

TransCIP 2.0TM

Transit Data Management System



STATE USER GUIDE

TransCIP 2.0™

Transit Data Management System

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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.

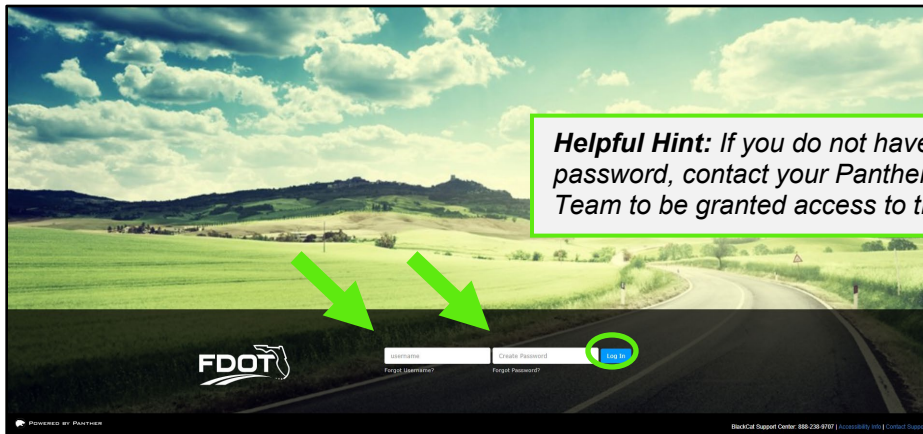
Note: Due to differences between internet browsers, your view may differ slightly from the view in the screenshot utilized to create this manual. While internet browsers may cause a variation in look and feel, all systems components should continue to function in all internet browsers.

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

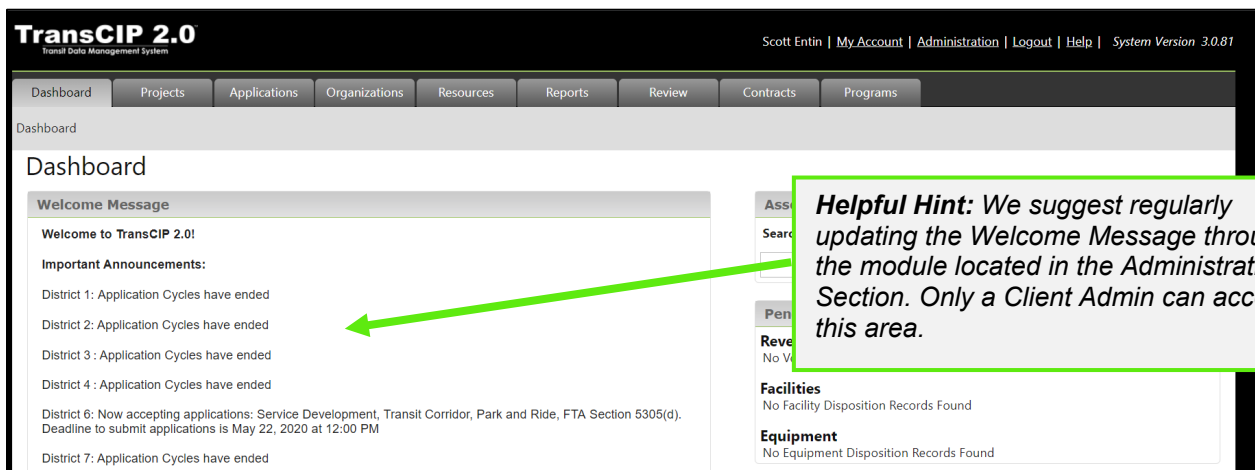
2.1 Access BlackCat Transit Management System

- 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



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.



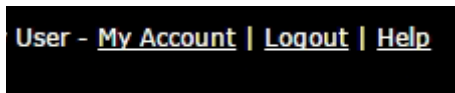
2) The System is sub-divided into several components:

- Dashboard
- Projects
- Applications
- Organizations
- Resources
- Reports
- Review
- Contracts
- 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*).

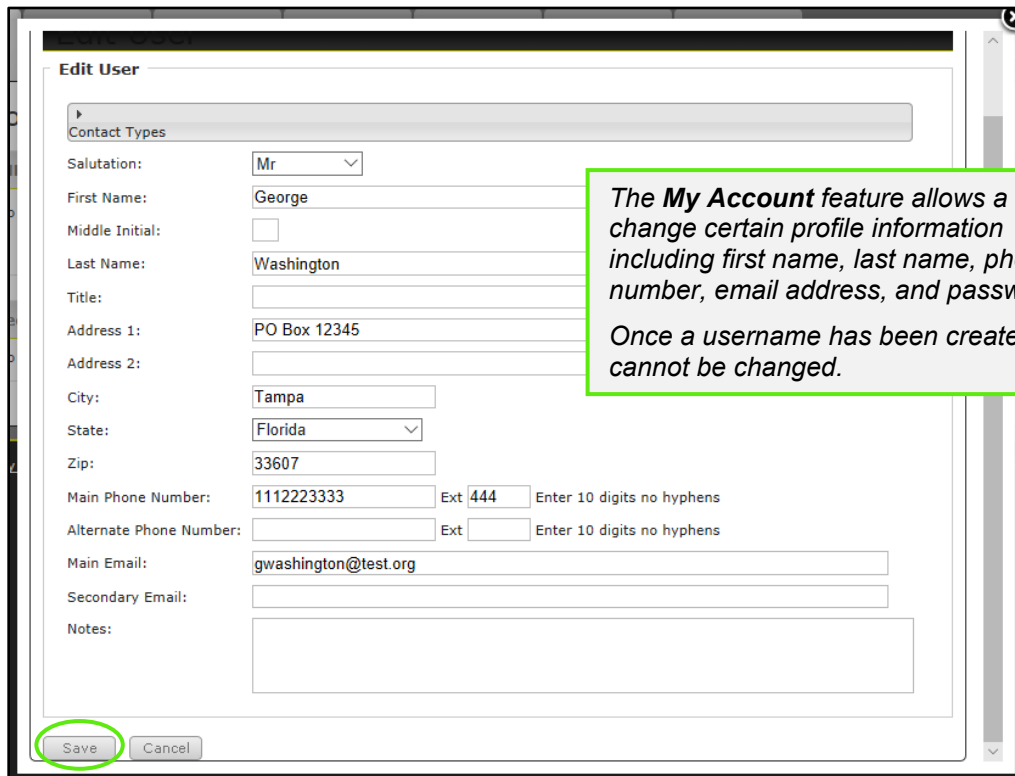


3) User specific features are located in the upper right corner of the screen



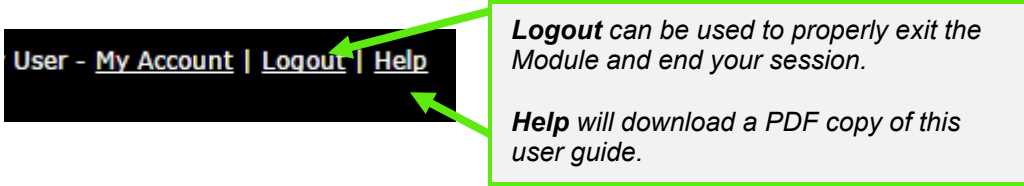
My Account:

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:



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 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:

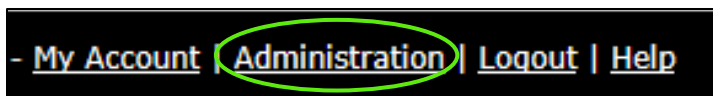
Allows an Agency User to submit questions, concerns, ideas or other information directly to the **BlackCat Support Team**.

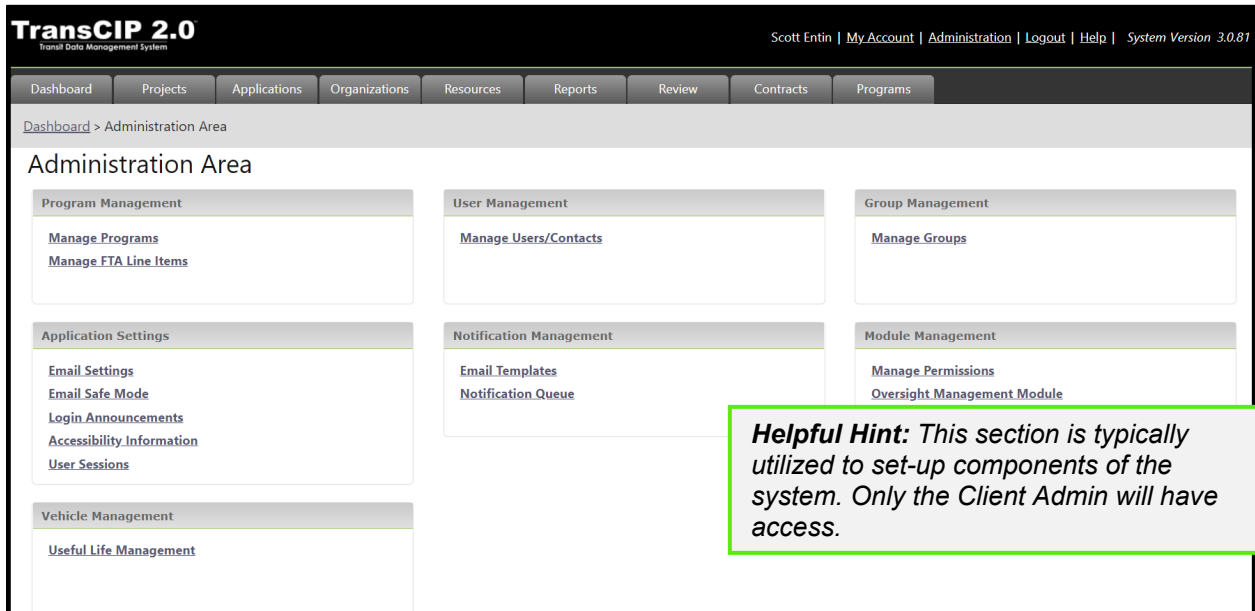
As a state user, if you need further assistance with the System, please contact your Panther Project Management Team.

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





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.

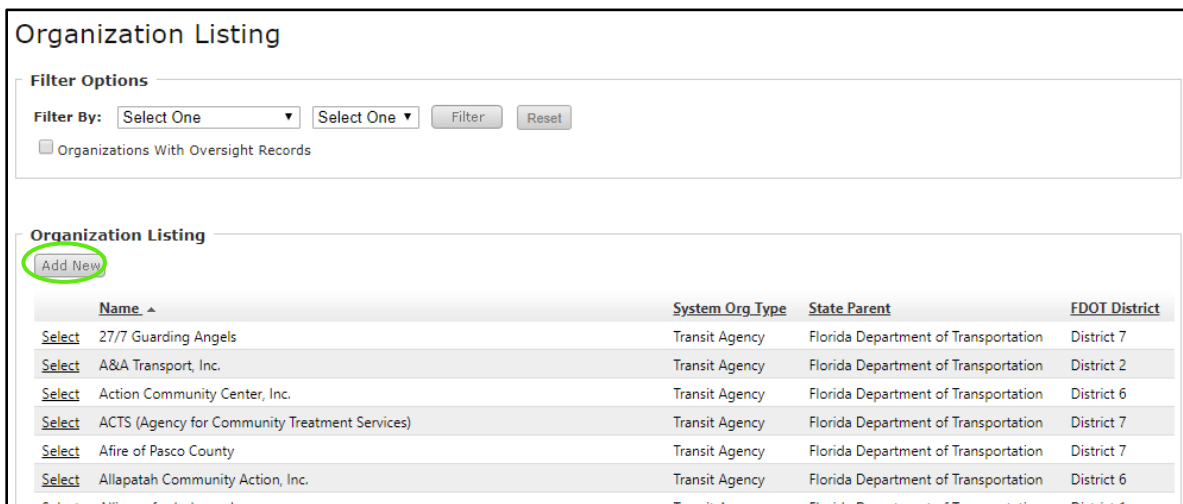
3.1 Adding A New Organization

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

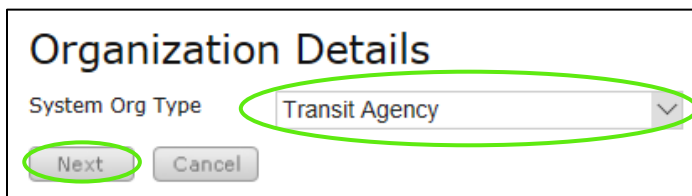
1. Select the **Organizations** tab



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:*

Zip Code:* -

County:

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



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



2) Select the organization record to review/edit

Organization Listing

Filter Options

Filter By:

Organizations With Oversight Records

Organization Listing

	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:*

Zip Code:* -

County:

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

3.3 Contact Management

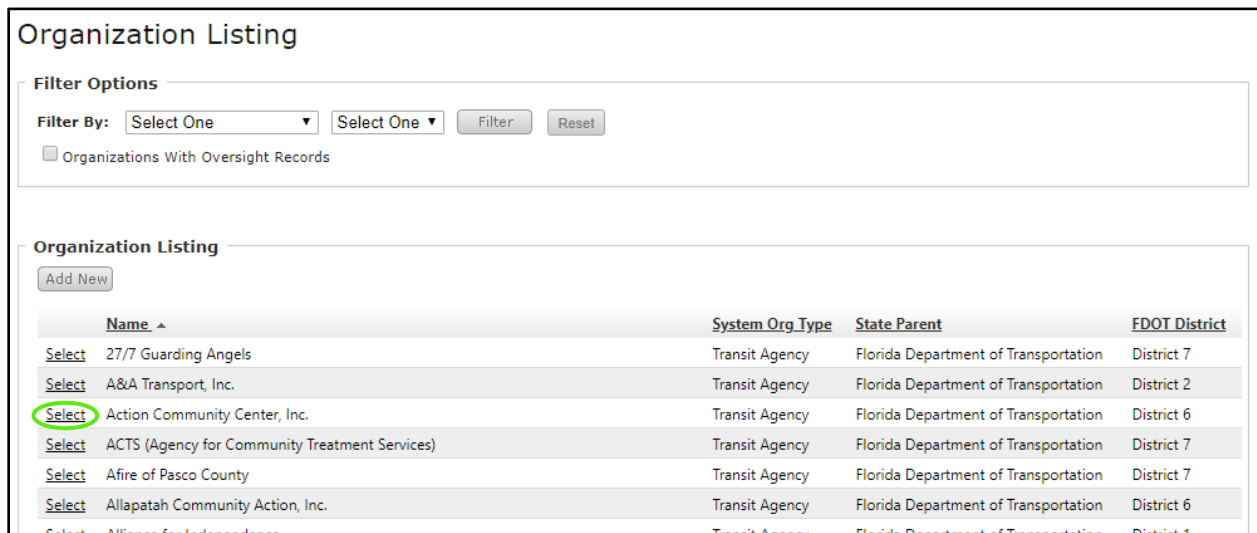
This section provides the opportunity for an agency to identify the individuals responsible for various tasks within the system. This is also the section State users will utilize to provide access to the system for new agency users.

To view an agency's contacts:

- 1) Select the **Organizations** tab



- 2) Select an **Organization**



Organization Listing

Filter Options

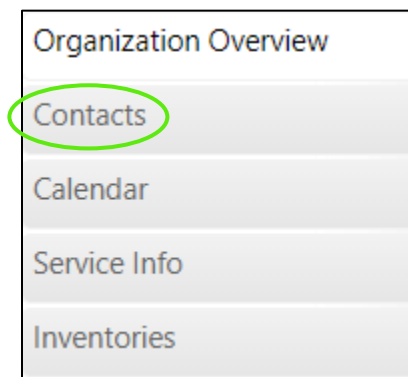
Filter By:

Organizations With Oversight Records

Organization Listing

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

Contact					
Add New					
FirstName	LastName	Title	Main Email	Main Phone	System Access
Mike	Bartholomew		MBartholomew@las-cruces.org	(575) 541-2537	Yes

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

Edit Contact

▸ Contact Types

<input type="checkbox"/> Primary Contact	<input type="checkbox"/> Contracts /Invoice Manager	<input type="checkbox"/> Mobility Manager
<input type="checkbox"/> Asset Manager	<input type="checkbox"/> DBE Liaison Officer	<input type="checkbox"/> Oversight / Compliance Representative
<input type="checkbox"/> Attorney / Legal Counsel	<input type="checkbox"/> Drug & Alcohol Representative	<input type="checkbox"/> Planning Liaison
<input type="checkbox"/> Authorized Signer	<input type="checkbox"/> Emergency Contact	<input type="checkbox"/> Program Coordinator
<input type="checkbox"/> Chief Executive Officer	<input type="checkbox"/> Financial / Accounting Manager	<input type="checkbox"/> Safety & Security Director
<input type="checkbox"/> Chief Operating Officer	<input type="checkbox"/> Grants Manager / Coordinator	<input type="checkbox"/> Transit Manager
<input type="checkbox"/> Civil Rights Officer	<input type="checkbox"/> Maintenance / Operations Manager	

▸ User Roles

<input type="checkbox"/> Agency Disaster Reporter	<input type="checkbox"/> Agency SSO Rep	<input type="checkbox"/> Application Reviewer
---	---	---

*Contact Status: Active Inactive

*Organization: Bay County Transportation Planning Organization ▼

*Salutation: Select One ▼

*First Name:

Middle Initial:

*Last Name:

*Title:

*Address 1:

Address 2:

*City:

*State: Select One ▼

*Zip:

*Main Phone Number: Ext: Enter 10 digits no hyphens

Alternative Phone Number: Ext: Enter 10 digits no hyphens

*Main Email:

Alternative Email:

Notes:

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

3) Select **Save**

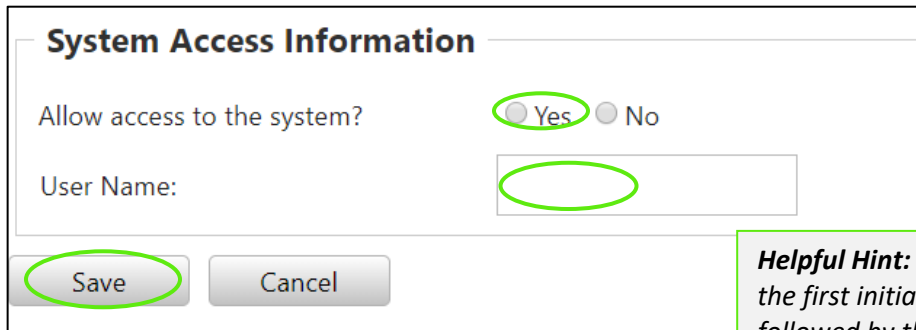


To provide system access to a user:

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

Contacts					
FirstName	LastName	Title	Main Email	Main Phone	System Access
Andrea	Rosser	Transit Planning Manager	Andrea.Rosser@talgov.com	(850) 891-5196	Yes
Angela	Bradley	Transit Systems Program Administrator	abradley@baycountyfl.gov	(850) 248-8161	Yes

- 2) Assign user roles in the **User Roles** box

Note: The available roles will vary based on the user (state, district, agency)

Edit Contact

▶ Contact Types

<input type="checkbox"/> Primary Contact	<input type="checkbox"/> Contracts /Invoice Manager	<input type="checkbox"/> Mobility Manager
<input type="checkbox"/> Asset Manager	<input type="checkbox"/> DBE Liaison Officer	<input type="checkbox"/> Oversight / Compliance Representative
<input type="checkbox"/> Attorney / Legal Counsel	<input type="checkbox"/> Drug & Alcohol Representative	<input type="checkbox"/> Planning Liaison
<input type="checkbox"/> Authorized Signer	<input type="checkbox"/> Emergency Contact	<input type="checkbox"/> Program Coordinator
<input type="checkbox"/> Chief Executive Officer	<input type="checkbox"/> Financial / Accounting Manager	<input type="checkbox"/> Safety & Security Director
<input type="checkbox"/> Chief Operating Officer	<input type="checkbox"/> Grants Manager / Coordinator	<input type="checkbox"/> Transit Manager
<input type="checkbox"/> Civil Rights Officer	<input type="checkbox"/> Maintenance / Operations Manager	

▶ User Roles

<input type="checkbox"/> Agency Disaster Reporter	<input type="checkbox"/> Agency SSO Rep	<input type="checkbox"/> Application Reviewer
---	---	---

3.4 Calendar Management

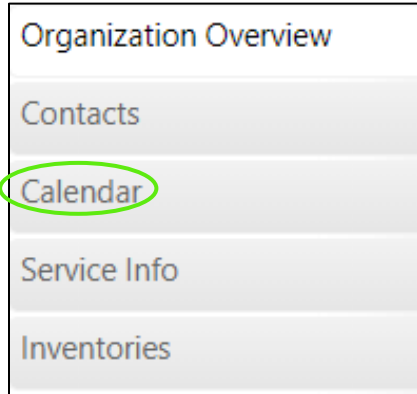
The Calendar section provides a monthly calendar that your agencies can use to track milestones and specific dates associated with funding requests. In addition, you can add events to the calendar that you would like all Agency Users to have access to.

