion Date (MM/DD/YYYY)	09302030	

**APPLICATION FORM IS COMPLETED – NEXT PART: WORKFLOW**







# Workflow of the Application in EBS

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# Workflow of the Application





## What's next?

- ✓ CHECK – check application to ensure all required fields are completed (incomplete required fields will highlight in pink)
- SAVE – if you are not ready to submit, save progress on application and return at a later time to complete
- SUBMIT- the application is complete and the workflow will advance to LPMO for review
- PRINT APPLICATION – will allow you to print the form that you just completed

Check

Save

Submit

**Print Application**

## SAVE APPLICATION

- When select the **green SAVE button** the application, you will receive Confirmation the application has been saved with an ID number

Application ID – 1000019328

- This is the application number for the project.

HELPFUL HINT: All of the information does not have to be completed on the application in order to save it.



**Confirmation**

Your Application has been **Saved** successfully. **Application ID - 1000019328**

## SAVE APPLICATION

To return to the saved application:

- From the Home page, select Edit Agreement Application
- Enter the TIP number in the search box
- Click on Search

The screenshot displays the EBS application interface. At the top right, a 'MENU' box lists various actions: 'New Agreement Application', 'Edit Agreement Application' (highlighted with a red arrow), 'View Agreement Application', 'Submit Document/View Agreement', 'Display Documents', 'New Change Request', 'Edit Change Request', 'New Reimbursement Claim', 'Edit Reimbursement Claims', 'View Reimbursement Claims', and 'View Program/Grants'. Below the menu is a search section titled 'Search: Grantor Applications'. It features a search form with a dropdown menu set to 'TIP number', a search operator 'is', and a search box containing 'AB-1234' (circled in red). To the right of the search box is a plus icon. Below the search box, it says 'Maximum Number of Results: 100'. At the bottom left of the search section is a 'Search' button, which is also highlighted with a red arrow.

## SAVE APPLICATION

- Note that the application status will show “In process by LGA” – this means that it is not yet submitted.
- Click on the Agreement ID and the application form will open

Search: Grantor Applications

TIP number  is  AB-1234

Maximum Number of Results:  100

Filter:

Pre-Agreement Request ID	Description	TIP number	Status
1000019328 ←	Installation of Sidewalk along Main Stre	AB-1234	In Process by LGA

## SUBMIT APPLICATION

If you've made all changes and you're ready to submit the Application:

- All fields must be completed and errors must be corrected
- Click on **Green Submit Button**
- Will receive message that application has been submitted successfully and Application ID will match



### Confirmation

Your Application has been **Submitted** successfully. **Application ID - 1000019328**

## ATTACHMENTS

- When submitting the application, it is helpful to attach the award letter or other backup documentation showing details about the funding
- Please include a copy of the Notice of Award or Funding to the application



Attachments			
Attachment Type	Description	Name	File Name
		2024-01-25 Resolution_signed.pdf	2024-01-25 R

## **ATTACHMENTS**

There are 2 ways to attach documents

- Click on “Attach Documents” when the Application is submitted; or,
- If you forget to attach, you can go back and view your application and attach documents.

Let's see how this works....

## ATTACHMENTS

Open

This PC > Desktop > Attachments

Name	Date modified	Type	Size
Attachment A	9/18/2024 9:10 AM	Microsoft Word D...	14 KB

File name: Attachment A All Files

Open Cancel

2. Click 'Open'

1. Click 'Choose File'  
Navigate to the files you want to upload.

Print/Save as PDF

Select file to attach supporting Documentation Choose File No file chosen Attach



## ATTACHMENTS

The screenshot illustrates the attachment process in the EBS application system. It shows two stages of the interface:

- Top Stage:** A confirmation message reads "Your Application has been Created successfully. - Application ID - 10000XXXXX". Below this is a "Print/Save as PDF" button and a file selection area. The text "Select file to attach supporting Documentation" is followed by a "Choose File" button, a text box containing "Attachment A.docx" (circled in orange), and an "Attach" button.
- Bottom Stage:** The same confirmation message is present. The file selection area now shows "No file chosen" after the "Attach" button has been clicked. A "Print/Save as PDF" button is also visible.

