Appendix B
TA Set-Aside Application System Instructions

Browser Compatibility - The application works best when viewed in **Google Chrome** or **Microsoft Edge**.

Training Video - A video tutorial is available on [PennDOT's Youtube](#)

Saved Applications – Deferred applications from previous rounds are available under the My Assignments or My Submissions tab. An applicant can continue working on a deferred application for submission during this round.

Instructions For Creating a New Application

1. Click Create New Item at top left of screen.

2. A new window will appear and allow you to Select Item Type (Create New 2023 Application).

3. Enter the project title and click OK.

4. Fill out Overview information which includes Sponsor Information, Project Description, and Project Location. Clicking (+) opens menu items and (-) will minimize. Please be sure all items are opened to review required information. Red (*) asterisk indicates mandatory fields required for application submittal. The application will auto save (boxes turn from red to green) and can be closed and returned to at any time. To locate a previously started application, click My Assignments or My Submissions.

5. Create a Proposal Area Map

   The PennDOT TA Set-Aside application allows users to define a project area by using a mapping selection tool named *Proposal Area Designer*. *The Proposal Area Designer* is accessed by clicking on the map under the **Project Location** portion of the application. For reasons that are later described in this document, it is important to create a map that represents the proposed project as accurately as possible.

Clicking the map within the application creates a new separate tab, titled *Proposal Area Designer.* In this tab, you will be able to add your project area to the map, which will become part of the application. The map is then scored based on the environmental data included in the proposal area.

Creating a Project Area

By default, the *Proposal Area Designer* will open with the **Redline Tool** activated. Projects that do not include state roads or bridges, such as trails, will need to be created with this tool. To add your project, click once on your project's location to begin drawing the line. Double-click to complete your line, or single click to continue drawing multiple line segments.
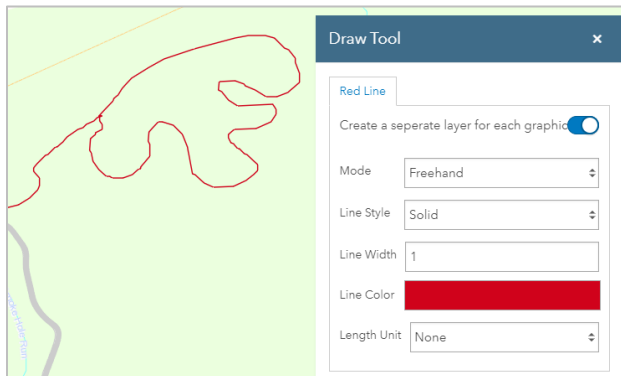
Once completed, line features will be added to the Proposal Redlines layer. See **Removing Features** below to delete excess lines.

Selecting Project Area

By default, state road and state/local bridge layers are not visible. They can be made visible using the RMS Segments or Bridges checkbox in the legend on the left.
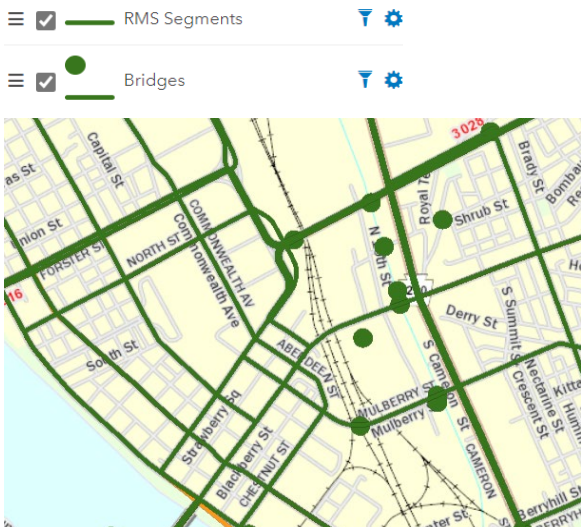
State roads and bridges can be added to your project area through the **Layer Information** box or the **Lasso Tool**. To add a road or bridge using the **Layer Information** box, first close the Redline Tool box, then click on a route segment or bridge on the map.
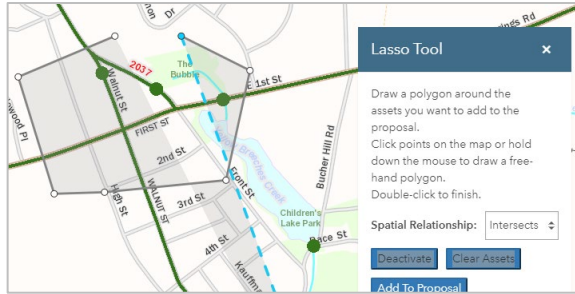
The selection will be highlighted, and a **Layer Information** popup will appear on the screen.
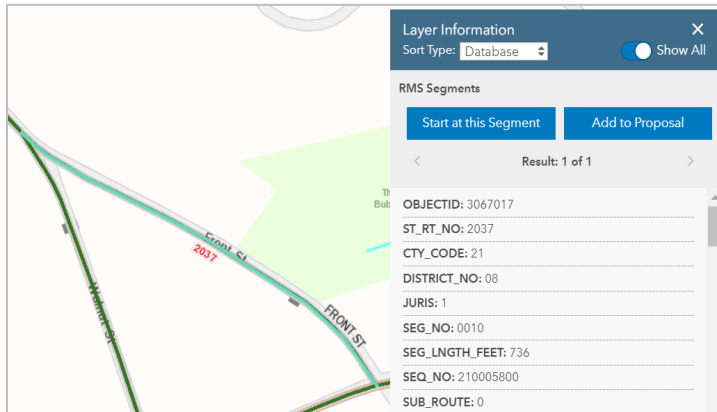

