TransCIP 2.0™

Transit Data Management System

STATE USER GUIDE

TransCIP 2.0™
Transit Data Management System

Table of Contents

Section 1: Introduction

1.1 What is the TransCIP 2.0 System?

Panther International, LLC is proud to offer the **TransCIP 2.0 System** is a grant management system designed and developed specifically for use by the Florida Departments of Transportation (FDOT) and other key transportation industry organizations.
The **TransCIP 2.0 System** is a secure, web-based system that allows an entire grant program to be automated and managed online. **TransCIP 2.0** will allow you to apply for funding through an online grant application process and will provide an efficient way to report on your grant after funds are awarded. In addition, the system allows users to track their budgets and request payments in one easily accessible database. The system prevents duplication of data and ensures efficient tracking of progress throughout the life cycle of a grant program for both the grantor and grantee.

1.2 This User Guide

This user guide was created to assist State Users with the efficient use of the **TransCIP 2.0 System.** This guide will walk you through each step of the grant process, from gaining access through reporting. In addition, this guide will assist you in how to set-up the system to properly track funding programs, annual grants, and organizations/users. We suggest utilizing this manual to help walk through each component of the system while you complete the process. If immediate technical help or support is needed, please contact your Panther Project Management Team. You have access to the Project Management team for all of your State needs.

Note: Due to differences between internet browsers, your view may differ slightly from the view in the screenshot utilized to create this manual. While internet browsers may cause a variation in look and feel, all systems components should continue to function in all internet browsers.

Disclaimer: All screenshots in this guide are from our test site and while the names and data may be familiar, the information is test information we have entered and is not accurate.

Section 2: Getting Started

2.1 Access BlackCat Transit Management System

1) Locate the **TransCIP 2.0** System login screen at: **2.transcip.com**

2) Login to the **TransCIP 2.0 System:**
   a. Enter your username
   b. Enter your password
   c. Select the Login button

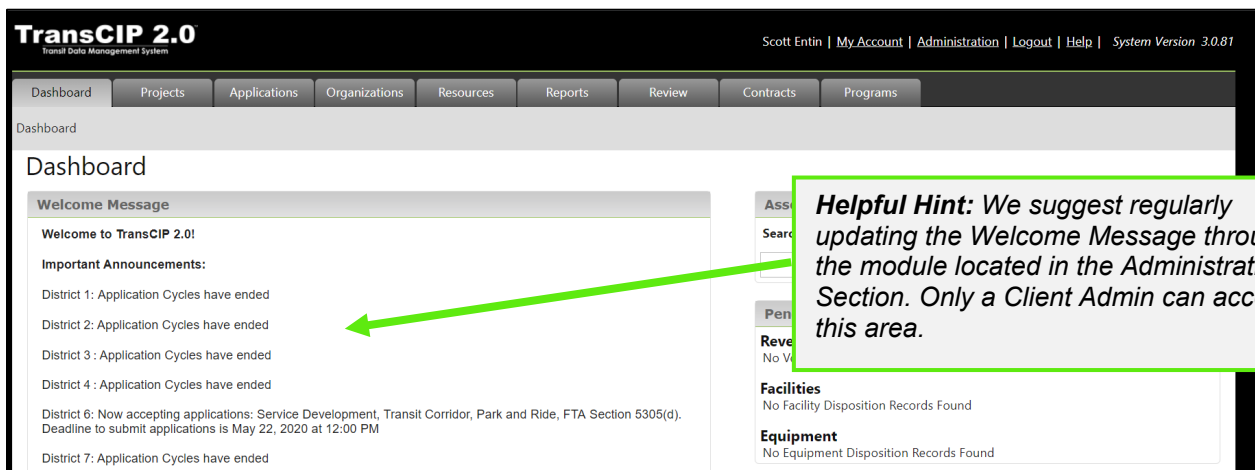*Helpful Hint: If you do not have a username and password, contact your Panther Project Management Team to be granted access to the system.*
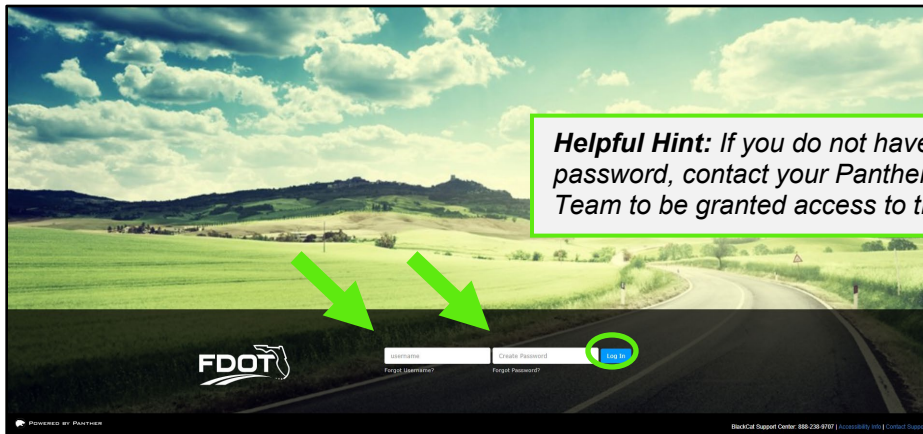
2.2 System Overview

1) **Dashboard:** After logging in, you will see the System dashboard. On the dashboard, you will have quick access to welcome messages as well as important deadlines. In addition, you will have quick link sections available for fast access to applications, projects, and inventory that is ready for disposition.


Helpful Hint: We suggest regularly updating the Welcome Message through the module located in the Administration Section. Only a Client Admin can access this area.

2) The System is sub-divided into several components:

- o Dashboard
- o Projects
- o Applications
- o Organizations
- o Resources

- o Reports
- o Review
- o Contracts
- o Programs

Access for these components are provided through tabs across the top of the system. The components available to you depend on your user role in the system *(more detail will be provided on each component throughout this guide).*
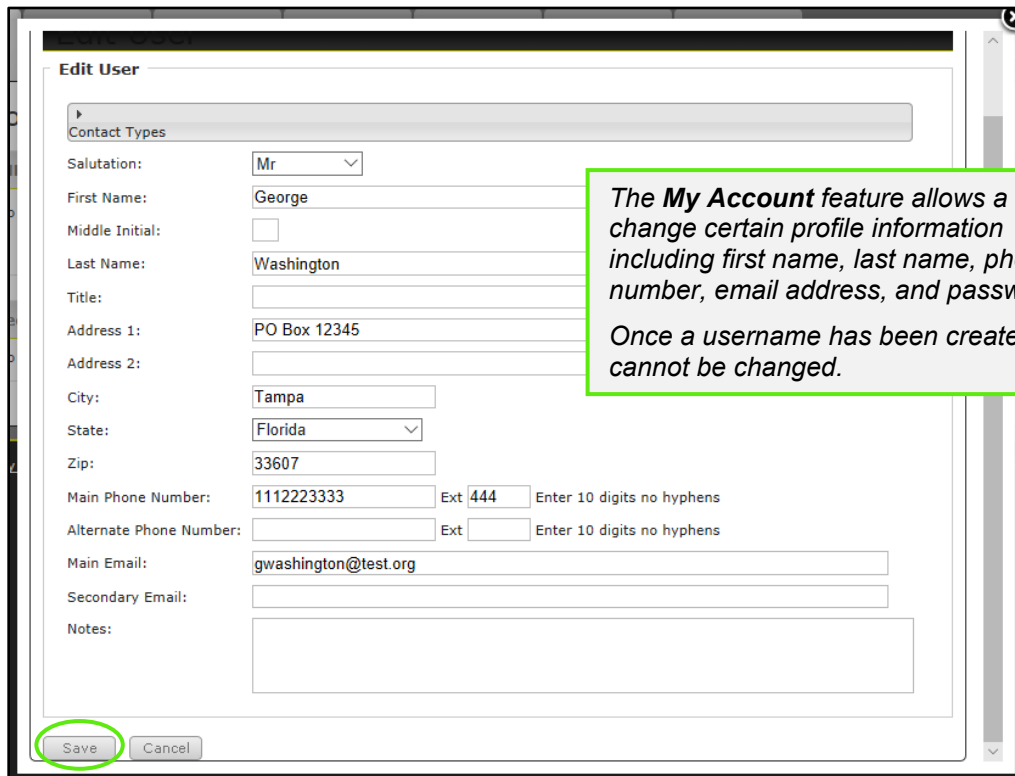
Dashboard	Projects	Applications	Organizations	Oversight	Resources	Reports	Review	Contracts	Programs

3) User specific features are located in the upper right corner of the screen
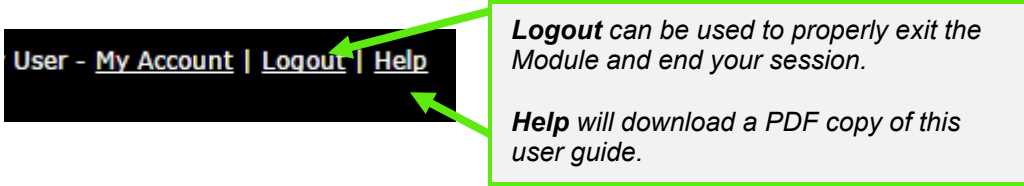
User - My Account | Logout | Help
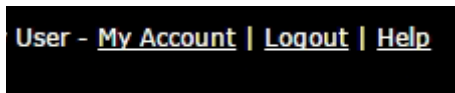
My Account:

If any changes are made to your account, select the **Save** button

The **My Account** feature allows a user to change certain profile information including first name, last name, phone number, email address, and password.

Once a username has been created, it cannot be changed.

Logout and Help:

User - My Account | Logout | Help

Logout can be used to properly exit the Module and end your session.

Help will download a PDF copy of this user guide.

4) Support for the **TransCIP** is available on the lower right side of each screen once you are inside the system. Your Agency Users should contact the **BlackCat Support** if they are experiencing any system functionality issues. State Users should contact the Panther Project Management Team if they are experiencing any system issues.

BlackCat Support: 888-238-9707 | Accessibility Info |Contact Support

BlackCat Support Phone Number:
Located at the bottom right corner and should be used by Agency Users to request technical assistance.

Accessibility Info:
Provides information for those users needing accessibility assistance. The Client Admin user has access to update this information

Contact Support:
Allows an Agency User to submit questions, concerns, ideas or other information directly to the **BlackCat Support Team**.

As a state user, if you need further assistance with the System, please contact your Panther Project Management Team.

2.3 Administration
The Administration section is used to manage components of the system and is only accessible by the Client Admin assigned within Central Office. If you are the Client Admin, the Administration link will be available in the top left corner of the system.

1) Select the **Administration** link

- My Account | Administration | Logout | Help
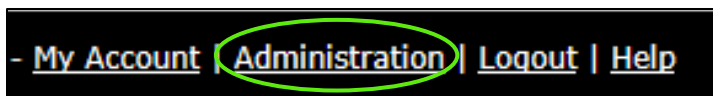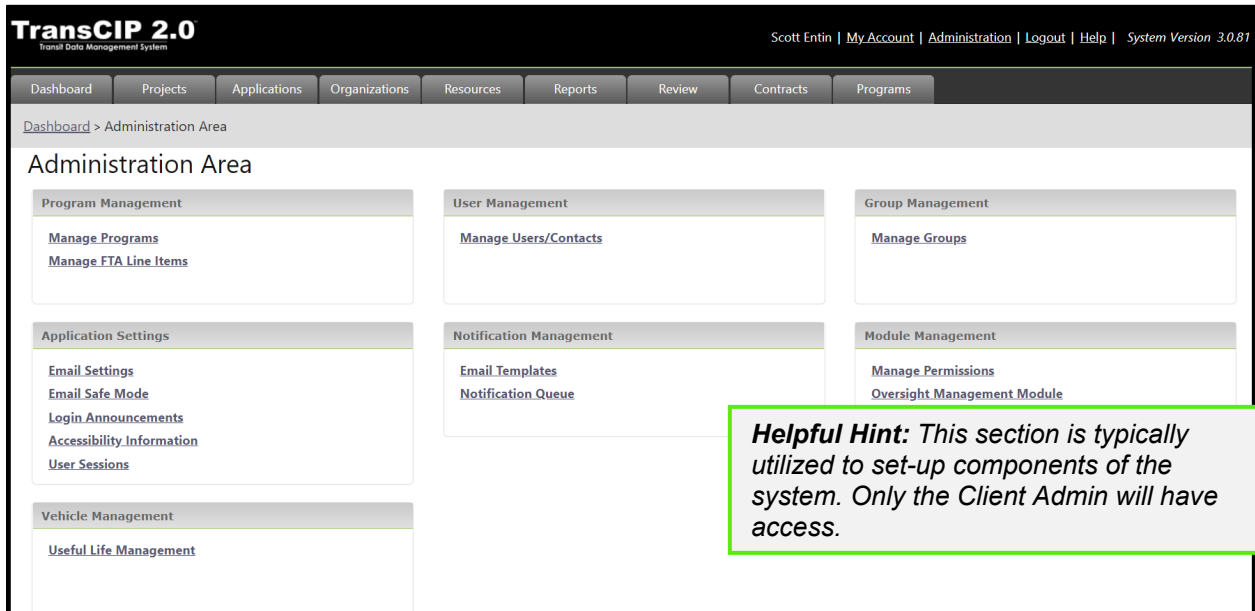
Manage Programs:
This section is where funding programs are created. The funding programs are tied to grants and encumbered funds.

Manage Users:
This section allows Client Admins to manage information on all users of the system. Contact information and organization associations may be updated through this link.

Email Settings:
This section allows Client Admins to temporarily turn the system generated notifications off and on.

Login Announcements:
This section is where Client Admins will update the message on the Dashboard. It's encouraged to update this message regularly and remind Agency Users to check the Dashboard for important bulletins.

Accessibility Information:
This section is where Client Admins will update the accessibility information narrative as needed.

Notification Queue:
This section provides a log of all system generated notifications that have been sent.

Oversight Management Module:
The Oversight Management Module is where Client Admins create the templates for Review Types.

Section 3: Organization Management

The Organization section includes data about agencies, including addresses, contacts, key company information, users, and oversight details. Both Agency and State users have access to add and edit organizational information.

3.1 Adding A New Organization

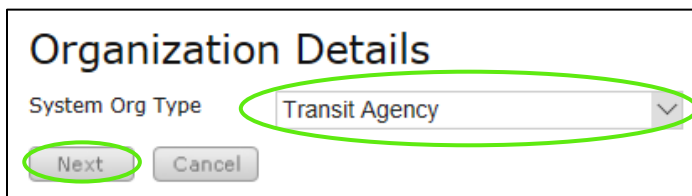Only State and District Users have the ability to add a new organization in the system.

1. Select the **Organizations** tab

2. Select the **Add New** button
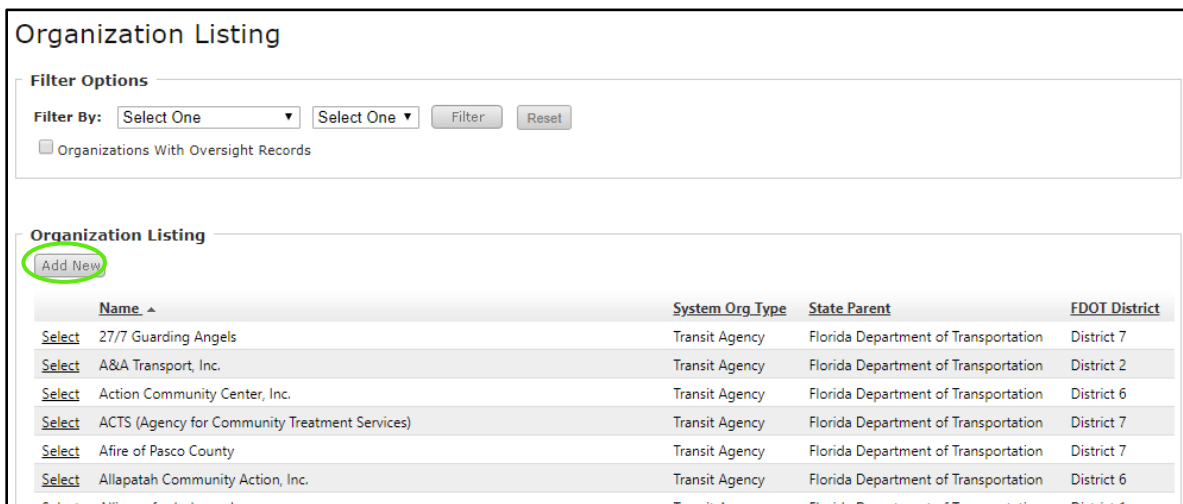
3. Select an organization type, and then the **Next** button

4. Enter information in the fields

Organization Details

Legal Name:*

Common Name/Acronym/DBA:*

Physical Address

Address 1:*

Address 2:

City:* State:* Select One

Zip Code:* -

County: Select One

☐ Mailing address if different

☐ Remittance address

Contact Info

Website:

Customer Service Email:

Main Phone Number: - - Ext

Alternate Phone Number: - - Ext

Fax Number: - -

Helpful Hint: Be sure to complete all the appropriate fields. Any field marked with an asterisk is a required field.

5. Select the **Save** button to ensure the information you entered is saved

Actions

Save

3.2 Editing Organization Details

State, District, and Agency Users can edit organizations. Agency Users have access to their own organization, District Users have access to all organizations within their district, and State Users have access to all organizations.

1) Select the **Organizations** tab

| Dashboard | Projects | Applications | Organizations | Oversight | Resources | Reports | Review | Contracts | Programs |

2) Select the organization record to review/edit

Organization Listing

Filter Options

Filter By: [Select One ▼] [Select One ▼] [Filter] [Reset]

☐ Organizations With Oversight Records

Organization Listing

[Add New]

	Name ▲	System Org Type	State Parent	FDOT District
Select	27/7 Guarding Angels	Transit Agency	Florida Department of Transportation	District 7
Select	A&A Transport, Inc.	Transit Agency	Florida Department of Transportation	District 2
Select	Action Community Center, Inc.	Transit Agency	Florida Department of Transportation	District 6
Select	ACTS (Agency for Community Treatment Services)	Transit Agency	Florida Department of Transportation	District 7
Select	Afire of Pasco County	Transit Agency	Florida Department of Transportation	District 7
Select	Allapatah Community Action, Inc.	Transit Agency	Florida Department of Transportation	District 6
Select	Alliance for Independence	Transit Agency	Florida Department of Transportation	District 1

3) Edit the necessary fields

Organization Details

Legal Name:* [_____]

Common Name/Acronym/DBA:* [_____]

Physical Address

Address 1:* [_____]

Address 2: [_____]

City:* [_____] State:* [Select One ▼]

Zip Code:* [____] - [____]

County: [Select One ▼]

☐ Mailing address if different

☐ Remittance address

Contact Info

Website: [_____]

Customer Service Email: [_____]

Main Phone Number: [____] - [____] - [____] Ext [____]

Alternate Phone Number: [____] - [____] - [____] Ext [____]

Fax Number: [____] - [____] - [____]

Helpful Hint: Be sure to complete all the appropriate fields.

