FTA Integrating TAM Data into the NTD Transcript
April 2, 2024

Tamalynn Kennedy: Again, we'll get started in just a few moments. Thanks for joining us. Okay, I think we're ready to begin. I want to welcome everyone. Good afternoon or good morning, depending on where you're joining us from. This is the webinar, Integrating TAM Data into National Transit Database or NTD Reporting. My name is Tamalynn Kennedy, and I'm the TAM Program Manager for the FTA. Next slide, please. I first want to cover a few of the logistics. The presentation will be available on our website. It's not up now, but it will be available shortly after the presentation. You can go to our website at transit.dot.gov forward slash TAM and look for it under “TAM Events”. This webinar is being recorded and it will be posted to the FTA TAM website as well. I want to make clear that questions should be submitted using the Q&A feature. The chat feature will not be monitored for questions. Again, and some questions may not get published due to time constraints. Finally, closed captioning is available by clicking “Show captions,” then selecting “View full transcript”. Next slide. I would like to introduce our first speaker. Chelsea Champlin is the Program Manager for the FTA's National Transit Database, where she worked with an awesome team to collect, validate, and publish data about the nation's transit systems. Over the last decade, she has supported public programs and federal executives across the U.S. Department of Transportation on topics as diverse as data analytics, business operations, process improvement, and organizational performance. I will now turn the webinar over to Chelsea. Thank you.