Select **Add to Proposal** and then click the **X** to close the layer information box. The selected feature is added to the Proposal Roads or Proposal Bridges layer. You will need to click the box in the legend on the left to make these layers visible. Multiple roadway segments may be added to the project area by selecting beginning and ending segments. First, click on a road and click **Start at this Segment** in the **Layer Information** box. Next, click on another section of the same road. Then, click **End at this Segment** in the **Layer Information** box. Both sections you selected, plus sections in between, will be added to your proposal.
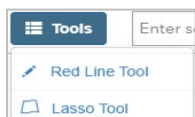

The **Lasso Tool**, located in drop-down under the **Tools** button in the top ribbon (upper-right of screen), creates a project area by drawing a polygon (lasso). **The Lasso Tool can only be used when your project area is on a state road or state/local bridge.** The Spatial Relationship selection has two options, **Intersects** or **Contains**. **Intersects** causes any features that are touching or inside the lasso to be highlighted. **Contains** highlights only features that are completely within the lasso. To make a lasso, hold down the left mouse button and draw a shape on the screen. A lasso may also be drawn by repeatedly left clicking to add a vertex (point), and then dragging the mouse to create a line. Double clicking the left mouse button will complete the drawing.

When the polygon is completed the selected roads/bridges will be highlighted.
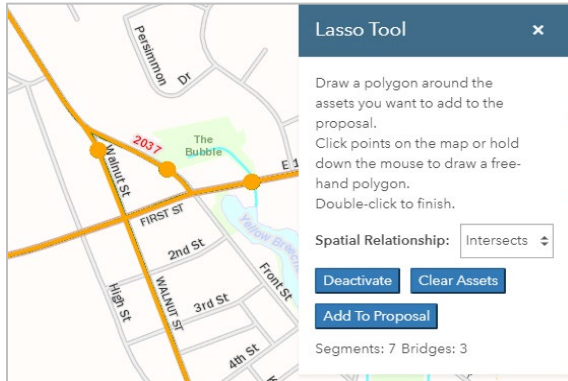
Click ![Add To Proposal] and the roads/bridges will be added to their respective Proposal Roads/Bridges layers. The **Lasso Tool** may be turned on and off with ![Deactivate] and assets may be cleared before they are added to the project area with ![Clear Assets] .
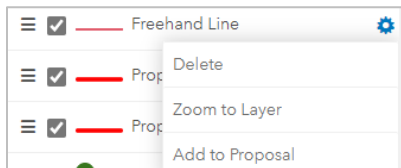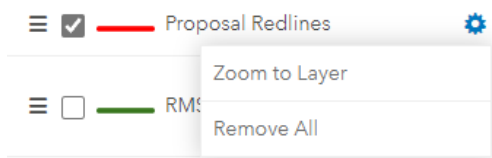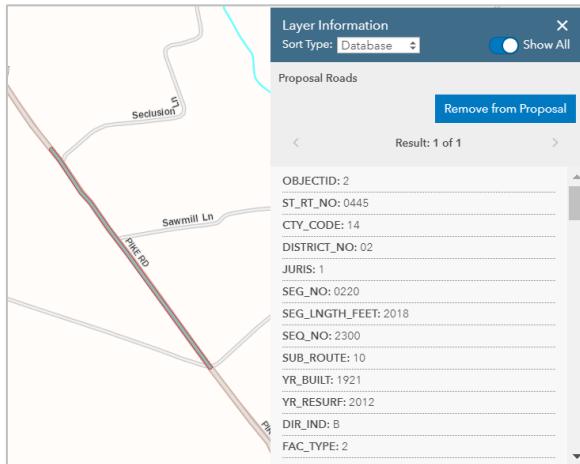