Annotations with orange boxes and arrows provide instructions:

- "File name is shown here." points to the "Attachment A.docx" text box.
- "Click 'Attach'" points to the "Attach" button.
- "Confirmation message will appear below." points to the "Documents successfully uploaded." message, which is circled in orange.

## ATTACHMENTS

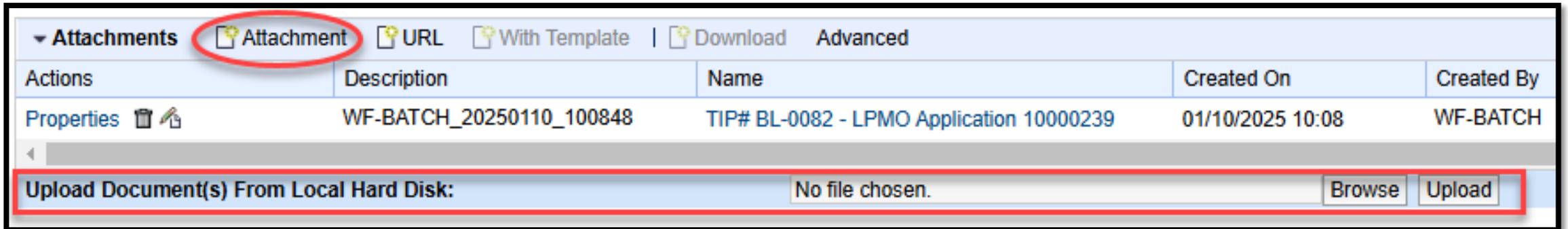
What if you forgot to add on the previous page?

- From the Home page, select View Agreement Application.
- Enter the TIP number in the search box
- Click on Search

The screenshot displays a web application interface. At the top right, a 'MENU' box lists various actions: 'New Agreement Application', 'Edit Agreement Application', 'View Agreement Application' (highlighted with a red arrow), 'Submit Document/View Agreement', 'Display Documents', 'New Change Request', 'Edit Change Request', 'New Reimbursement Claim', 'Edit Reimbursement Claims', 'View Reimbursement Claims', and 'View Program/Grants'. Below the menu is a search section titled 'Search: Grantor Applications'. It features a search form with a dropdown menu set to 'TIP number', a search operator 'is', and a search box containing 'AB-1234' (circled in red). To the right of the search box is a plus icon. Below the search box, it says 'Maximum Number of Results: 100'. At the bottom left of the search section is a 'Search' button, which is also highlighted with a red arrow.

## ATTACHMENTS

- Once your application is open, scroll down to Attachment section.
  - You can click on New Attachment; or,
  - You can Click on Browse to upload several documents at once; or
  - You can “drag and drop”



Attachment

Actions	Description	Name	Created On	Created By
Properties  	WF-BATCH_20250110_100848	TIP# BL-0082 - LPMO Application 10000239	01/10/2025 10:08	WF-BATCH

Upload Document(s) From Local Hard Disk:

## ATTACHMENTS

- The dialog box gives you a line to name the attachment and a line to include a description of the attachment.
- Click on Browse and you will locate the file, and click on the file and it will upload
- TIPS for naming attachments:  
Use TIP # followed by type of document  
AB-1234 Funding Award Ltr

Application: 1000019323, abc

Save | Cancel | Refresh

Employee Responsible 1000012302 may not be used

Attachment - Google Chrome

qcr.ebs.nc.gov/sap(===)/bc/bsp/sap/bsp\_wd\_base/popup\_buffered\_frame\_cached.htm?sap-client=600&sap-language=EN&sap...

To attach a document, select the document using the value help. If you upload a document from your local hard disk, you can enter a name for the document. If you choose to enter a name, this name is displayed in the attachment list. If you do not enter a name, the file name is displayed.

