

OFFICE OF BROWNFIELDS

Department of Toxic Substances Control · Cleanup In Vulnerable Communities Initiative

DTSC'S Application Portal

FLUXX USER GUIDE

QUARTERLY REPORTS & REALIGNMENT OF ECRG PROJECT SCOPE, SCHEDULE AND BUDGET TABLE

Equitable Community Revitalization Grant

ECRGenius – Grantee Series

Version 1 – September 27, 2022



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1. KEY TERMS USED FOR THIS TRAINING

- Fluxx – software housing DTSC’s Application/Grant Portal
- ECRG Tasks – New consistent terminology to define ECRG work
- ECRG Spending Categories – Categories in which costs associated with ECRG Tasks can be allocated
- Reimbursement Request – Grantee’s method of requesting payments
- Scope, Schedule and Budget Table – Located in Section 9 of ECRG application, needs to be updated based on new ECRG Tasks and ECRG Spending Categories
- Fiscal Year – State Fiscal Year starts on July 1st
- Quarters – State Fiscal Quarters July-Sept (1Q), Oct-Dec (2Q), Jan-March (3Q) , April-June(4Q)
- State Controller’s Office – Sends reimbursement checks to Grantees

2. COMPARISON OF FLUXX TOOLS FOR ECRGRANTEES

Reimbursement Requests

Why: Getting paid

Where: *Cost Reimbursement Form* under *Reports* in the Application/Grant Portal

When: As needed, minimum of \$15,000 of eligible costs required

Quarterly Reports

Why: Performance tracking

Where: *Quarterly Reports* under *Reports* in the Application/Grant Portal

When: On a quarterly basis, as outlined in Section 5

Scope, Schedule, and Budget Table

Why: Standardized scope, schedule and budget to expedite approval of reimbursement requests

Where: *Section 9* of the Application under *Grants > Active* in the Application/Grant Portal

When: One-time realignment and periodic updates of ECRG Task Status

2. COMPARISON OF FLUXX TOOLS FOR ECRGRANTEES

Reimbursement Requests

Content:

Site
Submitted Invoice Date Range
Payment Address
Summary of Costs (using ECRG Spending Categories)
Invoice Upload (PDF)

Quarterly Reports

Content:

Project Impact
Grantee Project Management
Environmental Activities and Regulatory Oversight
Community Engagement
Reuse
Contracts
Reimbursement
Schedule
Changes/Updates
Photo Upload (.jpg, .tif, .png)

Scope, Schedule, and Budget Table

Content:

Grantee chooses from a standard list of ECRG Tasks to describe project scope
For each ECRG Task, Grantee to provide:
–Estimated Schedule
–Brief Description of Task
–Task Status (Ongoing, Not Started, or Completed)
–Budget Detail (using ECRG Spending Categories)