Removing Features

Proposed features may be removed from the map several different ways.

- In the Redline Tool box click ![Undo Last Redline] .

- Click ![X Clear Proposal Features] in the center of the top ribbon.

- Click on the **gear** icon by the layer in the contents pane and select **Remove All.**


Individual features may be removed by clicking on the

feature and selecting **Remove from Proposal** in the popup.

Adding Layers (Optional)

The *Proposal Area Designer* has several default layers in the contents pane that may be used as

references or added to **Proposal Features**. Additional layers may be added with the **+ Layers**

button in the top ribbon, but this step is not required. The headings can be expanded and layers

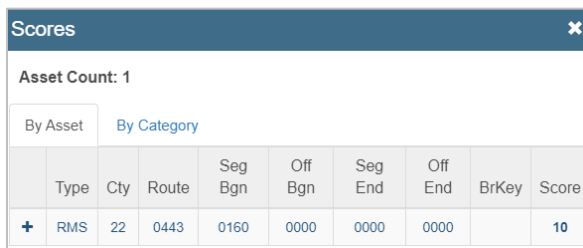may be turned on and off with the check boxes and clicking Add Selected Layers.
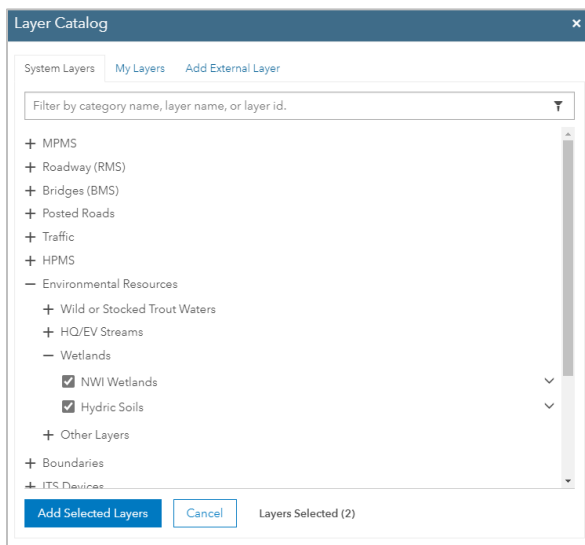
As previously stated, It is advisable **not to delete layers** until desired mapping is completed. Refreshing ⟳ the page will restore the defualt layers, but **user created layers will be lost**.

Saving and Scoring

The next step is saving and scoring the map. If the Layer Information box is open on the right of the screen close by clicking X. The project area is scored based on potential environmental concerns. Selecting ⬇ **Save and Score** on the top ribbon initiates the scoring process. A series of green and blue boxes will appear in the upper-right corner. This indicates scoring is in process and when the process is completed. To view the scores, click ⊘ **Scores...** button on the top ribbon.

Scores								✖
Asset Count: 1								
By Asset	By Category							
	Type	Cty	Route	Seg Bgn	Off Bgn	Seg End	Off End	BrKey	Score
+	RMS	22	0443	0160	0000	0000	0000		10

The scores are categorized by asset or category. Clicking the **+** next to an asset, opens the score descriptions for each layer. The layers may be added to the map for reference.

Closing Proposal Area Designer

Once the project is saved and scored the *Proposal Area Designer* tab in the browser can be closed, or you can toggle to return to the application tab.