Chelsea Champlin: Hello, everyone. Good afternoon. Good morning. Thanks so much for joining us today and thanks for that introduction, Tamalynn. I am thrilled to see folks in the chat already introducing themselves and saying where they're joining from. If you haven't done so far, I would love to know your name, your organization, and your role, and geography is cool, too. So where are you joining us from today? As Tamalynn shared, my name is Chelsea Champlin. I work at the Federal Transit Administration. I'm based out of Washington, D.C. and I manage the National Transit Database or NTD program. So to start today, I want to take a few minutes to talk about what the NTD program is, share some changes and updates to the program and the reporting requirements, and hopefully share some tips and tricks for effective reporting. Then we'll turn things over to Mitchell. So I am seeing folks from across the U.S., which is really awesome. Looks like we've got about 250 folks in here. I will just say, “Welcome. Again, thank you for sharing.” All right. Now we're switching your attention from the chat pod to our first poll, because I am curious to know what you already know about the National Transit Database. How familiar are you since the first time you heard that acronym? Maybe you know that your agency-- your transit agency is required to report, but you don't have a role there. You might be your agency's NTD report contact, or maybe you're a data user. Seeing about 60% participation, and it looks like we have a good mix of folks who are aware that NTD is a thing, or they are the NTD reporter. A couple folks, it's your first time. Not a problem. Okay. Thank you for sharing. So I will be brief here. I just got a couple slides on what the NTD is. But this program was established in the 1970s to be a comprehensive source of information on the financial, operating, and asset condition information from transit systems across the country. So any transit agency or organization that operates public transportation and receives their benefits from FTA funds are required by statute to report to the NTD. This amounts to around 3,000 separate organizations of varying size and service. It includes previous recipients who have continuing grant requirements, and we've also got some voluntary reporters who could become eligible for this funding in the future. The requirements for recipients to report to NTD depend on the type of funding received and the type and amount of service provided. So how is the data used? The data that we collect is used for peer benchmarking and performance monitoring, for policy analysis and research. We use it to report to Congress, and, what I assume is everyone's favorite reason, we use it to allocate federal funds to transit agencies. Now, I think Tamalynn even included this in my introduction, but when I talk about NTD, and we can go to the next slide-- sorry about that-- I always talk about collection, validation, and publication. Those are the three sort of arms of NTD. If you're an NTD reporter, you're familiar with these. The first one is that agency contacts are given access to our reporting system, our front-end interface for collecting data. So all of our annual, monthly, safety and security reports are collected through this system using a series of fillable forms. Now, again, depending on the type of reporter and the reporter cycle, a user will be prompted to fill out a series of forms to collect required service, operational, financial, and asset data. The second piece, validation, is a very key component of the NTD. Validation is conducted both automatically by the system itself, as well as manually by an agency's validation analyst. So every reporting agency is assigned a validation analyst who can answer questions, provide policy guidance, give technical assistance with the system itself, and will work with an agency to validate the data that's submitted. So, as I mentioned, validation can come from checks between related data on separate forms. It might compare to a prior year, the data that you submitted previously, or against an expected range of values. So when we have questions about the data that's submitted during the validation process, there's two paths forward, really. The agency can either revise the data to reflect accurate information in case there was an error or a mistake, or you can provide an explanation or documentation to establish accuracy of the data. So I want to reassure you, for those of you who are familiar with this, all annual NTD reports go through this process. It's really important that we conduct these checks so that we can ensure that submitted data meets the requirements, it's accurate, and we can achieve a high level of data integrity. Now the last piece here on publication, everything that we collect from you all is shared back out to those interested parties-- your peers, the public, Congress, academia-- after we clean and compile it. These reports are provided on our website. There's dozens of data products, including data tables and database files, time series, and the single summary of transit. On the next slide, I want to share a little bit about updates that we've had over the last year. Now, the way that the timeline works, the report year 2023 started in September, so, again, if you're familiar with NTD reporting, this actually won't be new. I'm hoping to only talk about the new requirements a few more times until we move on to the next big thing. But I wanted to cover it briefly to make folks aware, especially if you're less familiar with NTD. Big news out of the 2022 report year is that we saw changes come out of the 2020 census reflected. That affects, you know, reporting and our formula apportionments. We do have some resources online. They're still available on our website to review these changes. Most notably, I would say, is the FTA census map. So you can see where those boundaries that were drawn by census have shifted. For safety and security reporting out of the bipartisan infrastructure law, we're now required to collect information about all assaults on transit workers, both physical and non-physical, regardless of injury. That was a big change. The third one listed here on geography, also out of the bipartisan infrastructure law, we're now required to collect geographic service area coverage. FTA is implementing this requirement in two ways. For all reporters with fixed or deviated fixed route service, we're requiring links to your general transit feed specification or GTFS; and for demand response services, we're asking for information about this geographic coverage through a series of questions, a 10-question survey. The next item on here for weekly reference reporting, this is about unlinked passenger trips and vehicle revenue miles. So we are taking a sample of 400 modes of service that are submitting one week of this data on a monthly basis. So sample agencies, this is old news for them, too. They've been notified and they're reporting for a three-year period. If you haven't heard from us on this, you won't, at least for the next three years or so. The last two feel easier somehow than the previous ones, but on emergency contact, we're now collecting this to facilitate communication with FTA in the case of an emergency and we're asking agencies to certify or update that on an annual basis. Last, but not least, previously we only required fuel type for vehicle inventory from all full reporters, and now we're requesting it from everyone. This is used to track progress towards fleet electrification. The next area I want to talk about is program improvements. So in the NTD program, I feel like in my day-to-day or week-to-week, that's what my focus is on. This is a federal requirement, so how can we make the interface easier, or the data products more searchable or findable? Things like that. So I just wanted to highlight a couple of those that have happened over the last few years that I think are interesting and relevant maybe to this group. The first is that we've expanded and