Update to the Application Format to Include Executive Summary Questions.

May 4, 2017 (Afternoon Session) Hosted by the Office of Program Management

>>Marci Malaster: Hello, everyone. Good afternoon. It is 2:00 p.m. I will talk and chat for a little bit before people log on to the session. Today's session is the Executive Summary Questions, update to the terms application format. My name is Marci Malaster and I am in the Office of Program Management. Today's session will be more of a how to end not so much on the guidance side. Just some other housekeeping bits of information. We are captioning this session. If you go over to the far right hand side, you will see a menu. If this is something you don't want to see it you can, I believe, hide it for yourself and make your screen personally bigger. You may also find over in the top right-hand corner 4 little arrows that are pointing outward and you can make the session full screen. There is a file pod down in the bottom left-hand corner. There are 2, the first being the Executive Summary question which is the presentation and the second which is a tip sheet on what you can expect based on the type of application you are working on or Post-award action and whether or not the information is editable or not. We will have a few other documents that will be posted after the session concludes, including the recording of this presentation. I consider these files draft and whatever is posted to the TrAMS page is going to be the final for your use. And I will visit that page so, you know, exactly where to go in a few moments. I do have everyone on listen only mode. I will stop and take questions in the checked box. I will cover it up for a little bit to get through a section of the slides and then open it up for some questions. And with that, and of course, my next slide would tell me that I need to hit record which I have not done yet. So now that we are recording, once again, this is the second session today for the update to the Executive Summary application format. So I am so glad that I added that extra slide. All right, so the outline for today's session is to do an overview of the changes that incorporate the Executive Summary Questions into the application format. Hopefully folks are aware of these questions. They are generally referred to as the required application information that we request you put in the Executive Summary, manually typing that in. We will also discuss and demonstrate what you can expect to see once you are in TrAMS after the deployment of this enhancement and what you can see and do during the application and award action, review new application or a Post-award action. And then, just a friendly reminder about where to find information about TrAMS, including this particular session.

***** So we consider this a major change to the system. We've had a number of changes over the past year. This change incorporates that required application information you've been entering manually. Now they are part of that application format so it does replace it so you know longer have to type it in manually into the Executive Summary section of the narrative, it does replace. There may be future modifications as necessary and I might point out a few today and the information must be complete and satisfactory for FTA to determine that a new application is complete and proceed with FAIN assignment. So I am going to go over each question. These should be familiar to you. They are included in the required application information document that is currently posted on the FTA public page. Okay, so the start date is the same date as the date of award. This will populate once the administrator obligates an award to the application. There will be some standard language that I will point out and once the award is made, then the date will populate in the dashboard and view prints. When I refer to dashboard, that is the view so if you are landing on a summary page for your application, that is a dashboard. So I will point that out again once we are in TrAMS. So just note that the start date does not preclude the ability to claim pre-award authority. That's a separate selection. Application activity milestones within the application may procedure start date and this may be representative of pre-award authority. The start date cannot be modified. The next is the end date or period of performance end date this is the date by which all activities will be complete and cost incurred. The date may not be earlier then the create application date that's a validation. It's expected the end date should be beyond your latest milestone. Note that the end date does not equal to date by which closeout must be complete. Grantees should complete closeout within 90 days after the period of performance ends. Regional Offices may have additional requirements on how to address your end date and milestones to track awards. If you are not aware of what your office requires, please reach out to your point of contact the next question most people are familiar with is the pre-award Authority question. If the applicant is electing to use available pre-award authority or if you have a letter of no prejudice, then select this particular question as, yes. Just to be reminded that when you do select yes, that requires an initial FFR before the official can execute the award. We still do get a number of questions about I received a notice and I'm ready to execute but I don't have the task. Generally, that's because the FFR has not been submitted yet. So the initial FFR must be submitted before the official can get the task complete execution. So coordination might be needed there. Know that this selection cannot be modified after the initial application has been awarded. So it becomes static. The next question is about research and development activities. You must indicate whether or not the scope of work includes these type of activities and in most cases it will be no, unless you receive a cooperative agreement for research activities. Again, regardless of whether or not on the initial application you will be required to make the selection and it does not have any relationship to the type of funding source that you are requesting.

**[Will direct cost be applied to this? -- I'm stumbling over my words here. And I had my coffee this morning]*. Okay, so will indirect cost be applied to the application? So if you are going to apply indirect costs, please select yes. You will also need to up load documentation about your approved rate from your cognizant agency and that should be attached to the recipient profile and not the application however, you never know your particular region may want to have it in both places so please reach out. If you're uncertain if you have a rate or the documentation, work with your representative. Know that any rate applied must be documented and recorded in the financial -- Federal Financial Report or FFR. A good indication here, if you are selecting indirect cost and you are selecting pre-award authority, please make sure you include the information on the initial FFR. Does this application include suballocation funds? So this question addresses suballocations by designated recipients. [audio disruption] this is very similar to agencies who receive funds directly, but they could not execute the award previously in TEAM until the designated recipient PINed, the notation of the language you use to in the supplemental agreement that was PINed is now incorporated into your split letter. The key is [which you can find in the apportionment notice and it's] the transfer of responsibility language. So please take note [to include] in the documentation [of] the governor split letter or UZA split the appropriate language has been included. Okay, so in the suballocation [question] there are three questions. The first is, is my organization the designated recipient for suballocated funds? Second is, my organization a Direct Recipient of sub allocated funds? [Third is I] Am a Direct Recipient of allocated? We will provide additional information in regard to the suballocation question. We did have some good conversation in the first session, but primarily most people will be selecting the second question and in most cases they have a split letter and are coming in for funds directly. And it might be a state. We know that most states include a [inaudible] [program of] project [(POP)] and this is not the place to be including that [document] but we will come up with some additional guidance and I am working on a document that goes over each of these suballocation questions so hopefully we can provide better guidance in regard to designated recipients and direct recipients and this particular question. So stay tuned in regards to that.