6. The fields below the map should automatically populate except for the Project Location Description. If the fields are not populated, click the refresh button next to the website address.

    ⟳

7. If a project lies within multiple areas (counties, municipalities, PennDOT Districts, planning regions, or school districts) select the primary area from the dropdown menu.
8. Fill in further details for the Project Location Description.
9. Scores will be present under the Environmental section.

Environmental
Please describe the actions necessary to further investigate the potential impact and any planned mitigation efforts.

Potential impacts to wild or stocked trout streams score* 💬
0

Potential for impacts to High Quality/EV Streams?* 💬
8

Potential for impacts to wetlands?* 💬
10

Potential temporary or permanent impacts (use) to resources protected under Section 4(f)?* 💬
1

If scores are not present, click the refresh button again. The higher the score the more likely the resource may be present or impacted. Click on the black comment cloud to add additional information regarding those resources.

A score will not be entered for **Potential impacts to federally proposed, candidate or listed threatened and endangered species** as this information is only available through the Pennsylvania Natural Heritage Program. If this information is known, click the black comment cloud and enter a comment. If the information is not known, leave this section blank.

10. Fill out the Conceptual Engineering, General Criteria and Area of Emphasis sections. The General Criteria and Area of Emphasis sections have point values associated with them and will be used by the Selection Committee to score the application.

11. Attach the Construction Cost Estimate by clicking on the paper clip. This is a required attachment.

Project Construction Cost Estimate 📎 0

12. Click Edit Table under the Project Phase Costs Estimate section and provide Local Estimated Costs for all Pre-Construction phases and indicate Funding Source(s). Once complete, click Save Table. Calculate Pre-Construction Total which includes Preliminary Engineering, Final Design, Right-of-Way and Utilities. Click the second Edit Table button and provide amounts and availability status for all identified sources of funding.

13. Enter the Construction and Construction Inspection estimates. It is recommended that a Contingency and Inflation factor also be added. Construction Total will be calculated automatically.

14. Enter the desired amount of TA Set-Aside funding in the Amount Requested section.

15. Attach any pertinent attachments to support the application. The only required attachment is the Cost Estimate.

16. In the Terms & Conditions section enter appropriate information if a Connects Meeting or other coordinating meeting was held.

17. The next step is submitting the application to the District for a Draft Application review. After submission, a meeting will be held with PennDOT and the Planning Partner to review the draft application

18. Click the Action (Workflow) drop down at the bottom of the screen and select Submit to District and click submit. This will send the draft application to the TA Set-Aside Coordinator at the appropriate PennDOT District Office for review.

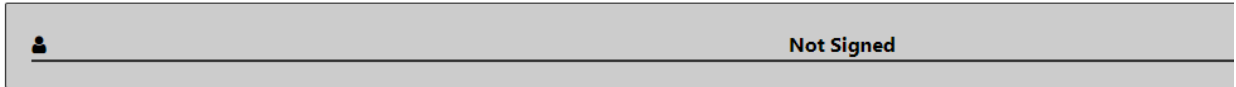**Assignments** Users and Roles assigned to complete this task.

👤 | District 8

Action (Workflow)ⓘ

Submit to District ⌄ | Submit

19. The District TA Set-Aside Coordinator will set up a meeting with the applicant and the Planning Partner to discuss the proposed project in more detail.

20. The District may add information to the application or adjust the project location map at this time. The applicant cannot edit the application once it has been submitted to the District. The District will note in the application if the meeting also served as a PennDOT Connects meeting and include the date within the Terms & Conditions section of the application.

21. Once the revisions are complete, the District will close out this review step and return the application to the applicant. The applicant will receive an email notifying them that the application has been returned.

22. Click the link in the email notification or login to the TA Set-Aside application. Click the My Assignments tab at the top and click on your application. Make any additional edits to the application based on the coordination with the District TA Set-Aside Coordinator. Add any additional information to the application that resulted from the meeting.