diversified our NTD training offerings, so that's in partnership with the National Transit Institute, beyond just courses for full urban reporters. We now have courses available for rural and tribal reporters, so, again, specific to those reporting requirements, as well as safety and security training that covers both rail and non-rail modes. We are exploring varying offerings between virtual and in-person in this post-COVID world, right? It used to be all in-person, then it was all virtual. My personal preference is sort of hybrid, is to meet people where they are and their needs and offer both going forward. But I certainly welcome your feedback there. I'd love to hear from folks how the training is working for you. The next item on our annual data tables, these are now accessible in an open data and machine-readable format, including the metadata on DOT's Data Hub. This is really exciting for more advanced users because you can stack technologies. You can connect to an API and use other tools like ArcGIS, so it makes the data that we have online a little bit more usable than just a flat Excel file. The data products also use census urban area codes so they're more interoperable with other datasets, right? You can connect or link or merge files based on that value. The third piece here, I feel like in some sense it doesn't feel super interesting, but it's very exciting to me because I do hear from reporters about the challenges of validation. So, as part of the operations and maintenance of the system itself, we're constantly working to enhance the user experience and reduce the burden of reporting, right? How can we make it easier? And I know I've heard from reporters myself that the validation process can be challenging. In terms of our operations and maintenance, we're prior-- excuse me-- prioritizing improvements that refine the checks used for data validation. The last one on here I wanted to highlight because it's specific to the Transit Asset Management Program and asset reporting, two form-specific changes. On the A15, there's now a Google API lookup capability to find latitude and longitude for facilities and that'll auto-populate on the form based on an address. And on the A30, the current year “average lifetime miles” is now auto-calculated when “miles this year” is entered. We have additional updates coming. In fact, I'm wondering if this has gone into production over the last couple of weeks, but we want to include showing previous year mileage data on the form and add a recalculate button for ALM. On all forms, there's a button to “View previous year data," allowing users to view what was reported in the previous year for easy comparison. On the next slide, I just wanted to point out, and I think part of the reason that I'm here in partnership with Tamalyn and the TAM program is that the National Transit Database and Transit Asset Management are connected. Much of the data collected through the NTD includes transit asset information. There's transit asset-- excuse me-- asset forms. The A10, 15, 20, 30, 35, and 90. They tell us information about the age and condition of an agency's vehicles and facilities. And of course, these are federal requirements. All agencies must comply with both NTD reporting requirements and TAM regulations. I think a resource available to folks on this call is to access the information online, the asset information that we've collected, and consider how this information from peer agencies could inform your TAM plan. You can evaluate your performance targets against industry benchmarks for maybe more realistic or achievable goals. You can analyze past capital and operating expenditures again by peer agencies to understand investment patterns and priorities. My last line of content here, when we move forward, we're going to start with a poll, because this is the biggest takeaway that I have for you. Let's see. I'm curious, do your asset people talk to the people who complete the annual report? This answer obviously will be related to your question earlier, how you responded, your role in the organization, your familiarity with NTD. Maybe you're an asset manager and you're not involved. Someone else over in finance does NTD reporting. They ask me for data once a year, we don't really interact otherwise. Maybe it's more collaborative. There's communication, but, asset managers are not involved. Maybe you work together to complete the reporting or maybe in some cases-- I've heard of this, too-- it's the same person. And I'm just seeing… we've got about 66% of folks responding and more than half work together. That brings me great joy. That's what we want to hear. I lost my notes here. Give me just a moment. All right. So, the big takeaway here is to make sure your asset people talk to your NTD people. You can either-- if you're the asset person, you can ask to be a part of the process or vice versa. If you're the NTD person, invite them to be part of the process. Now the items I have here on the slide are a bit more generic, but I think they're useful to point out just from my perspective: some strategies, some things to think about for effective NTD reporting. The first one is understand the requirements. Now I am not suggesting that anyone read the manual front to back or the uniform system of accounts. That said, of course, I reference them all the time. They do contain everything you need to know about meeting NTD requirements. But I bring this up as a point, because if something is unclear or if reporting gets frustrating, I hope you'll reach out to us. The second one is develop a data collection and management system. Knowing that reporting requirements will be around as long as federal funding is, being organized and systematic about both collecting and maintaining data will make things easier each time the deadlines come around. Opportunities like this webinar, the TAM Peer Exchanges, are great ways to learn about and share best practices. The third one is document and develop standard operating procedures. So in line with number two, documentation, I'm like the documentation queen I feel like in our team, it helps me immensely. It helps others immensely when it comes to reporting. Questions like "What were the data sources? Which teams did you talk to gather the data? How did you collect it or calculate it?" This is about nailing down a step-by-step process to reference internally and reuse. The fourth one is use technology and automation where appropriate and applicable. So what technology or reporting tools are available in-house or, if resources allow, can you seek out to incorporate into your reporting? And I think the word automation can sound like a big deal, but even in small ways, right? Like using a formula and an Excel spreadsheet can help you make the process more efficient and also reduce any manual errors. The last one, which is probably the most important from my perspective is to leverage available resources. For NTD, your number-one resource is your validation analyst. Their job is to answer your questions, clear roadblocks, and validate the data you've entered. So if you have your data ready to go, you're working on your report, and you spend more than five minutes fighting to enter a value in a field, for example, that's too much. Get in touch with us so that we can clear the path. Additionally, all of NTD's prior webinars are recorded and available online. We've got plenty more coming down the pike, and that's in addition to those full courses I referenced through the National Transit Institute. If there's an area of reporting that's still unclear, or you'd like specific guidance, I hope you'll let us know. My job is to find ways to make this process easier for reporters while still meeting the federal mandate. I will close. The last slide here is “Resources and References”. This includes our NTD website, the NTI training that I referenced, and then our contact information for your reference. But I thank you very much for listening, and look forward to chatting with you all through question and answer.