Name:

Description:

Attachment Type:

Upload Document(s) From Local Hard Disk:

Amount	Attachment Name	End Date
0.00 USD		
	ab-1234	01/27/2025
		12/31/2099

▼ Attachments | Attachment | URL | With Template | Download | Advanced | Filter:

No result found

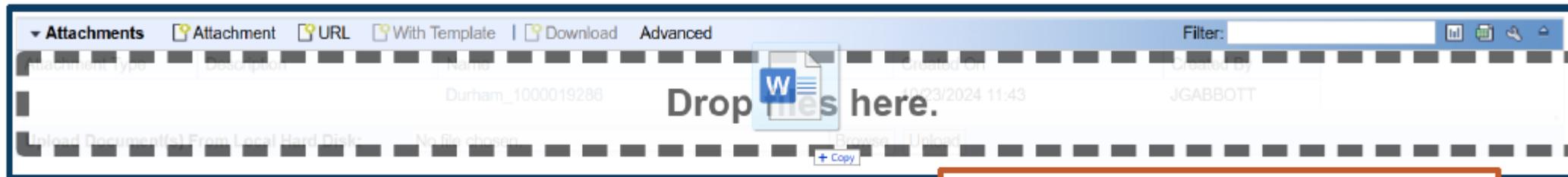
## ATTACHMENTS

- EBS allows you to Drag and Drop a document in the attachments

TIPS for naming attachments:

Use TIP # followed by type of document

AB-1234 Funding Award Ltr



You can also Drag and Drop the file from an open window on your computer to the EBS window.

A screenshot of the EBS Attachments interface showing a table of attachments. The table has columns for Attachment Type, Description, Name, Created On, and Created By. Below the table is a section for 'Upload Document(s) From Local Hard Disk' with the text 'No file chosen.' and 'Browse' and 'Upload' buttons.

Attachment Type	Description	Name	Created On	Created By
		Agreement_10000XXXXX	10/23/2024 11:43	DIVISION USER
		REVISED_Agreement_10000XXXXX	11/04/2024 16:14	DIVISION USER

Upload Document(s) From Local Hard Disk: No file chosen. Browse Upload



## Questions?

Are there any  
questions?



# Application Submitted for Agreement

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## Agreement Process

Application has been submitted - What happens now?





## NCDOT REVIEW

When LGA submits application, EBS will route the workflow to LPMO for review.

The following items will be reviewed:

- Look at Project Name and description
- Are eligible phases programmed in the STIP in the year indicated?
- Who is providing maintenance? If both, then need some details on who is responsible for maintaining what.
- Does funding source match the STIP?





## **NCDOT Review – cont'd**

- Do percentages and funding amounts match what the funding program approved? The STIP rounds to the nearest \$1,000, so information from the MPO may be needed.
- Is the math correct? Does  $TOTAL \times percentage = Federal\ funds$  without rounding up? Local match may need to be adjusted.
- Are attachments included that explain funding? Re: Award Letter



The more information you can provide, the easier our review will be

## Agreement Process

Once application is reviewed, there are 3 options that can be taken on application.