To update the calendar:

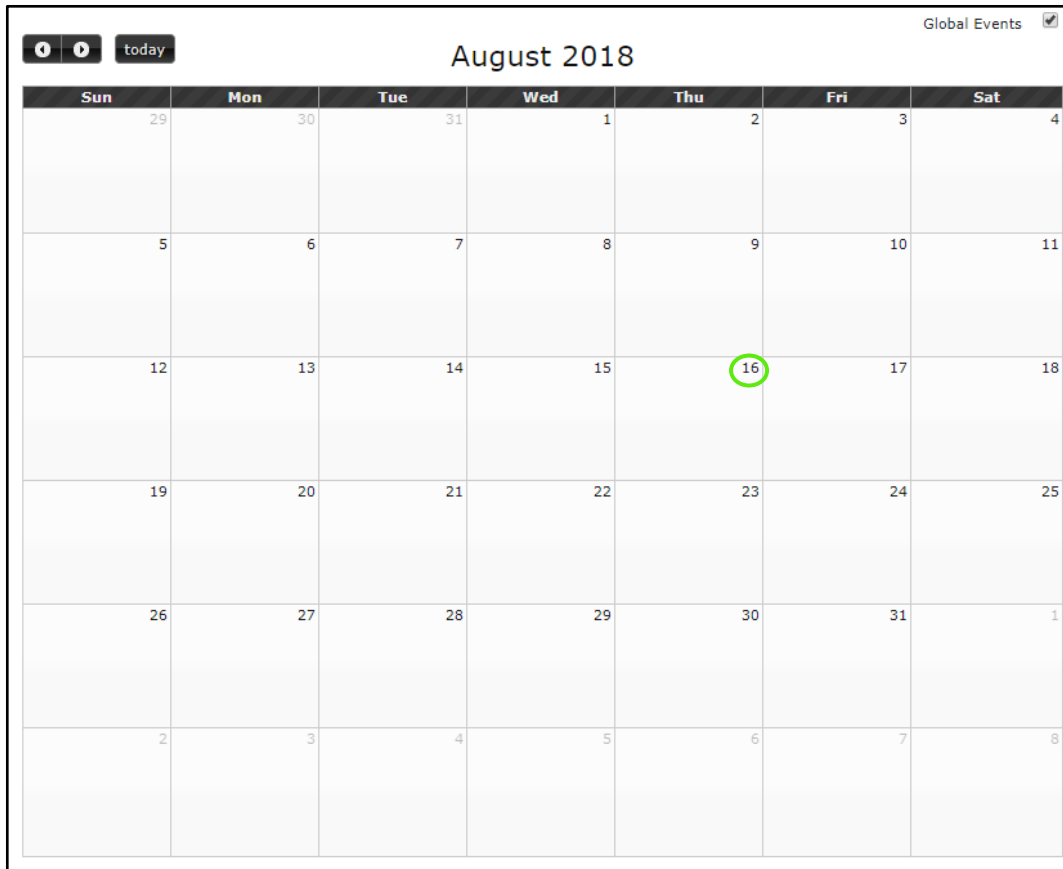
- 1) Select the **Organizations** tab for your agency



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

Global Events

today

August 2018

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
				9	10	11
				16		
				23	24	25
				30	31	1
2	3	4	5	6	7	8

Add New Event [X]

Title

Start

End

Public Event

Description

Save Cancel

Helpful Hint: All fields should be updated as needed.

5) Select **Save**

Global Events

today

August 2018

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
				9	10	11
				16	17	18
				30	31	1
2	3	4	5	6	7	8

Add New Event [X]

Title

Start

End

Public Event

Description

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

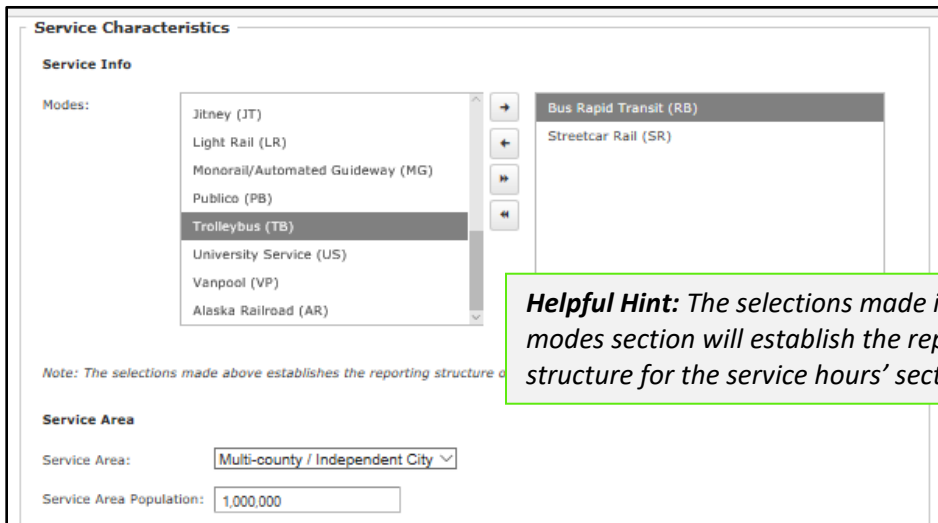
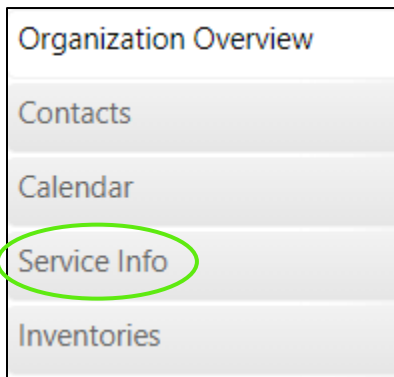
The Service Info section is a place for Agency Users to add information regarding their services. Agency Users should be guided to complete this section and State Users should utilize this section to view the Service Characteristics for an agency. To access the Service Info section, select the **Organization**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



- 2) Select the **Service Info** section



County: Alachua
Baker
Bay
Bradford
Brevard
Broward
Calhoun
Charlotte
Citrus

Municipalities: Alachua
Archer
Campville
Earleton
Evinston
Gainesville
Hague
Hawthorne

Service Hours
Periods of Service

Comments:

Actions
Save Cancel

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**

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	Apple League	Transit Agency	Florida Department of Transportation	District 7	Active

3) Select the **Inventories** tab

Organization Overview

Contacts

Calendar

Service Info

Inventories

4) Select **Add New**

Inventories

Inventory: Revenue Vehicles ▾ **Add New** Export [Lien Releases](#) | [Dispositions](#) | [Transfers](#)

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 #:

Grant # (Primary): Not Listed:

Grant # (Secondary): Not Listed:

DOT Contract #: Not Listed:

UPIN:

Total Cost:

Federal Share: or

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

6) Select **Save**

Save Cancel

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**

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

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 Apple Healers	Transit Agency	Florida Department of Transportation	District 7	Active

3) Select the **Inventories** tab

Organization Overview

- Contacts
- Calendar
- Service Info
- Inventories**

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.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) 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 by 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 Apollo League	Transit Agency	Florida Department of Transportation	District 7	Active

3) Select the **Inventories** tab

Organization Overview

- Contacts
- Calendar
- Service Info
- Inventories**

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: Valid as of: 

Year of Renewal: Select One ▼

Type of Renewal: Select One ▼

6) Select **Save**

Inventory: Revenue Vehicles

Actions

7) Select **Release**

Inventory: Revenue Vehicles

Actions

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:

Useful Life Miles Remaining: -1,000

Useful Life Years Remaining: -4

Early Release (Y/N): No

***Reason for Request of Lien:**

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.

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:

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:

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: No file chosen

Document Name	Size	Uploaded	Modified	Email
Six Months Maintenance	12 KB	Shawn Mitchell	5/20/2022, 04:29 PM	<input type="checkbox"/>

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

Dashboard

Welcome Message

Asset Search

Pending Lien Releases / Dispositions / Transfers

Revenue Vehicles

The ARC Naturecoast
Lien Release | VIN: 3FA6P0G72GR398529 | DOT Control #: 70718
Lien Release Denied

Helpful Hint: The District will get a notification and review the request.

Organization Name	Application Type	Fiscal Year	Status
Broward County Transit	TRAINING - Section 53XX	2022	Submitted
City of Hiialeah	Public Transit Service Development Program	2022	Submitted
Easter Seals Southwest Florida - D1	5310_V2	2020	Submitted
Dr. Piper Center for Social Services, Inc.	5310_V2	2020	Submitted
Lakeland Area Mass Transit District	5310_V2	2020	Submitted
Charlotte County Board of County Commissioners	5310_V2	2020	Submitted
Better Way of Miami	Section 5310 FFY21-SFY22 PY46 (2021-22) Capital Application	2022	Submitted

ACTS (Agency for Community Treatment Services)
Lien Release | VIN: 3FA6P0HD0LR128729 | DOT Control #: 700065
Early Lien Release Submitted
Next Action: District Asset Manager

- 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:

Useful Life Miles Remaining: -1,000

Useful Life Years Remaining: -4

Early Release (Y/N): No

***Reason for Request of Lien:**

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:

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:



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
- 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

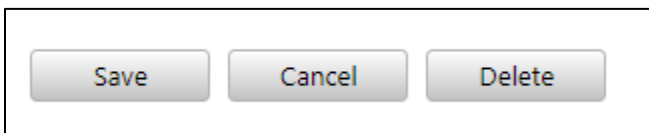
Please select one reason for the lien release:

- 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**



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:

- 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:

**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

The screenshot shows the TransCIP 2.0 dashboard with the following components:

- Navigation Tabs:** Dashboard, Projects, Applications, Organizations, Oversight, Resources, Reports, Review, Contracts, Programs, Rail SSO.
- Dashboard Header:** Dashboard, Switch User: Scott Entin
- Welcome Message:** Welcome to TransCIP 2.0! Remember to check out the Global Resources section under the resources tab for training videos, helpful hints and "cheat" sheets to help you with the system upgrades! Look for the Federal Program Applications in the next few weeks. Agencies will be able to access the FTA Section 5310, 5311 and 5339 applications through TransCIP.
- Submitted Grant Application Table:**

Organization Name	Application Type	Fiscal Year	Status
Broward County Transit	TRAINING - Section 53XX	2022	Submitted
City of Hialeah	Public Transit Service Development Program	2022	Submitted
Easter Seals Southwest Florida - D1	5310 V2	2020	Submitted
Dr. Piper Center for Social Services, Inc.	5310 V2	2020	Submitted
Lakeland Area Mass Transit District	5310 V2	2020	Submitted
Charlotte County Board of County Commissioners	5310 V2	2020	Submitted
Better Way of Miami	Section 5310 FFY21-SFY22 PY46 (2021-22) Capital Assistance	2022	Submitted
- Asset Search:** Search By: VIN, Submit
- Pending Lien Releases / Dispositions / Transfers:**
 - Revenue Vehicles**
 - [The ARC Naturecoast](#)
Lien Release | VIN: 3FA6P0G72GR398529 | DOT Control #: 70718
Lien Release Denied
Next Action: District Asset Manager
 - [Westcare Gulf Coast Florida, Inc.](#)
Lien Release | VIN: 1GAWGPF4E1207919 | DOT Control #: 99704
Lien Release Recommended
Next Action: Statewide Asset Manager
 - [ACTS \(Agency for Community Treatment Services\)](#)
Lien Release | VIN: 3FA6P0HD0LR128729 | DOT Control #: 700065
Early Lien Release Submitted
Next Action: District Asset Manager

- 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:	<input type="text"/>	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>		

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

Statewide Operations Manager Review	
Status:	<input type="radio"/> Accept <input type="radio"/> Reject
Comment:	<input type="text"/>
<input type="button" value="Cancel"/>	

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

State Review

Status: Approve Deny

Comment:

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

Title Information

*Does DOT Hold Title as Lienholder? Yes No *Lien Release Approved by Lazara Stinnette on 2/21/2020 8:53:24 AM*

Is the Title an Electronic Title? Yes No

Title #:

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**

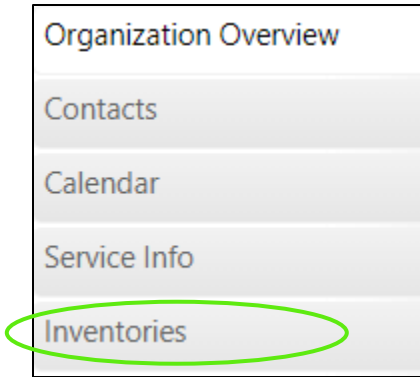


- 2) Select the **Organization**

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	ALTS (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	Apple League	Transit Agency	Florida Department of Transportation	District 7	Active

3) Select the **Inventories** tab



4) Select **Vehicle**

Inventories

Inventory: Revenue Vehicles [Lien Releases](#) | [Dispositions](#) | [Transfers](#)

Revenue Vehicles

VIN	Actions	Status	DOT ID	Year	Mileage	Vehicle Category	Last Modified	U.L
1GBJG31K681214731	Dispose / Transfer	Active	90253	2009	1,548	Type A, Transit Buses Heavy Duty	2/21/2020 11:39:28 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	

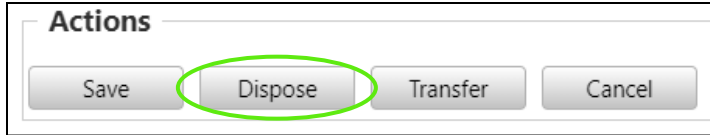
5) Update the Vehicle Mileage and **Save** the information

Condition Information

*Status: Active
Vehicle Purpose: Select One
Current Condition: 4 Valid as of: 2/20/2020
Condition Rating: Adequate
Current Mileage: 1,548 Valid as of: 10/17/2008

Year of Renewal: Select One
Type of Renewal: Select One

6) Select Dispose



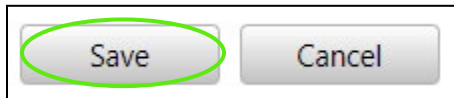
7) Review the Disposition form, and add any comments, if any.

A screenshot of a 'Disposition Request' form. The form contains the following fields:

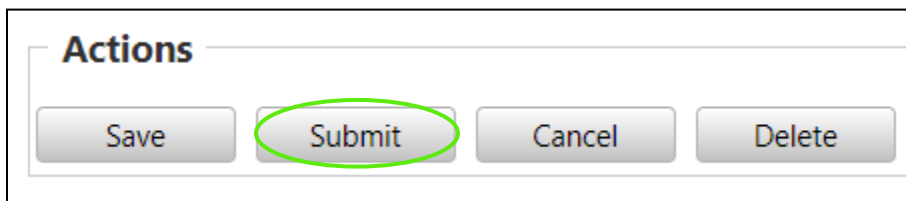
- Status: Disposal Not Submitted
- Request Date: 2/24/2020
- Disposition Justification: Select One (dropdown)
- Disposition Method: Select One (dropdown)
- Other: (text input)
- Mileage: 1,548
- Mileage as of Date: 10/17/2008
- Funding Program (Primary): 5311(f) State Match
- Total Cost: \$53,633
- Federal Share: (text input)
- State Share: (text input)
- Local Share: (text input)
- Fair Market Value (appraisal avg.): (text input)
- Fair Market Value Source: (text input)
- Comments: (text area)

At the bottom of the form, there are 'Save' and 'Cancel' buttons. A note at the bottom states: '- Attachment: If Disposal Justification is for a reason other than beyond useful life, provide documentation for Justification.'

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

Dashboard

Welcome Message

Welcome to Transcip 2.0!
Remember to check out the Global Resources section under the resources tab for training videos, helpful hints and "cheat" sheets to help you with the system upgrades!

Look for the Federal Program Applications in the next few weeks. Agencies will be able to access the FTA Section 5310, 5311 and 5339 applications through TransCIP.

Pending Lien Releases / Dispositions / Transfers

Revenue Vehicles
[Big Bend Transit \(D2\)](#)
Transfer | VIN: 2C7WDGBG9GR195505 | DOT Control #: 91259
Transfer Submitted
Next Action: District Asset Manager

[Big Bend Transit \(D2\)](#)
Lien Release | VIN: 1FDPE4F588DA86791 | DOT Control #: 90292
Lien Release Denied
Next Action: District Asset Manager

[Big Bend Transit \(D2\)](#)
Disposition | VIN: 1GBE4V1G38F414972 | DOT Control #: 90257
Disposal Submitted
Next Action: District Asset Manager

[Baker County Council on Aging](#)
Disposition | VIN: 1GBJG31K681214731 | DOT Control #: 90253
Disposal Submitted
Next Action: District Asset Manager

Facilities
No Facility Disposition Records Found

Equipment
No Equipment Disposition Records Found

Submitted Grant Application

Organization Name	Application Type	Fiscal Year	Status
BASCA Inc.	Section 5310	2020	Submitted
Gainesville Regional Transit System	Section 5311	2020	Submitted
BASCA Inc.	Section 5310	2020	Submitted
Nassau County Council on Aging	Section 5311	2020	Submitted
Gainesville Regional Transit System	Section 5310	2020	Submitted
Baker County Council on Aging	Section 5339	2020	Submitted
Baker County Council on Aging	Section 5310	2020	Submitted
Gainesville Regional Transit System	Section 5310	2020	Submitted
St. Johns County COA	Section 5310	2020	Submitted
The Arc Jacksonville	Section 5310	2020	Submitted

- 2) Review the request

Disposition Request

Status: Disposal Submitted

Request Date: 2/24/2020 5:59:47 PM

Disposal Justification:

Disposal Method: Other:

Mileage:

Mileage as of Date:

Funding Program (Primary):

Total Cost:

Federal Share:

State Share:

Local Share:

Fair Market Value (appraisal avg.):

Fair Market Value Source:

- Attachment: If Disposal Justification is for a reason other than beyond useful life, provide documentation for Justification.

- 3) Add any **Comments**

Comments

[Insert](#)

	Comment	User	Date
Select	This vehicle needs to be disposed of.	Tiffany Shrull	2/24/2020 5:59:47 PM

Actions

[Save](#) [Cancel](#)

District Review

Status: Recommend Return

Comment:

[Submit](#) [Cancel](#)

Disposition Documents

Document Name:

Select Document: [Choose File](#) No file chosen

[Upload](#)

	Document Name	Size	Uploaded	Modified	
Edit	Document Name	11 KB	Tiffany Shrull	2/24/2020 6:13:07 PM	X

[Email](#)

4) Select **Recommend/Return**

District Review

Status: Recommend Return

Comment:

[Submit](#) [Cancel](#)

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

District Review

Status: Recommend Return

Comment:

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

Dashboard

Welcome Message
 Welcome to Transcip 2.0!
 Remember to check out the Global Resources section under the resources tab for training videos, helpful hints and "cheat" sheets to help you with the system upgrades!
 Look for the Federal Program Applications in the next few weeks. Agencies will be able to access the FTA Section 5310, 5311 and 5339 applications through TransCIP.

Submitted Grant Application
 There are no submitted grant applications. Please visit the [applications sections](#).

Asset Search
 Search By: VIN

Pending Lien Releases / Dispositions / Transfers

Revenue Vehicles

Big Bend Transit (D3)
 Lien Release | VIN: 2C7ZWDGRG3GR358438 | DOT Control #: 93355
 Lien Release Recommended
 Next Action: Statewide Asset Manager

Big Bend Transit (D3)
 Lien Release | VIN: 1FDEFAE50FDB17346 | DOT Control #: 92376
 Lien Release Submitted
 Next Action: District Asset Manager

Big Bend Transit (D3)
 Transfer | VIN: 1GB3G2BG1B1149209 | DOT Control #: 92337
 Transfer Submitted
 Next Action: District Asset Manager

- 2) Select the **Review** the request

Disposition Request

Status: Disposal Submitted

Request Date: 2/24/2020 5:59:47 PM

Disposal Justification:

Disposal Method: Other:

Mileage:

Mileage as of Date:

Funding Program (Primary):

Total Cost:

Federal Share:

State Share:

Local Share:

Fair Market Value (appraisal avg.):

Fair Market Value Source:

- Attachment: If Disposal Justification is for a reason other than beyond useful life, provide documentation for Justification.