4) Select the **Save** button to ensure the information you entered is saved

Actions

[Save]

3.3 Contact Management
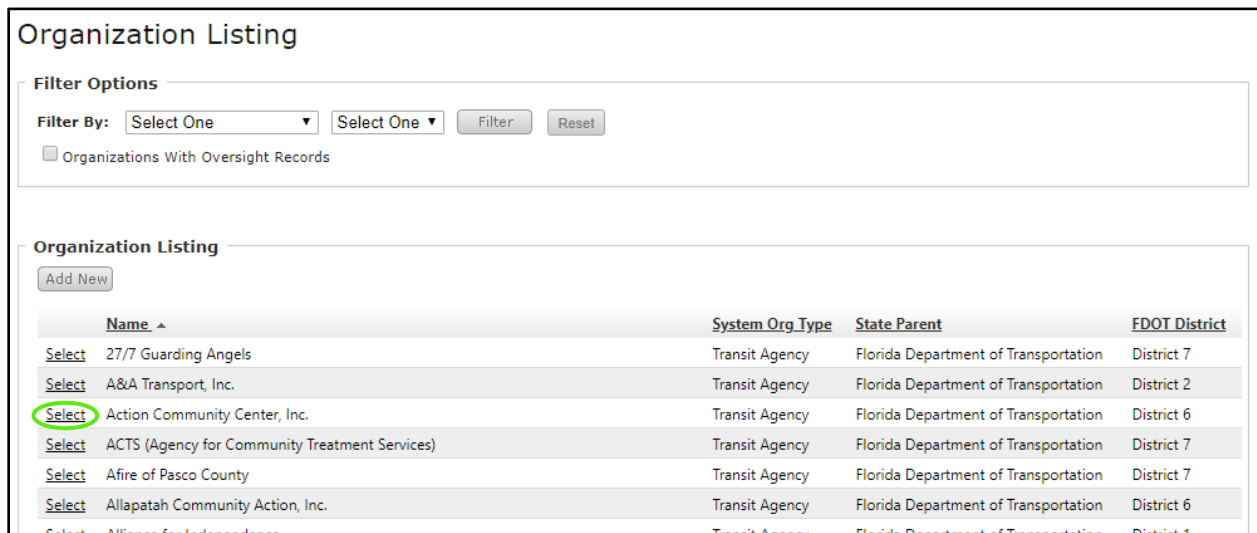
This section provides the opportunity for an agency to identify the individuals responsible for various tasks within the system. This is also the section State users will utilize to provide access to the system for new agency users.

To view an agency's contacts:

1) Select the **Organizations** tab

| Dashboard | Projects | Applications | Organizations | Oversight | Resources | Reports | Review | Contracts | Programs |

2) Select an **Organization**

Organization Listing

Filter Options

Filter By: [Select One ▼] [Select One ▼] [Filter] [Reset]

☐ Organizations With Oversight Records

Organization Listing

[Add New]

	Name ▲	System Org Type	State Parent	FDOT District
Select	27/7 Guarding Angels	Transit Agency	Florida Department of Transportation	District 7
Select	A&A Transport, Inc.	Transit Agency	Florida Department of Transportation	District 2
Select	Action Community Center, Inc.	Transit Agency	Florida Department of Transportation	District 6
Select	ACTS (Agency for Community Treatment Services)	Transit Agency	Florida Department of Transportation	District 7
Select	Afire of Pasco County	Transit Agency	Florida Department of Transportation	District 7
Select	Allapatah Community Action, Inc.	Transit Agency	Florida Department of Transportation	District 6
Select	Alliance for Independence	Transit Agency	Florida Department of Transportation	District 1

3) Select the **Contacts** section

Organization Overview

Contacts

Calendar

Service Info

Inventories

To add a new contact:

1) Select the **Add New** button

2) On the resulting Contact Details page, complete all the applicable fields
- Contact Type
- Name
- Title
- Address
- City, State, Zip
- Phone, Cell,
- Email

Helpful Hint: Be sure to complete all the required fields.

3) Select **Save**

To provide system access to a user:

1) Select the user from the user list

2) Select Yes to Allow access to the system and type in a username then select **Save**
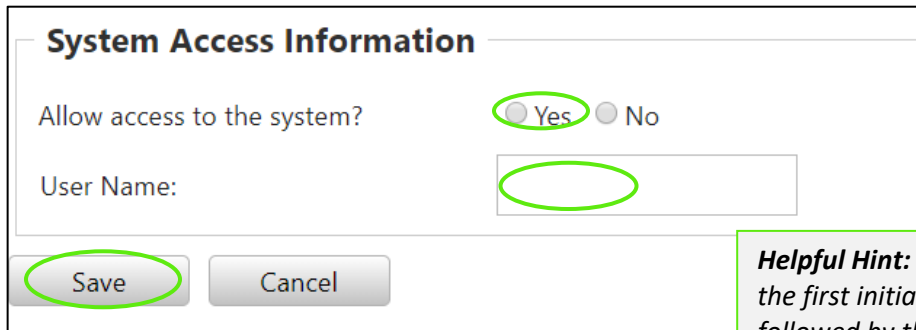
Helpful Hint: Usernames should be the first initial of the first name followed by the last name.

To assign user roles to a user:

A user may assign another user particular roles based on their own permissions. The table below lists the permissions each user has, and capabilities in the assignment of other roles.

User Role Assignments - Permissions			
Client Administrator	**State User (FDOT CO)**	**District Administrator**	**District User**
Client Administrator State Roles District Administrator District Roles Agency Roles	District Administrator District Roles Agency Roles	District Roles Agency Roles	Agency Roles

1) Select the user from the Contacts list

2) Assign user roles in the **User Roles** box
   Note: The available roles will vary based on the user (state, district, agency)

3.4 Calendar Management

The Calendar section provides a monthly calendar that your agencies can use to track milestones and specific dates associated with funding requests. In addition, you can add events to the calendar that you would like all Agency Users to have access to.

To update the calendar:
1) Select the **Organizations** tab for your agency

2) Select the **Calendar** section
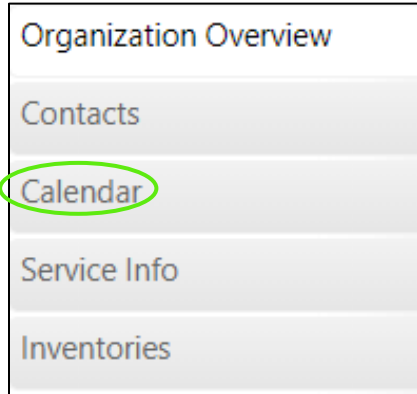
3) Click on the **date** of the event you want to add
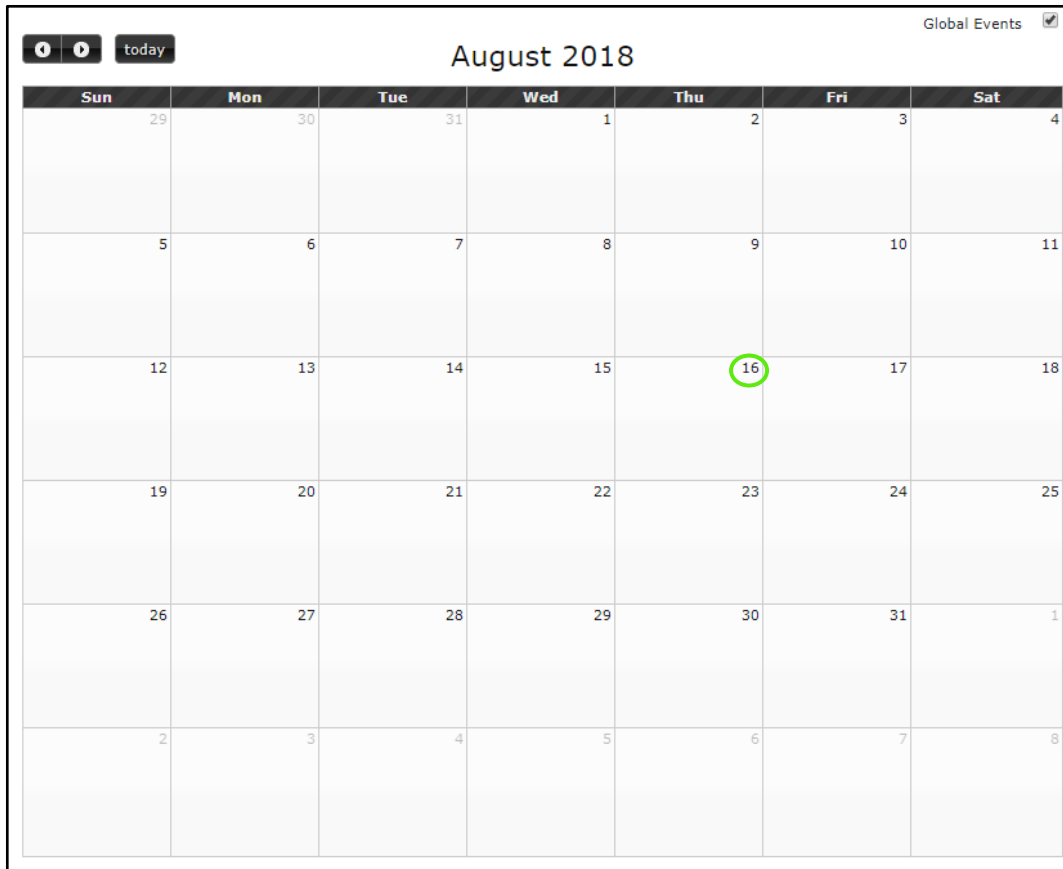
4) Fill out the **Add New Event** fields

Add New Event

Title

Start   08/16/2018 12:00 am

End   08/16/2018 12:00 am

Public Event

Description

Save   Cancel

Helpful Hint: All fields should be updated as needed.

5) Select **Save**

Add New Event

Title   District One Training

Start   08/16/2018 12:00 am

End   08/16/2018 12:00 am

Public Event

Description   Please register for training.

Save   Cancel

Helpful Hint: If you select Public Event all users will be able to view the event on their calendar.

3.5 Service Info Management

The Service Info section is a place for Agency Users to add information regarding their services. Agency Users should be guided to complete this section and State Users should utilize this section to view the Service Characteristics for an agency. To access the Service Info section, select the **Organization** tab, select the organization you would like to review, and select the **Service Info** sub-section.

To update the Service Info Management:
1) Select the **Organizations** tab for your agency
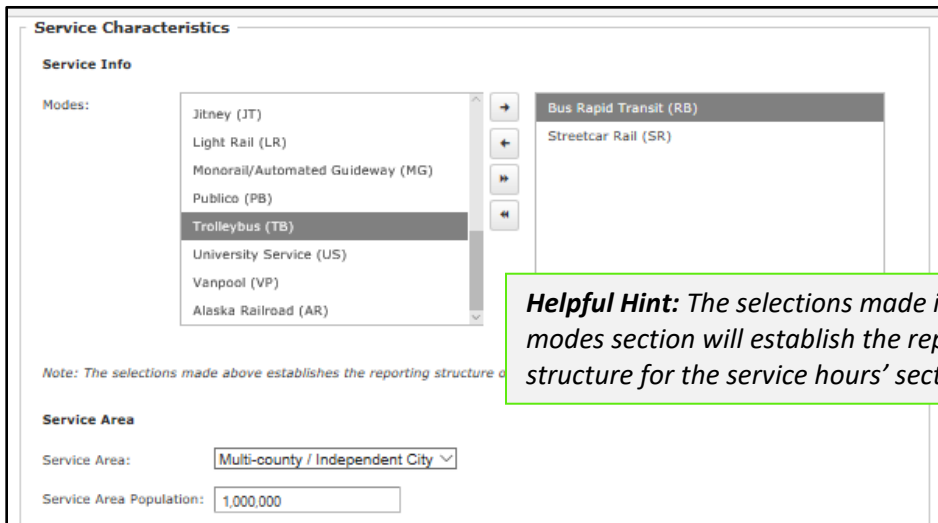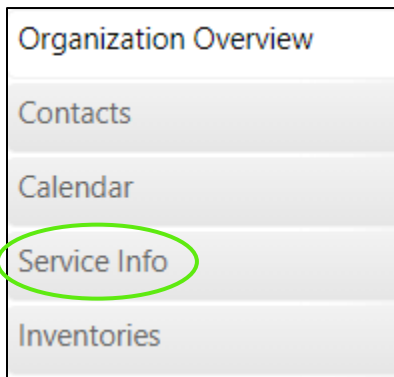
| Dashboard | Projects | Applications | Organizations | Oversight | Resources | Reports | Review | Contracts | Programs |

2) Select the **Service Info** section

Organization Overview

Contacts

Calendar

Service Info

Inventories

Service Characteristics

Service Info

Modes:
- Jitney (JT)
- Light Rail (LR)
- Monorail/Automated Guideway (MG)
- Publico (PB)
- Trolleybus (TB)
- University Service (US)
- Vanpool (VP)
- Alaska Railroad (AR)

- Bus Rapid Transit (RB)
- Streetcar Rail (SR)

Note: The selections made above establishes the reporting structure o

Helpful Hint: *The selections made in the modes section will establish the reporting structure for the service hours' section.*

Service Area

Service Area: Multi-county / Independent City

Service Area Population: 1,000,000

Helpful Hint: *Agency Users can add as many modes/service hours as needed.*

3.6 Inventory Management

The Inventories section is a place for Agency Users or State Users to view and add inventory. Agency and State Users should be guided to utilize this section to manage the Inventory for an agency.

Please note: Current Mileage, Current Condition, and Current Rating will update directly inside a vehicle's record based on values entered in the Annual Vehicle Report. This reporting form is to be completed once a year by the transit agency, and submitted for review. Once it's reviewed and approved by the District Asset Manager, the values will update inside each vehicle's inventory form. To read more about creating reporting forms, please visit the Reporting Form section of this User Guide.

3.6.1 Vehicle Setup

Vehicles may be added by FDOT CO, District Users, and Transit Agency Users.

To add to an organization's vehicle inventory:
1) Select the **Organizations tab**

2) Select the **Organization**

3) Select the **Inventories tab**

4) Select **Add New**

5) Complete all the Vehicle information

Inventory: Revenue Vehicles

Actions

Save   Cancel

Denotes a required field

Identification

*VIN:

DOT Control #:

Agency ID:

License Plate:

Funding Information

Funded by DOT?:   ○ Yes ● No

FM #:   XXXXXX-X-XX-XX

Grant # (Primary):   Select One ▼   Not Listed:

Grant # (Secondary):   Select One ▼   Not Listed:

DOT Contract #:   Select One ▼   Not Listed:

UPIN:

Total Cost:

Federal Share:

> **Helpful Hint:** *Be sure to complete all the appropriate fields.*

6) Select **Save**

3.6.2 Viewing and Editing Inventory

This step can only be completed by the user with the Association of State or District User. Role associations can only be edited by a Client Admin. District Users may update Current Condition, Current Rating, and Current Mileage. Agency Users are only able to update Current Mileage.

To View and Edit an organization's vehicle inventory:
1) Select the **Organizations tab**

2) Select the **Organization**

3) Select the **Inventories tab**

4) Select **Vehicle**

5) Make any **Edits**

Inventory: Revenue Vehicles

Actions

| Save | Release | Transfer | Cancel |

Denotes a required field

Identification

*VIN: `1FDFE4FS3GDC25975`

DOT Control #: `70204`

Agency ID: `_____`

License Plate: `_____`

Funding Information

*Funded by DOT?:   ◉ Yes   ○ No

FM #:   `XXXXXX-X-XX-XX`

*Funding Program (Primary):   `Transit Service Development ▼`

Grant # (Primary):   `Select One ▼`   Not Listed: `_____`

Grant # (Secondary):   `Select One ▼`   Not Listed: `_____`

DOT Contract #:   `Select One ▼`   Not Listed: `_____`

UPIN: `_____`

Total Cost: `$74,429.00`

> **Helpful Hint:** *Be sure to complete all the required fields, marked bv asterisks.*

6) Select **Save**

| Save | Cancel |

3.6.3 Early and Regular Lien Release Process

If a vehicle has "Yes" indicated for the "Does DOT Hold Title as Lienholder?" question on a vehicle's inventory form, the vehicle must be processed through the Lien Release workflow in TransCIP in order for disposition to be available. Please see screenshot below, which shows this question inside a vehicle's inventory form.

There are two different workflows for the Lien Release process built into the system, Early and Regular. The Early Lien Release workflow occurs if the useful life of the vehicle has not yet been met. The steps for each workflow are summarized in the table below.

Note: *For view which users have the ability to assign roles to users in TransCIP, e.g. District Asset Manager, Statewide Operations Manager, Statewide Asset Manager, please reference pg. 12.*

Early Lien Release	Regular Lien Release
Early Lien Release Submitted (Transit Agency)	Lien Release Submitted (Transit Agency)
Early Lien Release Recommended (District Asset Mgr.)	Lien Release Recommended (District Asset Mgr.)
Early Lien Release Accepted (FDOT CO, Statewide Operations Mgr.)	Lien Release Approved (FDOT CO, Statewide Asset Manager)
Early Lien Release Approved (FDOT CO, Statewide Asset Manager)	

The initiation of an Early or Regular Lien Release is to be completed by the Agency User, however, District Users, and FDOT CO may initiate the process on their behalf as well. Once an early lien release is submitted, the District User with the Asset Manager role (see pg. 13) will review the request and then submit it to FDOT CO for their review and approval. Within FDOT CO, the request is reviewed first by the Statewide Operations Manager, followed by the Statewide Asset Manager. The Regular Lien Release follows a similar workflow process; however, the request is not reviewed by the Statewide Operations Manager role in FDOT CO.