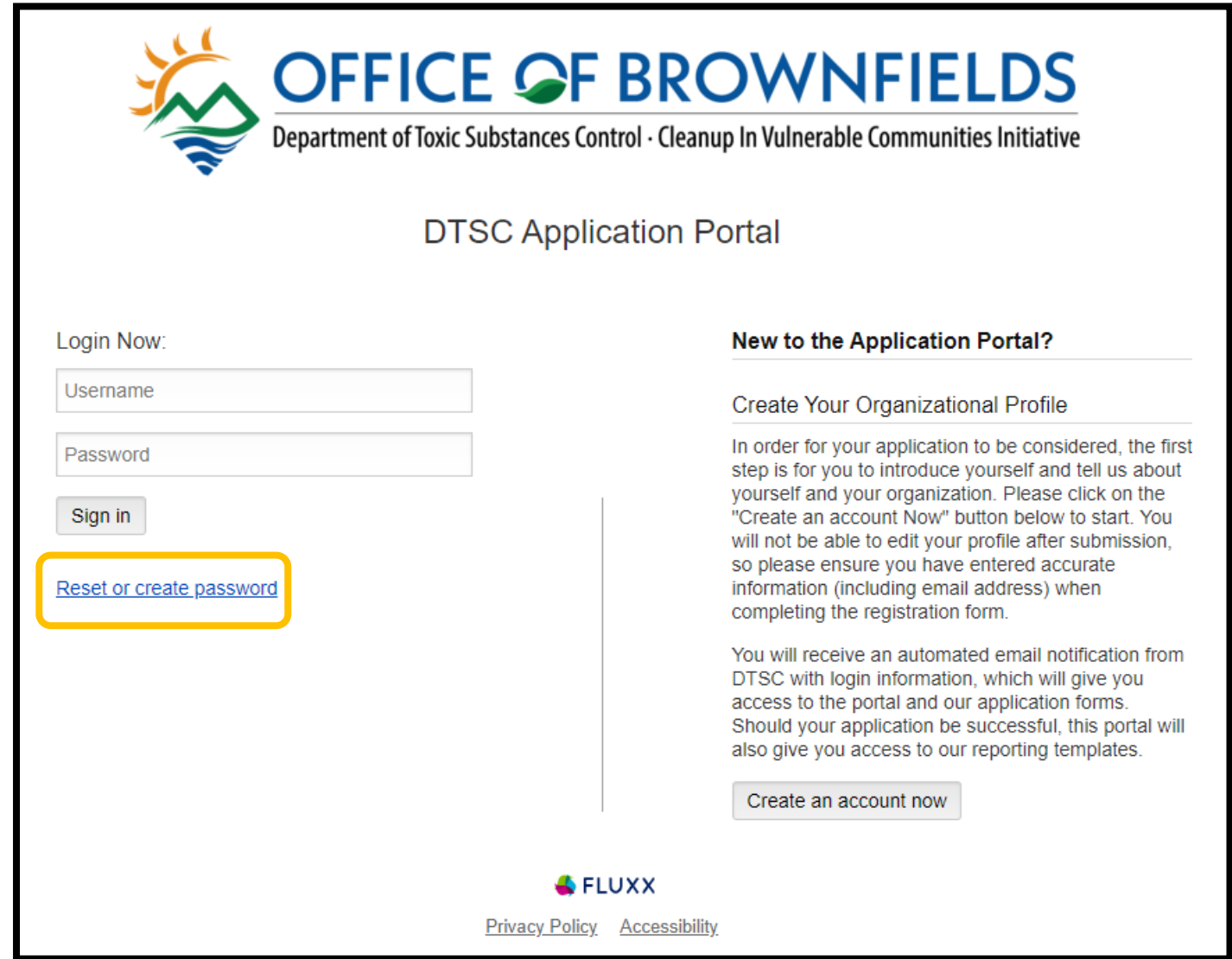
QUARTERLY REPORTS

3. HOW TO ACCESS DTSC'S APPLICATION/GRANT PORTAL

3A. Visit dtsc.fluxx.io

to log in to DTSC's Application/Grant Portal

3B. Click **Reset or create password** to reset password if needed



The screenshot shows the DTSC Application Portal login page. At the top left is the logo for the Office of Brownfields, Department of Toxic Substances Control - Cleanup In Vulnerable Communities Initiative. The page title is "DTSC Application Portal". On the left side, there is a "Login Now:" section with two input fields for "Username" and "Password", a "Sign in" button, and a link "Reset or create password" which is highlighted with a yellow box. On the right side, there is a section titled "New to the Application Portal?" with a sub-section "Create Your Organizational Profile". This section contains text explaining that users must create an account to be considered for an application and that they will receive an automated email notification upon successful registration. A "Create an account now" button is located at the bottom of this section. At the bottom of the page, there is the FLUXX logo and links for "Privacy Policy" and "Accessibility".

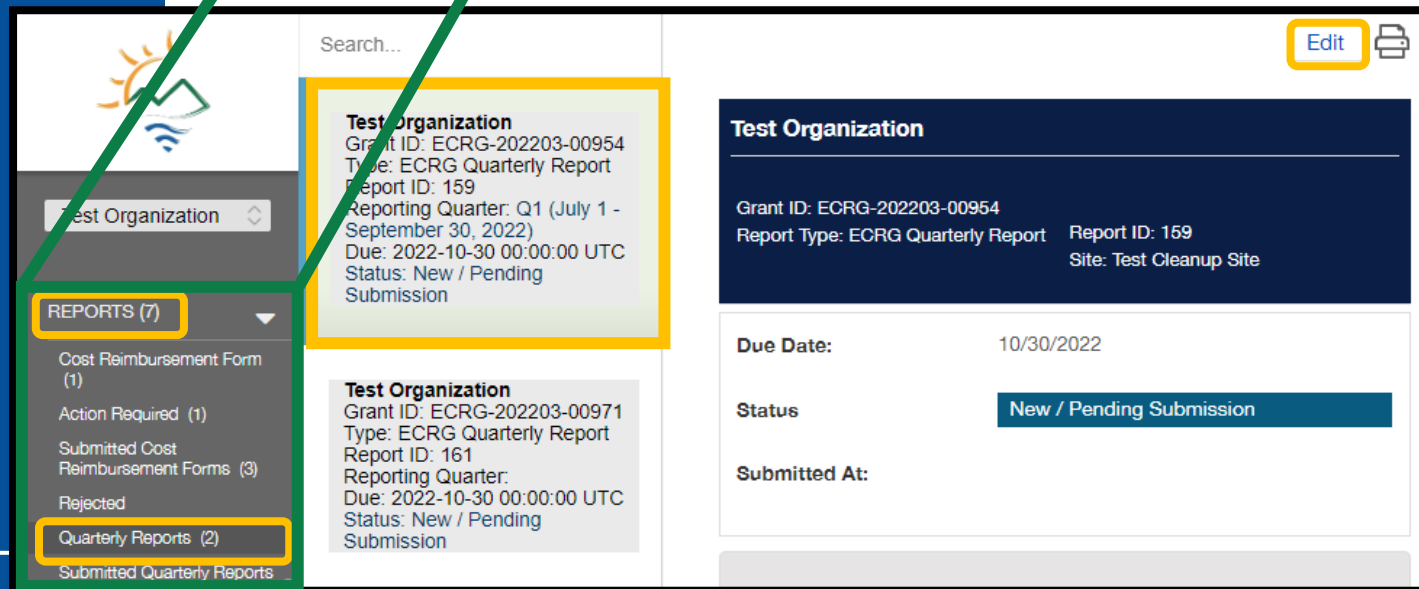
4. HOW TO COMPLETE AND SUBMIT A QUARTERLY REPORT

4A. Navigate the Portal using the menu bar on the left-hand side

4B. Under **Reports**, select **Quarterly Reports** and click to display the form

4C. Click the appropriate **Quarterly Report** for the site and enter **Edit** mode by clicking the button at the top right corner

- If you have multiple sites, double check that you are answering questions for the appropriate site



4. HOW TO COMPLETE AND SUBMIT A QUARTERLY REPORT

4D. The **Grantee and Site Information** and **Reporting Quarter** sections will auto-populate with information

4E. Throughout the Quarterly Report, text boxes and dropdowns will be visible to answer questions about the status and progress of the awarded ECRG project

4F. Click **Save** at the bottom right often, Fluxx does not auto-save answers

Test Organization

Grant ID: ECRG-202203-00954
Report Type: ECRG Quarterly Report

Report ID: 159
Site: Test Cleanup Site

Due Date: 10/30/22
Status: new
Submitted At:

ECRG Quarterly Report Instructions

Grantee and Site Information

Grantee: Test Organization
Site Name(s): Test Cleanup Site
Site Address(es): 2780 West Casitas Avenue
City: Los Angeles
County: Los Angeles County
Grant Type: Environmental Cleanup
Agreement Number: ECRG-2021-00954
Regulatory Agency: DTSC
CalEnviroScreen (CES) 3.0 Overall Percentile(s): 90
ECRG Round: Round 1

Reporting Quarter: Q1 (July 1 - September 30, 2022)

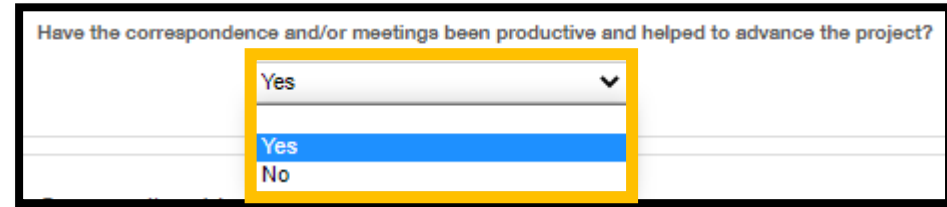
Impact

Cancel Save and Close **Save**

4. HOW TO COMPLETE AND SUBMIT A QUARTERLY REPORT

4G. Note some dropdown answers dictate what fields will be shown (similar to the ECRG Application)

Example drop down:



Have the correspondence and/or meetings been productive and helped to advance the project?