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

Comments

Insert

	Comment	User	Date
Select	This vehicle needs to be disposed of.	Tiffany Shrull	2/24/2020 5:59:47 PM

Actions

Save Cancel

State Review

Status: Approve Deny

Comment:

Submit Cancel

Disposition Documents

Document Name:

Select Document: No file chosen

Document Name	Size	Uploaded	Modified
Edit Document Name	11 KB	Tiffany Shrull	2/24/2020 6:13:07 PM <input type="checkbox"/>

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

State Review

Status: Approve Deny

Comment:

Submit Cancel

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

State Review

Status: Approve Deny

Comment:

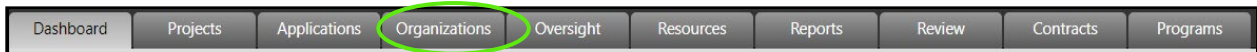
3.6.5 Transfer Process

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**

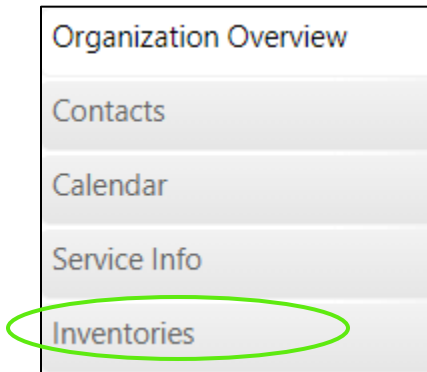


- 2) Select the **Organization**

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	Apple Leavers	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.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

Condition Information

*Status: Active ▾

Vehicle Purpose: Select One ▾

Current Condition: 4 ▾ Valid as of: 2/20/2020

Condition Rating: Adequate ▾

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

Year of Renewal: Select One ▾

Type of Renewal: Select One ▾

6) Select Transfer

Actions

Save Dispose Transfer Cancel

7) Review and complete the Transfer form

Transfer Request

Status: Transfer Not Submitted

Request Date: 2/25/2020

Transfer Justification:

Transfer To:

Mileage:

Mileage as of Date:

Funding Program (Primary):

Total Cost:

Federal Share:

State Share:

Local Share:

Fair Market Value (appraisal avg.):

Fair Market Value Source:

Comments:

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

Transfer Documents

Document Name:

Select Document: No file chosen

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

Dashboard

Welcome Message

Welcome to Transcip 2.0!
Remember to check out the **Global Resources** section under the resources tab for training videos, helpful hints and "cheat" sheets to help you with the system upgrades!

Look for the Federal Program Applications in the next few weeks. Agencies will be able to access the FTA Section 5310, 5311 and 5339 applications through TransCIP.

Submitted Grant Application

Organization Name	Application Type	Fiscal Year	Status
BASCA Inc.	Section 5310	2020	Submitted
Gainesville Regional Transit System	Section 5311	2020	Submitted
BASCA Inc.	Section 5310	2020	Submitted
Nassau County Council on Aging	Section 5311	2020	Submitted
Gainesville Regional Transit System	Section 5310	2020	Submitted
Baker County Council on Aging	Section 5339	2020	Submitted
Baker County Council on Aging	Section 5310	2020	Submitted
Gainesville Regional Transit System	Section 5310	2020	Submitted
St. Johns County COA	Section 5310	2020	Submitted
The Arc Jacksonville	Section 5310	2020	Submitted
Jacksonville Transportation Authority	Section 5311	2020	Submitted

Pending Lien Releases / Dispositions / Transfers

Revenue Vehicles

[Big Bend Transit \(D2\)](#)
Transfer | VIN: 2C7WDGBG9GR195505 | DOT Control #: 91259
Transfer Submitted
Next Action: District Asset Manager

[Big Bend Transit \(D2\)](#)
Lien Release | VIN: 1FDFE4FS88DA86791 | DOT Control #: 90292
Lien Release Denied
Next Action: District Asset Manager

[Baker County Council on Aging](#)
Transfer | VIN: 1GBE4V1G99F413066 | DOT Control #: 80232
Transfer Submitted
Next Action: District Asset Manager

[Big Bend Transit \(D2\)](#)
Disposition | VIN: 1GBE4V1G38F414972 | DOT Control #: 90257
Disposal Submitted
Next Action: District Asset Manager

Facilities
No Facility Disposition Records Found

Equipment
No Equipment Disposition Records Found

Project Watch List

- 2) Complete the **Transfer** request

Transfer Request

Status: Transfer Submitted

Request Date: 2/25/2020 2:00:07 PM

Transfer Justification:

Transfer To:

Mileage:

Mileage as of Date:

Funding Program (Primary):

Total Cost:

Federal Share:

State Share:

Local Share:

Fair Market Value (appraisal avg.):

Fair Market Value Source:

3) Select **Save**

Transfer Request

Status: Transfer Submitted
Request Date: 2/25/2020 2:00:07 PM
Transfer Justification:
Transfer To:
Mileage:
Mileage as of Date:
Funding Program (Primary):
Total Cost:
Federal Share:
State Share:
Local Share:
Fair Market Value (appraisal avg.):
Fair Market Value Source:

Comments

[Insert](#)

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

Actions

4) Add any comments, if any.

Comments

[Insert](#)

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

Actions

District Review

Status: Recommend Return

Comment:

Transfer Documents

Document Name:

Select Document: No file chosen

No documents have been uploaded

5) Select Recommend/Return

District Review

Status: Recommend Return

Comment:

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

District Review

Status: Recommend Return

Comment:

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

Dashboard

Welcome Message

Welcome to Transcip 2.0!
Remember to check out the **Global Resources** section under the **resources** tab for training videos, helpful hints and "cheat" sheets to help you with the system upgrades!

Look for the Federal Program Applications in the next few weeks. Agencies will be able to access the FTA Section 5310, 5311 and 5339 applications through TransCIP.

Submitted Grant Application

Organization Name	Application Type	Fiscal Year	Status
BASCA Inc.	Section 5310	2020	Submitted
Gainesville Regional Transit System	Section 5311	2020	Submitted
BASCA Inc.	Section 5310	2020	Submitted
Nassau County Council on Aging	Section 5311	2020	Submitted
Gainesville Regional Transit System	Section 5310	2020	Submitted
Baker County Council on Aging	Section 5339	2020	Submitted
Baker County Council on Aging	Section 5310	2020	Submitted
Gainesville Regional Transit System	Section 5310	2020	Submitted
St. Johns County COA	Section 5310	2020	Submitted
The Arc Jacksonville	Section 5310	2020	Submitted
Jacksonville Transportation Authority	Section 5311	2020	Submitted

Pending Lien Releases / Dispositions / Transfers

Revenue Vehicles

[Big Bend Transit \(D2\)](#)
Transfer | VIN: 2C7WDG8G9GR195505 | DOT Control #: 91259
Transfer Submitted
Next Action: District Asset Manager

[Big Bend Transit \(D2\)](#)
Lien Release | VIN: 1FDFF4FS88DA86791 | DOT Control #: 90292
Lien Release Denied
Next Action: District Asset Manager

[Big Bend Transit \(D3\)](#)
Transfer | VIN: 1FDFF4FS1HDC70625 | DOT Control #: 93385
Transfer Recommended
Next Action: Statewide Asset Manager

[Big Bend Transit \(D2\)](#)
Disposition | VIN: 1GBE4V1G38E414972 | DOT Control #: 90257
Disposal Submitted
Next Action: District Asset Manager

Facilities
No Facility Disposition Records Found

Equipment
No Equipment Disposition Records Found

Project Watch List

- 7) Review the **Transfer** request

Transfer Request

Status:	Transfer Recommended
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

8) Add any comments or transfer documents:

Comments

Insert

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

Actions

State Review

Status: Approve Deny

Comment:

Transfer Documents

Document Name:

Select Document: No file chosen

No documents have been uploaded

9) Select Approve/Deny

State Review

Status: Approve Deny

Comment:

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

State Review

Status: Approve Deny

Comment: This looks good for transfer.

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.

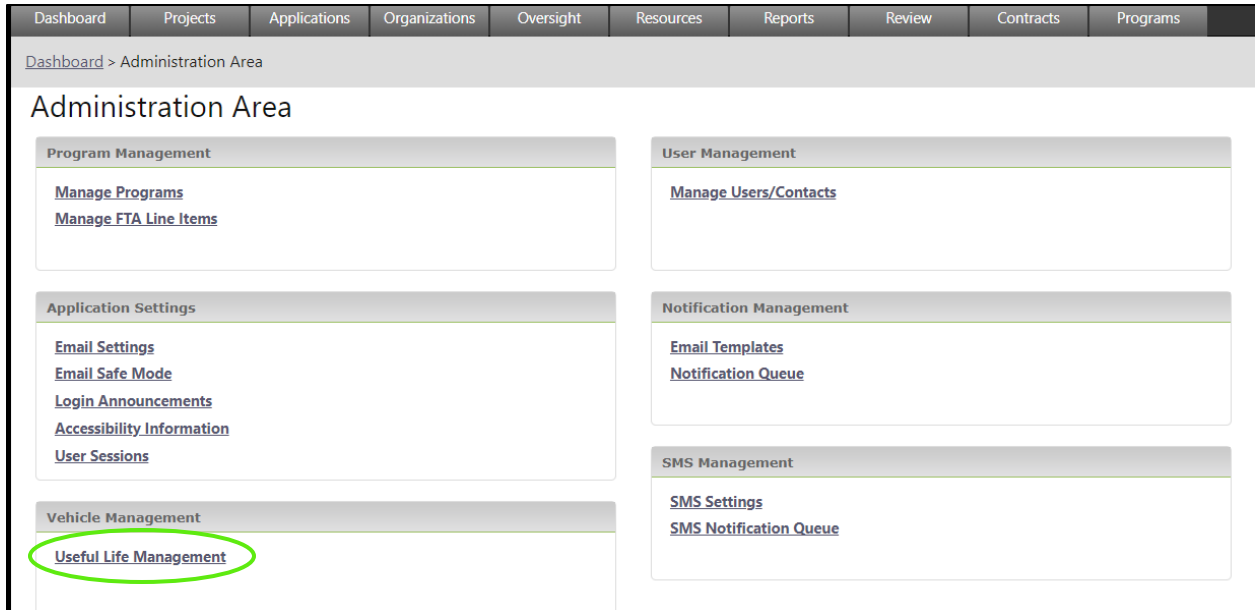
The Useful Life Management Tool allows for exceptions to be made to each scenario, for each year, which is based on the vehicle manufacturer. The Vehicle Manufacturer is also a field that is required inside each vehicle inventory form in order to save the record. See screenshot highlighting the above-mentioned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

The screenshot displays the TransCIP 2.0 interface. On the left, a navigation menu shows 'Inventories' circled in green. The main content area shows the 'Organization Details' page for 'Big Bend Tra'. The 'Inventories' section is active, showing a list of VINs. The 'Vehicle Information' form is visible, with the following fields circled in green: '*Description:' (Small Cutaway), '*Vehicle Year:' (2019), and '*Manufacturer:' (Ford Motor Corporation). Other fields include '*Category:' (Light-Duty Van, Sedan, or Bus), '*Vehicle Type:' (MV - Minivan), Model, Chassis, Fuel Type, Vehicle Height, Vehicle Length, Gross Vehicle Weight Rating (GVWR), *Seating Capacity (8), Standing Capacity, and Wheelchair Positions (2).

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

The screenshot shows the top navigation bar of the TransCIP 2.0 interface. The 'Administration' link is circled in green. The user is logged in as Scott Entin, and the system version is 2.0.933.

2) Then select Useful Life Management:



- 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.

Useful Life Management

Useful Life Management

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

+ Add new record Save changes X Cancel changes

Year	Useful Life Years	Useful Life Miles	Exception
▶ 2026	12	500000	Create
▶ 2025	12	500000	Create
▶ 2024	12	500000	Create
▶ 2023	12	500000	Create

3.6.6a Adding a New Year for a Vehicle Scenario

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

Useful Life Management

Useful Life Management

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

+ Add new record Save changes X Cancel changes

Year	Useful Life Years	Useful Life Miles	Exception
2027			
▶ 2026	12	500000	Create
▶ 2025	12	500000	Create
▶ 2024	12	500000	Create

- 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.

Useful Life Management

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
2027			
▶ 2026	12	500000	Create
▶ 2025	12	500000	Create
▶ 2024	12	500000	Create

- Select Save Changes.

Useful Life Management

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
2027			
▶ 2026	12	500000	Create
▶ 2025	12	500000	Create
▶ 2024	12	500000	Create

3.6.6b Creating an Exception for a Vehicle Scenario

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

Useful Life Management

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
2027			
▶ 2026	12	500000	Create
▶ 2025	12	500000	Create
▶ 2024	12	500000	Create

- Select Create in that year's row

Useful Life Management

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
▶ 2025	12	500000	Create
▶ 2024	12	500000	Create

- 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.

1 - Heavy Duty Bus

Make Adjustments

Add Useful Life Exception

*Manufacturer:

Useful Life Years:

Useful Life Miles:

[Update](#) [Cancel](#)

Useful Life Y	Exception
12	Create
12	Create
12	Create
12	Create
12	Create
12	Create
12	Create
12	Create
12	Create
500000	Create

- 4) Select Save Changes

Useful Life Management

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
▶ 2025	12	500000	Create
▶ 2024	12	500000	Create

- 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.

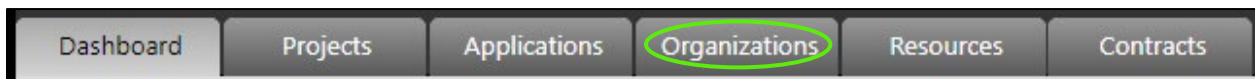
Useful Life Management				
Category - Heavy-Duty Large Bus : Type - BU - Bus : Description - Heavy Duty Bus				
+ Add new record Save changes X Cancel changes				
Year	Useful Life Years	Useful Life Miles	Exception	
2026	12	500000	Create	
Manufacturer	Useful Life Years	Useful Life Miles		
Champion Bus	10	450000	Remove	
EIDorado National	11	475000	Remove	
2025	12	500000	Create	

3.7 Disaster Reporting

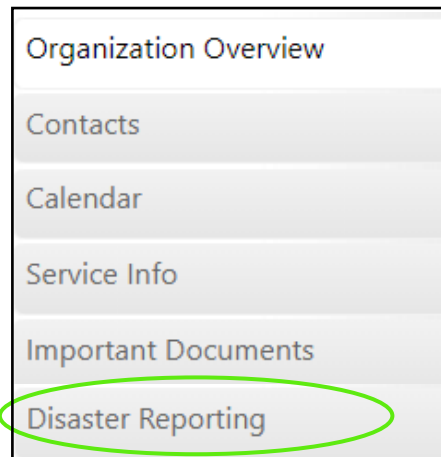
Certain users have been designated in the system to have access to Disaster Reporting for their respective agency. If a user has been designated as a Disaster Reporter, they will have access to the Disaster Reporting tab within their organization’s page.

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**

Organization Overview | **Disaster Reporting** | Contacts | Inventories | Important Documents | Oversight | Disaster Reporting

Organization Information

Gainesville Regional Transit System
 34 SE 13th Road
 Gainesville, Florida 32601
 (352) 334-2600
 http://go-rts.com

Primary Contact: Millie Crawford
 Title: ADA Transit Coordinator
 Email: crawfordma1@cityofgainesville.org
 Phone: (352) 393-7826

Disaster Reporting

COVID-19 Disaster Form
 Last Modified: Millie Crawford at 5/8/2020 4:11:55 PM

HAVE YOU HAD ANY SERVICE CHANGES FOR THE FOLLOWING?

Suspended Fares:	Yes	test
Suspended Services:	No	
Reduced Services:	Yes	test
Social Distancing:	Yes	social
Rear Door Loading (Fixed Route only):	No	
Screening of Passengers:	No	

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.

TransCIP 2.0
 Transit Data Management System

Scott Entin | My Account | Administration

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

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

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.

The screenshot shows the 'Organization Details' page for District 6. The left sidebar contains navigation options: Organization Overview, Contacts, Calendar, Service Info, Inventories, Important Documents, Reporting, and Disaster Reporting. The main content area is divided into two sections: 'Organization Information' and 'Edit Contact'. The 'Organization Information' section displays details for District 6, including the address (1000 N.W. 111 Ave., Miami, Florida, 33172), main phone number, website, and primary contact information (Raymond Freeman, Title, Email: raymond.freeman@dot.state.fl.us, Phone: (305) 470-5255). The 'Edit Contact' section includes a 'User Roles' list with checkboxes for various roles. The '5310 Report Reviewer' role is checked and highlighted with a green circle. Other roles include District Administrator, District Asset Manager, District Disaster Reporter, District Oversight Review Manager, District Oversight Reviewer, District SSO Rep, Lead Reviewer, Program Manager, and CovidApprovers. Below the roles, there are fields for '*Contact Status:' (Active/Inactive) and '*Salutation:' (Select One).

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

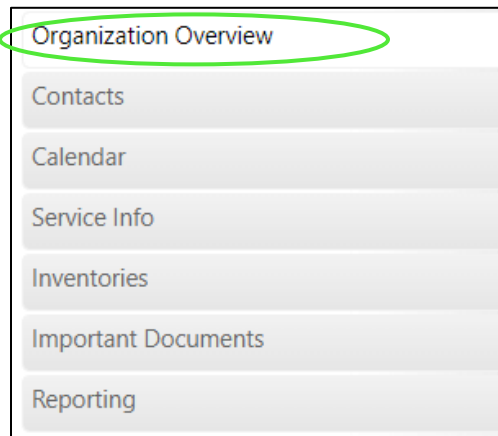
Filter By: Status Select One Select One Filter Default list displays active status organizations

Search By Organization:

Organization Listing

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 #:

Federal Tax ID:

FEIN:

State Vendor ID:

State Vendor Location:

NTD Reporting ID:

FTA Recipient ID:

5310 Reporting Access: Yes

Actions

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

Reporting Listing					
Action	Report	Year	Type	Period	Status
Add	5310 Annual Report	2023	Annual	2023	Approved

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

Report

Report Types:

Fiscal Year:

Report Period:

- 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.

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 disabilities through the Department of Transportation (the Department). In order to understand the far reaching impacts of the highly specialized services and FTA collect performance data on an annual basis. The Department will use this data across program years to understand the role which Section 5310 projects play 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 Section 5310 Funding.

The reporting year is the previous year of the services' calendar year (January 1 – December 31). All data provided in the report should be consistent with the service provided in the previous year. File uploads may be used for backup documentation as requested by the District (for example, additional calculation methodology details or trip logs).

Functional Instructions:

Please complete each report below. When a report is complete, please check the Completed checkbox within the report and then save. The grayed checks on the page will turn green to indicate that a report is done. Once all reports have green checkboxes, the Submit button will allow the group of reports to be submitted

Report Name

5310 Annual Report

Delete Cancel

Helpful Hint: The gray checkmarks next to each reporting form will turn to green once the requirements are met.

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

5310 Reporting

Save

Service Outputs and Capacity

	Value	Data Collection Process
Number of (unduplicated) senior and individuals with disabilities served this year: i	<input type="text"/>	Character Limit 100
Total ridership for seniors and individuals with disabilities (unlinked passenger trips): i	<input type="text"/>	Character Limit 100
Number of requests for trip services by seniors and individuals with disabilities: i	<input type="text"/>	Character Limit 100

Service Improvements

	Value	Data Collection Process
Total vehicle service miles traveled to provide service to seniors or individuals with disabilities: i	<input type="text"/>	Character Limit 100
Total vehicle service hours traveled to provide service to seniors or individuals with disabilities: i	<input type="text"/>	Character Limit 100

Please indicate increases or enhancements to your program that were funded by Section 5310 during the reporting period:

Character Limit 650

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

Reporting Period

Big Bend Transit

Year	Report Period	Status
2024	Jan - Dec	Not Submitted

Mark this reporting component as complete

5310 Reporting

Service Outputs and Capacity

	Value	
Number of (unduplicated) senior and individuals with disabilities served this year: ⓘ	<input type="text"/>	Character Limit 100
Total ridership for seniors and individuals with disabilities (unlinked	<input type="text"/>	Character Limit 100

- 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 disabilities through the Florida Department of Transportation (the Department). In order to understand the far-reaching impact of the services provided by your organization, and as required per the program circular, the Department and FTA collect performance data on a regular basis across program years to understand the resource investment levels needed to sustain the State's coordinated transportation system, which plays 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 Section 5310.