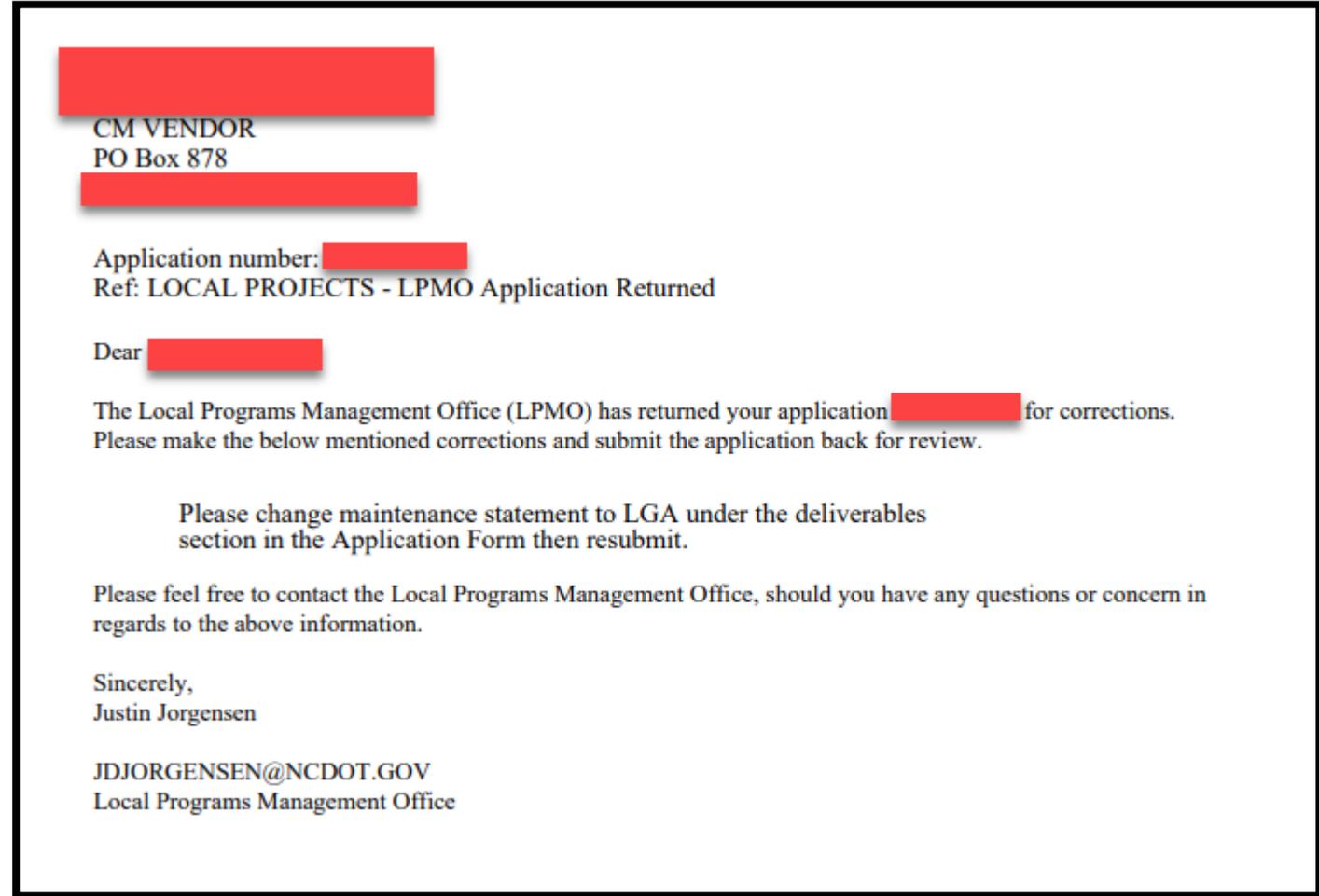
- **Approved:** If all information is correct, a note will be added for the next reviewer
- **Returned:** Application will be returned to LGA to make corrections. Items to be corrected will be listed in the letter that is sent via e-mail.
- **Rejected:** This is rarely used; generally, for duplicates, or for projects that are not programmed in the STIP.