Tamalynn Kennedy: Thank you, Chelsea. I think what we really heard from you is that, again, if you spend more than five minutes on a data validation or a question, to get in touch with the NTD program support and to… just reach out to them, and they'll be happy to assist you. Secondly, what we also heard was that at least 50% of us are working in conjunction with those who do the NTD reporting, and that's really what we're trying to talk about here, is how to integrate that TAM data analysis into those who do the NTD reporting. A lot of times it is someone, maybe in a finance position, and we really work closely with them to make sure that the asset manager or the asset team is not circumvented from that process. So, to talk a little bit more about a specific agency process, we're going to turn it over to Mitchell Rose, who is the Operating Budget Specialist at the Southeastern Pennsylvania Transportation Authority, or SEPTA. And he's going to discuss how SEPTA integrates their TAM data into NTD reporting. And I will now turn it over to Mitchell. Oh, Mitchell, sorry, let me circumvent you for a second. I do want to note, put all questions in the Q&A pod. If you have your hand raised, we're not going to answer raised hands, so you should put any question in the Q&A pod. Okay. Thank you. Sorry, Mitchell. Go ahead.

Mitchell Rose: Right, thanks Tamalynn. As she was saying, I work for the Southeastern Pennsylvania Transportation Authority, or SEPTA. We are one of the largest authorities in the country. And in addition to working here, I also teach the NTD course that Chelsea was mentioning. I'm one of the teachers and I actually have a class here next week, but I also would strongly recommend new people taking that class, it's definitely helpful. All right, we can go to the next slide. And the next one. Okay. I'm just going to give you some brief information about SEPTA. We were established in 1964 and it was essentially cobbling together a lot of different public transportation companies that were privately held, but then went bankrupt, so all of the assets were kind of put together into SEPTA. So one of the issues that we have is that we're operating seven different modes and types of service, we have multiple different types of vehicles, there's track that we have to maintain, different types of stations, and there's a large area that has to be covered. And also, the other thing is that all of this has been in place since the 1800s, so there are bridges or other guideway that we have to maintain that is over a hundred years old. We have reported that we have over $6 billion in assets, which I'm seeing that we're going to probably spend twice that amount over the next 10 or so years to upgrade our assets, including new vehicles and updates to infrastructure. Our operating budget is going to be over $1.7 billion. And this past fiscal year, we had 197 million riders. That's actually down from about 300 million pre-pandemic, but we're working our way back. Okay, so go to the next slide. Right, so this is the NTD process and SEPTA's fiscal year starts in July 1st and ends June 30th. So we essentially follow the same guideline that Chelsea had mentioned that the FTA uses, in terms of collection, validation, and publication within our organization. So in terms of the collection process, in May we put out a request for information and then start getting that information in July and August. Then we do an internal validation and analysis process in that time between July and September, just to compare the numbers coming in this year to last year, seeing what changes were. That's one thing that I always try to emphasize to people in my classes, don't wait till the last minute to try to validate information, or don't wait for the system to open up to get issues, and then send it back. The more time you give yourself the easier it will be, so you're not jamming everything into those last couple of weeks before the report is due. So as a June 30th fiscal year, our system usually opens in September and then we have to submit our report. The original submission by October. Okay. Next slide. Right. This is one of the forms that I will send out in May. This is about half of the preparers that I would deal with. I cut it down just for the size, but in this-- this gives everyone a pretty easy chance to look and find their name right away. They can see what forms they're responsible for, which of the lines in those forms, as well as what modes and types of service that they're responsible for, and then we provide a due date for that. This is definitely helpful where each of the people that we deal with, they can just easily find what responsibilities they have. Being a large agency, we have multiple people that we would have to deal with for the asset modules, which you can see the different forms on here. We can go to the next slide, please. In the next few slides, I'm just going to show you what some of these forms look like, if you're not familiar with them, and how I coordinate that with our asset managers. So with the A10 form, this doesn't specifically tie into the TAM, but it does tie in with the A15, where all of your stations and maintenance facilities that you're reporting on the A15-- when you add them up, those should be equaling what you have here on your A10 form. If they don't equal, then you'll get an issue on that. If you can go to the next slide, please. One of the things that's really important is to have backup data, or backup information, for each of your