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

Functional Instructions:

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

Report Name

[5310 Annual Report](#)

Document Upload

Document Name:

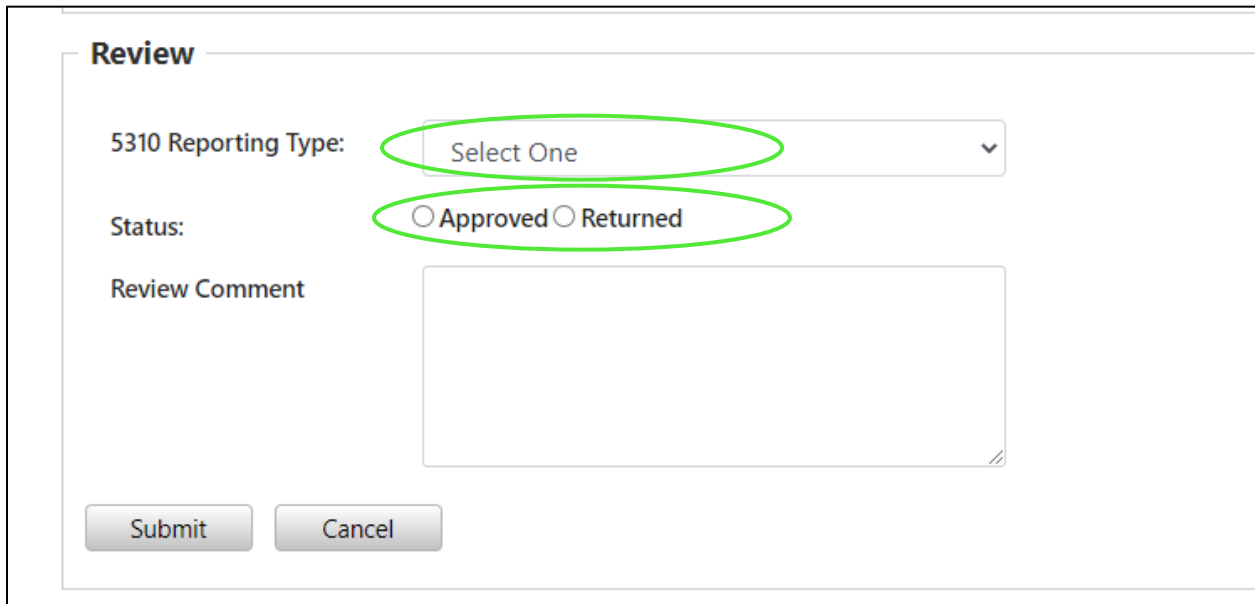
Select Document: No file chosen

No documents have been uploaded

- 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.



The screenshot shows a 'Review' form with the following elements:

- 5310 Reporting Type:** A dropdown menu with 'Select One' selected. This field is circled in green.
- Status:** Two radio buttons labeled 'Approved' and 'Returned'. This section is circled in green.
- Review Comment:** A large empty text area.
- Buttons:** 'Submit' and 'Cancel' buttons at the bottom.

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**



Axah McCalla | [My Account](#) | **Administration** | [Logout](#) | [Help](#) | System Version 2.0.624

- 2) Select **Oversight Management Module**

Administration Area

The Administration Area is organized into several sections:

- 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** (circled in green), 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: [Add Review Area](#) Folder Needed?
There are currently no review areas for this review category

History Log

Status	Comments	Updated By	Date
No records to display.			

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](#)

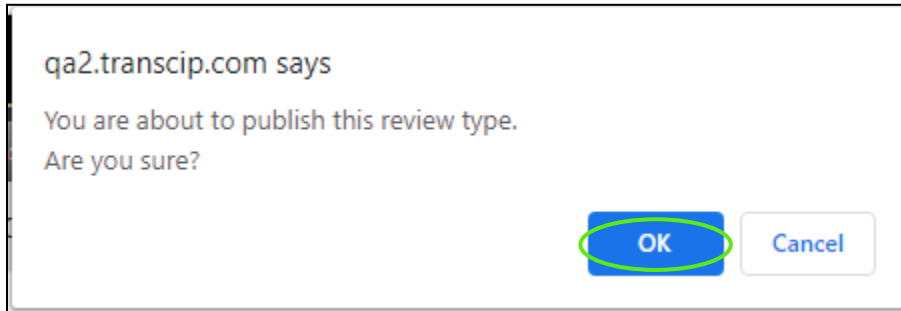
Review Category	Order
Edit Delete Other	↑ ↓
Edit Delete Drug & Alcohol	↑ ↓
Edit Delete Maintenance	↑ ↓
Edit Delete Safety & Security	↑ ↓

Review Area: [Add Review Area](#) Folder Needed?
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

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

Organization Information

Agency Logo

Website:

Primary Contact:
Title:
Email:
Phone:

Review Profile

**An asterisk signifies a required field*

*Organization: Select One

*Year: Select Or

*Review Type: Select One

*Site Visit Start Date: [Calendar Icon]

*Site Visit End Date: [Calendar Icon]

*District Review Manager: Select One [Add]

*District Reviewers: Select One [Add]

Save Cancel

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**

Save Cancel

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

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 **State Reviewers and Add**

Review Profile

**An asterisk signifies a required field*

*Organization: Faith in Action

*Year: 2020

*Review Type: 2020 Triennial Review

*Site Visit Start Date: 2/28/2020

*Site Visit End Date: 3/7/2020

*State Review Manager: Select One **Add**

*State Reviewers: Select One **Add**

Reviewer	Role	Organization
Remove Autumn (Brooke) Feagle	District Oversight Manager	District 1
Remove Jan Parham	District Oversight Reviewer	District 1

Save Cancel

4) Select **Save**

Save Cancel

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**

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 **Engagement Documents**

Review Profile

Compliance Folders

Engagement Documents

Findings

4) Select **Add New**

Notification of Review

Add New

No documents attached

5) Enter a Document Name and upload the file

Review Documents

Document Upload

Document Type: Pre-Review Document

Document Name: ←

Select Document: No file chosen

Save Cancel

6) Select **Save**

Review Documents

Document Upload

Document Type: Pre-Review Document

Document Name: Review Questionnaire

Select Document: Choose File Required Docu...nt test.docx

Save Cancel

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**

Review Profile

Compliance Folders

Engagement Documents

Findings

2) Select **Add a Folder**

Folder Management

Add a Folder: Safety & Security S Add

Review Category	Review Area
Maintenance	Maintenance
Other	Other

3) Select **Name the Folder**

Folder Management

Add a Folder:

Review Category	Review Area
Maintenance	Maintenance
Other	Other

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**

Review Profile

- Compliance Folders
- Engagement Documents**
- Findings

2) Select **Submit to Agency**

Notification of Review

<input checked="" type="checkbox"/>	Notification of Review	Draft	Review Questionnaire	<input type="button" value="Submit To Agency"/>
-------------------------------------	------------------------	-------	--------------------------------------	---

3) Select **OK**

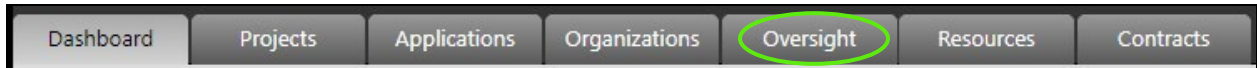
Are you sure you want to submit this Notification of Review document and/or comments to this agency?

4.3 Agencies Review of Notification

4.3a Review Engagement Document

To Review the Engagement Document as an Agency user:

1) Select **Oversight**

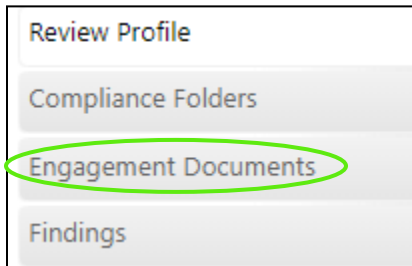


2) Select **Oversight Listing**

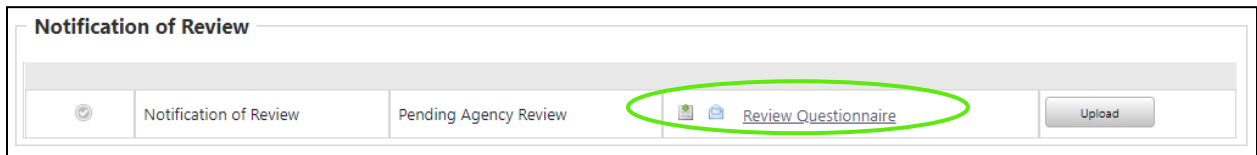
Oversight Listing

	Organization	District	Review Type	Year	Site Visit Date	Review Status
Select	Faith in Action	District 1	Triennial Review	2024	2/05/2020	Review and Mitigation
Select	Faith in Action	District 1	2020 Triennial Review	2020	2/21/2020	Pending Agency Review
Select	Faith in Action	District 1	2020 Triennial Review	2020	2/28/2020	Pending Agency Review

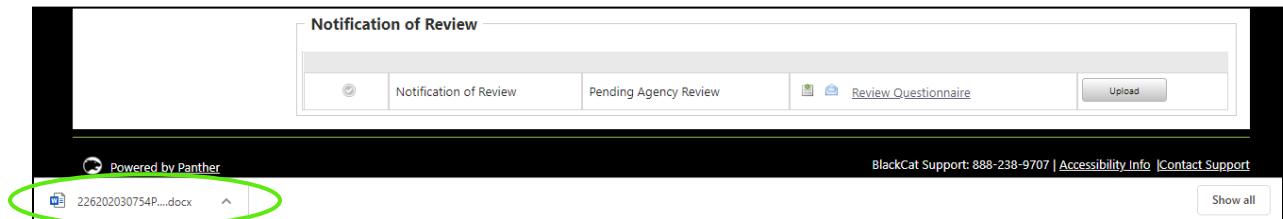
3) Select **Engagement Documents**



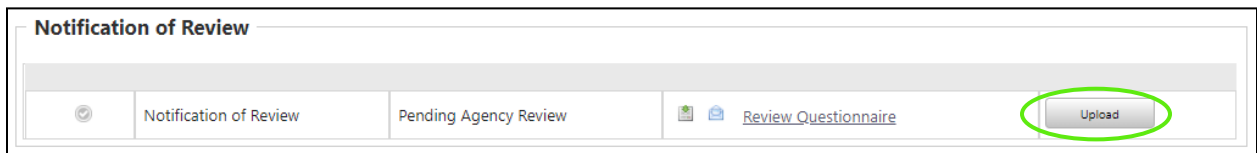
4) Select the document provided in **Notification of Review**



5) The document will download to the computer. Open document, complete, and Save the file



6) Select **Upload**



7) **Name & Select Document**

Review Documents

Document Upload

Document Name:

Select Document: No file chosen

8) Select **Save**

Review Documents

Document Upload

Document Name:

Select Document: Required Docu...nt test.docx

9) Select **Send to District**

Notification of Review

<input checked="" type="checkbox"/>	Notification of Review	Pending Agency Review	Review Questionnaire	<input type="button" value="Send to District"/>	<input type="button" value="Re-Upload"/>
-------------------------------------	------------------------	-----------------------	--------------------------------------	---	--

10) Select **OK**

Are you sure you want to submit this Notification of Review document and/or comments to your DOT representative?

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**

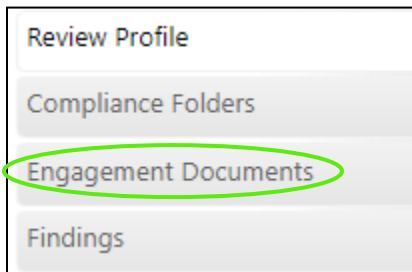


2) Select the **Oversight** record

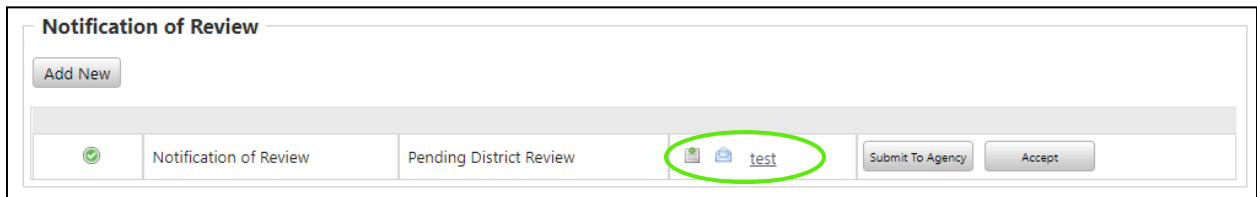
Oversight Listing

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

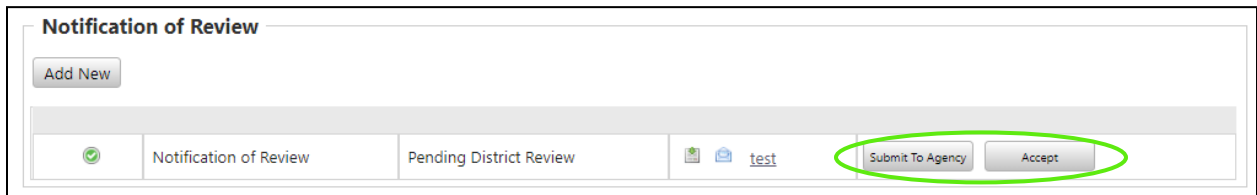
3) Select **Engagement Documents**



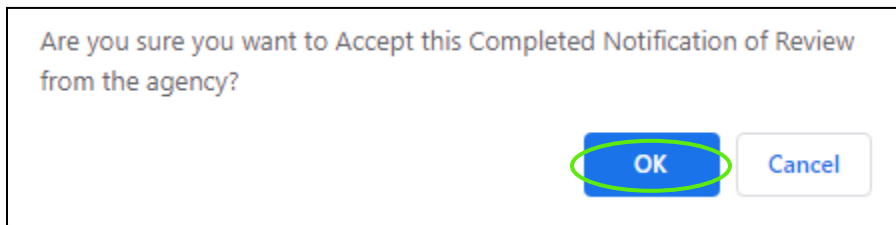
4) Select the document name to review



5) If complete select **Accept**, if not **Submit To Agency**



6) Select **OK**



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:

Save Cancel

Helpful Hint: Be sure to complete all the appropriate fields

6) Select **Save**

Save Cancel

7) Add any Comments or Supporting Documentation

Comments

Add

There are no comments provided for this finding at this time

Supporting Documentation

Document Name:

Select Document: Choose File No file chosen

Upload No documents have been uploaded

History

Status	User	Date
Draft	aporter	Feb 28, 2020 2:59 PM

Save Cancel

8) Select **Save**

Save Cancel

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**

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

Findings

Add New Publish to District Review Sections Complete: Maintenance

	Category	Review Area	Type	Due Date	ID#	Last Action Date	Status
View Delete	Maintenance	Maintenance	Deficiency	3/05/2020	F000000087	2/28/2020	Draft

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

Findings

Add New **Publish to District** Review Sections Complete: Maintenance

	Category	Review Area	Type	Due Date	ID#	Last Action Date	Status
View Delete	Maintenance	Maintenance	Deficiency	3/05/2020	F000000087	2/28/2020	Draft

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

Findings

Add New Publish to Agency

Category	Review Area	Type	Due Date	ID#	Last Action Date	Status
Maintenance	Maintenance	Deficiency	3/05/2020	F000000087	2/28/2020	Pending District Review

View Delete Send To State

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

Findings

Add New Publish to Agency

Category	Review Area	Type	Due Date	ID#	Last Action Date	Status
Maintenance	Maintenance	Deficiency	3/05/2020	F000000087	2/28/2020	Pending District Review

View Delete Send To State

6) Select **OK**

Are you sure you want to Publish this group of findings to the Agency?

OK Cancel

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

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	Faith in Action	District 1	Triennial Review	2024	2/05/2020	Review and Mitigation
Select	Faith in Action	District 1	2020 Triennial Review	2020	2/21/2020	Pending Agency Review
Select	Faith in Action	District 1	2020 Triennial Review	2020	2/28/2020	Review and Mitigation

3) Select **Findings**

Review Profile

Compliance Folders

Engagement Documents

Findings

4) Select **View**

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

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

Finding

Finding #: F000000087

Date Created: 2/28/2020

Review Category: Maintenance

Review Area: Maintenance

Finding Type: Deficiency

Repeat Finding? Check if "Yes"

Description:

Recommendation:

Corrective Action Plan:

Completion Date: 3/5/2020 [Due Date Extension Request](#)

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: No file chosen

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

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

7) Select **Save**

8) Select **Submit to District**

Findings

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

9) Select **OK**

Are you sure you want to submit this Finding back to the District Reviewer?

4.7 How to Request a Deadline Extension

Request for an Extension for an Agency

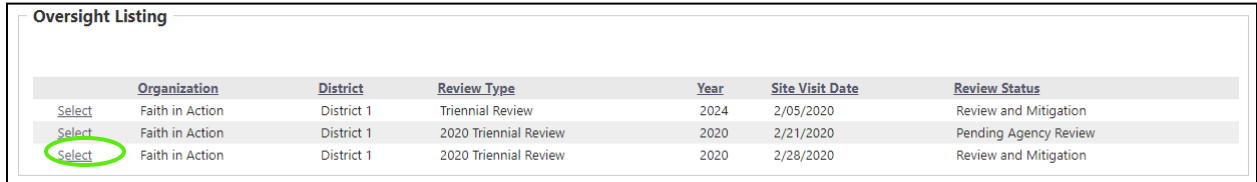
Findings that have a Finding Type of Deficiency or Area of Concern will have Completion Dates assigned to them. In order to request an extension to the completion date, agency users must complete the following steps prior to submitting the response to the District.

To request an extension as an Agency User:

- 1) Select the **Oversight** tab



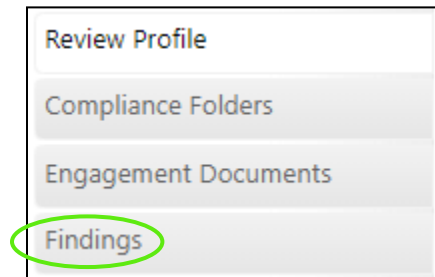
- 2) Select the **Oversight** record



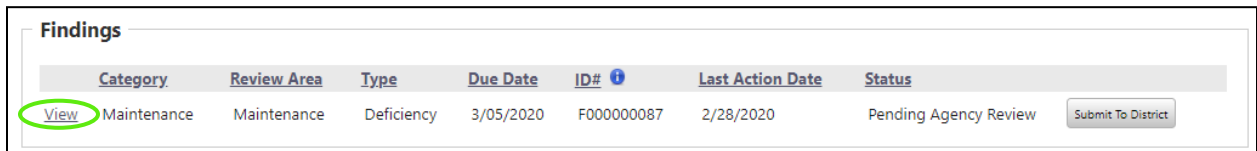
Oversight Listing

	Organization	District	Review Type	Year	Site Visit Date	Review Status
Select	Faith in Action	District 1	Triennial Review	2024	2/05/2020	Review and Mitigation
Select	Faith in Action	District 1	2020 Triennial Review	2020	2/21/2020	Pending Agency Review
Select	Faith in Action	District 1	2020 Triennial Review	2020	2/28/2020	Review and Mitigation

- 3) Select **Findings**



- 4) Select **View**



Findings

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

- 5) Review finding

Finding

Finding #: F00000087

Date Created: 2/28/2020

Review Category: Maintenance

Review Area: Maintenance

Finding Type: Deficiency

Repeat Finding? Check if "Yes"

Description:

Recommendation:

Corrective Action Plan:

Completion Date: 3/5/2020

6) Complete the Required Fields

Completion Date Extension Request

Extension Request

Please extend the current Completion Date:

From: 3/05/2020

To:

Justification:

7) Select **Submit**

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**

Oversight Listing

	Organization	District	Review Type	Year	Site Visit Date	Review Status
Select	Faith in Action	District 1	Triennial Review	2024	2/05/2020	Review and Mitigation
Select	Faith in Action	District 1	2020 Triennial Review	2020	2/21/2020	Pending Agency Review
Select	Faith in Action	District 1	2020 Triennial Review	2020	2/28/2020	Review and Mitigation

3) Select **Findings**

Review Profile

Compliance Folders

Engagement Documents

Findings

4) Select **View**

Findings

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

5) View the Request

Finding

Finding #: F000000087

Date Created: 2/28/2020

Review Category: Maintenance

Review Area: Maintenance

Finding Type: Deficiency

Repeat Finding? Check if "Yes"

Description:

Recommendation:

Corrective Action Plan:

Completion Date: 3/5/2020

Request to Extend to: 3/11/2020 - Submitted by Mildred McMillon on 2/28/2020 - [View Extension 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:

7) Select **Submit**

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**

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](#)

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:

Recommendation:

Corrective Action Plan:

Completion Date: 3/5/2020 [Due Date Extension Request](#)

Helpful Hint: Be sure to complete all the appropriate fields

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: No file chosen

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

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

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

9) Select **Submit to**

Are you sure you want to approve the finding?