## Agreement Process – Returned Application

“Return Notes” will appear in the letter that you will receive by e-mail





## Agreement Process – Returned Application

This letter also is listed under attachments

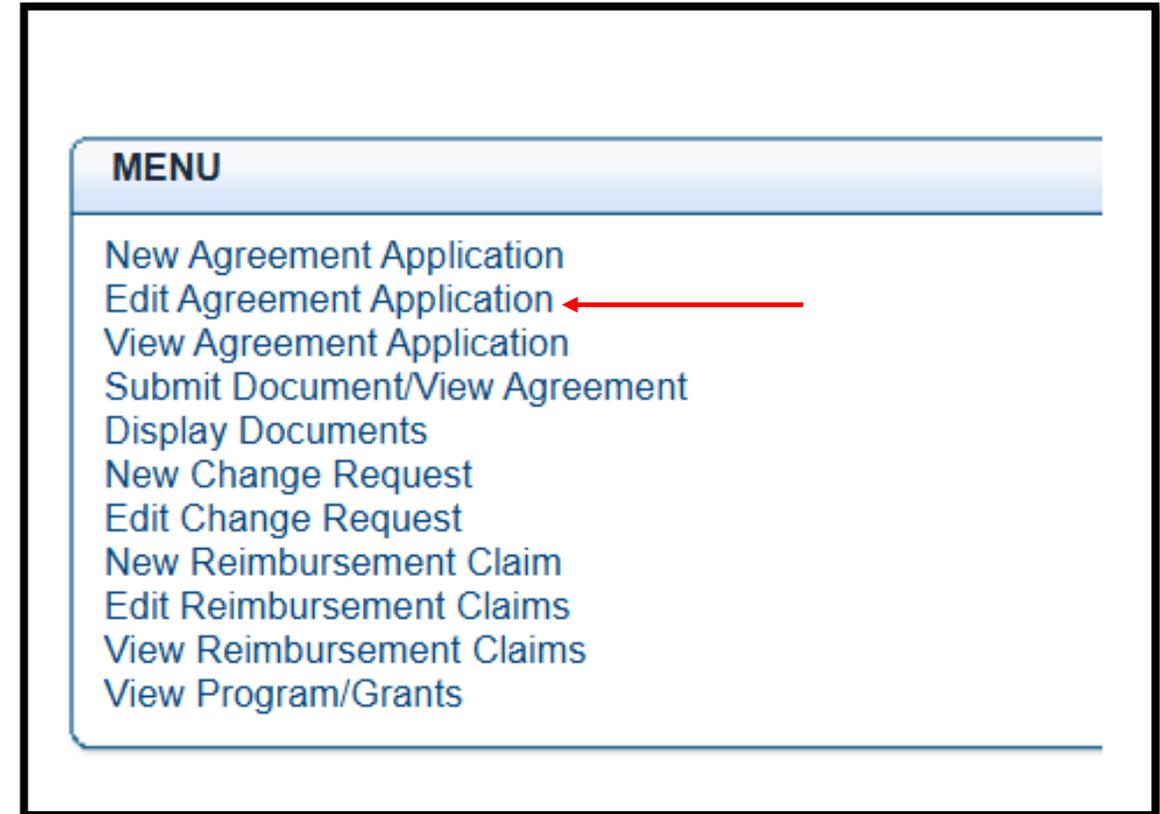
Attachments				
Attachment URL With Template   Download Advanced				
Actions	Description	Name	Created On	Created By
<a href="#">Properties</a>  	WF-BATCH_20250110_100848	TIP# [REDACTED] - LPMO Application 10000 [REDACTED]	01/10/2025 10:08	WF-BATCH



## Re-submit Application with Corrected Information

The application has been returned for corrections or additional information.

- From home screen select Edit Agreement Application





## Re-submit Application with Corrected Information

- Type in TIP # and click search
- Application will appear and you can click on agreement ID to open application
- Make corrections and submit

**Do not start a new application**

Search: Grantor Applications

TIP number ▼ is ▼ ab-1234 +

Maximum Number of Results: 100

Search

Pre-Agreement Request ID	Description	TIP number
1000019328 ←	Installation of Sidewalk along Main Stre	AB-1234