forms. I think this is especially important when there's transitions. If you have new people coming in that they can, instead of just seeing that we have 76 ADA-compliant commuter rail stations, this information gives you all the detail as to what those stations are and all the details within them. Okay. Next slide. That's the same thing here with the maintenance facilities. We can break down what the size are and where they're located. Okay. Next slide, please. Sorry about that. Okay. Now with the A15 form, this is part of the TAM. This is something that you definitely have to work with directly with your transit asset people. Now, once you have all the information in-- so one thing is that your assets aren't going to change very much from year to year. But one thing that has to get updated, at least every four years, is the condition assessment, so you'll see that in the fifth column there, and what the date was when that assessment was completed. That's one thing that you definitely need to keep track of year-in/year-out, just to make sure that your condition assessments are up to date. Also, if you get any new facilities, or if you close facilities, those are things that you'll also have to look out for. Next slide. Now, this is the A20 form, and you'll see this looks a little bit different. And this is an export out of the NTD system. Now, one of the capabilities that you have with the NTD reporting is an import-export functionality. All the information that is input into NTD previously, that will be there for your current year reporting. You can click “Export,” it will bring all that information into an Excel file, and then if you have to make any changes, you can just make those changes here and upload it back up into NTD. All right. Next slide. This is another example of the backup and the numbers that you saw on the previous screen. It's hard for someone just to look at that and to see, “Okay, there's 590 miles of commuter rail track,” but having backup where you can break down where the beginning and end points for each of the segments and what the distance is, this makes it a lot easier for new people coming in and they can just look at the backup and see how that matches with what's being reported. Okay, next slide. Now, one of the things I also have done for a while is creating spreadsheets, and I was even doing this even before there was the export-import feature. But what I found helpful to this is that I can easily compare this year's numbers to last year's numbers. If there are any differences, I can have formulas that point those out. And that's usually where a lot of issues come up that you have either new data or information that is divergent from the previous year, and having spreadsheets on the side can really help. It's also helpful once the information comes in the first two months after your fiscal year ends, so for me, it's July and August. I don't have to wait for the system to open up to be able to download the data. I already have it in my spreadsheets and I can make comparisons and get all that work done before we even have to do any input of data. Another thing that I've found helpful on the A30 forms is the mileage input. All the other information that you'll see here on the A30 form will already be there, but you would have to input all the mileage for the current year. So I've found that having the import-export is very helpful there. Otherwise, if you have multiple lines, like you see here on this form, if you're doing everything in the system, you have to pretty much do it one line at a time, and with this, you can just input all of the mileage data and then export it back in. Okay, next slide. For the A35, this is similar to all the other forms here, that the assets that you reported last year are going to automatically populate, but you have to make sure that you're looking out for the information that is being-- like, the assets that are being replaced or new information, you want to make sure that you're updating the useful life benchmark if that has to be done. Okay. Next slide. In essence, all the asset forms roll up into the A90 form. And for the most part, you're not inputting data here into the A90, you'll have to put in information for the new target dates for the upcoming year. But all the information that you put in for the A15, A20, A30, A35, the A90 form will show you what percentage of your assets either are at a certain level with the useful life benchmark, or with the assets for the facilities, there's a scale of one to five, and this will show you what percentage of those are meeting the threshold of three or greater. But everything on the asset forms essentially culminate into this A90 form. All right. Next slide. That's essentially the things that I wanted to go over now with the integrating between the finance department, where I've worked, and the assets, for the most part, we're working with them not necessarily throughout the year, but from the point that we're requesting information to the internal validation, the analysis. If there are any new assets, if there's changes to assets, for example, if we're making our stations ADA-compliant, that we're adding elevators or escalators, all that information has to be communicated and updated. Lastly, if there are any issues that we would have to work out, whether it's before submission, or as a validation aspect after submission, we'll work directly with the asset people just to make sure that all of our information is correct and being reported properly.