Yes

Yes

No

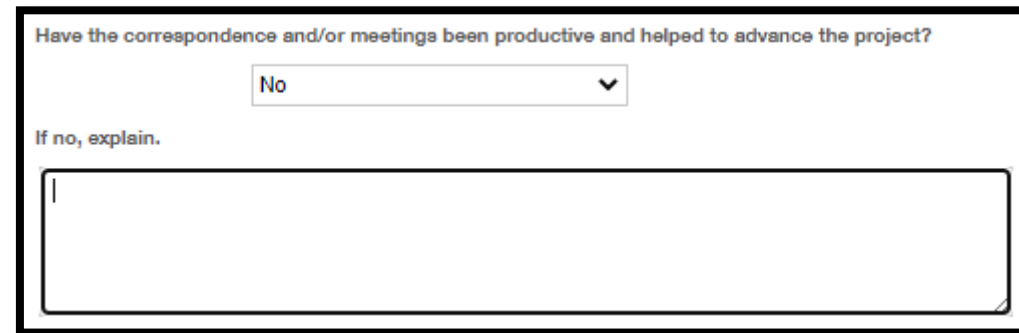
If “Yes” is selected, no additional fields are required for the question:



Have the correspondence and/or meetings been productive and helped to advance the project?

Yes

If “No” is selected, an additional field will become visible and will require an answer:



Have the correspondence and/or meetings been productive and helped to advance the project?

No

If no, explain.

4. HOW TO COMPLETE AND SUBMIT A QUARTERLY REPORT

4H. Once all questions have been answered, click **Save and Close** at the bottom right to exit Edit mode

4I. To submit the Quarterly Report, click **Submit** at the bottom right corner

Photographs

If available, provide progress photos from this quarter of community engagement (CE), investigation/cleanup activities (ACT), and/or reuse (RE).

Upload photos as a .jpg, .png, or .tif files and label as Agreement ID-Quarter_Activity Type-Photo Number (i.e. ECRG-2021-00971-Q1_CE-1).

Report Documents +

Cancel **Save and Close** Save

Photographs

Provide progress photos from this quarter of community engagement (CE), investigation/cleanup activities (ACT), and/or reuse (RE).

Upload photos as a .jpg, .png, or .tif files and label as Agreement ID-Quarter_Activity Type-Photo Number (i.e. ECRG-2021-00971-Q1_CE-1).

Report Documents +

Submit

5. CLARIFICATIONS ON QUESTIONS WITHIN THE QUARTERLY REPORT

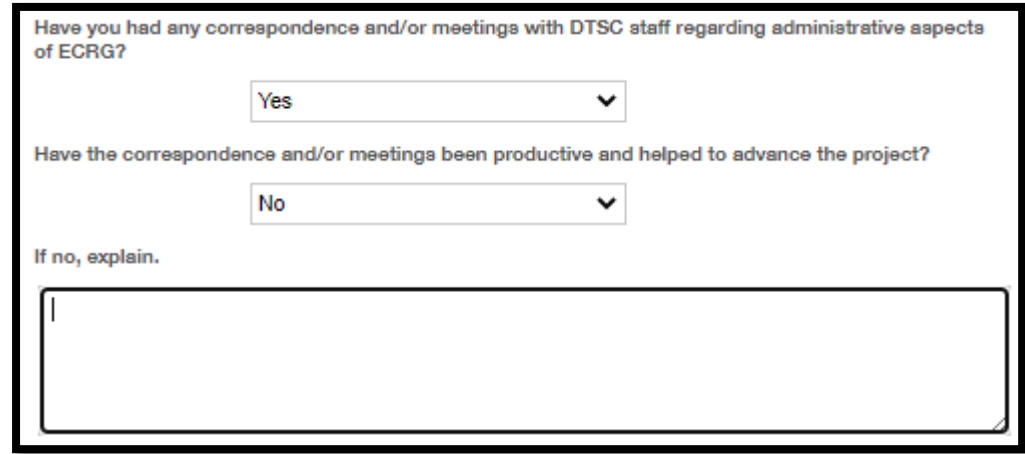
5A. If a question does not apply to your site, enter 0 or N/A as appropriate

5B. “Grantee Project Management” section

- These questions are to measure engagement with DTSC on ECRG-wide matters such as responsiveness and general grant questions, not project-specific management, and is intended to identify any issues that may need more support from DTSC
- Any project-specific management feedback can be provided in the “Environmental Activities and Regulatory Oversight” section

5C. “Environmental Activities and Regulatory Oversight” section

- Provide a high-level description or what activities were completed this quarter; do not include specific details such as contaminant concentrations and/or trends.