## LPMO Approves – Division Review

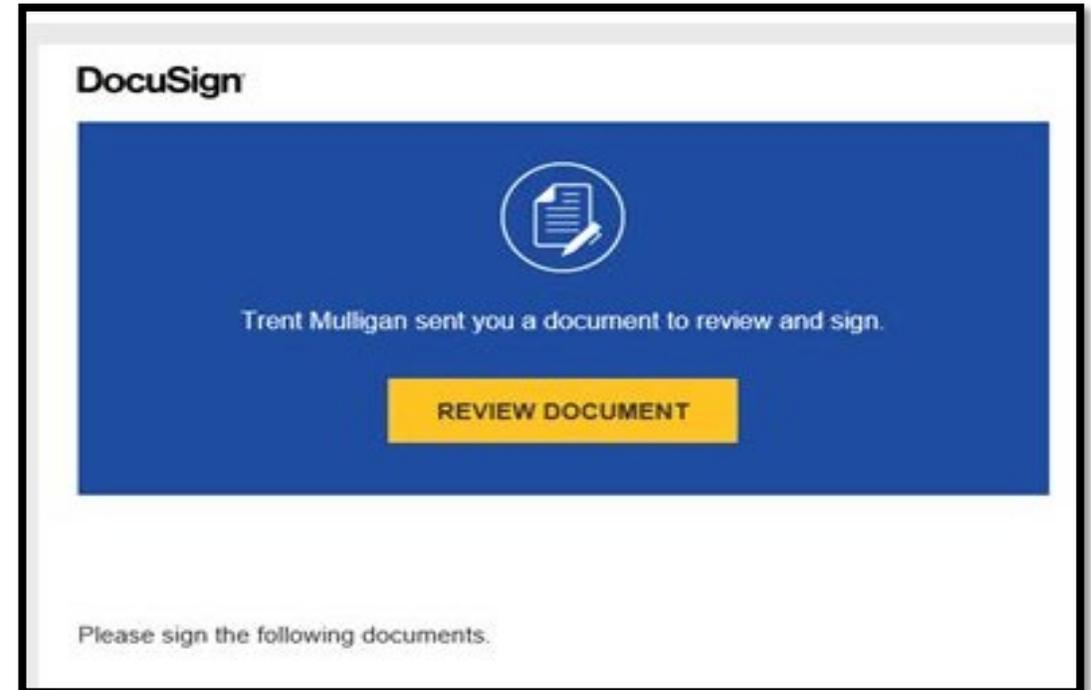
Division is reviewing primarily scope and schedule

- If there are questions, Division may have a conversation with LGA to ensure dates are realistic
- If ROW and Let date milestones do not match programming, Division will need to submit a schedule change
- If changes are requested by Divisions, application is returned to LPMO, who then returns to LGA. Process for editing and resubmitting application starts again



## Agreement Process – Signatures

- Once the review by LPMO and division is completed and any issues have been corrected, the agreement will be created and sent to the LGA for signatures.
- Agreements are sent through DocuSign with instructions on obtaining signatures.
- The contact person listed on the application will receive the DocuSign and will have authority to enter the names and e-mails of the LGAs authorized signer and finance officer.





## Agreement Process – Signatures cont.

- The contact person listed on the application will receive the DocuSign with the message shown.
- The authorized signer and finance officer are required to sign the agreement
- An account is NOT needed to use DocuSign
- DOT is using DocuSign for all its agreements

Please find attached the Municipal Agreement for **BN-0022**

Please open attached agreement to review and circulate as needed. When the Municipality is ready to sign the agreement, please return to this email and click on the link and enter the **NAMES and E-MAIL ADDRESSES of the AUTHORIZED SIGNER and FINANCE OFFICER. The Agreement will be routed to those individuals immediately; once the Municipality has signed, the Agreement will be routed to NCDOT for execution, and you will be notified when that is complete.**

For more information on the DocuSign process, please visit our website:

<https://connect.ncdot.gov/municipalities/Funding/Pages/default.aspx>

If you have questions regarding the content of this Agreement, please contact: Leah Roberts at 919-707-6630 or llroberts@ncdot.gov

Thank you,

Leah Roberts

NCDOT - Local Programs Management Office



## Agreement Process – Signatures - cont.

- Tabs will clearly mark where each person is required to sign.
- The finance person will complete the information for the Federal Tax Identification Number and the remittance address for the LGA.
- When both signatures and information has been completed, the agreement will come back to LPMO for DOT senior leadership signatures.

IN WITNESS WHEREOF, this Agreement has been executed, in duplicate, the day and year heretofore set out, on the part of the Department and the County by authority duly given.