3.6.3a Agency's Release Request

To complete an organization's Lien Release on a vehicle:

1) Select the **Organization tab**

2) Select the **Organization**

Organization Listing

	^ Name_	System Org Type	State Parent	FDOT District	Status
Select	2nd Chance Community Health Services, INC	Transit Agency	Florida Department of Transportation	District 4	Active
Select	A New Start: Financial & Social Services	Transit Agency	Florida Department of Transportation	District 4	Active
Select	Action Community Center, Inc.	Transit Agency	Florida Department of Transportation	District 6	Active
Select	ACTS (Agency for Community Treatment Services)	Transit Agency	Florida Department of Transportation	District 7	Active
Select	Advocacy Resource Center Marion, Inc.	Transit Agency	Florida Department of Transportation	District 5	Active
Select	Afire of Pasco County	Transit Agency	Florida Department of Transportation	District 7	Active
Select	All City Medical Transportation Service, Inc	Transit Agency	Florida Department of Transportation	District 4	Active
Select	Allapatah Community Action, Inc.	Transit Agency	Florida Department of Transportation	District 6	Active
Select	Alliance for Independence	Transit Agency	Florida Department of Transportation	District 1	Active
Select	Angels Unaware	Transit Agency	Florida Department of Transportation	District 7	Active

3) Select the **Inventories tab**
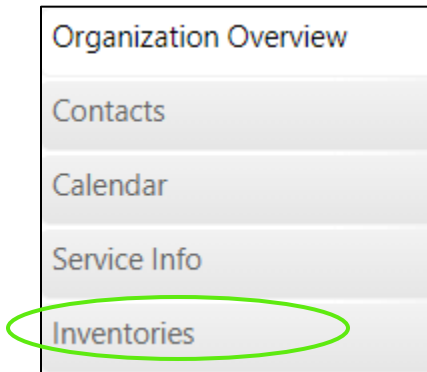
4) Select **Vehicle**

Inventories

Inventory: Revenue Vehicles ▾   [Add New]   [Export]   Lien Releases | Dispositions | Transfers

Revenue Vehicles

VIN	Actions	Status	DOT ID	Year	Mileage	Vehicle Category	Last Modified	U.L ⓘ
1GBJG31K681214731	Release / Transfer	Active	90253	2009	1,548	Type A, Transit Buses Heavy Duty	3/21/2019 11:10:56 AM	⚑
1GBE4V1G99F413066	Release / Transfer	Active	80232	2009	1,329	Type A, Transit Buses Heavy Duty	3/21/2019 11:10:56 AM	⚑
1GBE4V1GX9F413111	Release / Transfer	Active	80237	2010	184,503	Type A, Transit Buses Heavy Duty	3/21/2019 11:10:56 AM	⚑
1GBJG31K691129907	Release / Transfer	Active	90278	2010	1,138	Type A, Transit Buses Heavy Duty	3/21/2019 11:10:56 AM	⚑

5) Update the Current Mileage of the Vehicle

Condition Information

*Status: Active ▾

Vehicle Purpose: Select One ▾

Current Condition: Select One ▾   Valid as of: [ ]

Condition Rating: Select One ▾

Current Mileage: 1,548   Valid as of: 10/17/2008

Year of Renewal: Select One ▾

Type of Renewal: Select One ▾

6) Select **Save**

Inventory: Revenue Vehicles

Actions

[Save]   [Release]   [Transfer]   [Cancel]

7) Select **Release**

Inventory: Revenue Vehicles

Actions

[Save]   [Release]   [Transfer]   [Cancel]

8) The Lien Release form will vary, dependent on whether or not it is an Early or Regular Lien Release (see screenshots below). Review the form, and enter the required information. Select **Save.**

Regular Lien Release Form

Lien Release Request

Status:	Lien Release Not Submitted
Lien Release Request Date:	9/4/2024, 10:16 AM
VIN:	57WMD2C61GM100365
Title #:	
Type of Vehicle:	AO - Automobile
Wheelchair Positions:	1
Lift/Ramp?:	Lift
Lift/Ramp Manufacturer:	
Condition Rating:	
Current Mileage:	101,000
Useful Life Miles Remaining:	-1,000
Useful Life Years Remaining:	-4
Early Release (Y/N):	No
*Reason for Request of Lien:	request of lien reason

09/04/2024

If a lien release is approved, what are the plans for the vehicle?

◉ Vehicle will be disposed

○ Vehicle will continue to be utilized by the subrecipient for passenger transit services.

○ Vehicle will continue to be utilized by the subrecipient but not for passenger transit services.

Additional comments:

☐ All FDOT Funded vehicles must have FDOT approval prior to disposal.

[Save] [Submit] [Cancel] [Delete]

Early Lien Release Form

Lien Release Request

Status: Early Lien Release Not Submitted

Lien Release Request Date: 9/4/2024, 10:00 AM

VIN: 1GB3GRBG3G1145498

Title #:

Type of Vehicle: AO - Automobile

Wheelchair Positions: 2

Lift/Ramp?: Lift

Lift/Ramp Manufacturer: Braun

Condition Rating:

Current Mileage: 1,659   mm/dd/yyyy

Useful Life Miles Remaining: 98,341

Useful Life Years Remaining: -4

Early Release (Y/N): Yes

*Reason for Request of Lien:

*Estimated Cost to Return Vehicle Back to Service:

If a lien release is approved, what are the plans for the vehicle?

○ **Vehicle will be disposed**

○ **Other**

○ **Vehicle will continue to be utilized by the subrecipient but not for passenger transit services.**

Additional comments:

[Save]   [Cancel]

Note: You must upload documentation to include six months of maintenance records in order for the Submit button to appear.

Note: If vehicle is a total loss, please upload an insurance valuation report.

The Early Lien Release form requires a document upload of six months of Maintenance records in order for the **Submit** button to appear after selecting **Save.** Please also upload an insurance valuation form if the vehicle is a total loss. Upload these records in the Lien Release Documents section at the bottom of the form.

Lien Release Documents

Document Name:	[_____]
Select Document:	Choose File No file chosen
	Upload

Document Name	Size	Uploaded	Modified	Email
Six Months Maintenance	12 KB	Shawn Mitchell	5/20/2022, 04:29 PM	☐

Email

9) After Saving the record, and uploading the Maintenance records (Early Lien Release Only), select **Submit**.

Please note: the District Asset Manager will receive an email notification upon Submit.

3.6.3b District Lien Release Review

District Asset Managers complete the district review of an organization's Lien Release on a vehicle. To review the request form, District Asset Managers can select the link on their Dashboard page:

1) Select the link for the vehicle in the **Pending Lien Releases/Dispositions/Transfers** section

2) Review and complete the form. The Early Lien Release form includes a number of questions that may be answered within the text box, or you may upload documents in the Lien Release Documents section as an alternative.

Regular Lien Release Form

Lien Release Request

Status:	Lien Release Not Submitted
Lien Release Request Date:	9/4/2024, 10:16 AM
VIN:	57WMD2C61GM100365
Title #:	
Type of Vehicle:	AO - Automobile
Wheelchair Positions:	1
Lift/Ramp?:	Lift
Lift/Ramp Manufacturer:	
Condition Rating:	
Current Mileage:	101,000
Useful Life Miles Remaining:	-1,000
Useful Life Years Remaining:	-4
Early Release (Y/N):	No
*Reason for Request of Lien:	

mm/dd/yyyy 🗓

If a lien release is approved, what are the plans for the vehicle?

○ **Vehicle will be disposed**

○ **Vehicle will continue to be utilized by the subrecipient for passenger transit services.**

○ **Vehicle will continue to be utilized by the subrecipient but not for passenger transit services.**

Additional comments:

[Save] [Cancel]

Early Lien Release Form

Lien Release Request

Status: Early Lien Release Submitted

Lien Release Request Date: 9/4/2024, 10:08 AM

VIN: 1GB3GRBG3G1145498

Title #:

Type of Vehicle: AO - Automobile

Wheelchair Positions: 2

Lift/Ramp?: Lift

Lift/Ramp Manufacturer: Braun

Condition Rating:

Current Mileage: 1,659   09/04/2024

Useful Life Miles Remaining: 98,341

Useful Life Years Remaining: -4

Early Release (Y/N): Yes

*Reason for Request of Lien: The reason for the request of lien...

*Estimated Cost to Return Vehicle Back to Service: $6,000.00

If a lien release is approved, what are the plans for the vehicle?

○ Vehicle will be disposed

⦿ Vehicle will continue to be utilized by the subrecipient for passenger transit services.

○ Other

○ Vehicle will continue to be utilized by the subrecipient but not for passenger transit services.

Additional comments:

*Date of most recent FDOT Annual or Biannual inspection? `mm/dd/yyyy`

Deficiencies Identified during last inspection:

> *Comment or uploaded document required*

Additional Vehicle Observations:

> *Comment or uploaded document required*

Deficiencies Identified during Triennial Maintenance Review:

> *Comment or uploaded document required*

Additional Maintenance Program Observations:

> *Comment or uploaded document required*

Please select one reason for the lien release:

○ Safe operation of the vehicle is questionable due to excessive wear, corrosion, structural integrity problems, or safety inspection issues.

○ Cost of significant body repairs and/or replacement of major drive train components exceeds 50% of the fair market value of the vehicle.

○ Vehicle has a condition rating of 2.0 or less in the Transit Asset Management Plan.

Additional comments:

[Save] [Cancel] [Delete]

3) Select **Save**

[Save] [Cancel] [Delete]

4) Add any additional comments, as applicable.

Comments

This is where comments can be added.

Insert

There are no comments to display.

5) Add any supporting documents, including the fair market value estimations (required) in the Lien Release Documents section

Lien Release Documents

Document Name:

Select Document: Choose File No file chosen

Upload No documents have been uploaded

6) Complete the **District Review** by selecting Recommend or Return. The "I certify…" box must also be checked before recommending. Please be sure to upload a document as certified if recommending the lien release.

District Review

☐ I certify that I have uploaded documentation of the fair market value estimations in the document upload section of this form.

Status: ○ Recommend ○ Return

Comment:

Cancel

7) Select **Submit** when ready to submit the lien release to the State Asset Manager or Return it to the Agency

District Review

☑ I certify that I have uploaded documentation of the fair market value estimations in the document upload section of this form.

Status: ● Recommend ○ Return

Comment:

Submit   Cancel

The state will now get an indication to review the Lien Release

3.6.3c State Lien Release Review

In an Early Lien Release, Central Office will complete the next two steps, with the first completed by the Statewide Operations Manager, and the second by the Statewide Asset Manager. For a regular lien release, there will only be one step of review completed at Central Office; the recommendation by the District Asset Manager will go directly to the Statewide Asset Manager.

1) Select the link for the vehicle in the **Pending Lien Releases/Dispositions/Transfers** section

2) Review the request

Vehicle Information

VIN: 1GBJG31K681214731	**DOT Control #:** 90253	**Agency ID:**
Year: 2009	**Manufacturer:** Champion Bus	**Model:** **Vehicle Category:** Type A, Transit Buses Heavy Duty

Lien Release Request

Status:	Lien Release Not Submitted
Lien Release Request Date:	2/20/2020 1:36:45 PM
VIN:	1GBJG31K681214731
Title #:	101744949
Type of Vehicle:	BU - Bus
Wheelchair Positions:	
Lift/Ramp?:	
Lift/Ramp Manufacturer:	
Condition:	Adequate
Current Mileage:	1,548
Useful Life Miles Remaining:	498,452
Useful Life Years Remaining:	1
Early Release (Y/N):	Yes
Reason for Request of Lien:	

Save   Cancel

3) *Early Lien Release ONLY* - Complete the **Statewide Operations Manager** Review

Statewide Operations Manager Review

Status: ○ Accept ○ Reject

Comment:

Cancel

4) (Early and Regular Lien Release) Complete the **Statewide Asset Manager** Review

Once a release is approved, the Title Information will have automatically updated inside the vehicle's inventory form once each workflow is complete.

3.6.4 Disposition Process

This is to be completed and submitted by an Agency User after the lien release has been completed. Once submitted the District Asset Manager will review the request, and then submit it to the State Asset Manager for their review and approval.

3.6.4a Agency's Disposition Request

To complete an organization's disposition of a vehicle:

1) Select the **Organization tab**

2) Select the **Organization**

3) Select the **Inventories tab**

4) Select **Vehicle**

5) Update the Vehicle Mileage and **Save** the information

6) Select Dispose

7) Review the Disposition form, and add any comments, if any.

8) Select **Save**

9) Select **Submit**

3.6.4b District Disposition Review

The District Asset Manager will complete the District review of an organization's disposition request:

1) Select the Organization's **Pending Request** through the Dashboard link navigate to the record inside the organization's **Inventories** page

2) Review the request

3) Add any **Comments**

4) Select **Recommend/Return**

5) Add Comment, if any, and select **Submit** (Note: if Deny is selected, a comment is required)

3.6.4c State Disposition Review

The Statewide Asset Manager completes the State review of an organization's disposition of a vehicle:

1) Select the Organization's **Pending Request** through the Dashboard link navigate to the record inside the organization's **Inventories** page

2) Select the **Review** the request

3) Add any **Comments, if any, and Disposition Documents**

4) Select **Approve/Deny** (note: if Deny is selected, comments are required)

5) Add Comment, if any, and select **Submit** (Note: if Deny is selected, a comment is required)

3.6.5 Transfer Process

This is to be completed and submitted by an Agency User. Once submitted the District Asset Manager will review the request and then submit it to the Statewide Asset Manager for their review and approval.

3.6.5a Agency's Transfer Request

To complete an organization's transfer request on a vehicle:

1) Select the **Organizations tab**

2) Select the **Organization**

3) Select the **Inventories tab**

4) Select **Vehicle**

VIN	Actions	Status	DOT ID	Year	Mileage	Vehicle Category	Last Modified	U.I
1GBJG31K681214731	Release / Transfer	Active	90253	2009	1,548	Type A, Transit Buses Heavy Duty	3/21/2019 11:10:56 AM	
1GBE4V1G99F413066	Release / Transfer	Active	80232	2009	1,329	Type A, Transit Buses Heavy Duty	3/21/2019 11:10:56 AM	
1GBE4V1GX9F413111	Release / Transfer	Active	80237	2010	184,503	Type A, Transit Buses Heavy Duty	3/21/2019 11:10:56 AM	
1GBJG31K691129907	Release / Transfer	Active	90278	2010	1,138	Type A, Transit Buses Heavy Duty	3/21/2019 11:10:56 AM	

5) Update the Vehicle Mileage and **Save** the information

6) Select Transfer

7) Review and complete the Transfer form

Transfer Request

Status:	Transfer Not Submitted
Request Date:	2/25/2020
Transfer Justification:	Select One ▼
Transfer To:	Select One ▼
Mileage:	1,329
Mileage as of Date:	12/12/2012
Funding Program (Primary):	Section 5311: Formula Grants
Total Cost:	$71,086
Federal Share:	
State Share:	
Local Share:	
Fair Market Value (appraisal avg.):	
Fair Market Value Source:	
Comments:	

Save   Cancel

8) Select **Save**

9) Add any additional comments or transfer documents and select **Submit**

Comments

Insert

	Comment	User	Date
Select	We would like to transfer this vehicle	Lazara Stinnette	2/25/2020 2:00:07 PM

Actions

Save   Submit   Cancel   Delete

Transfer Documents

Document Name:

Select Document: Choose File   No file chosen

Upload   *No documents have been uploaded*

3.6.5b District Transfer Review

To complete the District review of an organization's Transfer on a vehicle:

1) Select the Organization's **Pending Request** through the Dashboard link navigate to the record inside the organization's **Inventories** page

2) Complete the **Transfer** request

3) Select **Save**

Transfer Request

Status:	Transfer Submitted
Request Date:	2/25/2020 2:00:07 PM
Transfer Justification:	Select One ▼
Transfer To:	Select One ▼
Mileage:	1,329
Mileage as of Date:	12/12/2012
Funding Program (Primary):	Section 5311: Formula Grants
Total Cost:	$71,086
Federal Share:	$35,000
State Share:	$3,000
Local Share:	$6,086
Fair Market Value (appraisal avg.):	$52,086
Fair Market Value Source:	Great Market Source, LLC

Comments

Insert

	Comment	User	Date
Select	We would like to transfer this vehicle	Lazara Stinnette	2/25/2020 2:00:07 PM

Actions

Save   Cancel

4) Add any comments, if any.

5) Select Recommend/Return

6) Add Comment, if any, and select **Submit** (Note: if Deny is selected, a comment is required)

3.6.5c State Transfer Review

To complete the State review of an organization's transfer on a vehicle:

1) Select the **Organization's Pending request** Select the Organization's **Pending Request** through the Dashboard link navigate to the record inside the organization's **Inventories** page

7) Review the **Transfer** request

8) Add any comments or transfer documents:

9) Select Approve/Deny

10) Add Comment, if any, and select **Submit** (Note: if Deny is selected, a comment is required)

3.6.6 Useful Life Management Tool

Users with Client Administration access are able to update the Useful Life Management Tool. This tool allows for useful life thresholds for vehicles regarding miles and years to be assigned; this is based on the Vehicle Description (Heavy Duty Bus, Medium Duty Bus, Small Cutaway, etc.) and the vehicle's year. The Vehicle Description and Vehicle Year are required fields that must be selected inside each vehicle's inventory form in order to save the record, and for the calculations to occur.

The Useful Life Management Tool allows for exceptions to be made to each scenario, for each year, which is based on the vehicle manufacturer. The Vehicle Manufacturer is also a field that is required inside each vehicle inventory form in order to save the record. See screenshot highlighting the above-mentioned fields located inside each vehicle inventory form (located inside each organization's Inventories page)

1) For a Client Administrator to access the tool, select Administration:

2) Then select Useful Life Management:
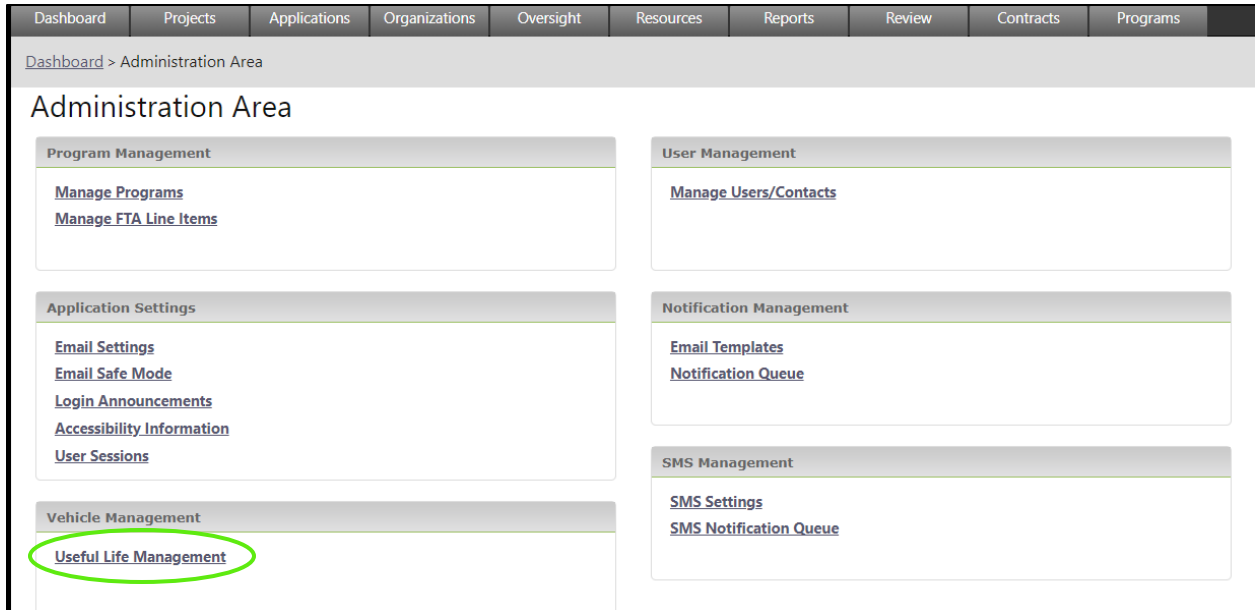
3) On the page, there will be a table of every scenario that has been programmed in the system, labeled in the following format: Category – [Heavy Duty Bus]: Type – [BU – Bus]: Description – [Heavy Duty Bus]. Scroll down the page to find the correct scenario that needs to be updated. ***Please note***: *If a new scenario needs to be added to the system, please contact your Project Manager at Panther International.*

3.6.6a Adding a New Year for a Vehicle Scenario

1) To add a new year for a scenario, select Add New Record at the top of the scenario's table.