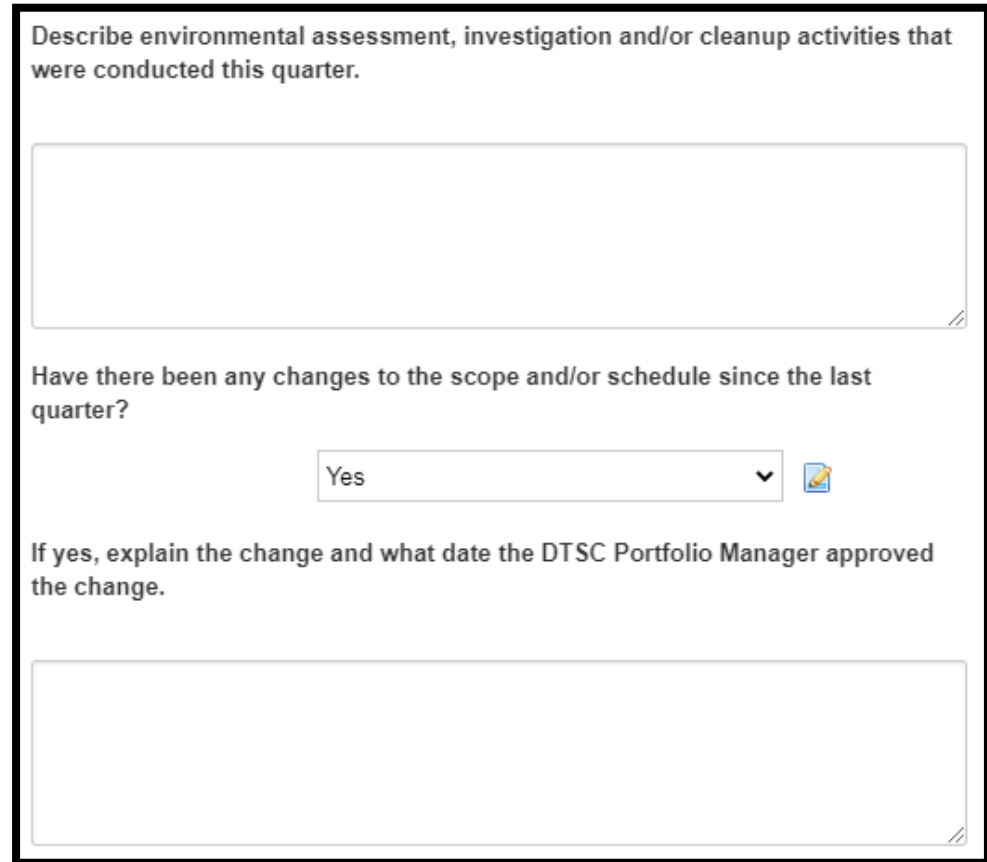
Have you had any correspondence and/or meetings with DTSC staff regarding administrative aspects of ECRG?

Yes

Have the correspondence and/or meetings been productive and helped to advance the project?


No

If no, explain.



Describe environmental assessment, investigation and/or cleanup activities that were conducted this quarter.

Have there been any changes to the scope and/or schedule since the last quarter?

Yes 

If yes, explain the change and what date the DTSC Portfolio Manager approved the change.

5. CLARIFICATIONS ON QUESTIONS WITHIN THE QUARTERLY REPORT

5D. "Reuse" section

- Provide details on any changes in feedback from the community regarding the proposed reuse, as applicable
- If your proposed reuse has been further solidified or updated from the information provided in your application, describe here

5E. "Equitable Development Grant Commitments"

- Updates to your chosen Equitable Development Grant Commitments will be required next quarter

5F. "Contracts" section

- **DIR number** is requested to track prevailing wage requirements, as described in Section 9.1 of the ECRG Agreement
 - If DIR number is not yet available, provide it on the next Quarterly Report
- The question on soliciting new contracts will be a flag to DTSC's Brownfields Technical Assistance Provider, CCLR, to be in contact about support you may require

Has there been a change in interest from the community regarding the proposed reuse(s)?

Yes

If yes, describe.

Has the main proposed reuse for the Site(s) been further defined or updated?

Yes

If yes, explain.

If services under the new contract(s) are subject to prevailing wage requirements, provide a Department of Industrial Relations (DIR) number if available.

Do you need help soliciting a competitive bid for any new contracts?

No

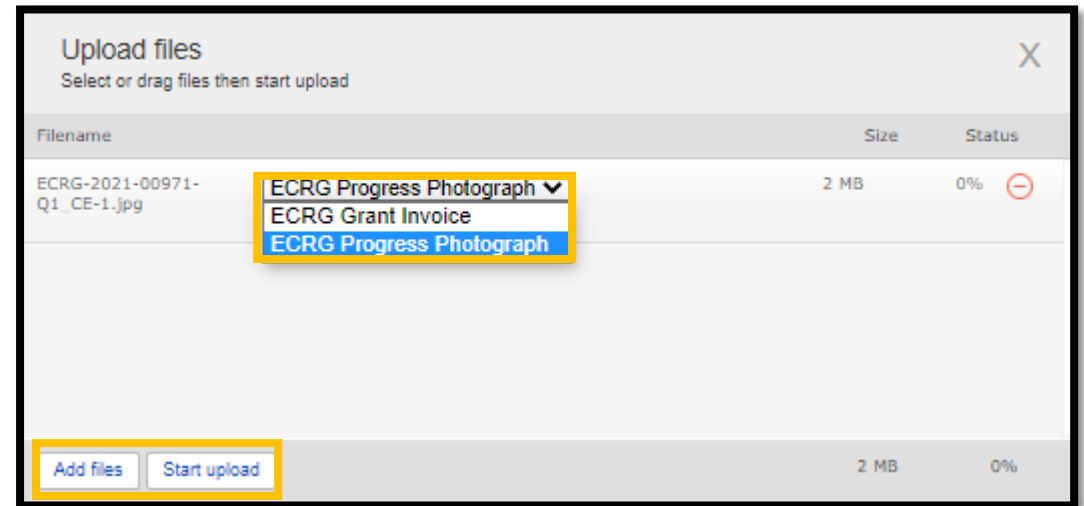
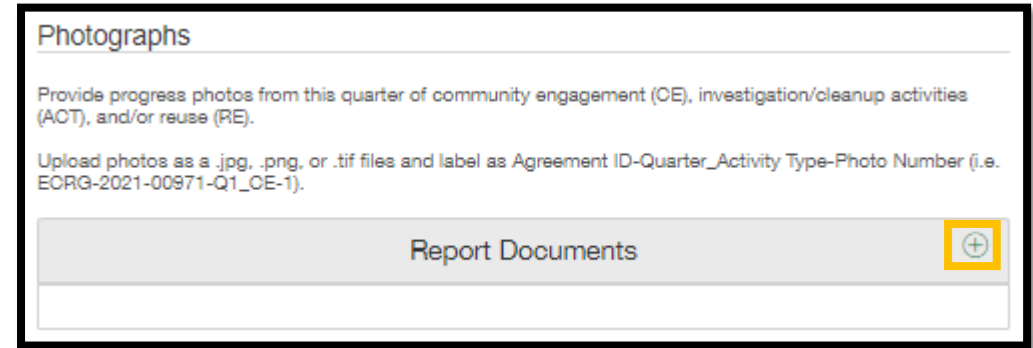
5. CLARIFICATIONS ON QUESTIONS WITHIN THE QUARTERLY REPORT