L.S. ATTEST: \_\_\_\_\_ NEW HANOVER COUNTY

BY: \_\_\_\_\_ BY:  \_\_\_\_\_

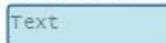
TITLE: \_\_\_\_\_ TITLE:  \_\_\_\_\_

DATE:  \_\_\_\_\_

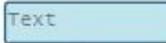
NCGS 133-32 and Executive Order 24 prohibit the offer to, or acceptance by, any State Employee of any gift from anyone with a contract with the State, or from any person seeking to do business with the State. By execution of any response in this procurement, you attest, for your entire organization and its employees or agents, that you are not aware that any such gift has been offered, accepted, or promised by any employees of your organization.

This Agreement has been pre-audited in the manner required by the Local Government Budget and Fiscal Control Act.

(SEAL)  \_\_\_\_\_  
(FINANCE OFFICER)

Federal Tax Identification Number  
 \_\_\_\_\_

NEW HANOVER COUNTY

Remittance Address:  
 \_\_\_\_\_  
 \_\_\_\_\_



## Agreement Process – Signatures - cont.

- Final signatures are for DOT senior leadership and all agreements must be reviewed and approved by the Board of Transportation at the monthly meetings.
- Application to signed and fully executed agreement can take 3-6 months

The diagram illustrates the signature and approval process for the Department of Transportation. It shows the following fields and actions:

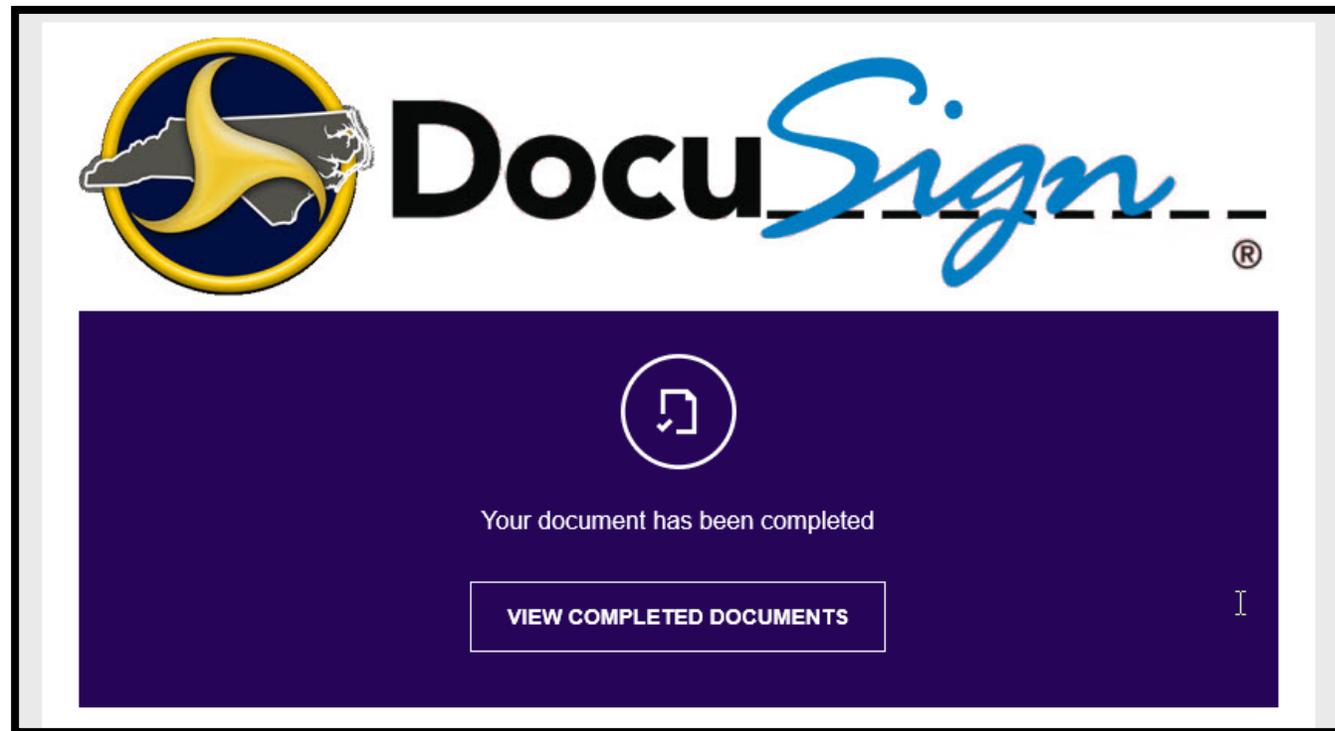
- DEPARTMENT OF TRANSPORTATION**: The header of the document.
- BY:** A line for the signature of the Chief Engineer, with a blue "Sign" button (containing a downward arrow) above it.
- (CHIEF ENGINEER)**: The title of the signatory.
- DATE:** A line for the date, with a blue "Date Signed" button above it.
- APPROVED BY BOARD OF TRANSPORTATION ITEM O:** A line for the Board of Transportation's approval, with a green "Text" button above it.
- (Date)**: A line for the date of approval, with an orange "Initial" button (containing a downward arrow) above it.