2) Then click inside the Year box, and enter the year. Click inside the Useful Life Years and Useful Life Miles boxes in that row and enter the appropriate values as well.

3) Select Save Changes.

3.6.6b Creating an Exception for a Vehicle Scenario

1) Locate the Vehicle Scenario and the Year for which the exception needs to be created

2) Select Create in that year's row

3) Select the vehicle manufacturer for which the exception should be made, followed by entering the parameters for Useful Life Years and Useful Life Miles. After entering the data, select Update.

4) Select Save Changes

5) To view exceptions, utilized the Expand/Collapse tool located in the table next to the appropriate year. Any exceptions that exist for a Year/Scenario will appear.

Useful Life Management

Category - Heavy-Duty Large Bus : Type - BU - Bus : Description - Heavy Duty Bus

+ Add new record   💾 Save changes   ✕ Cancel changes

	Year	Useful Life Years	Useful Life Miles	Exception
▾	2026	12	500000	Create

	Manufacturer	Useful Life Years	Useful Life Miles	
	Champion Bus	10	450000	Remove
	ElDorado National	11	475000	Remove

	Year	Useful Life Years	Useful Life Miles	Exception
▸	2025	12	500000	Create

3.7 Disaster Reporting

Certain users have been designated in the system to have access to Disaster Reporting for their respective agency. If a user has been designated as a Disaster Reporter, they will have access to the Disaster Reporting tab within their organization's page.

To view your organization's Disaster Reporting:
1. Select the **Organizations** tab for your agency
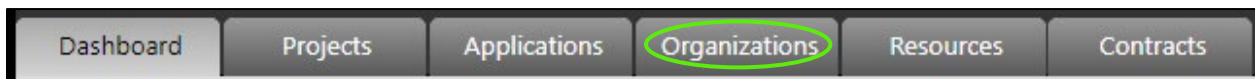
2. Select the **Important Documents** tab
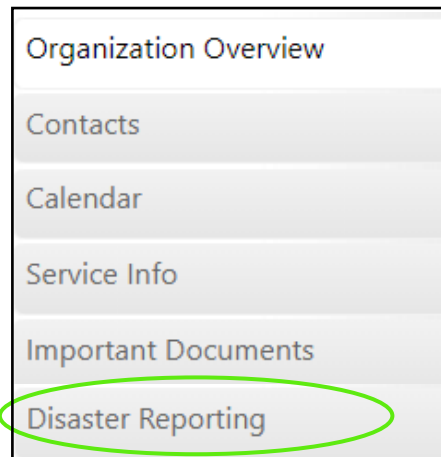
3. Select the **Complete the Disaster Reporting Form**

4. Select **Save**

Specific to District and State Users

On the Reports page, **District Users** may generate updated reports for the agencies within their districts. **Central Office Users** may generate reports for all agencies in the state. The generated report is populated with information entered and saved by agency users in the reporting form, and includes the Last Modified information as a reference.

3.8 Reporting

The Reporting section is where organizations may complete and submit reporting forms in the system. There are two reporting forms, the 5310 Annual Report and the Annual Vehicle Report. Every organization has access to the Annual Vehicle Report, whereas the 5310 Annual Report must be indicated for use on each relevant organization (see following section, *Setting Up 5310 Reporting Review and Access*).

3.8.1 Setting Up 5310 Reporting Review and Access

District Users must be assigned to be a 5310 Report Reviewer in the site. Those with this user role will receive email notifications once a report is submitted, and will be responsible for assigning reporting eligibility, reviewing submitted reports, indicating its type (Traditional/Non-Traditional/Both, and approving the form. Permissions for this user role may be assigned by users at Central Office, or those with the District Administrator role. To assign the role, navigate to the district user's account, select 5310 Report Reviewer role, and select the Save button at the bottom of their profile.

To assign which organizations should have access to this reporting form, navigate to the organization.

1. Select **Organizations**

2. Select an organization

Organization Listing

Filter Options

Filter By: Status ▾ Select One ▾ Select One ▾ [Filter] *Default list displays active status organizations*

Search By Organization: [   ]

Organization Listing

[Add New]

Action	^ Name_	System Org Type	State Parent	FDOT District	Status
Select	Apalachee Regional Planning Council	Transit Agency	Florida Department of Transportation	District 3	Active
Select	ARC Big Bend	Transit Agency	Florida Department of Transportation	District 3	Active
Select	Bay County Council on Aging, Inc.	Transit Agency	Florida Department of Transportation	District 3	Active
Select	Bay County Transportation Planning Organization	Transit Agency	Florida Department of Transportation	District 3	Active
Select	Big Bend Transit (D3)	Transit Agency	Florida Department of Transportation	District 3	Active
Select	Calhoun County Senior Citizens	Transit Agency	Florida Department of Transportation	District 3	Active
Select	Capital Region Transportation Planning Agency	Transit Agency	Florida Department of Transportation	District 3	Active
Select	Capstone Adaptive Learning	Transit Agency	Florida Department of Transportation	District 3	Active
Select	District 3	FDOT District	Florida Department of Transportation	District 3	Active
Select	Enterprise Holding Inc.	Transit Agency	Florida Department of Transportation	District 3	Active
Select	Escambia County Board of County Commissioners	Transit Agency	Florida Department of Transportation	District 3	Active
Select	Florida State University	Transit Agency	Florida Department of Transportation	District 3	Active

3. Remain on Organization Overview page.
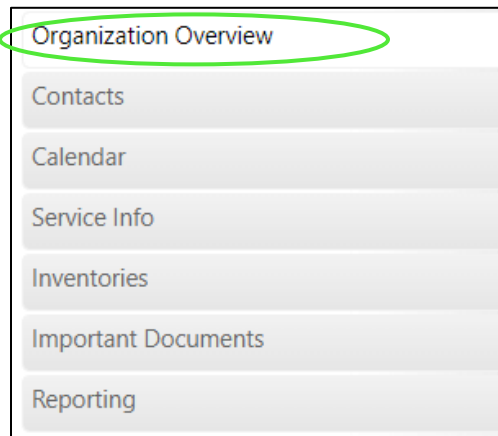
Scroll to the bottom of the page to the Financial/Reporting Info section. **Check** 5310 Reporting Access if the organization should have access to this reporting form. Select **Save**.

Financial /Reporting Info

Unique Entity ID (UEI) #: [   ]

DUNS #: [114328701]

Federal Tax ID: [59-1909296]

FEIN: [123456789]

State Vendor ID: [F591909296001]

State Vendor Location: [   ]

NTD Reporting ID: [   ]

FTA Recipient ID: [   ]

5310 Reporting Access: ☑ Yes

Actions

[Save] [Delete]

3.8.2 Creating 5310 Annual or Annual Vehicle Reporting Forms

To create a report instance, the user will continue within an organization's page.

1. Select **Reporting**

2. Select Add

Choose the Report Type (5310 Annual Report or Annual Vehicle Report), the associated information, and then select Save

3. Once inside the report record, select the reporting form.
   Please note: the screenshots below are specific to the 5310 Annual Report. The Annual Vehicle Report will have different fields to complete.

4. Once all data has been added in the reporting form, mark the report as complete and Save.

Fill out the necessary data inside the reporting form. If you want clarification on any items, hover over the information ("i") icons.

5. Once the report is marked complete, navigate back out to the main page for the reporting form, and the Submit button will be present. Select Submit.

   For 5310 reporting, please note the Document Upload section. File uploads may be used for backup documentation as requested by the District (for example, additional calculation methodology details or trip logs).

Report

Fiscal Year	Report Period	Status	Contract
2024	Jan - Dec	Not Submitted	

Purpose of Report and Reporting Instructions:

General Instructions: The Federal Transit Administration (FTA) funds transportation services for seniors and individuals with disab passes the funding through the Florida Department of Transportation (the Department). In order to understand the far reaching provided by your organization, and as required per the program circular, the Department and FTA collect performance data on data across program years to understand the resource investment levels needed to sustain the State's coordinated transportatio an essential role.

Goal 1: Collect and understand the service levels, deliverables, and outcomes associated with the Section 5310 Program.

Goal 2: Collect data that enables the Department to fully understand and evaluate the impact of services provided with FTA Sect

The reporting year is the previous year of the services' calendar year (January 1 – December 31). All data provided in the report provided in the previous year.
File uploads may be used for backup documentation as requested by the District (for example, additional calculation methodolo

Functional Instructions:

Please complete each report below. When a report is complete, please check the Completed checkbox within the report and the turn green to indicate that a report is done. Once all reports have green checkboxes, the Submit button will allow the group of

Report Name

⊘ 5310 Annual Report

[Delete] [Submit] [Cancel]

Document Upload

Document Name: [   ]

Select Document: [Choose File] No file chosen
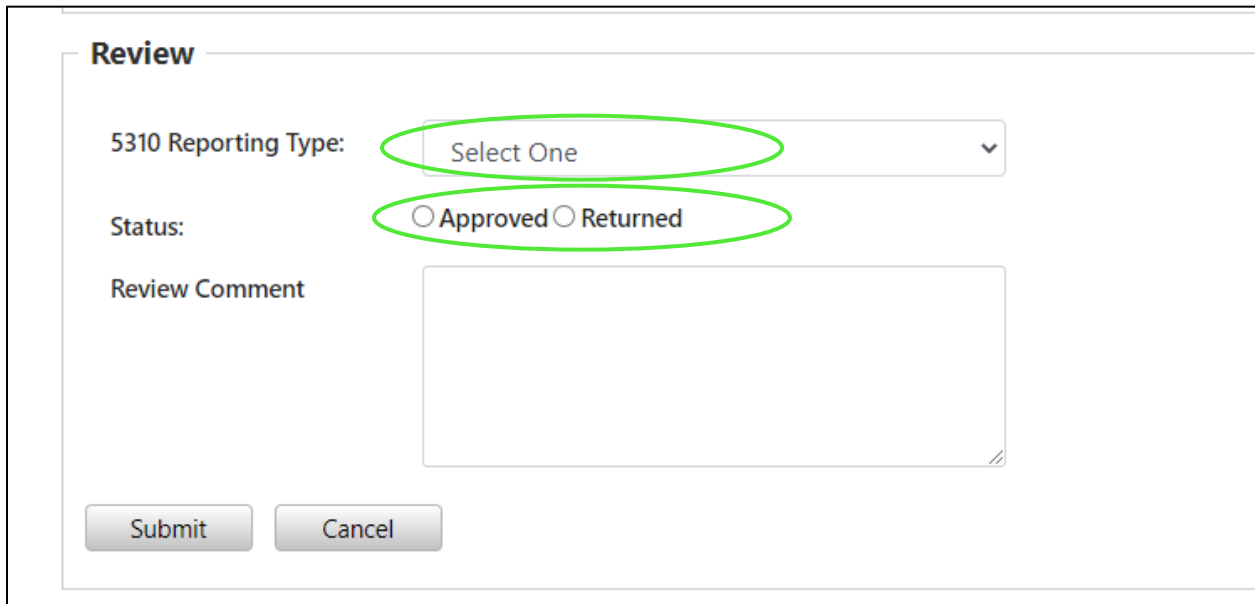
[Upload] *No documents have been uploaded*

6. For the *5310 Annual Report*, District Users with the 5310 Report Reviewer user role will receive notification of submittal and may then review and either Return (comments required) for edits, or Approve. The reviewer must also indicate the 5310 Reporting Type. The screenshot below is specific for the review on this type of reporting form.

   For the *Annual Vehicle Report,* District Users with the District Asset Manager user role will receive notification of submittal. These users will be able to approve the reporting form or return for edits. The review step in the screenshot below is very similar to the 5310 Report Reviewer's, however, there won't be a requirement to indicate the 5310 Reporting Type. Please note: once the report is approved, the Mileage and Current Condition/Current Rating fields will update inside each vehicle's unique inventory record.

Reporting forms may be returned and resubmitted as many times as necessary until they are approved.

Section 4: Oversight Management

The Oversight section includes pieces completed by both the agency and state users. This section will be utilized to manage audits and site visits and includes questionnaires, findings, and a document library. The Oversight functionality for each inspection is originally set up by a **State Oversight Reviewer** or **State Oversight Review Manager** in Administration, and then utilized by the District Reviewers to work with the Agency Users on requested items.

4.1 Oversight Review Type Set-up

The first step in Oversight is for a **State Oversight Reviewer / Oversight Review Manager User** to create the Oversight type(s) the state plans to utilize. Multiple Oversight types can be created and utilized.

To Set-Up an Oversight type:

1) Select **Administration**

2) Select **Oversight Management Module**

Administration Area

Program Management

Manage Programs
Manage FTA Line Items

User Management

Manage Users/Contacts

Group Management

Manage Groups

Application Settings

Email Settings
Email Safe Mode
Login Announcements
Accessibility Information
User Sessions

Notification Management

Email Templates
Notification Queue

Module Management

Manage Permissions
Oversight Management Module
Important Documents Module

Vehicle Management

Useful Life Management

3) Select **Add New**

Oversight Module

Manage Review Types

Add New

	Review Type	Published	Folders	Modified On	Status
Edit | Reopen	Triennial Review	Yes	Yes	Fri, Oct 25, 2019 8:35 AM	Closed
Edit | Reopen	Drug & Alcohol Review	Yes	Yes	Fri, Oct 25, 2019 8:15 AM	Closed
Edit | Close	New 2019 Triennial Review	Yes	Yes	Mon, Oct 14, 2019 9:18 AM	Open
Edit | Close	CY 2020 Triennial Review - 5307/5311	Yes	Yes	Fri, Oct 25, 2019 8:15 AM	Open
Edit | Close	CY 2020 Triennial Review - 5310	Yes	Yes	Fri, Oct 25, 2019 8:15 AM	Open

4) Enter a **Review Name** and select which districts should be associated with the review by selecting the appropriate boxes. **Review Categories**, e.g. Safety and Security, may be added by typing text in the field box and then selecting the "Review Category" link. Once a category is added it will populate in the **Review Area** pick list. Review Areas for each category, e.g. Safety Plan, may then be created by selecting **Add Review Area** link. Check the box **Folder Needed** if folders are necessary for agencies to upload information for a specific Review Area.

Oversight - Add New Review

Manage Review Types

Review #: RT00018

Date Created: 2/26/2020

Status: In Development

Review Name: [   ]

District Eligibility: Select All |Deselect All

☐ District 1 ☐ District 2 ☐ District 3 ☐ District 4 ☐ District 5 ☐ District 6 ☐ District 7

Review Category: [   ] Add Review Category

There are currently no categories for this review type

Review Area: [Select a Review Category ▼] [   ] ☐ Folder Needed? Add Review Area

There are currently no review areas for this review category

History Log

Status	Comments	Updated By	Date
No records to display.			

[Create] [Cancel]

Helpful Hint: Be sure to complete all the appropriate fields.

5) Select **Publish**

Oversight - 2020 Triennial Review

Manage Review Types

Review #: RT00019

Date Created: 2/26/2020

Status: In Development

Review Name: [2020 Triennial Review   ]

District Eligibility: Select All |Deselect All

☑ District 1 ☐ District 2 ☐ District 3 ☐ District 4 ☐ District 5 ☐ District 6 ☐ District 7

Review Category: [   ] Add Review Category

	Review Category	Order
Edit | Delete	Other	⬆ ⬇
Edit | Delete	Drug & Alcholol	⬆ ⬇
Edit | Delete	Maintenance	⬆ ⬇
Edit | Delete	Safety & Security	⬆ ⬇

Review Area: [Select a Review Category ▼] [   ] ☐ Folder Needed? Add Review Area

There are currently no review areas for this review category

History Log

Status	Comments	Updated By	Date
Review Type Created	New oversight review type: '2020 Triennial Review' was created	Ashley Porter	2/26/2020 10:27:34 AM

[Save] [Cancel] [Publish]

6) Select **OK**
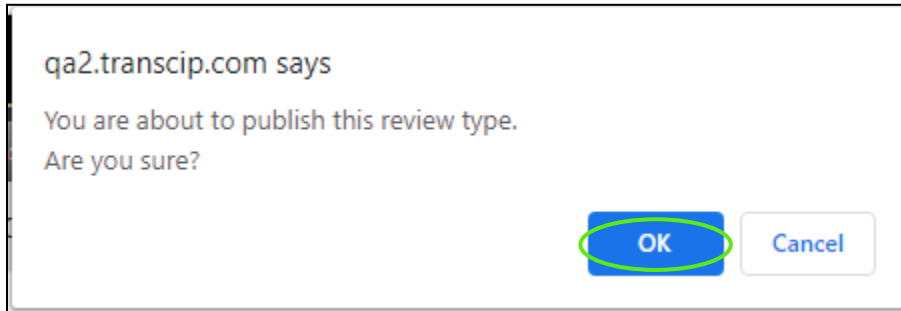
4.2 Agency Review Set-Up

This step can only be completed by the user with the Association of **District Oversight Reviewer**. Role associations can only be edited by a Client Admin.