5G. “Changes/Updates” section

- If there have been any changes to the following, notify your ECRG Portfolio Manager immediately:
 - Changes in ownership – this may affect your ability to reimburse the rest of your project
 - Changes in current land use
 - Any pending lawsuits at your site

5H. “Photographs” section

- If you don’t have any photographs, skip this section
- Upload any progress photos for the project to this section using the **green plus sign** at the bottom right
- A pop-up window will appear; after properly labeling your photographs, click **Add Files** or drag and drop files into the window
- Select **ECRG Progress Photograph** from the dropdown for all files
- Once all files have been added, click **Start Upload**



6. SCHEDULE FOR SUBMITTING QUARTERLY REPORTS

6A. Quarterly Reports are due on the following dates during the grant term:

- January 31st
- April 30th
- July 31st
- October 30th

Note that ECRG quarters are determined by DTSC’s fiscal year which starts on July 1st of a given year and ends June 30th of the following year.

Quarterly Reports for Round 1 of ECRGrantees will be for the following quarters:



SCOPE, SCHEDULE, AND
BUDGET REALIGNMENT
(for Round 1 Grantees Only)

7. CHANGES TO ECRG PROJECT SCOPE, SCHEDULE, AND BUDGET TABLE AND WHY

7A. The ECRG Schedule and Budget Tasks table was developed to standardize the way project scope, schedule, and budget is communicated

- Allows Grantees to allocate associated costs into the correct Spending Categories, which are identical to categories provided on the Reimbursement Request form

7B. All Grantees will need to add the following tasks to their Scope, Schedule, and Budget Table:

- Regulatory Oversight Fees: include all estimated costs within the Regulatory Overnight Fees task, do not break it out under other ECRG Tasks (may not be applicable for Community-wide Assessment Grantees)
- Grant Project Management: include all estimated costs for Grant Project Management in Project Management Labor and Project Management Travel, as applicable
 - Grantee Project Management Labor should be no more than 5% of total costs
- Community Engagement: include all estimated Community Engagement and/or Tribal Engagement fees

7C. Based on your grant type and the scope of your project, include the environmental ECRG tasks listed in orange and include all costs in the Environmental Contract Spending Category

ECRG Tasks

Community-wide Assessment	Site-specific Investigation	Site-specific Cleanup
Regulatory Oversight Fees (not required)	Regulatory Oversight Fees	Regulatory Oversight Fees
Grant Project Management	Grant Project Management	Grant Project Management
Community Engagement	Community Engagement	Community Engagement
Tribal Engagement	Tribal Engagement	Tribal Engagement
All Appropriate Inquiries (AAI) or Phase I	Investigation Workplan and Fieldwork	Investigation Workplan and Fieldwork
Investigation Workplan and Fieldwork	Investigation Report	Investigation Report
Investigation Report	Cleanup Plan	Cleanup Plan and Implementation
American Land Title Association (ALTA) Survey	Risk Assessment Workplan/Report	Cleanup Implementation Report
Reuse Planning	Feasibility/Pilot Study Workplan	Remedial Design and Implementation Plan
Brownfields Inventory and Planning	Feasibility/Pilot Study Report	Risk Assessment Workplan/Report
	CEQA Document	Feasibility/Pilot Study Workplan
	Land Use Covenant (LUC) Preparation	Feasibility/Pilot Study Report
		Operations and Maintenance (O&M) Plan
		CEQA Document
		Land Use Covenant (LUC) Preparation

Spending Category
Regulatory Oversight Fees
Environmental Contracts
Community Engagement Contracts
Grantee Project Management Labor
Grantee Project Management Travel

Note: See next slide for visual color-coded example of the realigned Scope, Schedule, and Budget Table

8. EXAMPLE OF REALIGNED ECRG PROJECT SCOPE, SCHEDULE, AND BUDGET TABLE

Scope, Schedule, and Budget Table

Budget Period	Budget
Grant Project Management : 9/1/2022 to 9/1/2024	12,500
Regulatory Oversight Fees: 9/1/2022 to 9/1/2024	30,000
Community Engagement: 9/1/2022 to 9/1/2024	25,000
All Appropriate Inquiries (AAI) or Phase I: 9/1/2022 to 11/1/2022	35,000
CEQA Neg Dec: 11/1/2022 to 2/28/2023	12,500
Soil Vapor Probe Installation and Sampling Workplan and Fieldwork: 12/1/2022 to 4/30/2023	60,000
Soil Vapor Probe Installation and Sampling Report: 4/30/2023 to 6/30/2023	25,000
Remedial Action Workplan: 6/30/2023 to 9/1/2024	100,000
Total	300,000

Budget Snapshot

	Grant Project Management	Regulatory Oversight Fees	Community Engagement	All Appropriate Inquiries (AAI) or Phase I	CEQA Neg Dec	Soil Vapor Probe Installation and Sampling Workplan and Fieldwork	Soil Vapor Probe Installation and Sampling Report	Remedial Action Workplan
	9/1/2022 to 9/1/2024	9/1/2022 to 9/1/2024	9/1/2022 to 9/1/2024	9/1/2022 to 11/1/2022	11/1/2022 to 2/28/2023	12/1/2022 to 4/30/2023	4/30/2023 to 6/30/2023	6/30/2023 to 9/1/2024
	Budget	Budget	Budget	Budget	Budget	Budget	Budget	Budget
Regulatory Oversight Fees (\$)		30,000						
Environmental Contracts (\$)				35,000	12,500	60,000	25,000	100,000
Community Engagement Contracts (\$)			25,000					
Grantee Project Manager Labor* (\$)	12,500							
Grantee Project Manager Travel** (\$)								
Total	12,500	30,000	25,000	35,000	12,500	60,000	25,000	100,000