Tamalynn Kennedy: Thank you, Mitchell. What I want to clarify is what Mitchell was showing you is actually-- because we had to do a static webinar, is that a lot of these are Excel templates that SEPTA has built themselves to mirror the NTD reporting. And if you'd like to see some of those during the Q&A pod, we'd be happy to share them. I can share my screen and share those templates with you as a reference. But I just wanted to make clear that just because… they weren't exact-- they weren't exports-- they weren't all exports from the NTD data system, they were templates that SEPTA uses to create and submit their data to the NTD system.

Mitchell Rose: Just one thing, Tamalynn. The Excel files that are being exported and imported, you cannot input any data outside of the specific cells that need information for the NTD. So, if you're trying to do calculations on the side, you would have to have a separate spreadsheet that you would do the calculations, whether you're comparing percentage changes from one year to the next, et cetera. So, I found it very helpful to have those side spreadsheets where we can do comparisons and analysis from one year to the next.

Tamalynn Kennedy: Thank you for that clarification. Yes. All right. Now we'll go-- thank you, Mitchell. Thank you, Chelsea, we're going to go into the Q&A section. Again, if you have questions for Chelsea or Mitchell, please put them in the Q&A pod, not the chat pod, and those will be monitored for questions. Some questions might not get published due to time constraints. Let me start checking the Q&A pod. Right up top, we have some for Chelsea because those came in first. “Chelsea, is there any plan to include API to extract data from the NTD?”

Chelsea Champlin: So one of the exciting program improvements that I spoke to was leveraging an open data platform that DOT hosts. It's through Socrata. I don't know if you have more specifics about including API, but the functionality of that platform allows people to connect with other APIs, but it's also super user-friendly. I think I'll actually put an example in the chat. If you haven't played around with this to see in terms of querying data, visualizing data, aggregating data, it's a lot more user-friendly. I don't think that answers your question, but if you have more specifics, you can reach out to me.

Tamalynn Kennedy: Another question for Chelsea. This is from a small service reporter, “Is there still something you have available for them, for a small reporter?” I think this is in regard to education and training.

Chelsea Champlin: Yeah. If you have reduced reporting requirements, you could still-- it's kind of funny, we organize things by module and then by reporter type. So, you would still benefit from either the urban or the rural training courses. I don't think we have anything specific for a small service, but I wonder, Mitchell, as an instructor, maybe there's something historically that I don't know about.

Tamalynn Kennedy: Well, let me speak to Mitchell, too, because we've had a lot of questions for you, Mitchell. So, I'm just going to jump in and say that a lot of people want to know about what class you teach, and if you could give specifics on that.

Mitchell Rose: Yes, this is the National Transit Database class that is taught every year. Usually, we start teaching the classes in August and they go through April. So next week is probably-- I think it's the last course for this period. Then, essentially, over the summer, we evaluate the course and see what new things are coming in and then we refresh it for the upcoming year. So new classes will be available in

August, if you go to the NTI website, that should have the information for upcoming classes. As Chelsea had mentioned, actually for the past four years, all of our classes have been virtual, but we are starting to have in-person classes, I think there was one in San Francisco last month and then Houston. This last one is in Philadelphia next week, and I've always found it to be really helpful to do in person. The online is definitely very effective as well, but I feel that we've missed out on getting to meet other people, be able to have face-to-face, talk about what issues that you're dealing with, and I've always found that to be very helpful, to have that back-and-forth.

Tamalynn Kennedy: Another question is for Chelsea, “You mentioned geographic information, linking by address for facilities. Can you speak to linear assets, such as rail lines and catenary? Will those be geographically enabled in NTD as well?”