4.2a To Set-Up an Agencies Review:

7) Select the **Oversight** tab

8) Select the **Add New** button

9) Complete the following information

Helpful Hint: *Be sure to complete all the appropriate fields.*

Helpful Hint: *Upon Save the State will be notified to add State Reviewers*

10) Select **Save**

4.2b Adding State Reviewers

State Oversight Reviewers and **State Oversight Review Managers** may add the State Reviewers to the Oversight record:

1) Select the **Oversight tab**

2) Select the **Oversight record**

3) Select **State Reviewers and Add**

4) Select **Save**

4.2c Adding Engagement Documents to the Review

The addition of Engagement Documents to the Oversight Record is completed by **District Reviewers**

1) Select the **Oversight tab**

2) Select the **Oversight record**

3) Select **Engagement Documents**

4) Select **Add New**

5) Enter a Document Name and upload the file

6) Select **Save**

4.2d Adding Compliance Folders

Compliance folders may be added by state and district reviewers in the Review Profile page. These folders will then populate on the Compliance Folders page. *Please note: while folders are created during this step, the ability to upload documents into the folders on the Compliance Folders page is not available until after the Engagement Document has been accepted by a District Reviewer.*

To add compliance folders:
1) Select **Review Profile**

2) Select **Add a Folder**

3) Select **Name the Folder**

4) Select **Add**

4.2e Submitting Engagement Documents to Agency

To submit the Engagement Document to agency users, a District Reviewer User will:
1) Select **Engagement Documents**

2) Select **Submit to Agency**

3) Select **OK**

4.3 Agencies Review of Notification

4.3a Review Engagement Document
To Review the Engagement Document as an Agency user:
1) Select **Oversight**
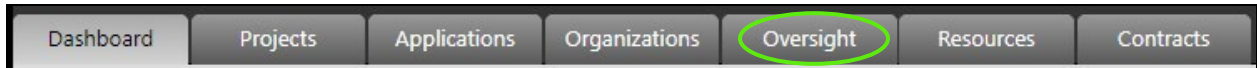
2) Select **Oversight Listing**

3) Select **Engagement Documents**

4) Select the document provided in **Notification of Review**
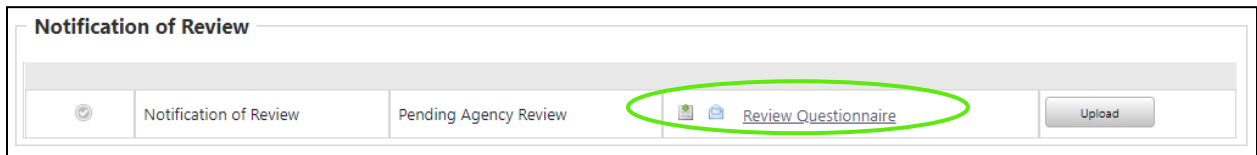
5) The document will download to the computer. Open document, complete, and Save the file
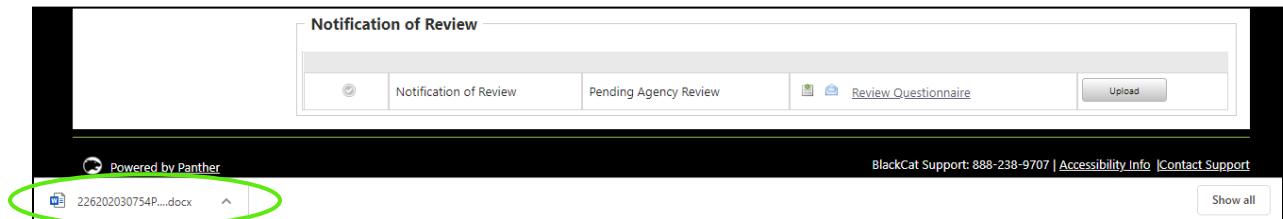
6) Select **Upload**

7) **Name & Select Document**

8) Select **Save**

9) Select **Send to District**

10) Select **OK**

4.4 Accepting a Notification of Review

4.4a Reviewing a Notification of Review as a District User
To access the Review:
1) Select the **Oversight tab**

2) Select the **Oversight record**

3) Select **Engagement Documents**
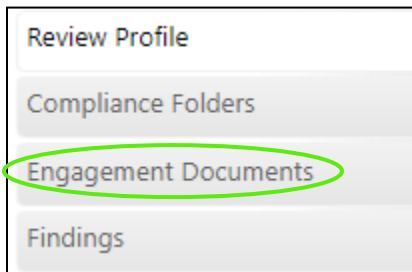
4) Select the document name to review
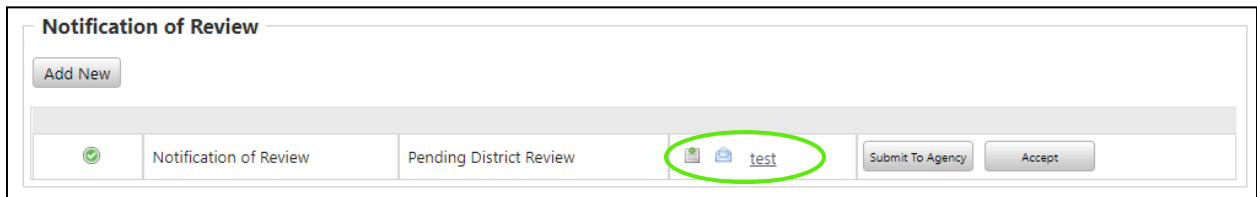
5) If complete select **Accept**, if not **Submit To Agency**

6) Select **OK**

Are you sure you want to Accept this Completed Notification of Review from the agency?

OK   Cancel
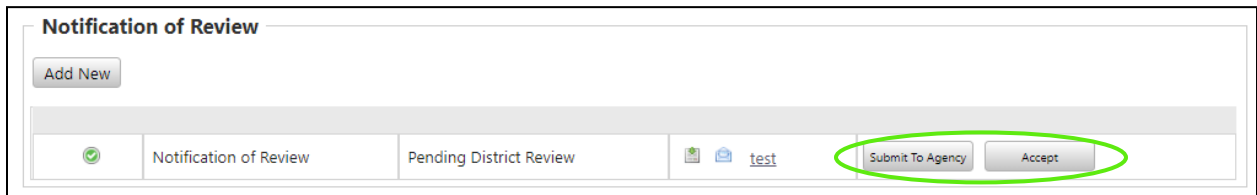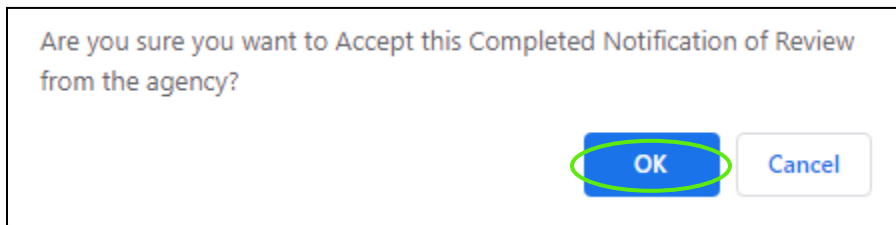
4.5 Setting Up Findings

4.5a Setting Up Findings by a State Reviewer

To set up findings:

1) Select the **Oversight tab**

2) Select the **Oversight record**

Oversight Listing

	Organization	District	Review Type	Year	Site Visit Date	Review Status
Select	Action Community Center, Inc.	District 6	New 2019 Triennial Review	2019	10/03/2019	Pending Agency Review
Select	Alliance for Independence	District 1	Triennial Review	2020	8/01/2019	Review and Mitigation

3) Select **Findings**

Review Profile

Compliance Folders

Engagement Documents

Findings

4) Select **Add New**

Findings

Add New ☐ No Findings

There are currently no Finding Records for this inspection

5) Complete all the fields. If a Finding Type is an Observation, a Due Date will not appear on the screen. If the Finding Type is a Deficiency or Area of Concern, a Due Date must be selected.

Finding

Finding #:	F000000087
Date Created:	2/28/2020
Review Category:	Select One ▼
Review Area:	Select One ▼
Finding Type:	Select One ▼
Repeat Finding?	☐ Check if "Yes"
Description:	
Recommendation:	
Comments:	

Helpful Hint: Be sure to complete all the appropriate fields

Save   Cancel

6) Select **Save**

Save   Cancel

7) Add any Comments or Supporting Documentation

8) Select **Save**

4.5b Publishing Findings by a State Oversight Review Manager

State Oversight Review Managers are the only users who can publish findings. To publish findings to a district user:

1) Select the **Oversight tab**

2) Select the **Oversight record**

3) Select **Findings**

4) View the Findings

5) When all Findings are added, Select **Publish**

6) Select **OK**

Are you sure you are ready Publish this list of findings to the District?

OK   Cancel

4.5c Publishing Findings by a District Oversight Reviewer Manager

District Oversight Reviewers and **District Oversight Review Managers** may view findings created by the state, however, only **District Oversight Review Managers** can only publish the findings :

1) Select the **Oversight tab**

| Dashboard | Projects | Applications | Organizations | Oversight | Resources | Reports | Review | Contracts | Programs |

2) Select the **Oversight record**

Oversight Listing

	Organization	District	Review Type	Year	Site Visit Date	Review Status
Select	Action Community Center, Inc.	District 6	New 2019 Triennial Review	2019	10/03/2019	Pending Agency Review
Select	Alliance for Independence	District 1	Triennial Review	2020	8/01/2019	Review and Mitigation

3) Select **Findings**

Review Profile

Compliance Folders

Engagement Documents

Findings

4) View the Findings

5) When ready, **District Oversight Review Managers** select **Publish to Agency**. Prior to publishing, district reviewers may add additional findings to the existing records.

6) Select **OK**

4.6 Completing Finding

4.6a Responding to Findings as an Agency User

To review and respond to findings as an **agency user**:

1) Select the **Oversight tab**

2) Select the **Oversight record**

3) Select **Findings**

4) Select **View**

5) Review finding, and be sure to enter information in the **Corrective Action Plan** (CAP) field.

6) Add Comments/Supporting Documents

7) Select **Save**

8) Select **Submit to District**

9) Select **OK**

4.7 How to Request a Deadline Extension

Request for an Extension for an Agency

Findings that have a Finding Type of Deficiency or Area of Concern will have Completion Dates assigned to them. In order to request an extension to the completion date, agency users must complete the following steps prior to submitting the response to the District.

To request an extension as an Agency User:

1) Select the **Oversight tab**

2) Select the **Oversight record**

3) Select **Findings**

4) Select **View**

5) Review finding

Finding

Finding #:   F000000087
Date Created: 2/28/2020
Review Category: Maintenance
Review Area: Maintenance
Finding Type: Deficiency
Repeat Finding?   ☑ *Check if "Yes"*
Description: Description
Recommendation: Recommendation
Corrective Action Plan:
Completion Date: 3/5/2020   Due Date Extension Request

6) Complete the Required Fields

Completion Date Extension Request

Extension Request

Please extend the current Completion Date:

From: 3/05/2020

To:

Justification:

Submit   Cancel

7) Select **Submit**

Submit   Cancel

4.7a How to View Extension Request

To view and approve an extension as a **District User:**
1) Select the **Oversight tab**

Dashboard Projects Applications Organizations Oversight Resources Reports Review Contracts Programs

2) Select the **Oversight record**

3) Select **Findings**

4) Select **View**

5) View the Request

6) Select an **Action**

Completion Date Extension Approval Screen

Mildred McMillon Requested a Completion Date Extension on 2/28/2020

From:	3/05/2020
To:	3/11/2020
Justification:	Our team has been out ill
Action:	Select One ▾
Comments:	

[Submit] [Cancel]

7) Select **Submit**

[Submit] [Cancel]

4.8 Completing Reviews of Findings

The District Review is completed by a District Oversight Review Manager.

To complete a district review:
1) Select the **Oversight tab**

| Dashboard | Projects | Applications | Organizations | Oversight | Resources | Reports | Review | Contracts | Programs |

2) Select the **Oversight record**

Oversight Listing

	Organization	District	Review Type	Year	Site Visit Date	Review Status
Select	Action Community Center, Inc.	District 6	New 2019 Triennial Review	2019	10/03/2019	Pending Agency Review
Select	Alliance for Independence	District 1	Triennial Review	2020	8/01/2019	Review and Mitigation

3) Select **Findings**

Review Profile

Compliance Folders

Engagement Documents

Findings

4) Select **View**

5) Review finding

6) Add Comments/Supporting Documents

Comments

Comments	User	Date
these look good to submit to agency	jparham	2/28/2020 01:34 PM
This is ready for State review	aporter	2/28/2020 01:12 PM

Supporting Documentation

Document Name:

Select Document: [Choose File] No file chosen

[Upload]

Document Name	Size	Uploaded	Modified	
Edit 🖾 Required Document	11 KB	Ashley Porter	2/28/2020 3:12:46 PM ☐	✖

[Email]

History

Status	User	Date
Pending Agency Review	afeagle	Feb 28, 2020 4:09 PM
Pending District Review	estutts	Feb 28, 2020 3:28 PM
Draft	aporter	Feb 28, 2020 2:59 PM

[Save] [Cancel]

7)   Select **Save**

8)   Select **Approve**

Findings

	Category	Review Area	Type	Due Date	ID# ⓘ	Last Action Date	Status		
View	Maintenance	Maintenance	Deficiency	3/05/2020	F000000087	2/28/2020	Pending District Review	Submit To Agency	Approve

9)   Select **Submit to**

Are you sure you want to approve the finding?

[OK]   [Cancel]

Section 5: Program Management
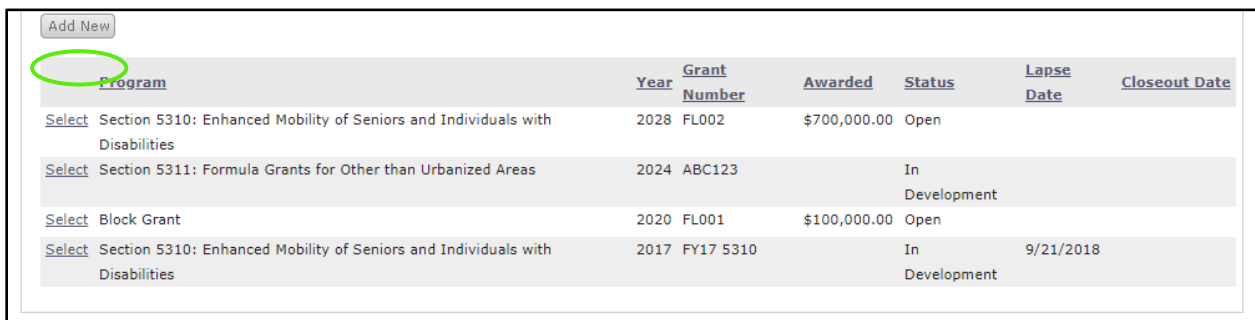
The Grant section is where Programs will be added to the System. A grant for each funding program being utilized should be created on an annual basis. The Grants created in this section will allow you to allocate and encumber funds against that Grant.

To add a Program:

1) Select the **Programs** tab

2) Select the **Add New** button

3) On the resulting Programs Details page, complete all the applicable fields and select **Save**

Helpful Hint: The Year, Legislation, and Program are all required to create the Program.

To View/Edit Distributions associated with a Program:

1) Select the **Programs** tab

2) Select the **Program**

3) Select **Distribution** and then **Add/Adjust Distributions**

> *Helpful Hint: As funds are allocated, encumbered, and expended the tables will update.*

4) For a new Distribution, enter a **Title** and **Awarded Amount** and select **Insert**

5) To Adjust a Current Distribution, change **Title** or **Award Amount** and then select **Update**

6) To view the details of the distributions, select the expandable arrow. Hover over each listing to see the organization associated with each listed allocation.

Section 6: Project Management

The Project section is a list of all agency projects. Projects include project details as well as a funding request/budget. Typically, Agency Users will add their own projects but this is an area where State Users can also assist agencies and create projects as well.

6.1 Project Creation/Edit

1) Select the **Projects** tab

2) Select the **Add New** button

> **Helpful Hint:** You will initially land on the Project Listing page. As a State User, you will see all agency Projects. Agency Users will only see their organizations projects.
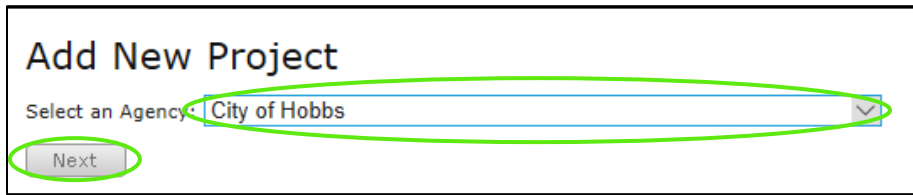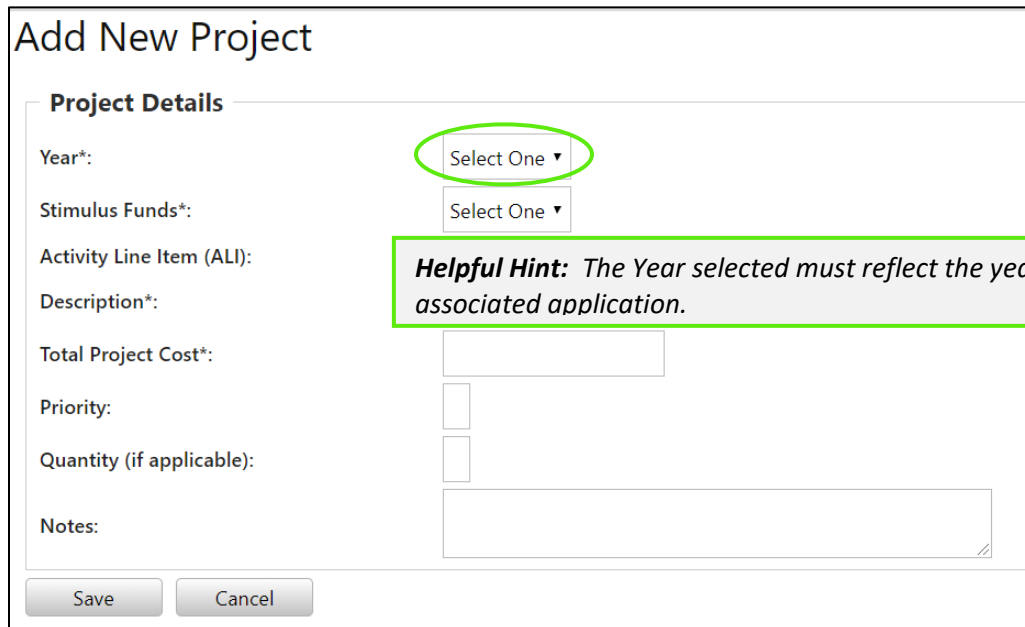
3) Select an **Agency** and Select **Next**

Add New Project

Select an Agency: City of Hobbs

Next

4) Select a **Year**

Add New Project

Project Details

Year*:   Select One ▾

Stimulus Funds*:   Select One ▾

Activity Line Item (ALI):

Description*:   **Helpful Hint:** *The Year selected must reflect the year on the associated application.*

Total Project Cost*:

Priority:

Quantity (if applicable):

Notes:

Save   Cancel

5) Select the **Lookup** button

Helpful Hint: *If the ALI box does not appear after selecting **Lookup** please check behind the current screen.*

6) The **FTA Line Item Code** when selected will populate here

Helpful Hint: *Select the appropriate FTA Line Item Code and Description from the list. Depending on your browser you may need to double click to make the selection.*

7) Select the **Scope Code** from the drop down.