9. HOW TO UPDATE THE ECRG PROJECT SCOPE, SCHEDULE, AND BUDGET TABLE

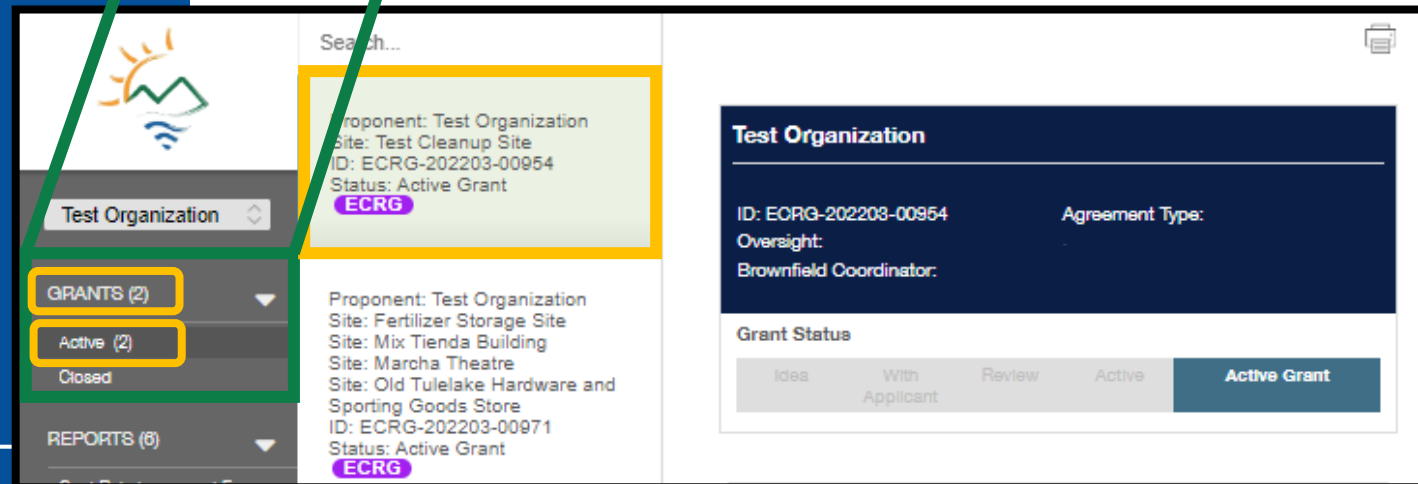
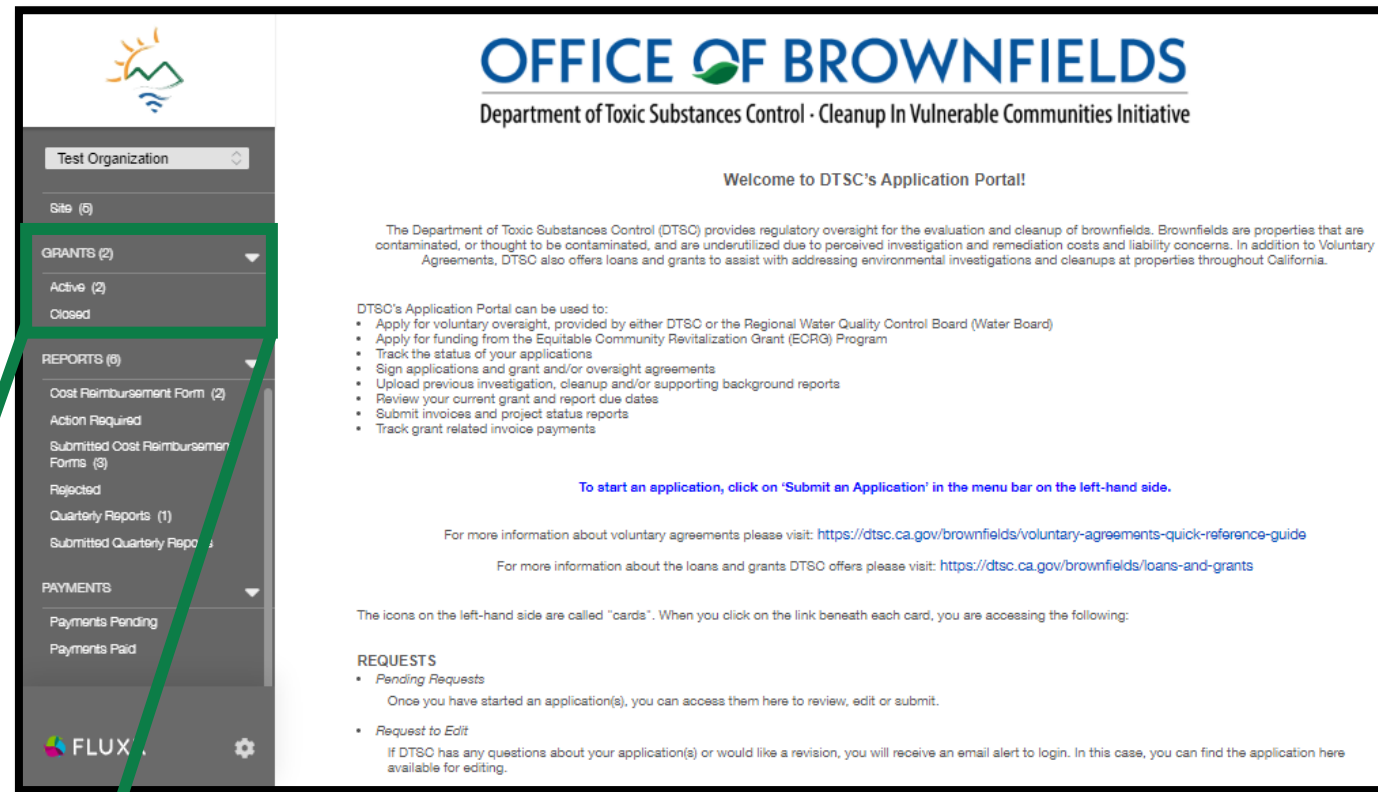
9A. Log in to the Portal (see Step 3)

9B. Navigate the Portal using the menu bar on the left-hand side

9C. Under **Grants**, select **Active**

9D. Click the **Site** you would like to update the ECRG Project Scope, Schedule, and Budget Table for