Chelsea Champlin: So GTFS gets at some of this, in that it's routes and stops and schedules, so that could meet some of the need, but there's no plans at this time. We recognize-- I recognize that we could leverage the address data linked to reportable segments, right? We have folks tell us the segments that they're providing service on, but that's legacy geospatial data. So, for more of a longer-term solution, I think, that would be an increased reporting burden. We're sensitive to that fact. I think it's something that's worth exploring in the future, again with the caveat being that, as an interim solution, we do have some of that data through GTFS.

Tamalynn Kennedy: Thank you. Mitchell, a question for you, “Are you saying that you import the forms into the NTD portal versus manually updating them?”

Mitchell Rose: Okay. Let's see. The example that I was giving and, essentially, any form that you're exporting, you can update the information in that form in Excel and then reload it back into the NTD site. I've found that with, for example, the A30, instead of going into each line where you have to put in the mileage for that year, and then I go to the next line, and you have to open up each line for that fleet, I find it just easier-- and, actually, I already have my spreadsheet set up, so it's just a matter of even just copying and pasting, as long as I’ve make sure that all the lines are in the right place. Then it's just a matter of uploading it. So, yeah, you can do that. I mean, still you do have to input data, but it's-- whether you're doing it in Excel or in the system, it's-- I've found it to be easier to do things in Excel and then upload it.

<overlapping conversation>

Tamalynn Kennedy: Is there one particular-- oh, go ahead, Mitchell.

Mitchell Rose: I think it was in 2018 when we first changed the asset module to include these other forms, and I think it was on the A15 where, at that point, I think that TAM had the modes listed. It might have been like “commuter rail-CR”. Whereas in the NTD, it was “CR-commuter rail”. And at that point, I didn't know that, so I think the first time I uploaded the information into the form-- well, the first few times, it just wasn't accepting it. But then I think I had 1,700 issues, but a lot of those were just whether things were in the right format. So once you get all that down, then it's a lot easier.

Tamalynn Kennedy: Mitchell, was there any particular form you'd like us to walk through. I'd be happy to share my screen and show those forms.

Mitchell Rose: Well, was there a question with that or...?

Tamalynn Kennedy: No. If there was one that you thought was particularly beneficial that you helped build out, I'm happy to share that, but otherwise, I'll leave it for the chat, if people want to see a particular form then. Please put that in the Q&A pod, if you'd like to see a particular form. A couple questions for FTA. "Other than updating the condition assessment annually for FTA, are the TAM plans required to be completed every year or only at the triennial audit?" Well, the other annual requirements are that you complete the narrative for the A90 and that you complete the A90, which is the performance and measures target. Those are the other annual reporting requirements, that you share those with your reporting partners, your NPOs, your state DOTs, or other reporting partners that you might have. Otherwise, TAM plans, you're correct, those only need to be completed every once every four years. Let me look here for additional questions. Chelsea, I think this is for you. "Would the FTA consider providing an option to unlock the Excel templates to allow for easier editing working with the data?"

Chelsea Champlin: Thank you. I will admit, I'm not sure what you mean by “unlocked”. We have the option to import and export using Excel and then our data products-- several of them are in Excel, but I don't think-- I hope none of them are locked files, so I might need more information if the person is available either in chat or--?

Mitchell Rose: Actually, I can give information about that. I know-- and I was kind of alluding to it before, that there's only certain cells where you can input information. Any other cells are blocked from input. So I don't know if they're trying to see if they can do calculations on the side, or something like that, but I think the issue is that when it's imported back in, any other information would probably get the system confused. So I think they have to lock those other cells just so the system doesn't pick up stuff it's not supposed to.

Chelsea Champlin: Thank you for that background, Mitchell. Yeah, I would say I think that's accurate. For the sake of the template, right, it's reading cell to cell, in terms of pulling that information into the system. If you want to do something on your own, right, if you want to use the same template to run a calculation or something, if you want it for your own reference, feel free to reach out to me and I'll see what we can do. Knowing what Mitchell just said, that if you then try-- if you manipulate the cells, you're not supposed to manipulate, and then you try to upload it, it might not work.

Tamalynn Kennedy: Thank you. This is not related to the asset information modules, but this is for Chelsea. “My team uses NTD as part of safety and security projects tasks on a regular basis. Are data for operator assaults currently available?”