8) Add what you think the **Total Estimated Amount** of the whole project will be

Helpful Hint: You will create a more specific funding request in the next step. This field is used primarily for Planning purposes.

9) Complete the remaining fields

Add New Project

Project Information

Year*:	2017 ▾
Activity Line Item (ALI):	11.12.04 Buy Replacement - Bus < 30 FT Lookup
Description*:	Buy Replacement - Bus < 30 FT
Scope Code:	111-00 ▾
Estimated Net Project Cost*:	$500,000
Priority:	1
Quantity (if applicable):	1
Notes:	Need a replacement vehicle.

10) Select **Save**

Save   Cancel

11) Select the **Select** link in the Funding Request section

Project Overview

Project Information

Action Community Center, Inc. : Operating Assistance up to 50% Federal Share

UPIN: BCG0000033
Project Status: In Development

Created by Annette Lapkowski on 7/12/2018 5:11:34 PM
Last Modified by Annette Lapkowski on 7/12/2018 5:18:35 PM

Delete   Closeout

Funding Requests

	Project Status	Year	Requested	Allocated	Encumbered
Select	Not Submitted	2018	$500,000	$0	$0

12) Enter your budget numbers for each budget category listed

Project Budget

Expense

Budget Code	Category	Amount
	Capital Expenses	
001	Salaries	$200,000
002	Fringe Benifits	$100,000
003	Contractual Services	$40,000
004	Travel	$50,000
005	Indirect Costs	$10,000
006	Other Direct Costs	$100,000

			Amount
Total Expenses			$500,000
Total Revenue	(minus)		$0
Net Project Cost			$500,000

Local Match (20%)		Amount
Local Match		$100,000
Source:		$50,000
Source:		$50,000
Source:		
Local Balance		$0

> **Helpful Hint:** *The budget lines will fluctuate for different project types.*

Save   Cancel

13) Select **Save** after all the fields have been addressed and dollar amounts have been entered

Save   Cancel
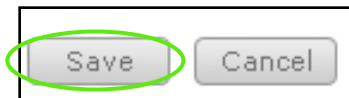
14) The project creation process can be completed as many times as necessary

Helpful Hint: *Filters may be utilized to shorten the list of projects.*

Helpful Hint: *As a State User, the project list will include all agency projects.*

Section 7: Application Management

The Application section is a list of all agency applications and the location where the State User will create applications. Applications include application forms, attached projects and a budget summery. Typically, Agency Users will add their own applications but this is an area where State and District Users can also assist agencies and create applications if needed.

7.1 Application Development

1) Select the **Applications** tab

2) Select the **Application Development** sub-section
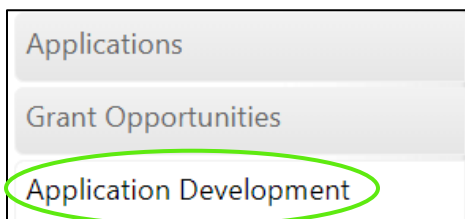
3) Select **Add New** button

4) Complete all of the required Application Profile fields
   - Application Name
   - District (Statewide or districts – note: Statewide is only for applications Central Office will review)
   - Public URL
   - Year
   - FAIN Number
   - Hard/Soft Deadline
   - Group Review
   - Scorecard (If Applicable)

If the submitted applications are to be reviewed by the districts, then Open Date/Time, Deadline Date/Time, and Lead Reviewers should be left blank as they will be completed by the district(s) once the opportunity is published.

If Central Office is creating a "Statewide" opportunity, which is to be used when CO is going to review all submitted applications, then Lead Reviewers, Open Date/Time, Deadline Date/Time must also be selected.

Helpful Hints: If you select Hard deadline the application will close on the deadline date and time.
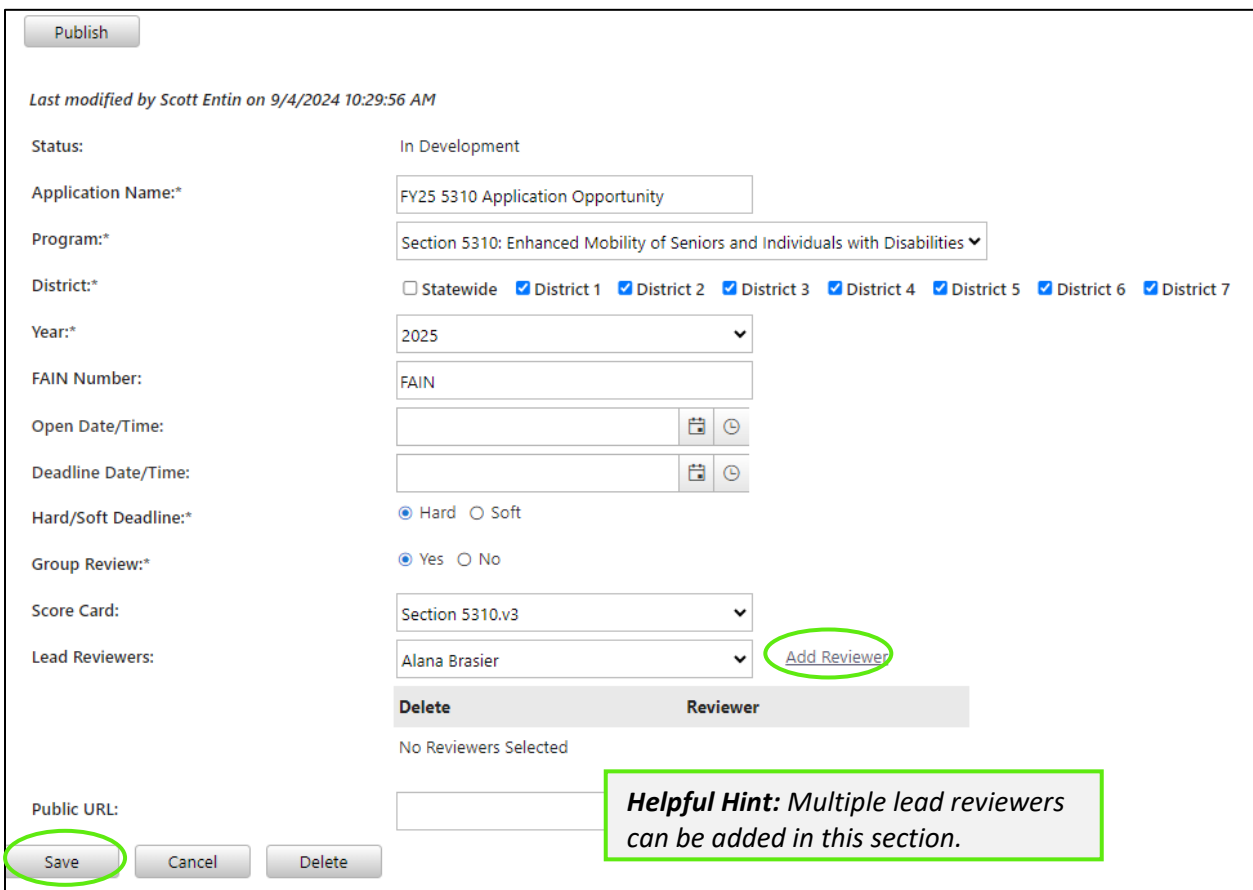
If Group Review is needed, a scorecard must be selected.

District Users may only create applications for their districts; state users may create applications for individual districts, or statewide opportunities

5) Select Insert

6) *Applies only if a "Statewide" Opportunity:* Select **Add Reviewer** in the Lead Reviewers section. Lead Reviewers are informed when an application has been submitted and are responsible for marking an application as Complete or Not Complete. If there is not a Group Review/Scorecard Review as part of an application, the Completeness Review is the only step required to approve an application.

7) Select the **Application Documents** sub-section

8) Select **Add New**

9) Enter applicable information and then select **Insert**

Allow Upload: Select this if a document should be uploaded in this space.

Required: Select this if a document upload is required.

Post Submittal: Select this if users should be able to upload documents after application submission.

Sequence: This should be a number that indicates where in the list of forms this document should be.
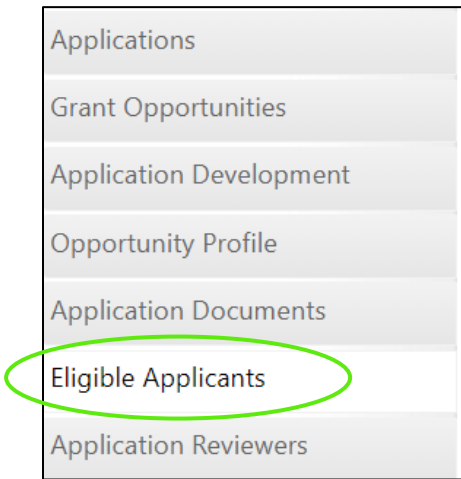
Form Title: This is the name of the document.

Select Document: Select browse and find the document associated with the form title (not required).

Insert

*Continue this process as many times as needed, there is no limit to the number of application forms

10) *Applies if only a Statewide Opportunity:* Select the **Eligible Applicants** sub-section

| Applications |
| Grant Opportunities |
| Application Development |
| Opportunity Profile |
| Application Documents |
| Eligible Applicants |
| Application Reviewers |

11) *Applies if only a Statewide Opportunity:* Select all organizations that are eligible to apply and then select **Save**

Application Access

Organization Access

Last modified by Axah on 7/18/2018 4:33:38 PM

Filter Options

Filter By: Select One ▼ Select One ▼ Filter Reset

Select All | Deselect All

☐ 27/7 Guarding Angels
☑ A&A Transport, Inc.
☑ Action Community Center, Inc.
☐ ACTS (Agency for Community Treatment Services)
☐ Afire of Pasco County
☐ Allapatah Community Action, Inc.
☐ Alliance for Independence
☐ American Lung Association
☐ Angels Unaware
☐ ARC Marion
☐ Arc of Alachua
☐ ARC of St. Lucie County, Inc
☐ ARC of the Glades
☑ ARC Volusia
☐ Aspire Health Partners
☐ Assn. for Retarded Citizens of South Florida, Inc. - The ARC
☐ Association for Development of the Exceptional, Inc
☐ Attain Inc.
☐ Attain Inc.
☐ Baker County COA
☐ Banyan Community Health Center, Inc.
☐ BARC Housing
☐ BASCA Inc.
☐ Bay Co TPO/Bay County

☐ Hillsborou...
☐ Historic Mc...
☐ Homeless...
☐ Hope Cent...
☐ Hope Heal...
☐ HPC Health...
☐ Human De...
☐ Independent Living for Retarded Adults, Inc.
☐ Indian River County BOCC
☐ Indian River County MPO
☐ Industrial Complex of Raiford
☐ Jacksonville Transportation Authority
☐ Jessie Trice Community Health Center
☐ Jewish Community Services of South Florida, Inc.
☐ Jewish Family & Children's Service
☐ Jewish Federation
☐ Jtrans
☐ Key Clubhouse of South Florida
☐ Key Training Center
☐ Kids in Distress
☐ Kiily's Kids, Inc.
☐ Kinneret, Inc.
☐ Lake County Board of County Commissioners, dba Lake County Public Transportation
☐ Lake County Public Works

> *Helpful Hint: Select the box next to any organization that should be able to apply for an application. If an organization is trying to apply and stating that there are applications available, verify that they are selected on this page.*

12) *Applies if only a Statewide Opportunity:* If a Group Review/scorecard review is part of the review process, select the **Application Reviewers** sub-section
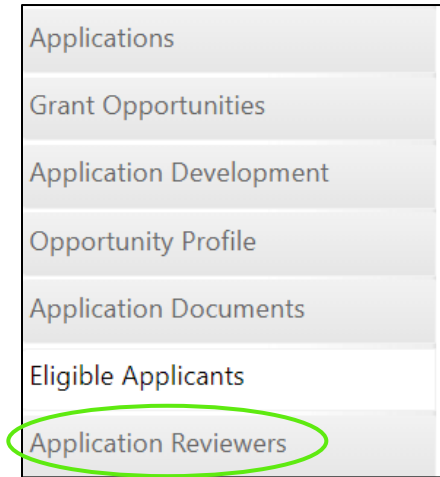
13) *Applies if only a Statewide Opportunity* - Select the Eligible Reviewers name, and then select the blue arrow pointing right and select **Save**

Helpful Hint: *You can add as many selected reviewers as you would like for each application.*

14) Return to the Opportunity Profile page and select the **Publish** button

NOTE: If the opportunity is set to apply to district(s), an email notification will be sent to district users, informing them the opportunity has been created and they must add in their respective Open Date/Time, Deadline Date/Time, Lead Reviewers, and Application Reviewers (as applicable per use of a scorecard).

7.2 Creating and Completing an Application

Creating and completing an application is typically completed by an Agency User but as a State User you can assist in creating an application for an organization.

1) Select the **Applications** tab

2) Select the **Grant Opportunities** page, select an **Organization,** and then select the **Apply** button. Only grant opportunities for the selected organization will appear with an Apply option.
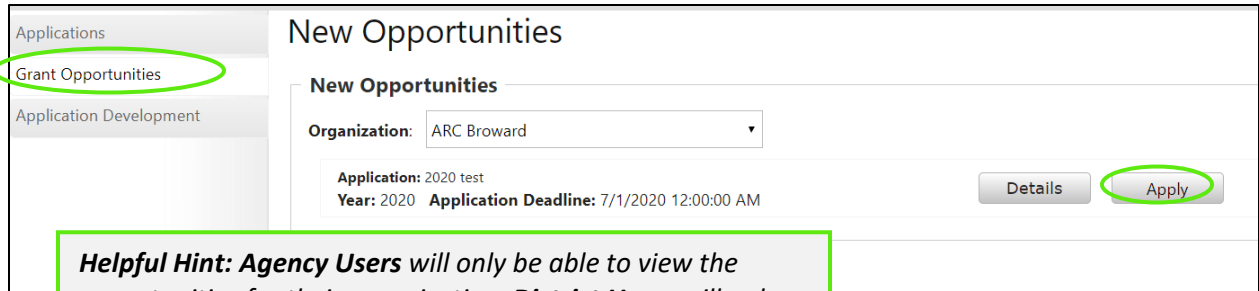
Helpful Hint: Agency Users will only be able to view the opportunities for their organization. **District Users** will only be able to view opportunities available for organizations in their district.

The following steps are completed by Agency Users

There are two sections of the application that must be completed in order for an agency to have access to the Submit button on their application:

1. **Applications Documents** section: All documents in this section must have a green or blue mark next to them if there is an upload requirement/option. Required documents that still have a gray checkmark indicate a document has not been uploaded.
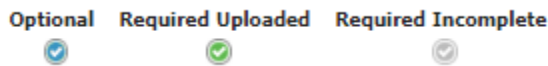
2. **Project Attachment** section: All projects to be included in an application must be attached and the Funding Request (budget) for each project must have been completed.

The submit button is **not active** until both of these steps are completed.

1) To complete the **Application Forms**
   a. Select **Attach Upload** next to the first required document and complete upload process

Helpful Hint: All forms that you added to the Application forms section will be available in the section for both download and upload.

Helpful Hint: Upon selecting save the Attach Form box will close and the line will now say Re-Upload, for required documents the check will change from grey to green
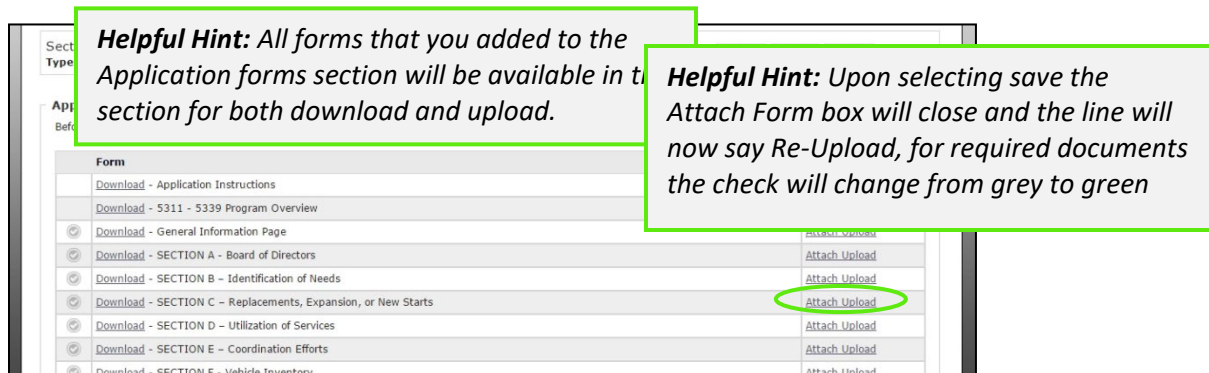
2) To complete the **Projects Section**
   a. **Attach** all necessary projects to the application

Projects

	Line Item	CY	Description	Budgeted Amount
Remove	30.09.01	2017	Operating (Federal Share 50%)	$16,760.00
Remove	11.79.00	2017	Project Administration (for Agency)	$11,963.00
			Total	$28,723.00

3) Once both sections are complete, the **Submit** button must be selected

Grant Opportunity

Section 5311: Formula Grants for Other than Urbanized Areas (Rural Transit Program (5311))   [Details] [Delete] [Submit]
Type: FTA   **Application Deadline:** 12/31/2014 12:00:00 AM   **Status:** Not Submitted

Application Forms

Before you can submit this opportunity you would need to download and re-upload all necessary documents.

	Form	
	Download - Application Instructions	
✓	Download - Public Notice Advertising / Public Meeting	Re-Upload
✓	Download - Brief System History	
✓	Download - Summary of Expansion or Reduct	

Helpful Hint: The status section of the application will indicate to Agency and State Users where in the process the application is in.