- If you have multiple sites, double check that you are updating the appropriate site



9. HOW TO UPDATE THE ECRG PROJECT SCOPE, SCHEDULE, AND BUDGET TABLE

9E. In your selected Grant, use the Table of Contents to navigate to Section 9. ECRG Activities and Budget Detail

9F. Scroll down to the Scope, Schedule, and Budget Table. You can either edit previous entries or delete them and start fresh. Below are the functions you'll use to update the Table:

- To edit a previous entry, select the **paper and pen icon** next to the task to edit, and window titled "ECRG Budget Details" will appear
- Add entries using the **green plus sign icon** at the top right corner of the Scope, Schedule, and Budget Table and the "ECRG Budget Details" window will appear
- Delete entries using the **red minus icon** next to the entry

Test Organization

ID: ECRG-202203-00954 Agreement Type: Oversight: Brownfield Coordinator:

Grant Status

Idea With Applicant Review Active **Active Grant**

ECRG Budget Detail

Organization Name: Test Organization
Award Amount: \$300,000.00
Request ID: ECRG-202203-00954
Start Date: 7/1/2022
End Date: 6/30/2024

Status **Active Grant**

▼ **Table of Contents**

- ECRG Overview
- DTSC's Application Portal Tips
- 1. Application Type
- 2. Applicant and Site Eligibility
- 3. Application Contacts and Project Team
- 4. Site Information, CalEnviroScreen 3.0 Score, Site Use, and Site Photos
- 5. Ownership and Access
- 6. Responsibility for Contamination
- 7. Previous Environmental Activities
- 8. Regulatory Oversight Agency
- 9. ECRG Activities and Budget Detail**
- 10. Community Engagement and Public Readiness
- 11. Contracts
- 12. Documents
- 13. Additional Information
- 14. Equitable Development Grant Commitments
- 15. Signature

Scope, Schedule, and Budget Table

Budget Period	Budget	
Grant Project Management : 9/1/2022 to 9/1/2024	12,500	
Regulatory Oversight Fees: 9/1/2022 to 9/1/2024	30,000	
Community Engagement: 9/1/2022 to 9/1/2024	25,000	
All Appropriate Inquiries (AAI) or Phase I: 9/1/2022 to 11/1/2022	35,000	
CEQA Neg Dec: 11/1/2022 to 2/28/2023	12,500	
Soil Vapor Probe Installation and Sampling Workplan and Fieldwork: 12/1/2022 to 4/30/2023	60,000	
Soil Vapor Probe Installation and Sampling Report: 4/30/2023 to 6/30/2023	25,000	
Remedial Action Workplan: 6/30/2023 to 9/1/2024	100,000	
Total	300,000	

Note: You can access your original schedule in Exhibit E and original budget in Exhibit F of your ECRG Agreement package

9. HOW TO UPDATE THE ECRG PROJECT SCOPE, SCHEDULE, AND BUDGET TABLE

9G. The ECRG Budget Detail window has two sections that need to be completed/updated

• 1. ECRG Task and Schedule

- **ECRG Task Description and/or Document Name:** enter the name for the specific task
 - If it is a document, enter the descriptive document name
- **ECRG Task:** select from the dropdown menu (these are the same tasks listed in Section 7 of this guide for each grant type)
- **Estimated Dates:** add dates for the task
- **ECRG Task Status:** update to reflect the status of the task
 - Once a task is either started or completed, you will need to go into the Table and update the ECRG Task Status appropriately throughout the remainder of the grant term

ECRG Task and Schedule

ECRG Task Description and/or Document Name
Regulatory Oversight Fees

ECRG Task
Regulatory Oversight Fees

Estimated Start Date
9/1/2022

Estimated End Date
9/1/2024

ECRG Task Status
Ongoing

ECRG Task

- Regulatory Oversight Fees
- Grant Project Management
- Community Engagement
- Tribal Engagement
- Brownfield Inventory and Planning
- All Appropriate Inquiries (AAI) or Phase I
- ALTA Survey
- Reuse Planning
- Investigation Workplan and Fieldwork
- Investigation Report
- Cleanup Plan
- Cleanup Implementation Report
- Cleanup Plan and Implementation
- Remedial Design and Implementation Plan
- Risk Assessment Workplan/Report
- Feasibility/Pilot Study Workplan
- Feasibility/Pilot Study Report
- Operations and Maintenance (O&M) Plan
- California Environmental Quality Act (CEQA) Document
- Land Use Covenant (LUC) Preparation