23. Once the application is finalized, click the gray signature block at the bottom of the application. Enter the email address and password that you use to log into the TA Set-Aside application system and click Sign Form. **The application cannot be modified once it is signed.**
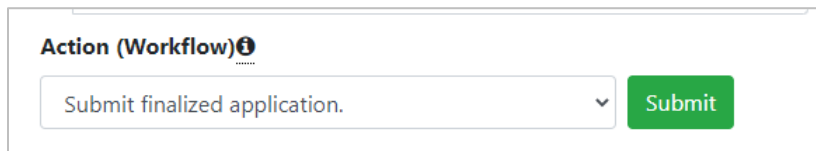
I AGREE TO THESE TERMS AND CONDITIONS.

👤	Not Signed

24. Submit the final application.

Under Action (Workflow) at the bottom of the screen select Submit from the drop down and click Submit. This officially submits the application to PennDOT.
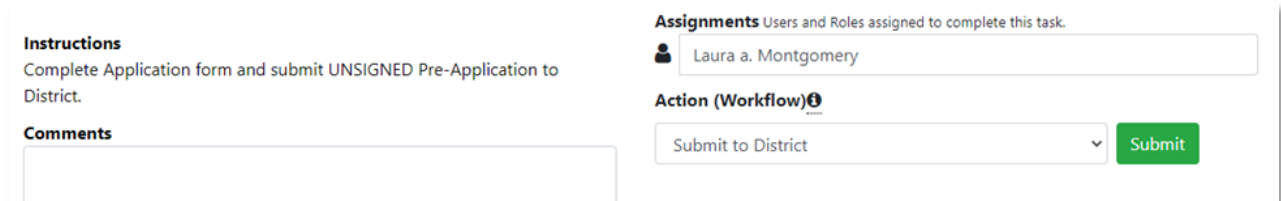
Action (Workflow) ℹ

Submit finalized application. ⌄	Submit

After review, the applicant will receive an email notifying them if the application was determined eligible, ineligible, or if more information is needed.
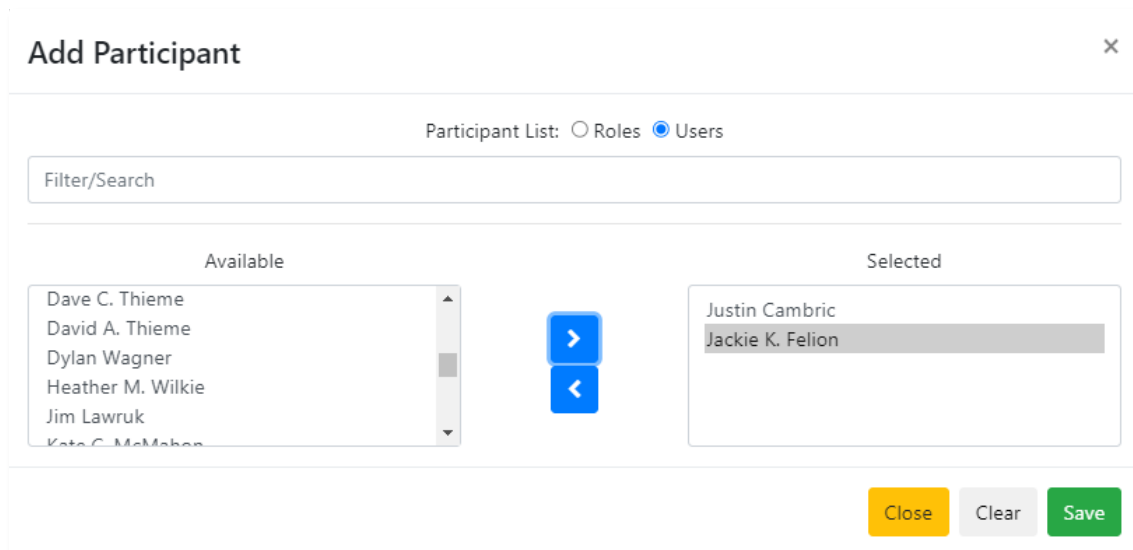
Add Users to Application

Some applicants may want to allow others to access/edit their application (for example, to assist with application preparation). To do so, first make sure they have registered for access through PDAuth (See Appendix A).

To add a user to your application, click on the Assignments box at the bottom of the page.

A separate box will open to add a participant. Next to Participant List, select the Users option. Select the user from the Available list and click the > arrow. Click save.

DO NOT clear or remove your name, or you will lose the ability to edit your application or change Assignments.

The added user will now see the application in the My Assignments tab, and will be able to edit the application before submission.