Section 7.3: Review Process

The review process has multiple steps and each is completed by a State or District User.
1. Completeness Review
2. Reviewer Assignment (applies if application opportunity has a "Group Review")
3. Individual Review and Scoring (applies if application opportunity has a "Group Review")
4. Application Review Management (applies if application opportunity has a "Group Review")
5. Allocation of Funds
6. Final Approval

7.4 Completeness Review

The completeness review is completed by the Lead Reviewer for the region:

1. Select the **Review** tab

| Dashboard | Projects | Applications | Organizations | Oversight | Resources | Reports | Review | Contracts | Programs |

2. Select the **Review** link

Helpful Hint: Each Lead Reviewer will only have access to the submitted applications of organizations within the regions they are assigned to.

3. Check the application and projects for completeness; Select complete or not complete, add comments, and select **Submit**

Helpful Hint: If an application is marked "Not Complete" please provide detailed comments for the agency to review.
Once an application marked "Not Complete" is submitted by the reviewer, the agency will be notified and have the opportunity to rectify the issues and resubmit for a second round of completeness review.
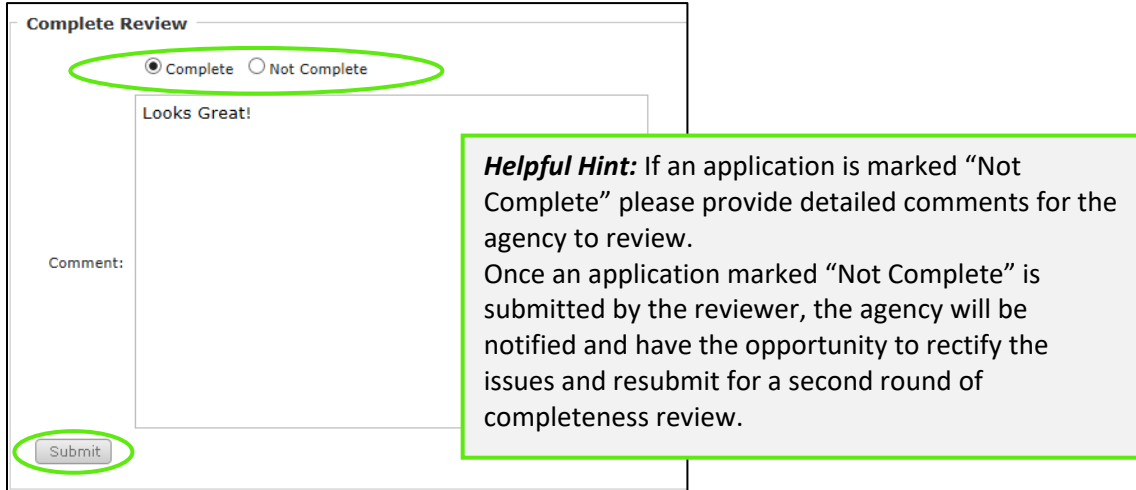
7.5 Reviewer Assignment

The reviewer assignment is completed by the Lead Reviewer for the opportunity, and only applies to application opportunities where "Group Review" was selected:

1. Select the **Review** tab

2. Select **Assignments**
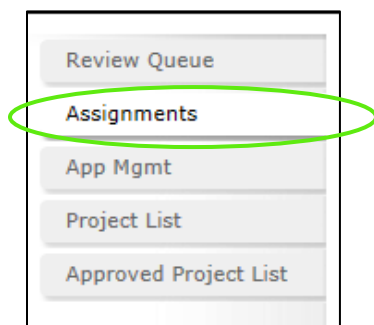
3. Select **No Assignment**

4. Select the names of the reviewers that should be assigned to the application from the box on the left and then select the blue arrow pointing to the box on the right. Once complete, select **Save**

Helpful Hint: To send an email to a reviewer that has been assigned an application to review, select their name from the assigned reviewer list and then select the Email Notification link at the bottom of the

5. The Application has now been assigned

6. Repeat steps 3-5 for each application that will be reviewed by a group of reviewers

7.6 Individual Review

The individual review (scorecard) is completed by each reviewer assigned to an application:

1) Select the **Review** tab

2) Select the **Review** link in the Committee Review table

3) Complete the reviewer scorecard by answering each question on the scorecard, adding comments when necessary, and selecting an option from the recommendation list; select the save button.
Note: As there may be different scorecard templates for each program, the screenshot included in this user guide is for illustrative purposes only.

FTA Section 5310 Grant Program
Evaluation Criteria/Score Sheet

1. SERVICE EFFICIENCY & EFFECTIVENESS

Annual Hours Of Service - Form A2: Item 10	3.3	(0-5)
Ridership/By Number of Seats = Unduplicated Passengers Per Vehicle - Form A2: Item 3/4	3.1	(0-5)
Total Expenses/Total One Way Trips = Cost Per Trip	5.0	(0-5)
Total Expenses/Total Mileage = Cost Per Mile	4.5	(0-5)
Subtotal	**15.90**	**(0-20)**

2. EXTENT TO WHICH ELDERLY PERSON AND PERSON WITH DISABILITIES ARE SERVED

Unduplicated Passengers Served - Form A2: Item 3	4	(0-5)
Disabled And Elderly Passenger Trips Served Per Day - Form A2: Item 2/8	4.8	(0-5)
Annual Service Miles Per Vehicle - Form A2: Item 6/4	4.7	(0-5)
Proposed Project Description	4.6	(0-5)
Subtotal	**18.10**	**(0-20)**

3. NEED

Number of Clients Served By Expansion - Form A2: Column Titled "If Grant Awarded"	3.4	(0-5)
Vehicle Mileage And Age (Replacement)	3.6	(0-5)
Subtotal	**7.00**	**(0-10)**

4. FISCAL & MANAGERIAL CAPABILITY

Site Reviews	9.8	(0-10)
Application Completeness & Accuracy	4.9	(0-5)
Document Submittal Of Compliance Items - Past Performance	4.9	(0-5)

> *Helpful Hint:* These steps must be completed for each application in the Committee Review section on the Review Queue page.

4) Once the information has been entered in the scorecard, select **Submit**
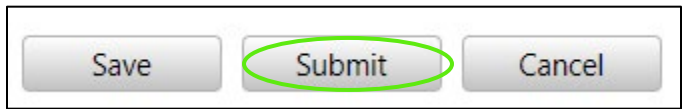
7.7 Application Review Management

The Application Review Management process is completed by the Lead Reviewer for the application opportunity:

1) Select the **Review** tab

2) Select **App Management** Sub-section
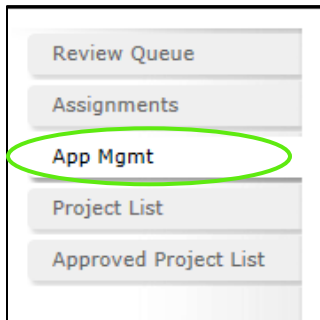
3) Review each submitted scorecard by utilizing the Expand/Collapse function next to each listed application. Once expanded, the lead reviewer will have access to each submitted scorecard by selecting View in the Score Card column.
A Calculated Score will prepopulate; if an Adjusted Score is necessary, enter information in that field.

4) Once an application has been reviewed by all reviewers, check the box next to the Application and then select **Recommend** from the pick list at the top of the page, followed by Submit.

5) Complete Steps 1-3 for each application

7.8 Allocation of Funds

The Allocation of funds is completed by the Grant Manager Reviewer for the region:

1) Select the **Review** tab

2) Select **Project List** Sub-section
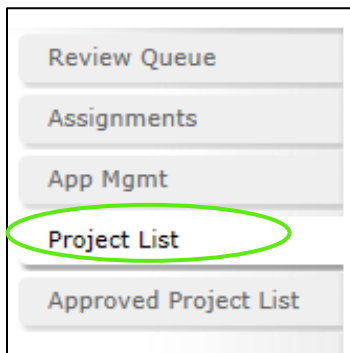
3) Select the funds link under Allocated

4) Select the year, grant, amount to allocate against the grant, and select **Save**

5) Continue steps 3-4 until all funds for the project are allocated

6) Select the checkbox next to the project (you can select more than one project)

Helpful Hint: We suggest allocating funds for each project and selecting all of the funded projects checkboxes before moving to the next step. This will allow you to submit all projects that have allocated funds at once.

7) Select recommend from the action dropdown and select Submit
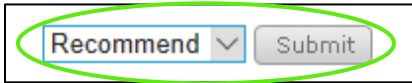
7.9 Final Approval

The Final Approval is completed by the Transit Manager Reviewer:

1) Select the **Review** tab

2) Select **Project List** Sub-section
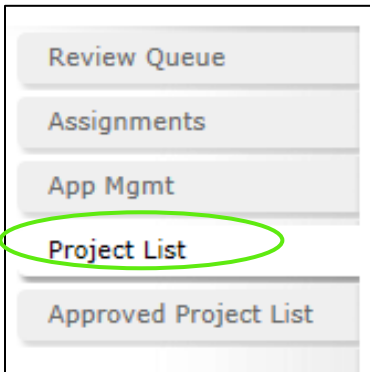
3) Select the checkbox next to all projects ready for final recommendation
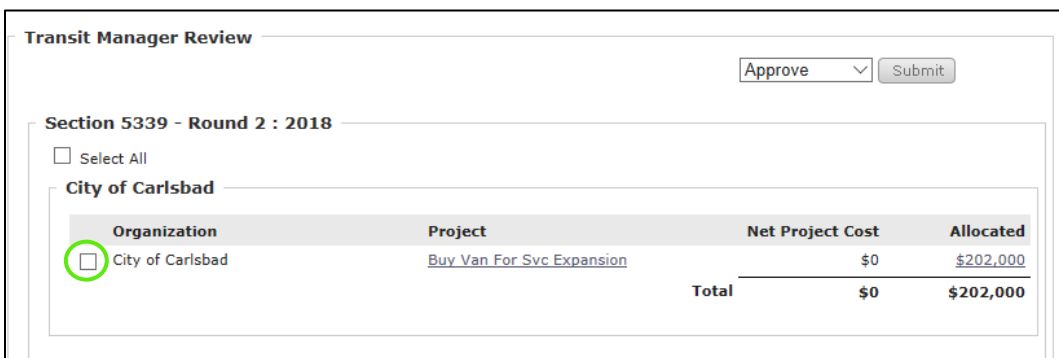
4) Select approve from the select action dropdown and select Submit

5) All approved projects are now on the Approved Project List. Projects on the Approved Project List may now be added to a contract profile.

Section 8: Contract Process

Contracts are created by State Users and Districts Users and can be viewed by Agency Users.

8.1 Creating a Contract

1) Select the Contract tab

2) Select the **Add New** button

3) Fill in the contract profile fields. The type of contract (PTGA/NOGA) and the associated exhibits that will be included in a generated contract package is dependent upon information entered in the Program pick list, Financial Project Number data fields, and other potentially selected items, e.g. Mobility Management. *Please note: If you are to create a NOGA, information you select in this section will result in a Federal Fiscal Year field populating on the page as well (Federal Fiscal Year will automatically populate as State Fiscal Year – 1. This can be modified if necessary).*

4) Select the Save button

5) After saving the record, select Add New Project and select any projects and allocations that are to be encumbered on the contract. Enter the correct dates. Once an Execution Date is entered, the Contract Expiration Date entered in the Original Contract section will also populate above in the Contract Information section. *Please note: the Execution Date is also necessary in order to create any amendments that may occur (a Create Amendment button populates in the Actions section once it has been entered).*

Now the contract can be generated by selecting the Generate Contract button

Central Florida Regional Transportation Authority, d/b/a LYNX - 2019

Contract Information

*Organization: Central Florida Regional Transportation Authority, d/b/a LYNX

*Program: Block Grant

*State Fiscal Year: 2019

Contract Number: G1730   Click here for FACTS Contract Info

Financial Project Number : 433306   1   84   02

Contract Expiration Date: [   ]   Expiration Date of most recent executed agreement will be displayed

Mobility Management: ☐

Upload Sketch: Choose File No file chosen

▼ Original Contract

Add New Project

Contract Start Date: 04/09/2019

Contract Expiration Date: 12/30/2020

Contract Exec Date: mm/dd/yyyy

Approved Enc Date: mm/dd/yyyy

BCG0000488 : Operating Assistance : 2019

Allocated	Encumbered	Type	Grant Year	Grant #	Grant Program	Distribution	Percent	Action
$11,041,145.00	$0.00	State	2019	Block Grant	Block Grant	District 5	0.00 %	Remove