ECRG Task Status

- Ongoing
- Completed
- Not Started

9. HOW TO UPDATE THE ECRG PROJECT SCOPE, SCHEDULE, AND BUDGET TABLE

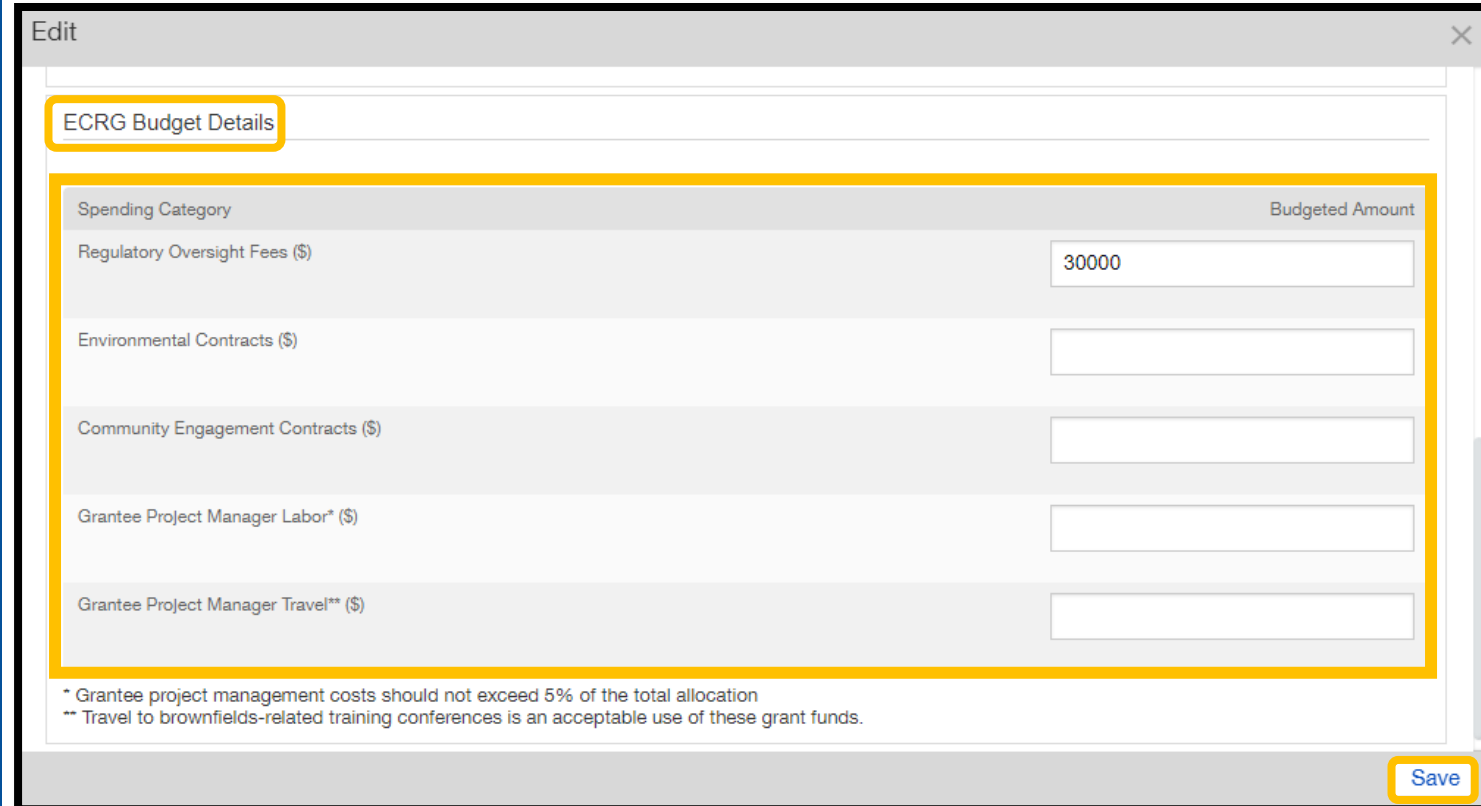
9G. The ECRG Budget Detail window has two sections that need to be updated (continued)

- **2. ECRG Budget Details**

- Update the expected budget amount in the appropriate **Spending Category**
 - These categories are the same as on the Cost Reimbursement Forms.

9H. Once the ECRG Budget Details have been updated, click **Save** at the bottom right

9I. Complete steps 9F through 9H for all ECRG Budget Tasks as determined by the ECRG Tasks table



Spending Category	Budgeted Amount
Regulatory Oversight Fees (\$)	30000
Environmental Contracts (\$)	
Community Engagement Contracts (\$)	
Grantee Project Manager Labor* (\$)	
Grantee Project Manager Travel** (\$)	

* Grantee project management costs should not exceed 5% of the total allocation
** Travel to brownfields-related training conferences is an acceptable use of these grant funds.

Save

GENERAL INFORMATION

10. HOW TO PROVIDE ADDITIONAL USERS ACCESS FOR GRANT REIMBURSEMENT

10A. If the user is not currently registered in Fluxx, direct them to the home page and have them register by clicking **Create Account Now** and filling out the Grantee Organization information under **Your Organization Information**, followed by their contact information

- We will connect the account and the new user will have access to Cost Reimbursement Forms associated with the Grantee Organization

10B. If the user is already registered in Fluxx, send an email to ApplicationPortal@dtsc.ca.gov to have your account linked to the appropriate Organization

OFFICE OF BROWNFIELDS
Department of Toxic Substances Control · Cleanup In Vulnerable Communities Initiative

DTSC Application Portal

Login Now:
Username
Password
Sign in
[Reset or create password](#)

New to the Application Portal?
Create Your Organizational Profile
In order for your application to be considered, step is for you to introduce yourself and tell us yourself and your organization. Please click on "Create an account Now" button below to start. You will not be able to edit your profile after submission so please ensure you have entered accurate information (including email address) when completing the registration form.
You will receive an automated email notification from DTSC with login information, which will give you access to the portal and our application forms. Should your application be successful, this portal also give you access to our reporting templates.

Create an account now

Your Organization Information
Organization Type
Organization Name
Address 1
Address 2
City
Country
United States
State/Province
Postal Code (Zip)
Organization Phone

Your Contact Information
First Name
Last Name
Work Phone
Work Phone Extension
E-mail

Note this will not provide the user access to the Grant Application or Grant Documents. For this type of access, you will need to be added to the Grant Record directly. When contacting DTSC, please specify your request clearly.

FLUXX
[Privacy Policy](#) [Accessibility](#)

11. GENERAL TIPS WHILE WORKING IN FLUXX



- The Application/Grant Portal does not auto-save, click the **Save** button often
- If a field or the webpage is non-responsive while completing the application, try clicking **Save** to refresh
- Chrome is the preferred browser for Fluxx
- For any other issues or questions, contact ApplicationPortal@dtsc.ca.gov

12. CONTACTS

Here is a contact directory to get answers as quickly as possible on various common topics:

Project Management

- [Triss Chesney](#)
 - Community-wide Assessments
- [Rana Georges](#)
 - ECRG projects under DTSC Oversight
- [Gregory “Greg” Shaffer](#)
 - ECRG projects under Water Board oversight
 - ECRG projects under Local Agency oversight
- [Katherine “Kathy” Takeshita](#)
 - Scheduling meetings

Finances and Fluxx

- [Jennifer Black](#)
 - Reimbursement (not related to Fluxx or eligible costs)
- [Sonia Reyes](#)
 - Standard Forms 204 and 205
- ECRGInfo@dtsc.ca.gov
 - Questions about specific eligibility costs
- [Natasha DiPietro](#)
 - Any questions related to DTSC’s Application/Grant Portal

Other

- ECRGInfo@dtsc.ca.gov
 - Questions about ECRG Grant Agreements
- ECRG@cclr.com – Brownfield Technical Assistance Provider
 - Assistance and general support