Section 5: Program Management

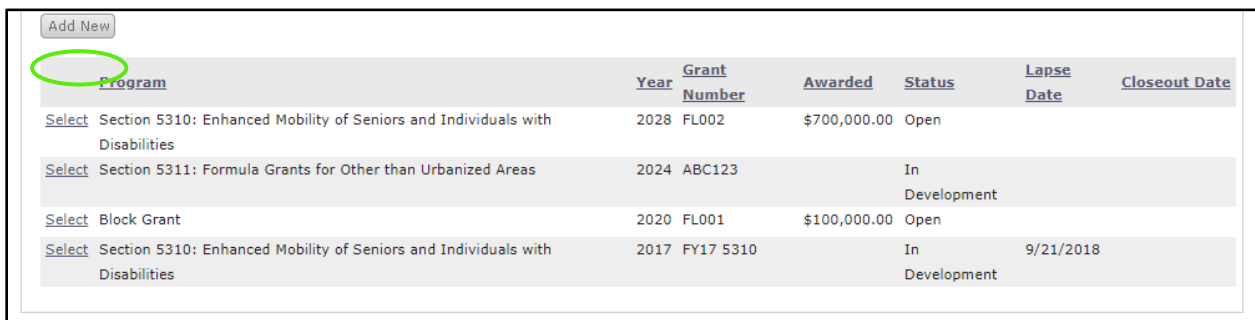
The Grant section is where Programs will be added to the System. A grant for each funding program being utilized should be created on an annual basis. The Grants created in this section will allow you to allocate and encumber funds against that Grant.

To add a Program:

- 1) Select the **Programs** tab



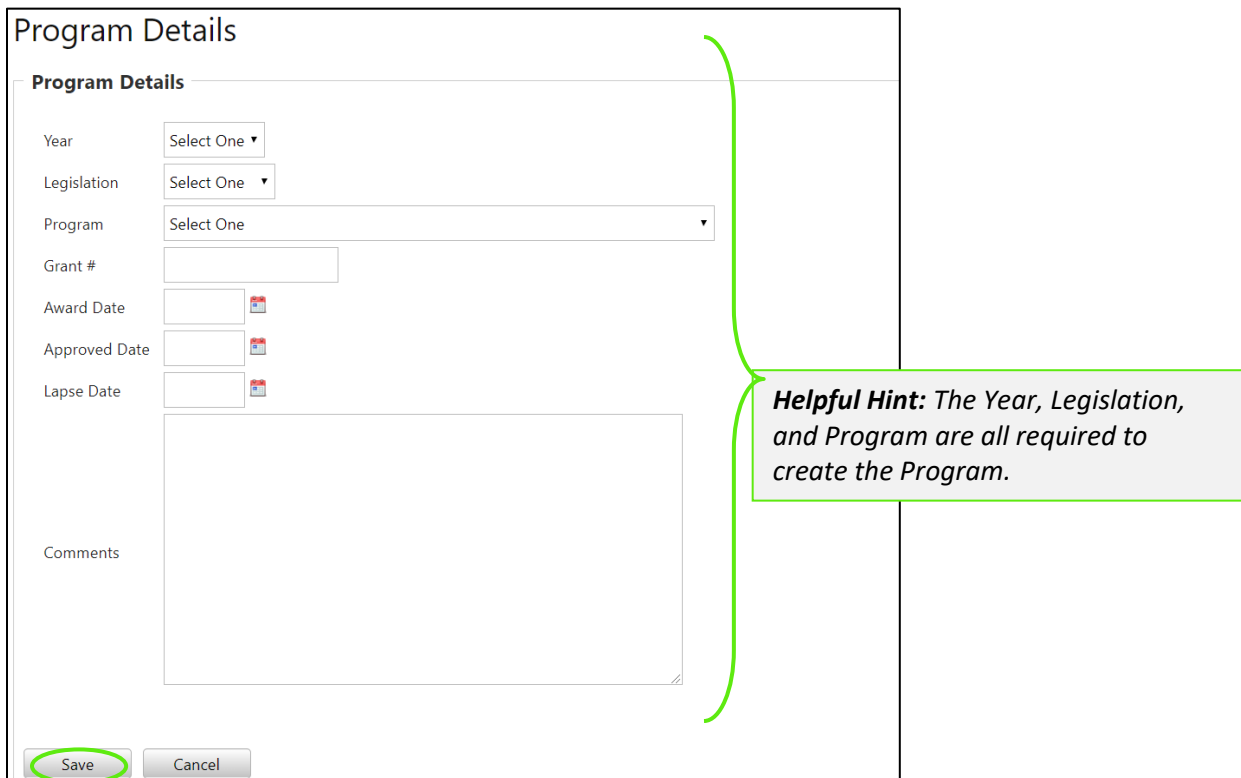
- 2) Select the **Add New** button



A screenshot of the Programs list page. The 'Add New' button is circled in green. Below it is a table with columns: Program, Year, Grant Number, Awarded, Status, Lapse Date, and Closeout Date.

Program	Year	Grant Number	Awarded	Status	Lapse Date	Closeout Date
Select Section 5310: Enhanced Mobility of Seniors and Individuals with Disabilities	2028	FL002	\$700,000.00	Open		
Select Section 5311: Formula Grants for Other than Urbanized Areas	2024	ABC123		In Development		
Select Block Grant	2020	FL001	\$100,000.00	Open		
Select Section 5310: Enhanced Mobility of Seniors and Individuals with Disabilities	2017	FY17 5310		In Development	9/21/2018	

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



A screenshot of the Program Details form. The form has fields for Year, Legislation, Program, Grant #, Award Date, Approved Date, Lapse Date, and Comments. The Save button is circled in green. A helpful hint box is present on the right side of the form.

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**

Programs

Search

Filter By: Grant # All

Programs

	Program	Year	Grant Number	Awarded	Status	Lapse Date	Closeout Date
<input type="button" value="Select"/>	Section 5310: Enhanced Mobility of Seniors and Individuals with Disabilities	2100		\$1,050,000.00	In Development		
<input type="button" value="Select"/>	Transit Corridor Development	2022		\$150,000.00	Open		
<input type="button" value="Select"/>	Commuter Assistance Program	2021		\$198,653.00	In Development		
<input type="button" value="Select"/>	Transit Corridor Development	2021		\$1,150,000.00	In Development		
<input type="button" value="Select"/>	Section 5311: Formula Grants for Other than Urbanized Areas (CARES Act)	2021	CARES123456	\$6,000,000.00	In Development		
<input type="button" value="Select"/>	5310: Palm Coast-Daytona Beach	2020	TJ Amendment	\$10,000.00	In Development	5/30/2020	

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

Details

Distribution

Application Documents

Distribution

Grant Information

Section 5310: Enhanced Mobility of Seniors and Individuals with Disabilities
 Type: FTA Grant #: Year: 2021

Grant Totals

Total Grant Awarded:	\$1,050,000.00	Total Grant Awarded Balance:	\$1,050,000.00
Total Grant Allocated (obligated):	\$0.00	Total Grant Allocated Balance:	\$0.00
Total Grant Encumbered:	\$0.00	Total Grant Encumbered Balance:	\$0.00
Total Grant Expended:	\$0.00	Total Grant Active Balance:	\$0.00
Total Grant Unallocated (unobligated):	\$1,050,000.00	Total Grant Close-out Balance:	\$0.00

Distributions

Expand All | Collapse All

District 2	Awarded	Allocated	Encumbered	Expended	Unallocated	Closeout Bal
	\$1,050,000.00	\$0.00	\$0.00	\$0.00	\$1,050,000.00	\$0.00

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**

Add/Adjust Distribution

New Distribution

Title

Awarded

[Insert](#) [Cancel](#)

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

Distribution

Awarded Encumbered \$90,000.00

Allocated \$90,000.00 Unallocated \$110,000.00

[Update](#) Expended \$0.00

- 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.

Distribution

Application Documents

Grant Information
 5310: Miami
 Type: FTA Grant #: Year: 2019
 Export

Grant Totals

Total Grant Awarded:	\$2,228,444.00	Total Grant Awarded Balance:	\$2,228,444.00
Total Grant Allocated (obligated):	\$857,822.00	Total Grant Allocated Balance:	\$857,822.00
Total Grant Encumbered:	\$820,452.00	Total Grant Encumbered Balance:	\$820,452.00
Total Grant Expended:	\$0.00	Total Grant Active Balance:	\$857,822.00
Total Grant Unallocated (unobligated):	\$1,370,622.00	Total Grant Close-out Balance:	\$0.00

Distributions Expand All | Collapse All

District 6	Awarded	Allocated	Encumbered	Expended	Unallocated	Closeout Bal
	\$2,228,444.00	\$857,822.00	\$820,452.00	\$0.00	\$1,370,622.00	\$0.00

Status / Year

Status / Year	Description	Allocated	Encumbered	Expended	Active Bal	Closeout Bal
Open / 2019	Operating Assistance	\$236,417.00	\$236,417.00	\$0.00	\$236,417.00	\$0.00
/ 2019	Operating Assistance	\$236,090.00	\$236,090.00	\$0.00	\$236,090.00	\$0.00
/ 2019	Operating Assistance	\$125,000.00	\$125,000.00	\$0.00	\$125,000.00	\$0.00
Open / 2019	Operating Assistance	\$37,370.00	\$0.00	\$0.00	\$37,370.00	\$0.00
Open / 2019	Operating Assistance	\$200,000.00	\$200,000.00	\$0.00	\$200,000.00	\$0.00
Open / 2019	Operating Assistance - Southwest Social Services Section 5310 Award	\$22,945.00	\$22,945.00	\$0.00	\$22,945.00	\$0.00

Organization: Sunrise Community, Inc.

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.

Project Listing

Filter Options

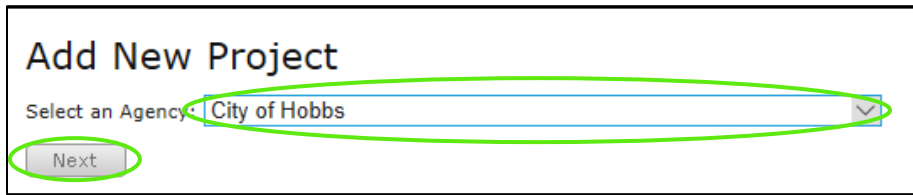
Filter By: Select One Select All Filter Reset

Project Listing

Add New

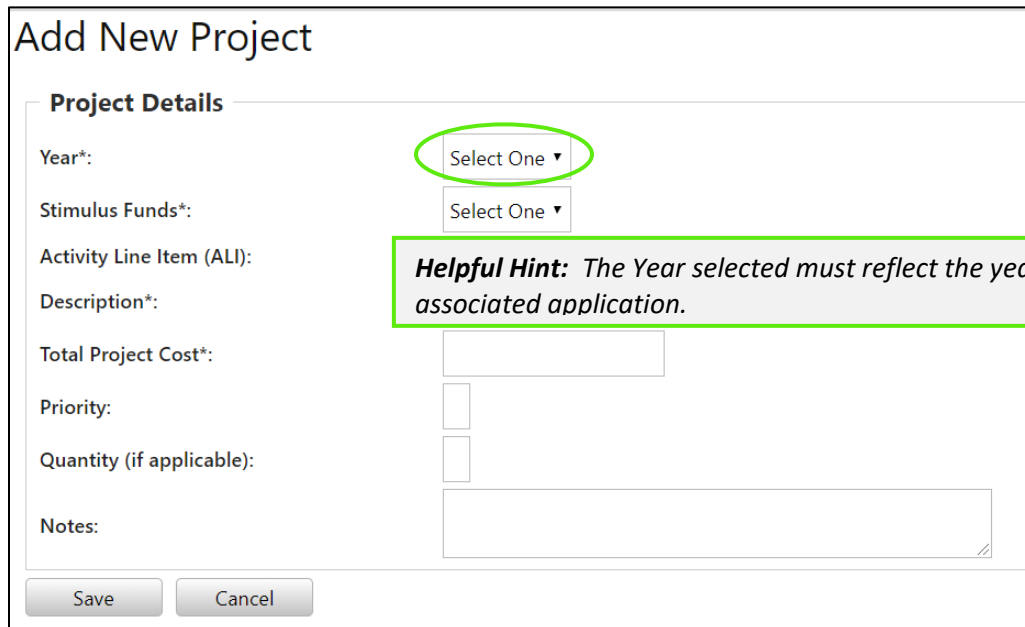
UPIN	Year	Priority	Organization	ALI	Description	Requested	Allocated	Encumbered	Status	Fav
BCG0000281	2017		Carlsbad Municipal Transit	30.09.01	Operating Assistance	\$202,000	\$100,020	\$100,000	In Development	<input type="checkbox"/>
BCG0000281	2017		Carlsbad Municipal	30.09.01	Operating Assistance	\$202,000	\$100,020	\$100,000	In	<input type="checkbox"/>

3) Select an **Agency** and Select **Next**



The screenshot shows a form titled "Add New Project". Below the title is a dropdown menu labeled "Select an Agency:" with "City of Hobbs" selected. A "Next" button is located below the dropdown menu. Both the dropdown menu and the "Next" button are circled in green.

4) Select a **Year**



The screenshot shows the "Add New Project" form with the "Project Details" section expanded. The "Year*" dropdown menu is highlighted with a green circle. Below it is the "Stimulus Funds*" dropdown menu, also with "Select One" selected. A green-bordered box contains the text: **Helpful Hint:** The Year selected must reflect the year on the associated application. Below the hint box are input fields for "Total Project Cost*", "Priority", and "Quantity (if applicable)", and a "Notes" text area. At the bottom are "Save" and "Cancel" buttons.

5) Select the **Lookup** button

Add New Project

Project Details

Year*:

Stimulus Funds*:

Activity Line Item (ALI):

Description*:

Total Project Cost*:

Priority:

Quantity (if applicable):

Notes:

test.nmdot.blackcatgrants.com - Microsoft Edge

<http://test.nmdot.blackcatgrants.com/Popups/FTALineItemsPOPUP.aspx>

LINE ITEMS

- 11.12.01 Buy Replacement - Bus STD 40 FT
- 11.12.02 Buy Replacement - Bus STD 35 FT
- 11.12.03 Buy Replacement - Bus 30 FT
- 11.12.04 Buy Replacement - Bus < 30 FT
- 11.12.15 Buy Replacement - Vans
- 11.13.01 Buy Expansion - Bus STD 40 FT
- 11.13.02 Buy Expansion - Bus STD 35 FT
- 11.13.03 Buy Expansion - Bus 30 FT
- 11.13.04 Buy Expansion - Bus < 30 FT**
- 11.13.15 Buy Expansion - Vans
- 11.42.07 Acquisition - ADP Hardware
- 11.42.08 Acquisition - ADP Software
- 11.42.09 Acquisition - Surveillance / Security (Bus)
- 11.42.10 Acquisition - Fare Collection (Mobile)
- 11.42.11 Acquisition - Support Vehicles
- 11.42.20 Acquisition - Miscellaneous Equipment
- 11.44.01 Rehab / Renovation - Admin Building
- 11.44.02 Rehab / Renovation - Maintenance Facility

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

Add New Project

Project Information

Year*:

Activity Line Item (ALI):

Description*:

Scope Code:

Estimated Net Project Cost*:

Priority:

Quantity (if applicable):

Notes:

Vehicle Information

Vehicle To Be Replaced (VIN):

VIN:

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.

The screenshot shows the 'Add New Project' form with the following fields and values:

- Year*:** 2017
- Activity Line Item (ALI):** 11.12.04 Buy Replacement - Bus < 30 FT
- Description*:** Buy Replacement - Bus < 30 FT
- Scope Code:** 111-00 (highlighted with a red circle)
- Estimated Net Project Cost*:** (empty)
- Priority:** (checkbox)
- Quantity (if applicable):** (checkbox)
- Notes:** (text area)
- Vehicle Information:**
 - Vehicle To Be Replaced (VIN):** Not Listed
 - VIN:** (empty)

Buttons: Save, Cancel

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

The screenshot shows the 'Add New Project' form with the following fields and values:

- Year*:** 2017
- Activity Line Item (ALI):** 11.12.04 Buy Replacement - Bus < 30 FT
- Description*:** Buy Replacement - Bus < 30 FT
- Scope Code:** 111-00
- Estimated Net Project Cost*:** \$500,000 (highlighted with a red circle)
- Priority:** (checkbox)
- Quantity (if applicable):** (checkbox)
- Notes:** (text area)

Buttons: Save, Cancel

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: BCG00000033 *Created by Annette Lapkowski on 7/12/2018 5:11:34 PM*

Project Status: In Development *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

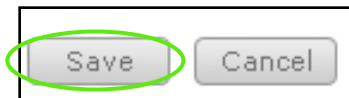
Budget Code	Category	Amount
Capital Expenses		
001	Salaries	\$200,000
002	Fringe Benefits	\$100,000
003	Contractual Services	\$40,000
004	Travel	\$50,000
005	Indirect Costs	\$10,000
006	Other Direct Costs	\$100,000
Total Expenses		\$500,000
Total Revenue (minus)		\$0
Net Project Cost		\$500,000

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



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

Project Listing

Filter Options

Filter By Select One Select All Filter Reset

Project Listing

Add New

UPIN	Year	Priority	Organization	ALI	Description	Requested	Allocated	Encumbered	Status	Fav
BCG0000281	2017		Carlsbad Municipal Transit	30.09.01	Operating Assistance	\$202,000	\$100,020	\$100,000	In Development	<input type="checkbox"/>
BCG0000281	2017		Carlsbad Municipal Transit	30.09.01	Operating Assistance	\$202,000	\$100,020	\$100,000	In Development	<input type="checkbox"/>
BCG0000281	2017		Carlsbad Municipal Transit	30.09.01	Operating Assistance	\$202,000	\$100,020	\$100,000	In Development	<input type="checkbox"/>
BCG0000282	2017		CATS	44.00.00	Planning	\$700,000	\$0	\$0	Open	<input type="checkbox"/>
BCG0000283	2017	1	Carlsbad Municipal Transit	11.13.03	Buy 30-Ft Bus For Expansion	\$400,000	\$0	\$0	Open	<input type="checkbox"/>
BCG0000283	2017	1	Carlsbad Municipal Transit	11.13.03	Buy 30-Ft Bus For Expansion	\$400,000	\$0	\$0	Open	<input type="checkbox"/>
BCG0000283	2017	1	Carlsbad Municipal Transit	11.13.03	Buy 30-Ft Bus For Expansion	\$400,000	\$0	\$0	Open	<input type="checkbox"/>
BCG0000284	2017		CATS	11.12.02	Purchase Replacement Std 35 Ft Bus	\$380,000	\$0	\$0	In Development	<input type="checkbox"/>
BCG0000285	2017		CATS	11.12.01	Purchase Replacement Std 40 Ft Bus	\$0	\$0	\$0	In Development	<input type="checkbox"/>
BCG0000286	2017	1	ARCA	44.00.00	Planning	\$45,000	\$0	\$0	Open	<input type="checkbox"/>
BCG0000287	2017		ARCA	11.12.01	Purchase Replacement Std 40 Ft Bus	\$60,000	\$300,000	\$0	Open	<input type="checkbox"/>
BCG0000287	2017		ARCA	11.12.01	Purchase Replacement Std 40 Ft Bus	\$60,000	\$300,000	\$0	Open	<input type="checkbox"/>
BCG0000288	2017		ARCA	30.09.01	Operating Assistance					<input type="checkbox"/>
BCG0000288	2017		ARCA	30.09.01	Operating Assistance					<input type="checkbox"/>
BCG0000288	2017		ARCA	30.09.01	Operating Assistance					<input type="checkbox"/>

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

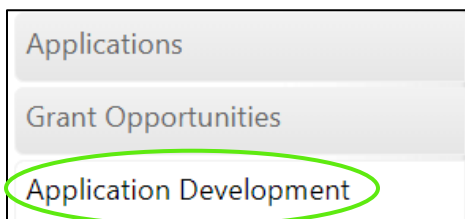
The Application section is a list of all agency applications and the location where the State User will create applications. Applications include application forms, attached projects and a budget summary. Typically, Agency Users will add their own applications but this is an area where State and District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

[Publish](#)

Last modified by Scott Entin on 9/4/2024 10:29:56 AM

Status: In Development

Application Name:*

Program:*

District:* Statewide District 1 District 2 District 3 District 4 District 5 District 6 District 7

Year:*

FAIN Number:

Open Date/Time:

Deadline Date/Time:

Hard/Soft Deadline:* Hard Soft

Group Review:* Yes No

Score Card:

Lead Reviewers: [Add Reviewer](#)

Delete	Reviewer
No Reviewers Selected	

Public URL:

[Save](#) [Cancel](#) [Delete](#)

Helpful Hints: If you select Hard deadline the application will close on the deadline date and time.