Generate Contract

6) Once the Generate Contract button has been selected, enter and edit any necessary data into each of the tabs located at the top of the window. Remember that the contract type (PTGA/NOGA) and available exhibits populate based on information entered in the Contract Information section.
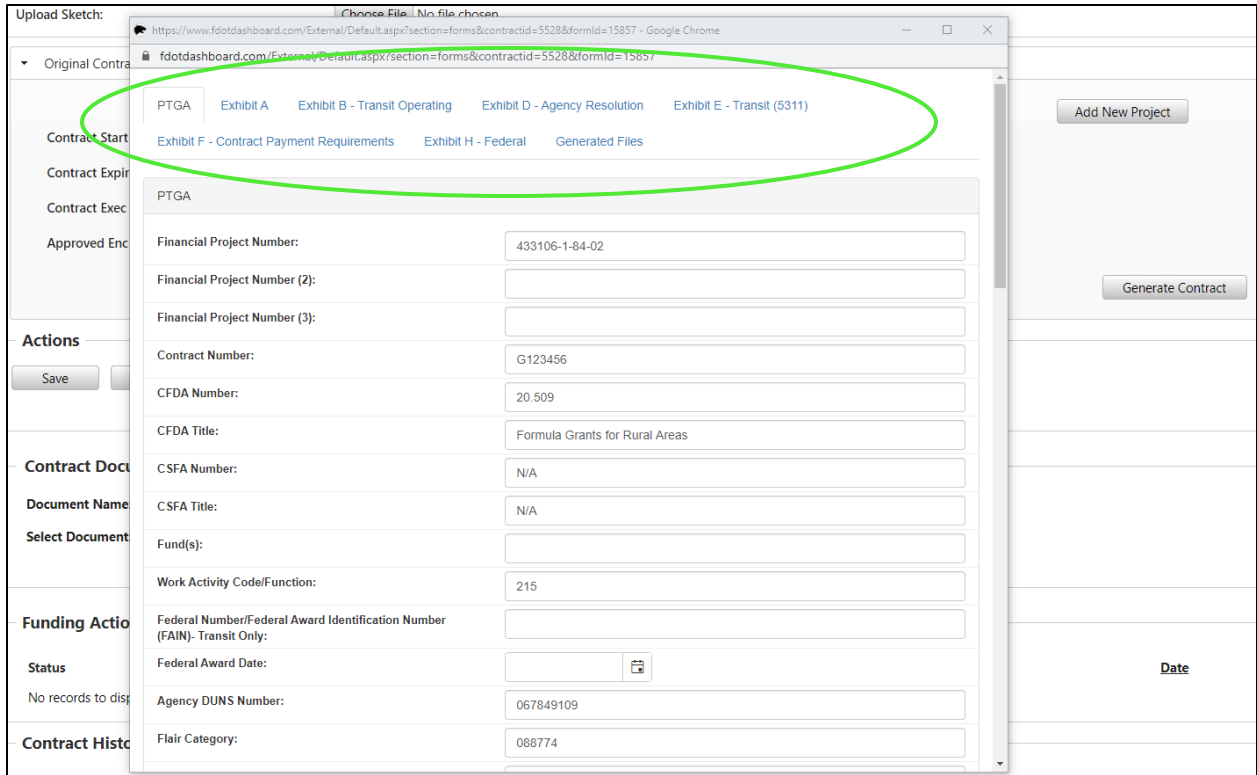
7) To enter data into any of the Exhibits, select the Exhibit at the top and then enter the necessary information, followed by selecting Save. If an exhibit is not necessary in a contract, simply select the Exhibit at the top and then select the Delete button.
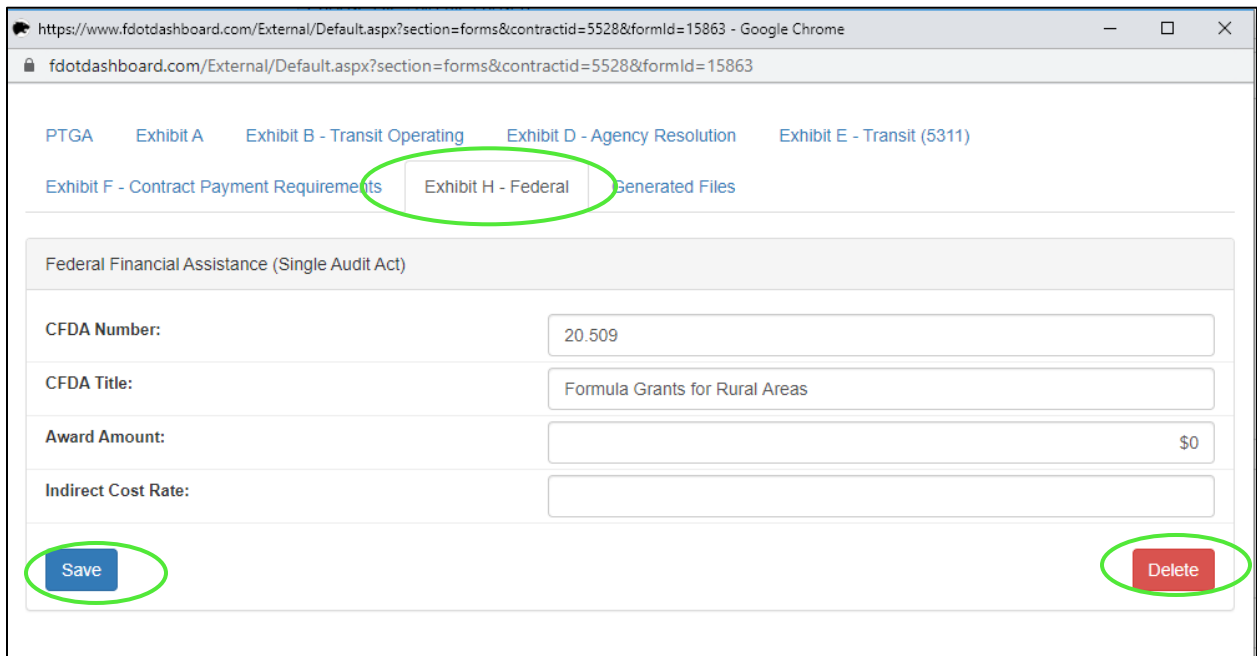
8) Exhibit D – Authorizing Resolution: If a project encumbered on the contract was processed in TransCIP utilizing the system's full lifecycle (it was attached to an application and reviewed), then Exhibit D – Agency Resolution will already include an uploaded version of the file, if it was supplied in the application. If a document exists, you will see a *Download File* button. If the button doesn't exist, a document was not uploaded by the organization within the associated application
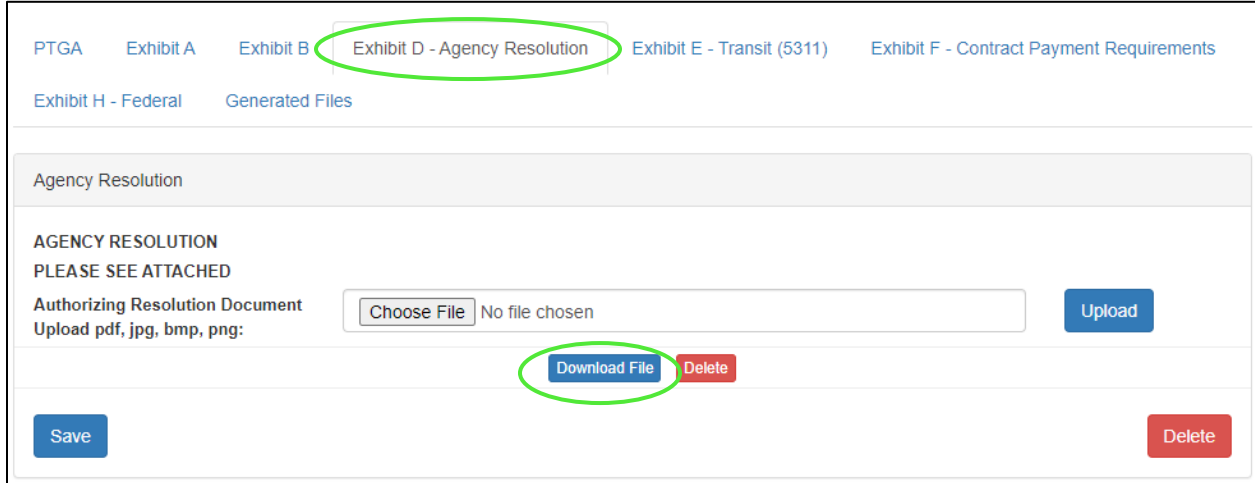
As additional reference, please see image below, which indicates the location on an application where a user may have uploaded an Authorizing Resolution document. If a document is present, the *Download Authorizing Resolution Document* link will be available for selection.
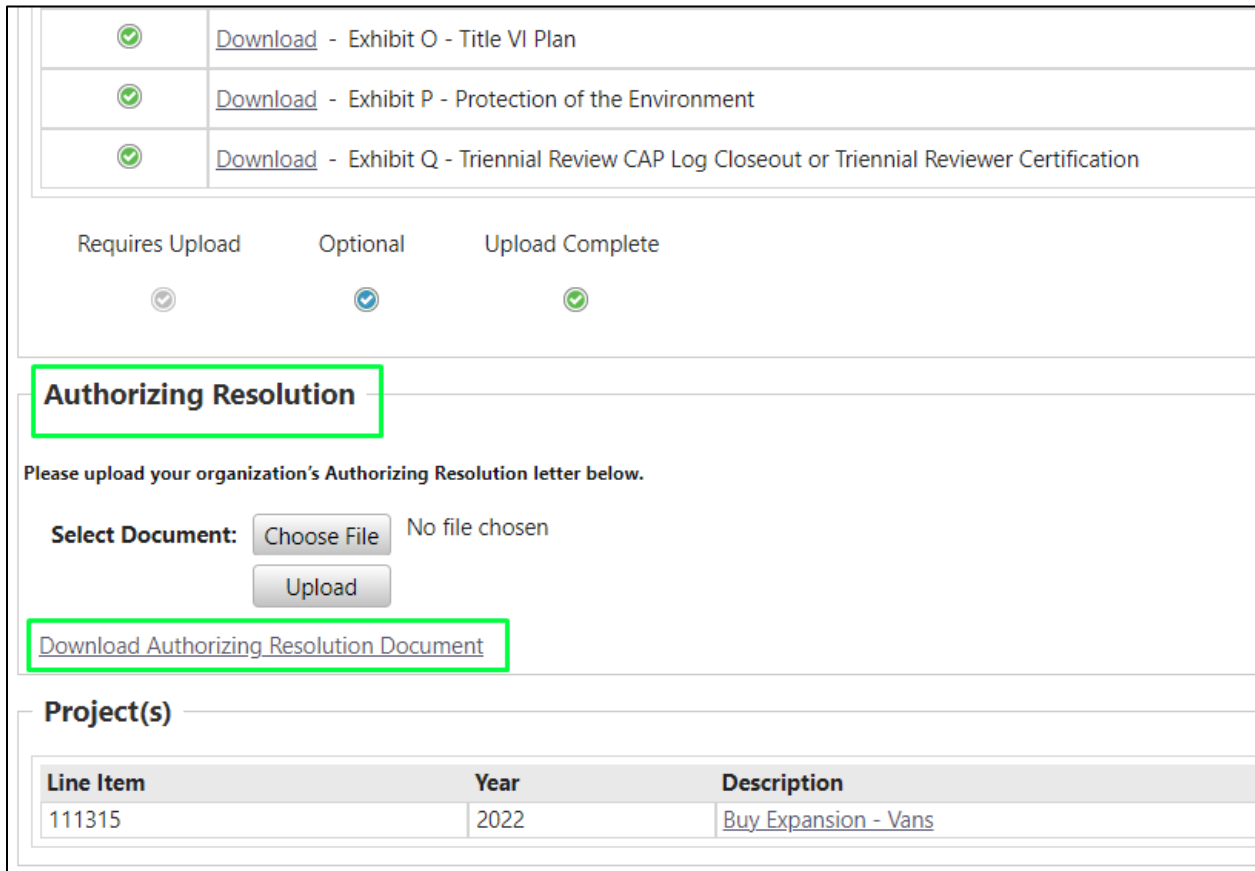
Additional Logic:
- If there is more than one project on the contract and they were associated with different applications, the most recent letter/application will pull in.
- It is highly recommended the existing letter is downloaded from the contract window and reviewed to ensure it is the organization's most recent letter.
- If the letter is outdated and must be replaced, simply delete and upload the most recent file.
- If no file was supplied in the application, a document will not pull in, and one must be uploaded by using the Upload button.

-
9) Once all information is entered and saved, select Generate Package. If data needs to be refreshed, select Regenerate Forms

8.2 Contract Amendments

Contracts can be amended as many times as necessary for Time Extension, Budget Revision, and Amendments. Please remember that in order for a Create Amendment button to appear in the Actions section, an Execution Date must be saved in the Original Contract section.

1) Select the Contract

2) Select Create Amendment

3) Select the type of amendment and then Submit

4) For an Amendment (adjusting dollars on existing allocations, adding a new project, adding a new allocation: Enter in the reason for the amendment

5) Select the dates. If you are extending a project as part of the amendment, include this information in the Comments.

6) Select Save

8.2.1 How to Adjust Allocation

1) Select Adjust

2) Complete Allocation Adjustment

3) Select Update

Helpful Hint: When making Adjustments to an Operating project remember to update the project budget in the project.

8.2.2 How to Add a New Project

1) Select Add New Project

2) Select the Project

3) Select Submit

8.2.3 How to add a New Allocation

1) Select Add New Allocation

2) Complete Details

3) Select Save

Helpful Hint: When making Allocations to an Operating project remember to update the project budget in the project.

Once the type of amendment changes have been made, select Generate Amendment.

Enter and edit information into tab and field, as applicable. Please remember the Contract Expiration Date will update once an Execution Date has been entered. *Also take note that the Exhibits will automatically populate based on the type of project/program you are amending.*

For a Time Extension, select Create Amendment, choose Time Extension, and select Submit.

Fill in the new Expiration Date and provide a reason for the extension. Enter the Execution Date and select Generate Amendment.

Fill out the necessary information in the PTGA Time Extension Form tab and then select Generate Package on the Generated Files tab.

To complete an Budget Revision (if overall dollar amount on project budget is not changing).

Select Create Amendment, select Budget Revision, and then Submit.

Select the project you are to make a Budget Revision against.

Update the project's budget (but not changing the overall amount) and Save.

Once back on the contract, Select Generate Amendment. Double check the funding breakdown in Exhibit B and generate the file.

Section 9: Resources

The Resources section is where additional documents and records are kept for the Organization, DOT and the **BlackCat Transit Management Support Team**.

1) Select **Resources**
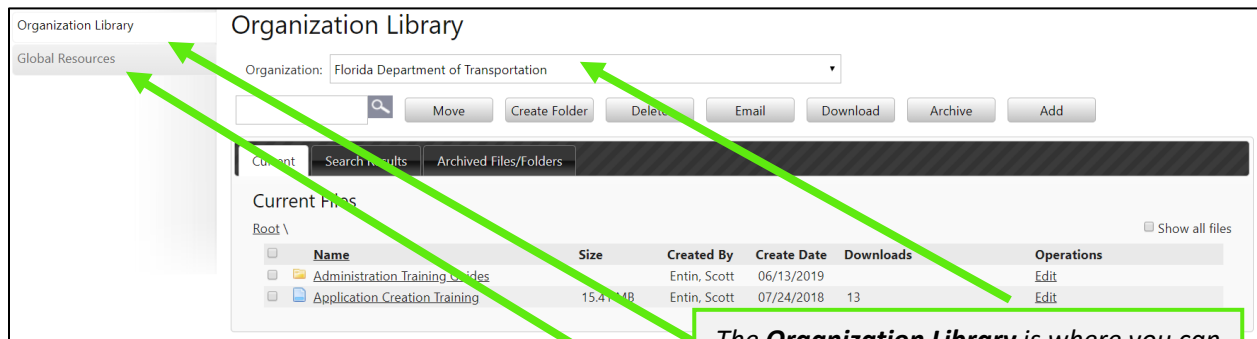
The **Organization Library** is where you can store documents for the state. You may also store document in a particular district or organization's library by selecting the organization in the **Organization** pick list.
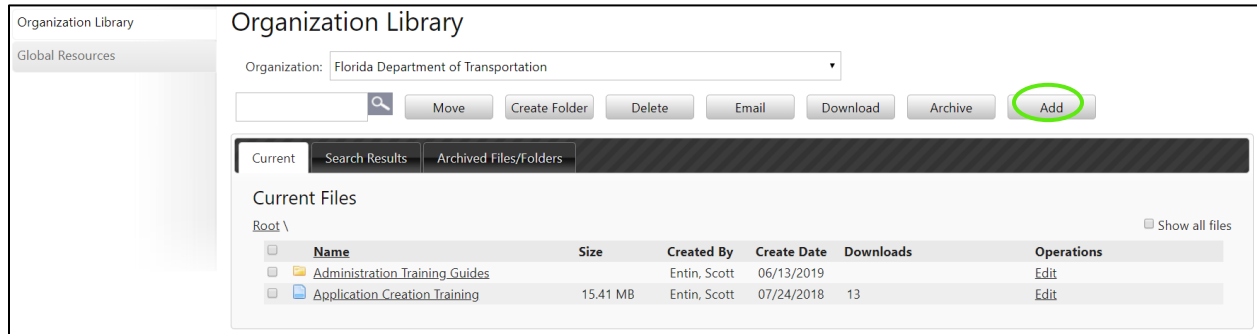
Global Resources is where the state will provide documentation and **Panther** will provide additional learning tools for the Module.

2) To **Add** a document to the Organization:

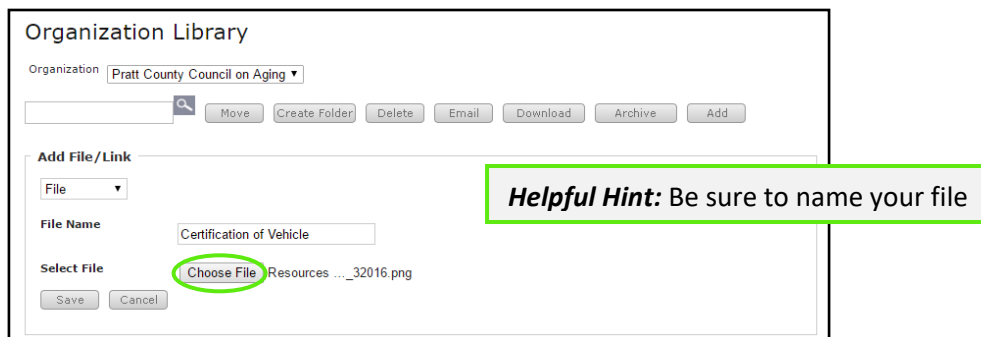   a. Select **Organization Library**
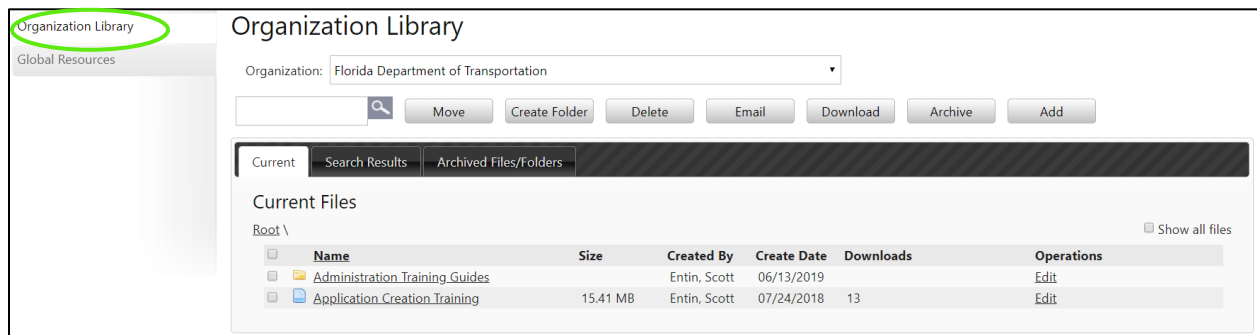
b. Select the **Add** button

c. Select the correct choice under **Add File/Link**

d. If you are adding a file, select **Choose File** and select the correct file

Helpful Hint: Be sure to name your file

e. Select the **Save** button

Your document is now loaded:

3) How to create a folder:

a) Select **Create Folder**

b) Enter a name for the folder and select the **Save** button

Your folder is now created:

4) To store and view items available to all organizations in the system, select **Global Resources**

Section 10: Reports

The reports section can be utilized to access information/data from within the system in a neatly formatted document.

1) Select **Reports**

Dashboard	Projects	Applications	Organizations	Oversight	Resources	Reports	Review	Contracts	Programs

2) Select **Generate**

Reports

Report Listing

Applications & Review

Organization Applications	Generate

Contracts

Contracts	Generate

Disaster Preparedness

Disaster Report	Generate

Equipment

Equipment	Generate

Grants

Program of Projects (POP) Export	Generate
Department of Labor (DOL) Export	Generate
Grant Exports	Generate
Pre-Program of Projects (POP) Export	Generate

Inventory

Revenue Vehicles	Generate
Facilities	Generate

Invoices

Invoices	Generate

Organizations

Organizations	Generate

Oversight

| Oversight Findings Report	Generate
Oversight Aging Report	Generate

Section 11: Additional Information

Website Bookmarking: We recommend bookmarking the website (URL) to allow easy access when returning in the future. Below is how to complete this task in each internet browser.
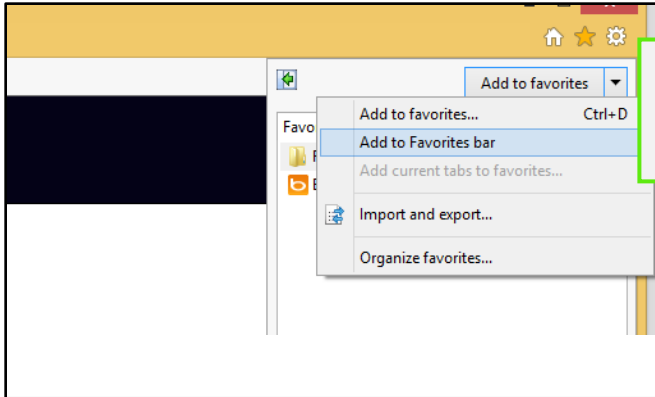
*Google Chrome: Go to the **BlackCat Transit Management System** web address. Click on the star icon at the top right had corner. Select the bookmark bar for your folder type.*

*Internet Explorer 11: Go to the **BlackCat Transit Management System** web address. Click on the star icon at the top right had corner. Select bookmark bar for your folder type.*
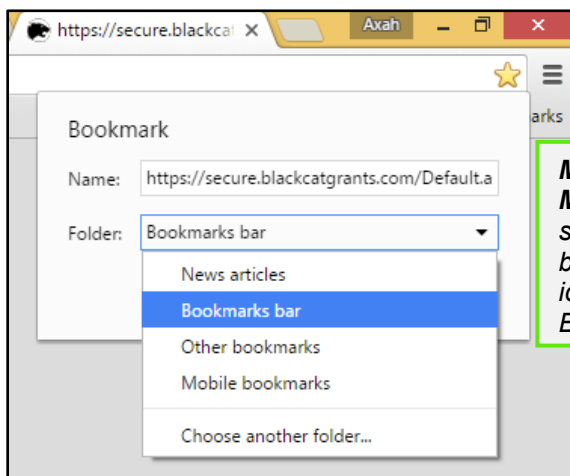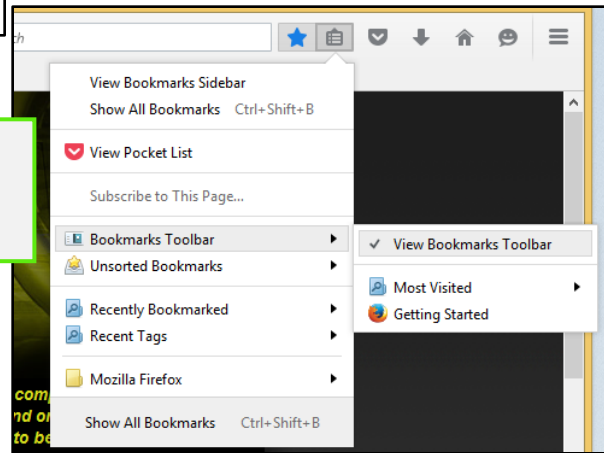
*Mozilla Firefox: Go to the **BlackCat Transit Management System** web address. Click on the star icon at the top right had corner. To show the bookmark in the toolbar click on the clipboard icon, select Bookmarks Toolbar and check 'View Bookmarks Toolbar'.*