## Agreement Process

# CONGRATULATIONS!

The Agreement contact will receive an e-mail when the agreement is fully executed





## Agreement Process

### Now what?

- LPMO will do a final approval of the application
- LPMO will convert the application to an Agreement in EBS
- LGA will receive a separate e-mail that agreement has been created in EBS
- To view Agreement, ignore the application options – go to “Submit Documents / View Agreement”



## Agreement Process – completed!!

We have completed the application to agreement process! It does feel like a Chutes and Ladders game!

There are several steps and approvals required to turn an application into an agreement.





## Resources

LPMO Website

<https://connect.ncdot.gov/municipalities/Funding/Pages/default.aspx>

# Any questions?

## Questions from EBS Application Process

- Will there be a way to access this PowerPoint after the training?

Yes, the PowerPoint will be on the LPMO website

<https://connect.ncdot.gov/municipalities/Funding/Pages/default.aspx>

You can also access the recording and transcript from the webinar meeting in Teams

- Will we be notified when the recording is on the website, and will there be a direct link to access it?

Yes, you will be notified. There should be a link to the website, with directions on accessing the training.

- What sort of documentation will LGAs be attaching?

Award letter or notice of funding

- What does MPO/RPO stand for?

Metropolitan Planning Organization - <https://www.ncampo.org/mpos/>

Rural Planning Organization - <https://ncarpo.org/>

- In Transaction History what is the difference in Submitted and submit. There are two transactions that state submit

This is an IT error, submit/submitted are the same

## Questions from EBS Application Process

- How do you go about submitting a formal schedule change?

Talk to your Division Project Manager – a contact list is available on our website.

- Early in the webinar, it was mentioned subrecipients could have 2 agreements (USDOT and NCDOT). Will both agreements be automatically generated by following the steps included in this webinar?

No. The USDOT agreement will be initiated by USDOT/FHWA and they will provide a template via e-mail.

- Will CMAQ awards have both federal and state agreements?

No. CMAQ funds are administered by NCDOT, so you will only have an agreement with NCDOT.

- Can I ask a question on Claims?

There will be another training session on claims.

- Do we have to update the FFATA annually?

Yes, or if information on the form changes before the next annual report is due.



# Contact Us

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**Marta Matthews – Local Programs Manager**

[mtmatthews@ncdot.gov](mailto:mtmatthews@ncdot.gov)

919-707-6626

**Leah Roberts – Divisions 1-4, 6**

[lroberts@ncdot.gov](mailto:lroberts@ncdot.gov)

919-707-6630

**Sheila Atwood – Divisions 5, 7-9**

[sbatwood@ncdot.gov](mailto:sbatwood@ncdot.gov)

919-707-6625

**Justin Jorgensen – Divisions 10-14**

[jdjorgensen@ncdot.gov](mailto:jdjorgensen@ncdot.gov)

919-707-6631

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**Thank you!**