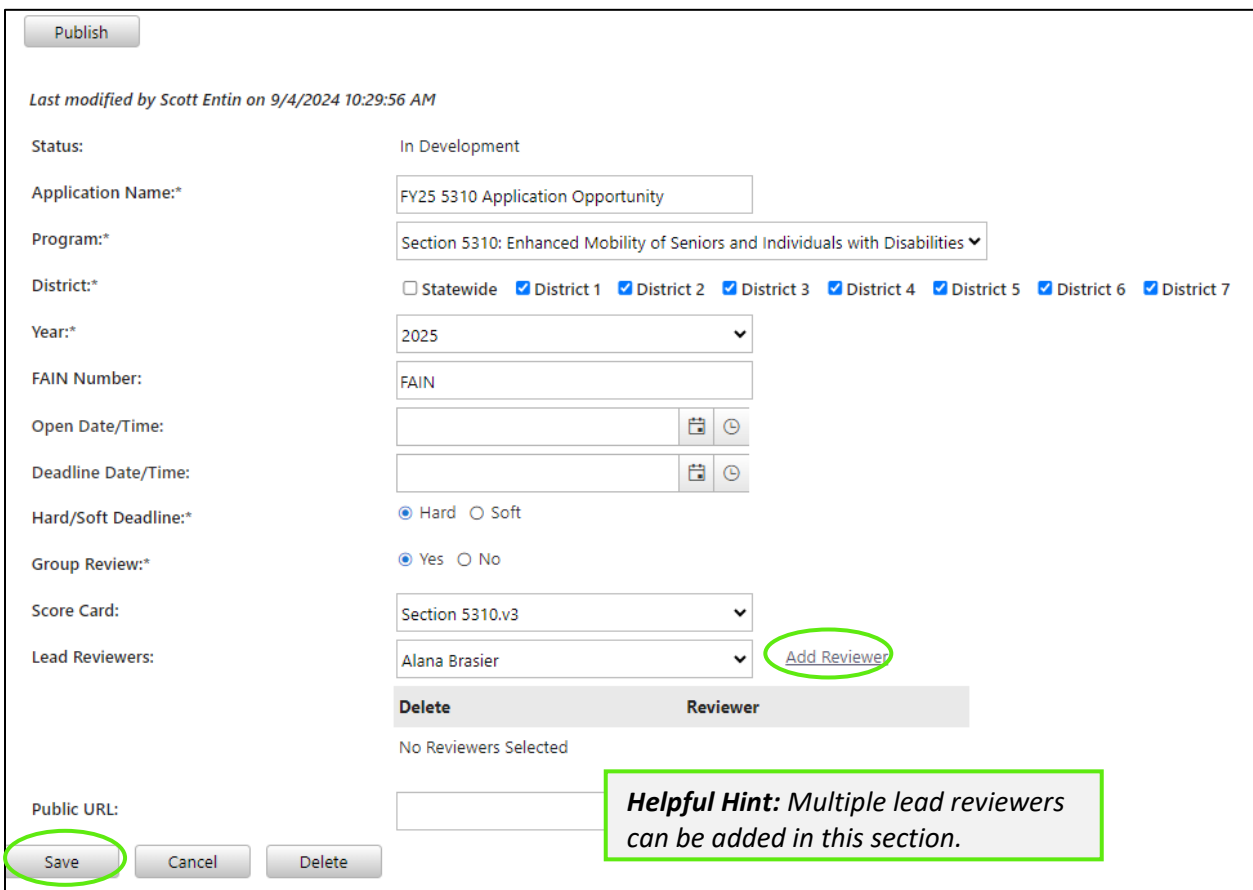
If Group Review is needed, a scorecard must be selected.

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.



Publish

Last modified by Scott Entin on 9/4/2024 10:29:56 AM

Status: In Development

Application Name:* FY25 5310 Application Opportunity

Program:* Section 5310: Enhanced Mobility of Seniors and Individuals with Disabilities ▼

District:* Statewide District 1 District 2 District 3 District 4 District 5 District 6 District 7

Year:* 2025 ▼

FAIN Number: FAIN

Open Date/Time: [Calendar Icon] [Clock Icon]

Deadline Date/Time: [Calendar Icon] [Clock Icon]

Hard/Soft Deadline:* Hard Soft

Group Review:* Yes No

Score Card: Section 5310.v3 ▼

Lead Reviewers: Alana Brasier ▼ **Add Reviewer**

Delete	Reviewer
No Reviewers Selected	

Public URL: [Text Field]

Save Cancel Delete

Helpful Hint: Multiple lead reviewers can be added in this section.

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

- Applications
- Grant Opportunities
- Application Development
- Opportunity Profile
- Application Documents**
- Eligible Applicants
- Application Reviewers

8) Select **Add New**

Application Documents

Application Documents

Add New

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

Add / Edit Application Form

Allow Upload:

Required:

Post Submittal:

Sequence:

Form Title:

Select Document: No file chosen

Comment:

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.

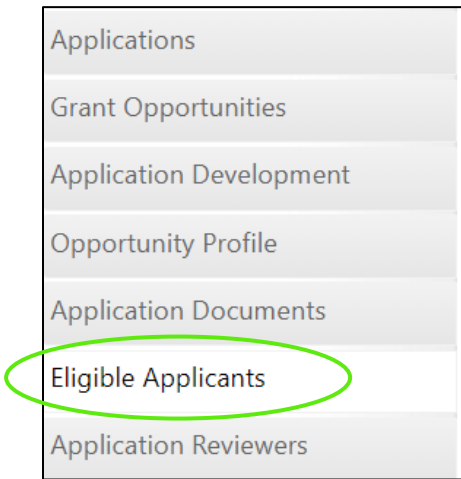
Form Title: This is the name of the document.

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

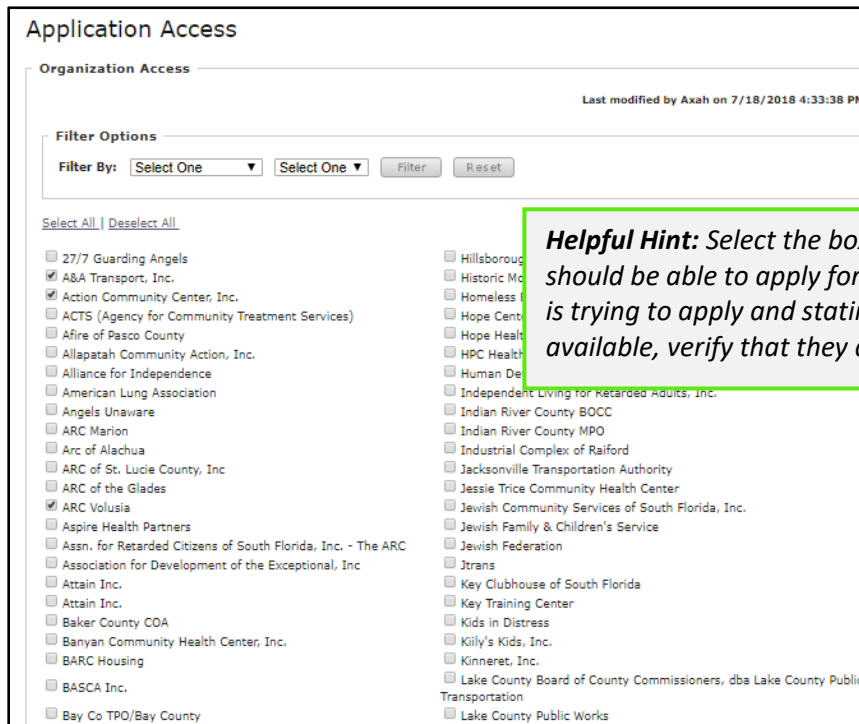


*Continue this process as many times as needed, there is no limit to the number of application forms

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



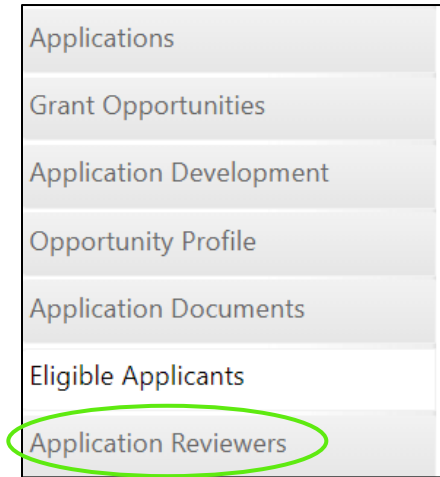
11) *Applies if only a Statewide Opportunity*: Select all organizations that are eligible to apply and then select **Save**



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**



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

Publish

Last modified by Scott Entin on 9/4/2024 10:29:56 AM

Status: In Development

Application Name:* FY25 5310 Application Opportunity

Program:* Section 5310: Enhanced Mobility of Seniors and Individuals with Disabilities ▾

District:* Statewide District 1 District 2 District 3 District 4 District 5 District 6 District 7

Year:* 2025 ▾

FAIN Number: FAIN

Open Date/Time:

Deadline Date/Time:

Hard/Soft Deadline:* Hard Soft

Group Review:* Yes No

Score Card: Section 5310.v3 ▾

Lead Reviewers: Alana Brasier ▾ [Add Reviewer](#)

Delete	Reviewer
No Rev	

Public URL:

Helpful Hint: Once you publish an application and it is past the open date, it is available for Agency Users to begin an application until the deadline date.

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).

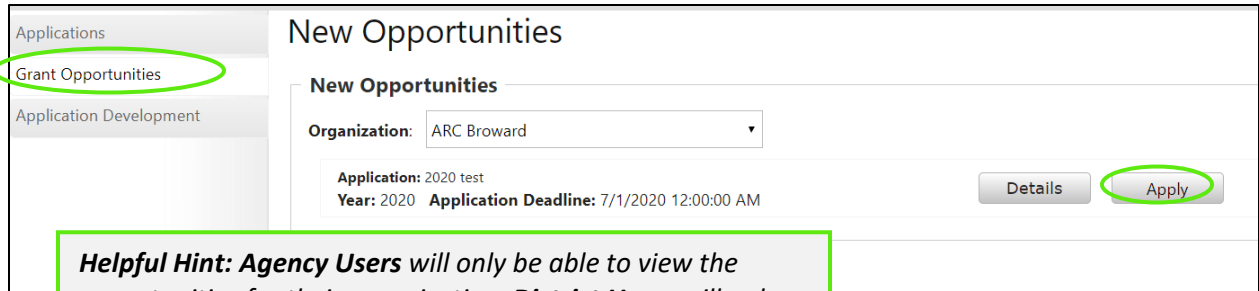
7.2 Creating and Completing an Application

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.

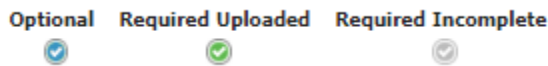


Helpful Hint: Agency Users will only be able to view the opportunities for their organization. District Users will only be able to view opportunities available for organizations in their district.

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:

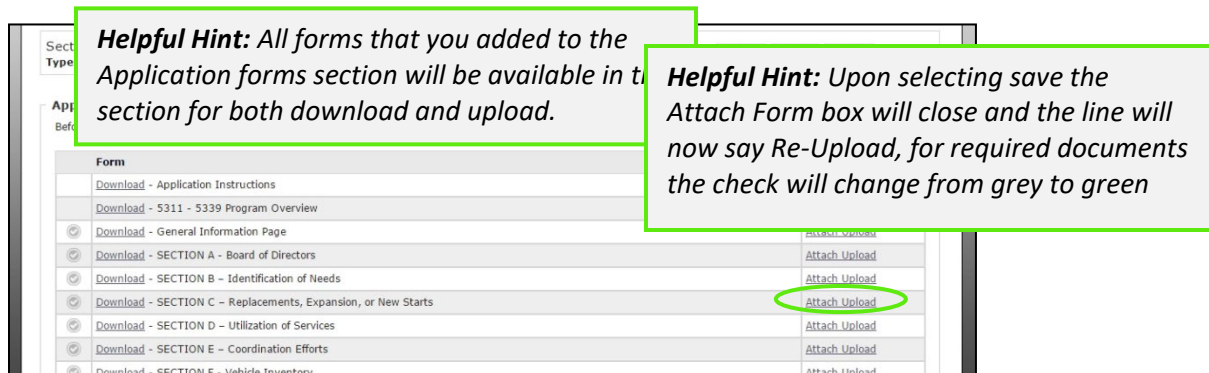
1. **Applications Documents** section: All documents in this section must have a green or blue mark next to them if there is an upload requirement/option. Required documents that still have a gray checkmark indicate a document has not been uploaded.



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



- 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))

Type: FTA Application Deadline: 12/31/2014 12:00:00 AM Status: Not Submitted

[Details](#) [Delete](#) [Submit](#)

Application Forms

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

Form	Re-Upload
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

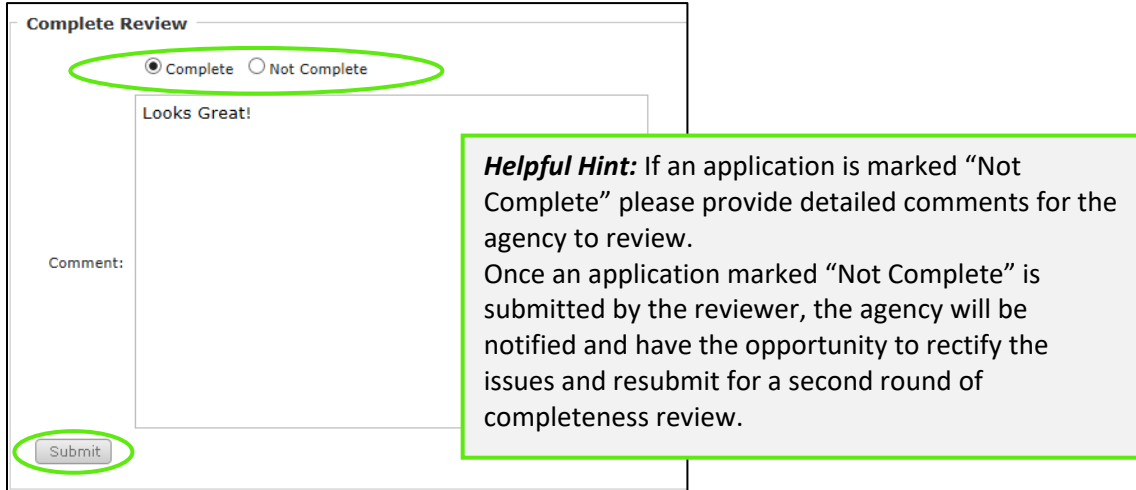


2. Select the **Review** link

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**



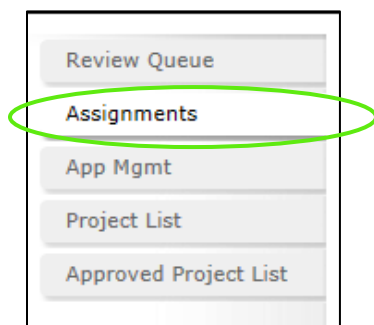
7.5 Reviewer Assignment

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**

Assignments

Reviewer Assignments

Mobility Management 2 : 2017

Organization	Application	Year	Status
Zia Therapy Center, Inc.	Mobility Management 2	2017	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**

Assignments

Application Reviewers

Organization: City of Hialeah
Application: Service Development 2021 D6
Year: 2021
Status: Complete

Application requires a group review. Please choose the users that will participate in the review.

Alana Brasier
Christopher Dube
Raymond Freeman

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

Hold down "Ctrl" to select multiple users [Email Notification](#)

5. The Application has now been assigned

Assignments

Application Reviewers

Section 5311 : 2019

Organization	Application	Year	Status
City of Opa Locka	Section 5311	2019	Assigned

- 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:

- Select the **Review** tab



- Select the **Review** link in the Committee Review table

Review Queue				
Completeness Review				
No Projects.				
Committee Review				
	Organization	Application	Year	Status
Review	ARCA	5334 Building Marina	2017	Pending
Review	ARCA	New 5311 Test Application	2017	Pending
Review	ARCA	New 5311 Test Application	2017	Pending

- 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.

TransCIP 2.0 You are connected to OA Environment Show Rank/Score Index

TransCIP 2.0
Transit Data Management System

Dashboard Projects Applications Organizations Oversight Resources

Dashboard > Applications > Applications

Application

Application: Agency Reviewer Application Deadline: 4/8/2021
 Organization: Good Wheels, Inc. Year: 2021 Status: Complete

Application Documents

Before you can submit this application, you must upload all required documents.

Status	Documents
✔	Download - Document 1
✔	Download - Required Document

Requires Upload Optional Upload Complete

Requires Upload: Optional: Upload Complete:

Project(s)

Line Item	Year	Description
111315	2021	Buy Expansion - Vans

Budget Request Summary

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

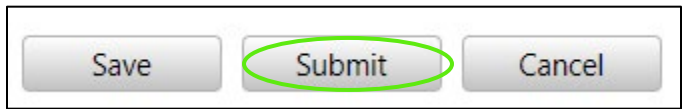
Number of Clients Served By Expansion - Form A2: Column Titled "If Grant Awarded"	3.4	(0-5)
Vehicle Mileage And Age (Replacement)	3.6	(0-5)
Subtotal	7.00	(0-10)

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**



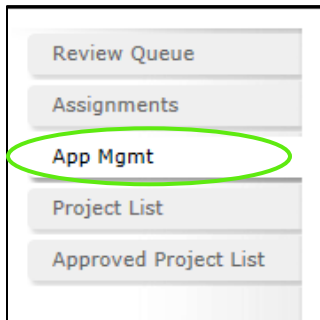
7.7 Application Review Management

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.

5310 V2 : 2020																																		
Action	Exp/Col	Organization	Net Project Cost Total	Status	Calculated Score	Adjusted Score	Notes																											
<input type="checkbox"/>	+/-	Collier County Board of County Commissioners	\$40,000.00	Pending	2.67	<input type="text"/>																												
		<table border="1"> <thead> <tr> <th>Reviewer</th> <th>Review Status</th> <th>Score</th> <th>Score Card</th> </tr> </thead> <tbody> <tr> <td>Melissa DeLeon</td> <td>Pending</td> <td></td> <td></td> </tr> <tr> <td>Michelle Peronto</td> <td>Complete</td> <td>0</td> <td>View</td> </tr> <tr> <td>Charlene Ross</td> <td>Complete</td> <td>0</td> <td>View</td> </tr> <tr> <td>Erin Schepers</td> <td>Pending</td> <td></td> <td></td> </tr> <tr> <td>Marybeth Soderstrom</td> <td>Pending</td> <td>8</td> <td></td> </tr> <tr> <td>Mark Mistretta</td> <td>Pending</td> <td></td> <td></td> </tr> </tbody> </table>	Reviewer	Review Status	Score	Score Card	Melissa DeLeon	Pending			Michelle Peronto	Complete	0	View	Charlene Ross	Complete	0	View	Erin Schepers	Pending			Marybeth Soderstrom	Pending	8		Mark Mistretta	Pending						
Reviewer	Review Status	Score	Score Card																															
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Mark Mistretta	Pending																																	
<input type="checkbox"/>	+/-	Peace River Center	\$40,000.00	Pending	<input type="text"/>	<input type="text"/>																												
		<table border="1"> <thead> <tr> <th>Reviewer</th> <th>Review Status</th> <th>Score</th> <th>Score Card</th> </tr> </thead> <tbody> <tr> <td colspan="4">No records to display.</td> </tr> </tbody> </table>	Reviewer	Review Status	Score	Score Card	No records to display.																											
Reviewer	Review Status	Score	Score Card																															
No records to display.																																		