Chelsea Champlin: They are currently available. I can share a link, pull something up, and bring it to the chat pod here. But we collect safety and security data-- or I should say we publish it on a monthly basis. So for full reporters, we've got that-- Not in real time, it's delayed, but more real time. Then for our reduced reporters, rural or tribal, that is collected on an annual basis. So, either way, all of that is online, depending on what you're looking for, you'll have more recent or more latent data. I'll add a link in the chat.

Tamalynn Kennedy: Thank you. I think this question is for both of you, and I'm going to turn to Mitchell first. “For someone new to transit, what would be a good starting point for assistance? I understand there are pieces of the NTD that I need to report, but I do not know what those are or where to start. Thank you.”

Mitchell Rose: Okay, well, I think Chelsea did mention a couple of things. One is the program manual, which is definitely really helpful in terms of all the information on reporting requirements. Talking to your analyst, also, is pretty much essential. And they can-- they're there to help you walk you through the process if you're new to it. Yeah, I mean, you would have to talk to your analyst if you're starting from scratch, I would say. Do you want to add to that, Chelsea?

Chelsea Champlin: I think that's pretty good coverage. Thanks, Mitchell.

Tamalynn Kennedy: And Chelsea, you put a lot of resources-- again, this slide deck will be available from the TAM website, and the recording will be available shortly, within a week or so, on the TAM website. But you put in a lot of starting points, too, for resources in your PowerPoint that people can refer to as well. And I think… I'm going to answer a question about TERM Lite. “Can you please share with us if the Microsoft Access-based TERM Lite software is going to be upgraded to something more capable of being integrated with an agency's maintenance management system? There are several limitations with access that could be beneficial if the software was upgraded to an open-source type database.” I'm just going to take that one and answer that and say, yes, we are currently looking at how to upgrade TERM Lite, that process has just started. We do recognize the limitations to TERM Lite, and we're looking at how it can be more fully integrated with reporting. So the answer is that, yes, it's in the works, but will it be a quick turnaround? It will not. So if you're looking for something this year, it will not happen this year, but it is something that is being developed at this point. I think we have time for one more question. Let me just quickly look through to see if there's something that both panelists can answer before we go to the last slides. This is, I think, for both Chelsea and Mitchell. “Are there any recommendations or best practices for MPOs? Our MPO currently uses TAM plan data for each agency in the region to aggregate the percent of assets in each category beyond the ULB and instead of target biannually.” I just wondered if either of you could speak just generally to working with MPOs. Maybe I'll start with Mitchell.

Mitchell Rose: Okay. Well, I personally don't really deal with the MPO here. I think that people in our capital budget department, they probably deal with more of that. So, yeah, I can't really answer that, sorry.

Chelsea Champlin: You're not going to like my answer either, Tamalynn.

Tamalynn Kennedy: Oh, no!

<laughter>

Chelsea Champlin: I don't think I shared at the beginning, and I'll keep this short, but I have not been in this role very long, and so a lot of my perspective and my understanding is through the lens of the NTD program, right? I'm still learning about how these things interconnect. And from the NTD program perspective, we have very few MPO-specific reporters. I have not interacted a lot with MPOs, and I'm going to take this away as a lesson for me to learn more, because, obviously, it would be great to have some tips and tricks to share, but I don't today. I apologize.

Tamalynn Kennedy: I appreciate both of you fielding that off-the-wall question then. Let's go to the next slide before we wrap up here. Just in the final moments here, I want to announce an upcoming discussion forum. The topic will be on TAM performance targets, specifically different types of performance targets, whether you set them as aspirational goals, or if you set them as realistic data-driven goals, whether you set targets for regional capabilities, different regions. But that will be on Wednesday, May 29th, from 1:00 o'clock to 2:30 Eastern. The time is set. So sign up if you'd like to receive correspondence from the TAM program announcing that peer learning offering. When you click the sign up, you'll want to subscribe to either the TAM or the SGR subscriber group. Next slide. I thank you so much for your attention and for participating today. I think it was a great webinar. We will put in the chat really quickly, before we leave the link to sign up for the TAM SGR updates, but thank you so much, Chelsea and Mitchell. Thank you, everyone, for your attendance. We'll close now. Thank you.