- 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.

Application Management

Applications in Review

Submit Select Action ▾

Select All

Section 5311 : 2020

Organization	Net Project Cost Total	Status	Calc. Score	Notes
<input type="checkbox"/> +/- City of Key West - Department of Transportation	\$1,018,924.00	Pending		
Description	Net Project Cost			
Operating Assistance Section 5311	\$1,018,924.00			

- Complete Steps 1-3 for each application

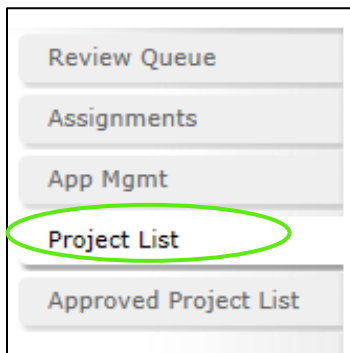
7.8 Allocation of Funds

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

- Select the **Review** tab



- Select **Project List** Sub-section



- Select the funds link under Allocated

Project List

Grant Manager Review Select Action ▾ Submit

Section 5311, 5311(f), and 5339 - Round 2 : 2017

Select All

ARCA

Organization	Project	Net Project Cost	Allocated
<input type="checkbox"/> ARCA	Purchase Replacement Std 40 Ft Bus	\$100,000	\$0
Total		\$100,000	\$0

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

Budget Request Summary

Net Project Cost	\$500,000
Total FTA Portion of Net Project Cost (max. allowed)	\$0
Total State Portion of Net Project Cost	\$250,000
Total Minimum Required Local Match	\$250,000
Toll Revenue Credits	\$0

New Allocation

Year: ▾

Grant: ▾

Amount:

Fund Code: ▾

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)

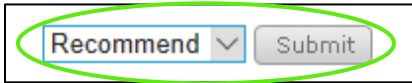
Select All

Zia Therapy Center, Inc.

Organization	Project	Net Project Cost	Allocated
<input checked="" type="checkbox"/> Zia Therapy Center, Inc.	Project Administration - Mobility Management (5302 (a)(1)(L))	\$15,000	\$15,000
<input checked="" type="checkbox"/> Zia Therapy Center, Inc.	Operating Assistance up to 50% Federal Share	\$60,000	\$60,000
<input checked="" type="checkbox"/> Zia Therapy Center, Inc.	Buy Replacement - Bus 30 FT	\$50,000	\$50,000
Total		\$125,000	\$125,000

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



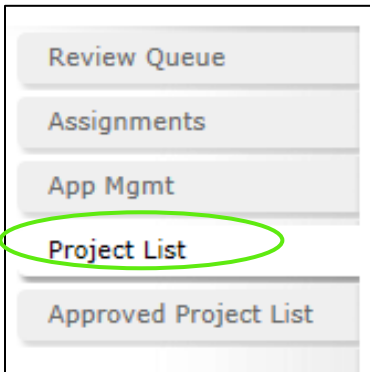
7.9 Final Approval

The Final Approval is completed by the Transit Manager Reviewer:

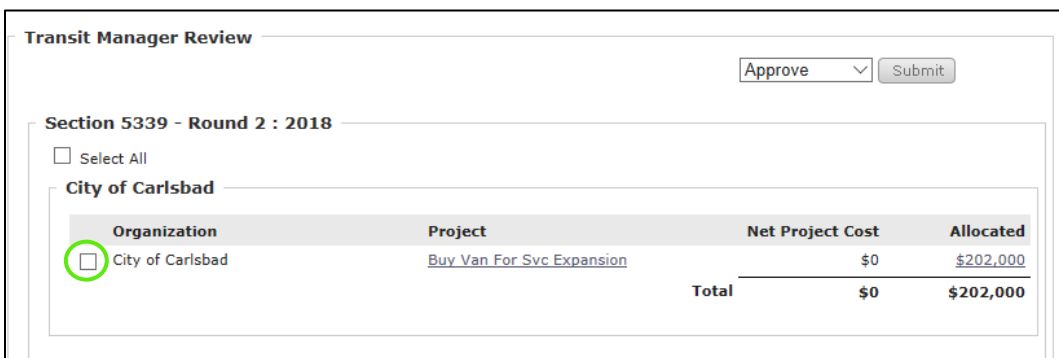
1) Select the **Review** tab



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.

Approved Projects

Add Project

Project Year 2020 ▾

Non-Application Project : 2020

Organization	Project	Allocated
City of Key West - Department of Transportation	FY2020 Transit State Block	\$6,256

Transit Corridor : 2020

Organization	Project	Allocated
Banyan Community Health Center, Inc.	Buy Expansion - Vans	\$44,600
City of Miami	Acquisition - Support Vehicles	\$75,000
The Fellowship House	Buy Replacement - Vans	\$41,400

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

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

- 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).*

Contract Information

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

*Program: Section 5311: Formula Grants for Other than Urbanized Areas

*State Fiscal Year: 2020

Contract Number: G123456

Financial Project Number : 433106 1 84 02

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

Mobility Management:

Upload Sketch: No file chosen

Actions

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).*

Contract Information

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

*Program: Section 5311: Formula Grants for Other than Urbanized Areas

*State Fiscal Year: 2020

Contract Number: G123456 [Click here for FACTS Contract Info](#)

Financial Project Number : 433106 1 84 02

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

Mobility Management:

Upload Sketch: No file chosen

Original Contract

Contract Start Date:

Contract Expiration Date:

Contract Exec Date:

Approved Enc Date:

*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: No file chosen

Original Contract

Contract Start Date: 04/09/2019

Contract Expiration Date: 12/30/2020

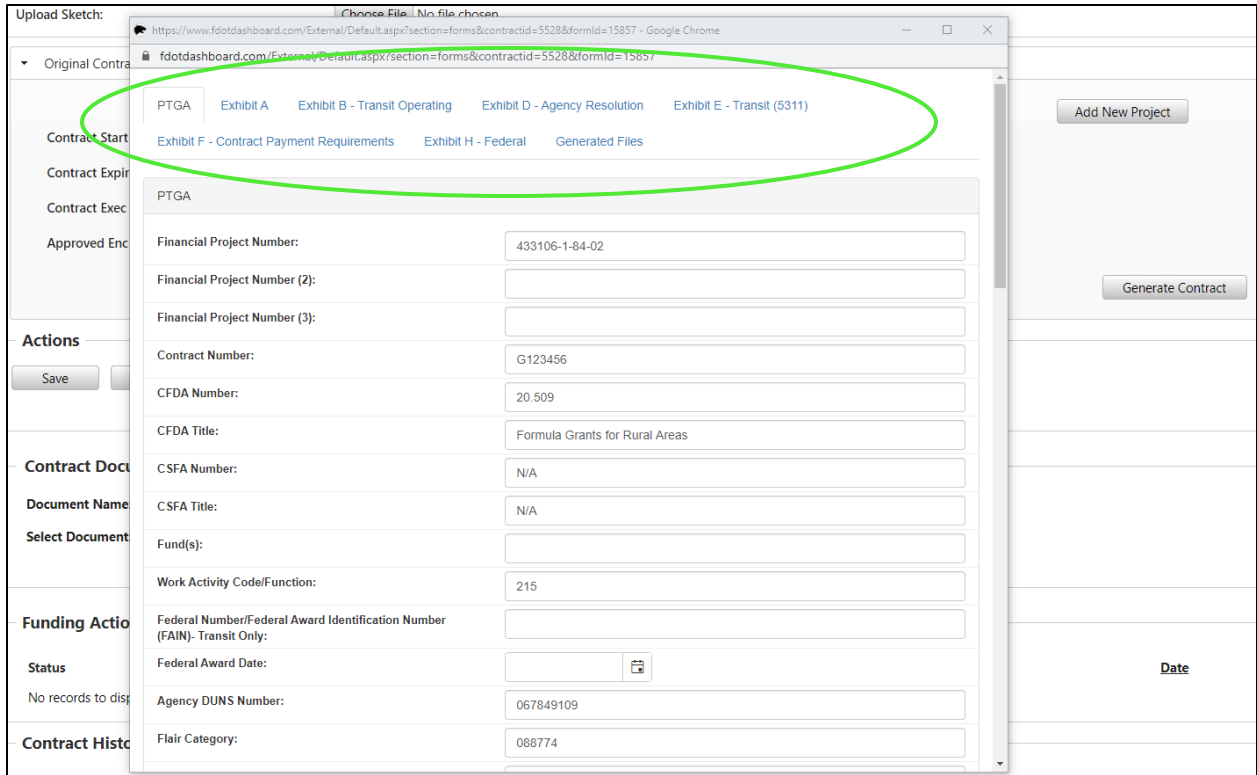
Contract Exec Date: mm/dd/yyyy

Approved Enc Date: mm/dd/yyyy

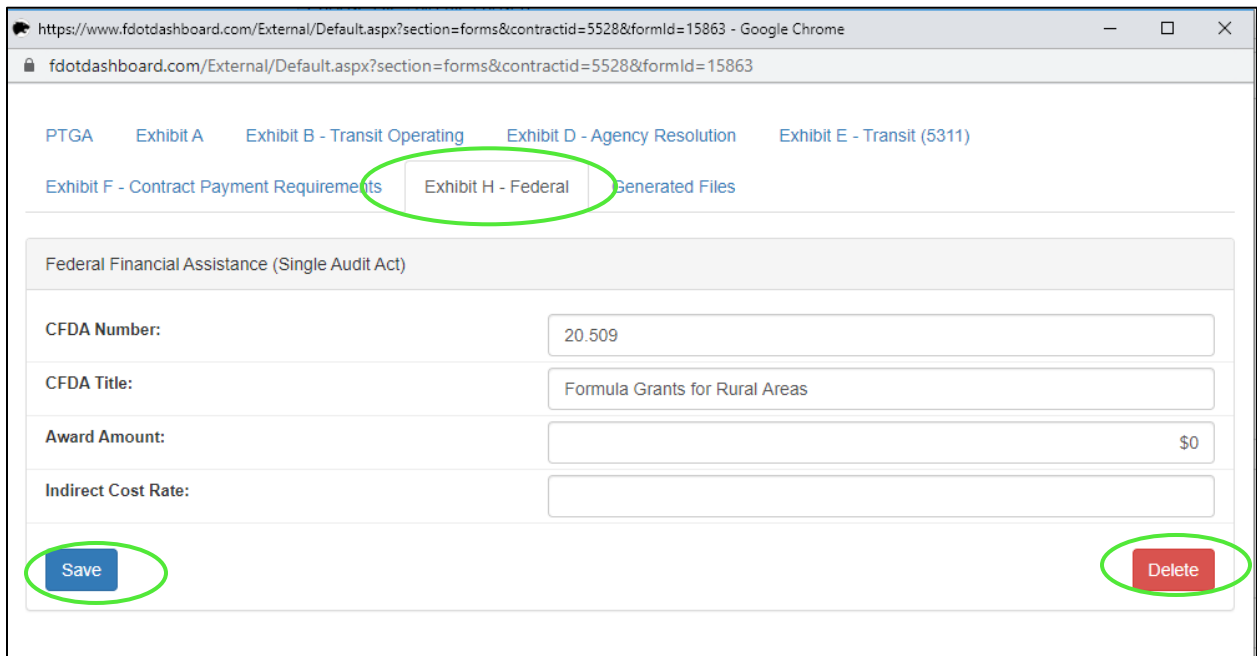
BCG0000488 : Operating Assistance : 2019

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

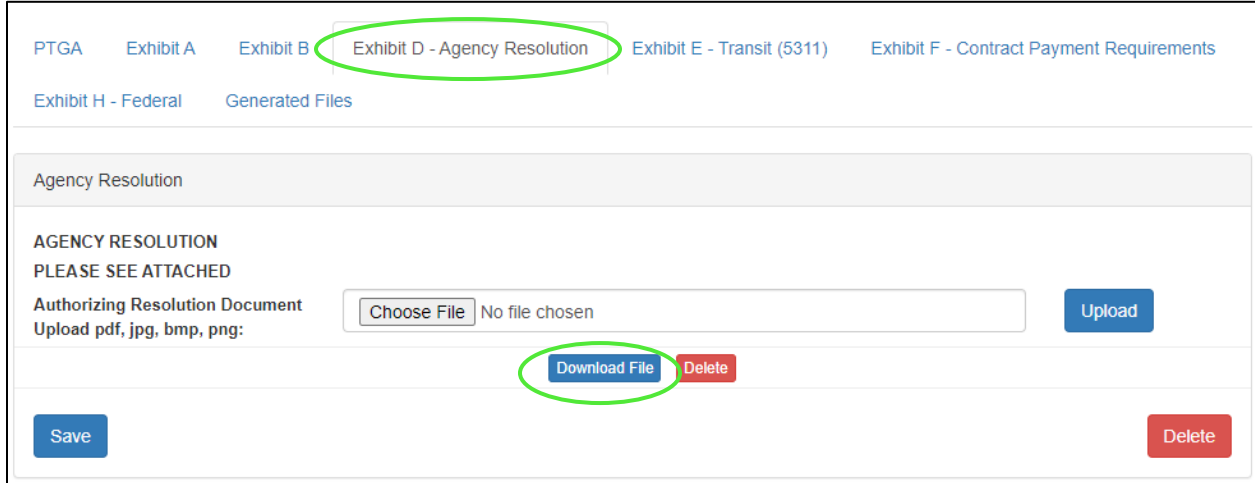
- 6) Once the Generate Contract button has been selected, enter and edit any necessary data into each of the tabs located at the top of the window. Remember that the contract type (PTGA/NOGA) and available exhibits populate based on information entered in the Contract Information section.



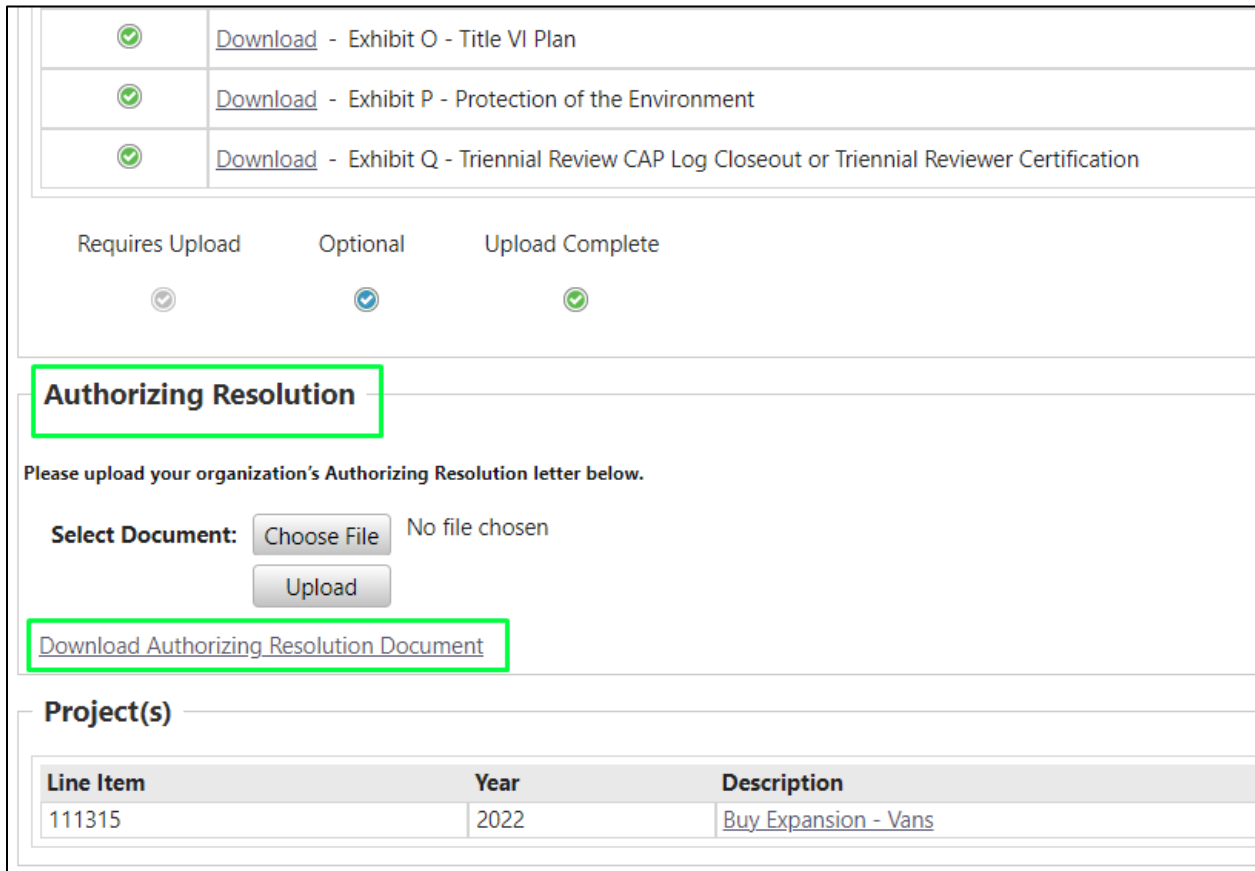
- 7) To enter data into any of the Exhibits, select the Exhibit at the top and then enter the necessary information, followed by selecting Save. If an exhibit is not necessary in a contract, simply select the Exhibit at the top and then select the Delete button.



- 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.

PTGA Exhibit A Exhibit B - Transit Operating Exhibit D - Agency Resolution Exhibit E - Transit (Urban Transit Corridor)

Exhibit F - Contract Payment Requirements Exhibit G - State Generated Files

Agency Resolution

AGENCY RESOLUTION
PLEASE SEE ATTACHED

Authorizing Resolution Document
Upload pdf, jpg, bmp, png:

Choose File No file chosen

Upload

Save Delete

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

https://www.fdotdashboard.com/External/Default.aspx?section=forms&contractid=5528 - Google Chrome

fdotdashboard.com/External/Default.aspx?section=forms&contractid=5528

PTGA Exhibit A Exhibit B - Transit Operating Exhibit D - Agency Resolution Exhibit E - Transit (5311)

Exhibit F - Contract Payment Requirements Exhibit H - Federal Generated Files

Files

Add New Form

File Name	Created
No records to display.	

Generate Package 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

Organization	Year	Contract Number	Program	Status	End Date	Variance
Jacksonville Transportation Authority	2019	G1036	Block Grant	Open	9/30/2019	
Volusia County Council d/r/a VOTRAN	2019	G0273	Bus Fleet/Demonstration Grants	Open	9/16/2020	
City of Miami Beach	2019	G0Y95	Service Development	Open	12/31/2019	
Miami-Dade Transit	2019	G0Y93	Block Grant	Open	12/31/2019	
Bay Co TPO/Bay County	2019	G0241	Block Grant	Open	9/30/2019	
ECAT (Escambia County Area Transit)	2019	G0276	Block Grant	Open	9/30/2019	
Okaloosa County BCC	2019	G0277	Block Grant	Open	9/30/2019	
StarMetro / City of Tallahassee	2019	G0278	Block Grant	Open	9/30/2019	

- 2) Select Create Amendment

Actions

Save Cancel Closeout Create Amendment

- 3) Select the type of amendment and then Submit

Create Amendment

Select Amendment Type--

Time Extension

Budget Revision

Amendment

Submit Cancel

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

Amendment 1 - Amendment

Add New Project

Contract Start Date:

Contract Expiration Date:

Contract Exec Date:

Approved Enc Date:

Reason for Amendment:

BCG0000038 : Operating Assistance : 2019 Add New Allocation

Expand	Prior Contract	Adjustment	Encumbered	Type	Grant Year	Grant #	Grant Program	Percent	Adjust	Action
▶	\$4,197,403.00	\$0.00	\$4,197,403.00	State	2019	Block Grant	Block Grant	100.00 %	Adjust	

Generate Amendment

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

Amendment 1 - Amendment

Add New Project

Contract Start Date:

Contract Expiration Date:

Contract Exec Date:

Approved Enc Date:

Reason for Amendment:

BCG0000488 : Operating Assistance : 2019 Add New Allocation

Expand	Prior Contract	Adjustment	Encumbered	Type	Grant Year	Grant #	Grant Program	Percent	Adjust	Action
▶	\$11,041,145.00	\$0.00	\$11,041,145.00	State	2019	Block Grant	Block Grant	100.00 %	Adjust	

Generate Amendment

6) Select Save

Actions

8.2.1 How to Adjust Allocation

1) Select Adjust

Amendment 1 - Amendment

Contract Start Date:

Contract Expiration Date:

Contract Exec Date:

Approved Enc Date:

Reason for Amendment:

BCG0000038 : Operating Assistance : 2019

Expand	Prior Contract	Adjustment	Encumbered	Type	Grant Year	Grant #	Grant Program	Percent	Adjust	Action
▶	\$4,197,403.00	\$0.00	\$4,197,403.00	State	2019	Block Grant	Block Grant	100.00 %	<input type="button" value="Adjust"/>	

2) Complete Allocation Adjustment

mm/dd/yyyy

Make Adjustments

Add Allocation Adjustment

Amount:

Type:

Comments:

3) Select Update

mm/dd/yyyy

Make Adjustments

Add Allocation Adjustment

Amount:

Type:

Comments:

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

Amendment 1 - Amendment

Add New Project

Contract Start Date:

Contract Expiration Date:

Contract Exec Date:

Approved Enc Date:

Reason for Amendment:

BCG0000038 : Operating Assistance : 2019 **Add New Allocation**

Expand	Prior Contract	Adjustment	Encumbered	Type	Grant Year	Grant #	Grant Program	Percent	Adjust	Action
▶	\$4,197,403.00	\$0.00	\$4,197,403.00	State	2019	Block Grant	Block Grant	100.00 %	Adjust	

Generate Amendment

2) Select the Project

Add Project Allocation(s)

BCG0000038 : Operating Assistance : 2018

Allocated Type	Grant Year	Grant #	Grant Program	Distribution
<input type="checkbox"/> \$1,000.00 State	2018	Block Grant	Block Grant	District 1

BCG00000600 : Construction of Stations/Terminal - Bus Passenger Shelters : 2019

Allocated Type	Grant Year	Grant #	Grant Program	Distribution
<input type="checkbox"/> \$195,000.00 State	2019		Transit Corridor Development	District 2

Submit **Cancel**

3) Select Submit

Add Project Allocation(s)

BCG0000038 : Operating Assistance : 2018

Allocated Type	Grant Year	Grant #	Grant Program	Distribution
<input type="checkbox"/> \$1,000.00 State	2018	Block Grant	Block Grant	District 1

BCG00000600 : Construction of Stations/Terminal - Bus Passenger Shelters : 2019

Allocated Type	Grant Year	Grant #	Grant Program	Distribution
<input checked="" type="checkbox"/> \$195,000.00 State	2019		Transit Corridor Development	District 2

Submit **Cancel**

8.2.3 How to add a New Allocation

1) Select Add New Allocation

Amendment 1 - Amendment

Contract Start Date:

Contract Expiration Date:

Contract Exec Date:

Approved Enc Date:

Reason for Amendment:

BCG0000038 : Operating Assistance : 2019

Expand	Prior Contract	Adjustment	Encumbered	Type	Grant Year	Grant #	Grant Program	Percent	Adjust	Action
▶	\$4,197,403.00	\$0.00	\$4,197,403.00	State	2019	Block Grant	Block Grant	100.00 %	Adjust	

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.

Amendment 1 - Amendment

[Add New Project](#)

Contract Start Date:

Contract Expiration Date:

Contract Exec Date:

Approved Enc Date:

Reason for Amendment:

BCG0000477 : Operating Assistance : 2019 [Add New Allocation](#)

Expand	Prior Contract	Adjustment	Encumbered	Type	Grant Year	Grant #	Grant Program	Percent	Adjust	Action
▶	\$644,442.00	\$0.00	\$644,442.00	FTA	2019	TBD	Section 5311: Formula Grants	100.00 %	Adjust	
▶	\$644,442.00	\$0.00	\$0.00	Local				0.00 %	Adjust	

[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.*

Amendment 1 - Amendment

Contract Start Date:

Contract Expiration Date:

Contract Exec Date:

Approved Enc Date:

Reason for Amendment:

BCG0000233 : Operating Assistance : 2019

Expand	Prior Contract	Adjustment	Encumbered
▶	\$0.00	\$250,000.00	\$0.00

BCG0000488 : Operating Assistance : 2019

Expand	Prior Contract	Adjustment	Encumbered
▶	\$11,041,145.00	\$20,000.00	\$11,041,145.00
▶	\$0.00	\$1,000.00	\$0.00

Actions: [Save](#) [Cancel](#) [Closeout](#)

PTGA Amendment | **Exhibit A** | **Exhibit B - Transit Operating** | Exhibit D - Agency Resolution | Exhibit G - State | Generated Files

State Financial Assistance (Single Audit Act)

State Project Title:

CSFA Number:

Award Amount:

[Save](#) [Delete](#)

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

Create Amendment

Select Amendment Type--

Time Extension

Budget Revision

Amendment

[Submit](#) [Cancel](#)

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

Contract Profile

Executed Documents

Invoices

Drawdowns

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

Contract Information

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

*Program: Section 5311: Formula Grants for Other than Urbanized Areas

*State Fiscal Year: 2019

Contract Number: [Click here for FACTS Contract Info](#)

Financial Project Number: 433309 1 84 37

Contract Expiration Date: 6/30/2020 Expiration Date of most recent executed agreement will be displayed

Mobility Management:

Upload Sketch: No file chosen

Original Contract

Amendment 1 - Amendment

Amendment 2 - Time Extension

Contract Expiration Date: mm/dd/yyyy

Contract Exec Date: mm/dd/yyyy

Reason for Amendment:

Actions

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

PTGA Time Extension Amendment

Generated Files

Files

File Name	Created
No records to display.	

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.

Amendment 3 - Budget Revision

To complete a Budget Amendment select the project and adjust the line items on the budget tab

Contract Start Date:

Contract Expiration Date:

Contract Exec Date:

Reason for Amendment:

BCG0000477 : Operating Assistance : 2019

Expand	Prior Contract	Adjustment	Encumbered	Type	Grant Year	Grant #	Grant Program	Percent	Adjust	Action
▶	\$644,442.00	\$0.00	\$644,442.00	FTA	2019	TBD	Section 5311: Formula Grants	50.00 %		
▶	\$644,442.00	\$0.00	\$644,442.00	Local				50.00 %		

Generate Amendment

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

Project Information

Central Florida Regional Transportation Authority, d/b/a LYNX : Operating Assistance

UPIN: BCG0000477
 Project Status: Open
 Contract: N/A

Created by: Jarrell Smith on 12/14/2018 5:37:49 PM
 Last Modified by: Jo Santiago on 2/25/2019 2:15:34 PM

Project Funding Summary

Year: 2019
 Status: Funds Available

Requested: \$1,288,884
 Allocated: \$1,288,884
 Encumbered: \$1,288,884

<< Return to Funding Requests

Budget Allocations Comments

Project Budget

Operating Expense

Category	Amount
Salaries	\$1,288,884
Fringe Benefits	\$0
Contractual Services	\$0
Travel	\$0
Indirect Costs	\$0
Other Direct Costs Click to add line item	\$0
Other Direct Costs	\$0
Total Expenses	\$1,288,884

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

Exhibit B - Transit Operating
Generated Files

Schedule of Financial Assistance for Transit Operating Only

Department Grant Manager Name:

Cost Reimbursement :

Fund Type and Fiscal Year

+ Add new record ↻ Refresh

	FPN	Fund Type	Flair Category	State Fiscal Year	Object Code	CSFA/CFDA Number	CSFA/CFDA Title	Funding Amount
<input type="button" value="Edit"/> <input style="background-color: red; color: white;" type="button" value="Delete"/>	456789-1-84-01	DU		2019				\$71,248.00

+ Add new record ↻ Refresh

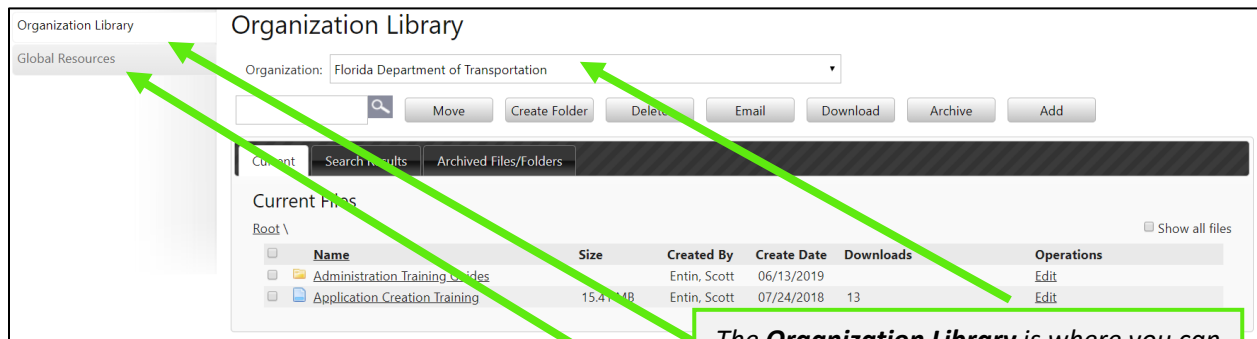
Estimate of Project Costs by Budget Category

Budget Categories Operations (Transit Only) *	State	Local	Federal	Totals
Salaries	\$0	\$0	\$0	\$0
Fringe Benefits	\$0	\$0	\$0	\$0
Contractual Services	\$0	\$0	\$0	\$0
Travel	\$0	\$0	\$0	\$0
Other Direct Costs	\$0	\$0	\$0	\$0
Indirect Costs	\$0	\$0	\$0	\$0

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

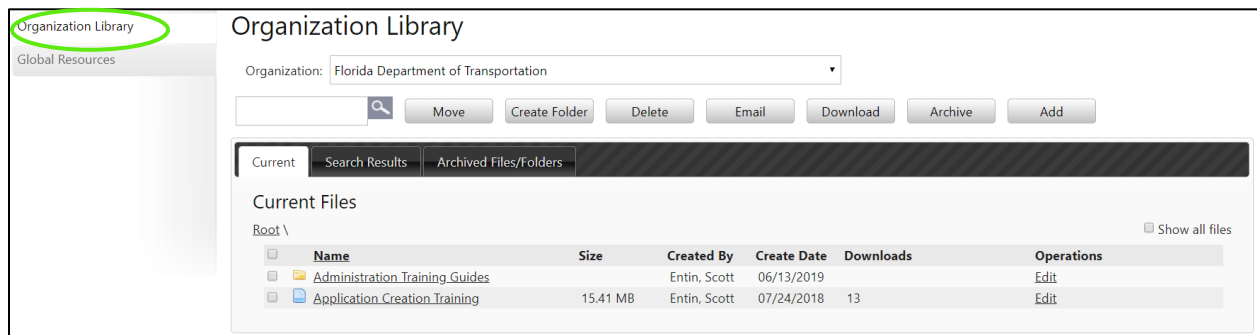


The **Organization Library** is where you can store documents for the state. You may also store document in a particular district or organization's library by selecting the organization in the **Organization** pick list.

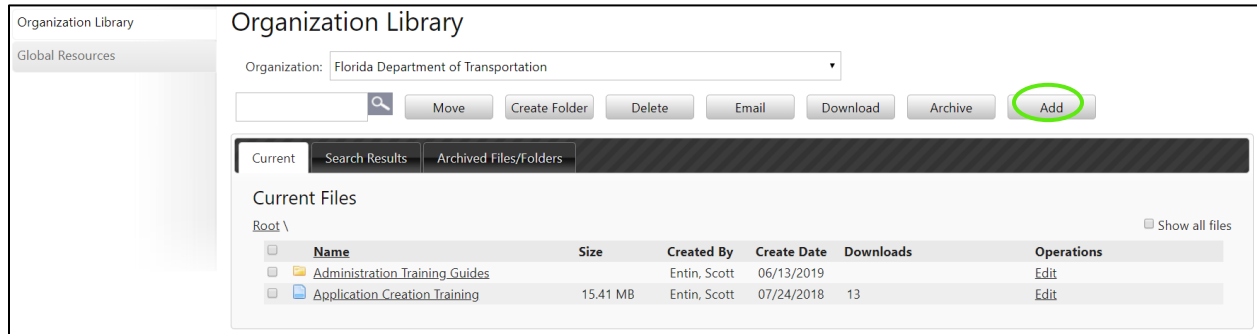
Global Resources is where the state will provide documentation and **Panther** will provide additional learning tools for the Module.

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

a. Select **Organization Library**



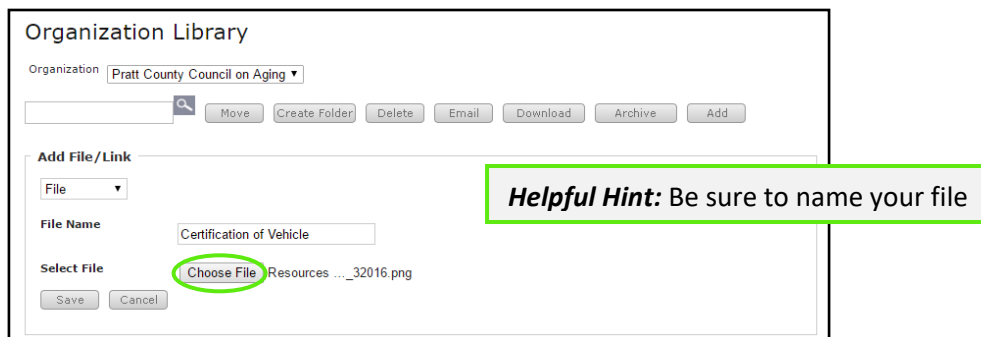
b. Select the **Add** button



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



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



e. Select the **Save** button

Add File/Link

File

File Name: FY2016 Project Plan

Select File: Choose File No file chosen

Save Cancel

Your document is now loaded:

Organization Library

Organization: Florida Department of Transportation

Move Create Folder Delete Email Download Archive Add

Create Folder

Folder Name:

Save Cancel

Current Search Results Archived Files/Folders

Current Files

Root \ Show all files

Name	Size	Created By	Create Date	Downloads	Operations
Application Creation Training	15.41 MB	Entin, Scott	07/24/2018	21	Edit

3) How to create a folder:

a) Select **Create Folder**

Organization Library

Organization: Florida Department of Transportation

Move Create Folder Delete Email Download Archive Add

Create Folder

Folder Name:

Save Cancel

Current Search Results Archived Files/Folders

Current Files

Root \ Show all files

Name	Size	Created By	Create Date	Downloads	Operations
Application Creation Training	15.41 MB	Entin, Scott	07/24/2018	21	Edit

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

The screenshot shows the 'Organization Library' interface for the 'Florida Department of Transportation'. A 'Create Folder' dialog is open, with 'Procurement' entered in the 'Folder Name' field. The 'Save' button is highlighted with a green circle. Below the dialog, the 'Current Files' table is visible, showing a file named 'Application Creation Training'.

Name	Size	Created By	Create Date	Downloads	Operations
Application Creation Training	15.41 MB	Entin, Scott	07/24/2018	21	Edit

Your folder is now created:

The screenshot shows the 'Organization Library' interface with the 'Procurement' folder now listed in the 'Current Files' table. A green arrow points to the 'Procurement' folder name. A green-bordered box contains the following text: **Helpful Hint:** to add a document to your folder, select the folder and repeat the above steps for adding a document.

Name	Size	Created By	Create Date	Downloads	Operations
Procurement		Entin, Scott			
Application Creation Training	15.41 MB	Entin, Scott			

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

The screenshot shows the 'Organization Library' interface with 'Global Resources' selected in the left sidebar. The 'Current Files' table displays two files: 'Administration Training Guides' and 'Application Creation Training'.

Name	Size	Created By	Create Date	Downloads	Operations
Administration Training Guides		Entin, Scott	06/13/2019		Edit
Application Creation Training	15.41 MB	Entin, Scott	07/24/2018	13	Edit

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**



2) Select **Generate**

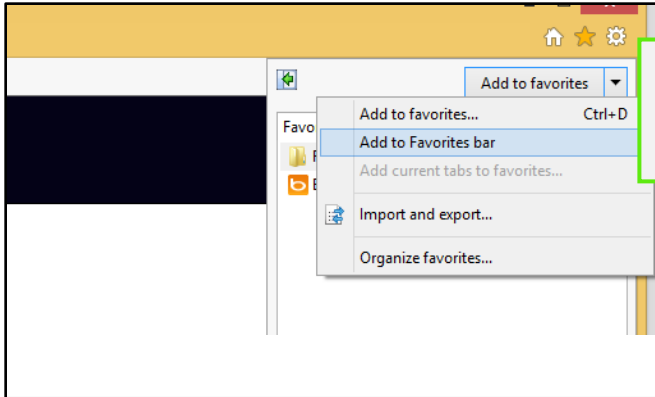
Reports

Report Listing

Applications & Review	
Organization Applications	<input type="button" value="Generate"/>
Contracts	
Contracts	<input type="button" value="Generate"/>
Disaster Preparedness	
Disaster Report	<input type="button" value="Generate"/>
Equipment	
Equipment	<input type="button" value="Generate"/>
Grants	
Program of Projects (POP) Export	<input type="button" value="Generate"/>
Department of Labor (DOL) Export	<input type="button" value="Generate"/>
Grant Exports	<input type="button" value="Generate"/>
Pre-Program of Projects (POP) Export	<input type="button" value="Generate"/>
Inventory	
Revenue Vehicles	<input type="button" value="Generate"/>
Facilities	<input type="button" value="Generate"/>
Invoices	
Invoices	<input type="button" value="Generate"/>
Organizations	
Organizations	<input type="button" value="Generate"/>
Oversight	
Oversight Findings Report	<input type="button" value="Generate"/>
Oversight Aging Report	<input type="button" value="Generate"/>

Section 11: Additional Information

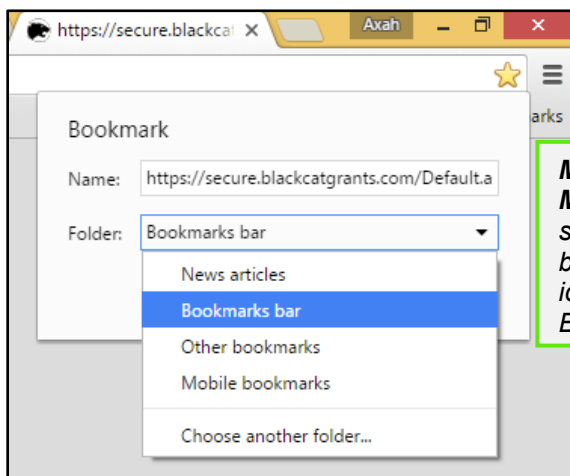
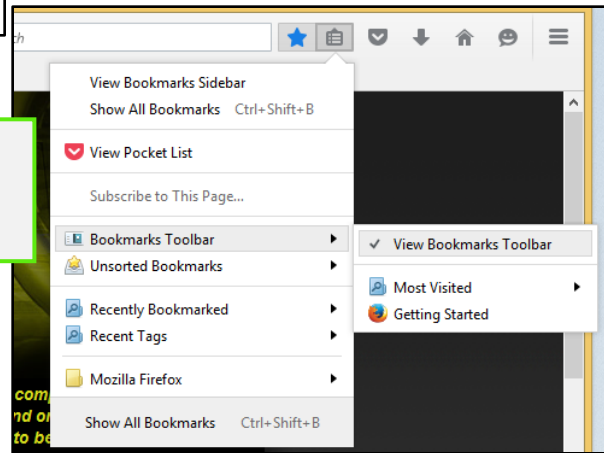
Website Bookmarking: We recommend bookmarking the website (URL) to allow easy access when returning in the future. Below is how to complete this task in each internet browser.



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'.