So this is all new and these are new questions and as I mentioned it will replace the Executive Summary [that were previously] required [to be] manually typ[ed] in.

*So the question is what should you do about applications that are already underway. You don't need to stop or restart. Continue and complete the application or Post-award action underway. If there is a future amendment on that particular award, at that point in time the Executive Summary Questions will display and can be modified and we will go over these examples as part of the demonstration. And when you do get to that first amendment, you will see some standardized language called “no selection made” on the dashboard and view prints and you will be able to update those and [flag] which ones need to be corrected or updated.

*Okay, so this is to go over some of the validations that have been implemented as part of the deployment of the Executive Summary Questions. For the start date there is no validation because the information auto populates. The end date, the field must be populated for the valuation to submit and the date cannot be earlier then the award date. The research and development of selection must be required for validation and transmission, same thing for pre-award authority and indirect selection is required to validate and transmit and if you include a yes to the first answer, that requires additional information and I'll show you that as part of the demonstration. Same for the suballocated fund question. If you have selected yes, you have to include documentation before you can validate and transmit.

*Okay, so far closeouts and amendments. Again no validation at the start date. For end date, validation confirm populated and is later than the award date. For existing TEAM awards, what you will notice is the last milestone -- sorry the last MPR that was submitted in TEAM, the beginning and end date on that MPR will actually populate and you would be able to edit [the end date]. Same thing for existing awards. It will populate a blank field and you will be able to update the end date and post- deployment meaning after we deployed the Executive Summary, any new award -- any amendment would have the last updated date and you can modify it. One thing to note when you are looking at your TrAMS award and you are trying to figure out what is the most appropriate end date, you can take a look at your [project] end dates if you have 4 different projects take a look at the end dates of each of the project and determine what is the most appropriate period of performance end date.

*So indirect is very similar. Again this is on existing active awards and any new awards post- deployment when you are taking an amendment or a closeout and the validation really depends on whether or not you actually are modifying the question. So, for example, on indirect, if you are adding new funds and the new scopes and ALIs and you are applying indirect at that point in changing it from no, to yes, then the validation applies. Similarly with sub allocation, the validation depends on whether you are making a modification to the existing question that was previously there or in the case of existing awards where it was no selection made and now you need to make the selection and you are adding a yes, and you need to upload the document or provide additional details on the case of indirect rate.

*Budget revisions, okay, so budget revisions for existing active awards. If you've taken action to do a budget revision on a team or a TrAMS that already exist, you will not see the Executive Summary Questions. So you will see the standard information populate. If you are taking a look at a brand-new award that is created after we have implemented the new Executive Summary Questions or a new amendment and then you take budget revision, at that point, the questions will be there, then the Executive Summary Questions will populate and will be editable. The only two that we cannot edit are the start and pre-award authority questions.
*Okay, so changes to the end date. We added a few of these FAQs. What do we do if the budget revision on an existing award, pre- the Executive Summary Questions includes new items and milestones that extend the period of performance. The recipient should indicate in the Executive Summary that the submission remarks that the action extends the period of performance from date to date. What if the last milestone progress report update results in a change to the last stated period of performance date? You may or may not necessarily need to take an immediate action on the award. Document [in] the milestone progress report your acknowledgment of the noted change in your overall and submission remarks to alert FTA. So on that note, does this mean you actually have to go and update all your existing awards? No, you don't. There is no requirement to take immediate action to update active team or TrAMS awards. That said, it's incumbent on the recipient to notify FTA to acknowledge and document that the period of performance has changed.

*This is just a quick little cheat sheet right here about when you can edit certain pieces -- and at the questions at different phases.   The one thing I would like to highlight across the board pretty much, after the award and start date is not editable and there is no validation, the end date is editable across the board.   Preaward authority is only editable with the new and therefore, static moving forward.   And for indirect sub allocation and research across the board, they are editable at each stage and then of course, the validation checks if the question has changed.   This is kind of a condensed version of the tip sheet that is in the file pod. Okay.   So before I go on to demonstration, I have a few tip sheet slides and then we will move into TrAMS and show you what you will see.   Before I do that, let's take a quick look at some of the questions that may have come in, which I think there are.   Just a comment, [new] personnel have a hard time understanding the start date -- sorry went forward here.   Is different than the preaward dates allowed under grants.   Yes, we have had that comment in the past.   Hopefully 5010 covers that a little bit more.   For right now, the start date is equal to the award date.   If an agency decides later that it wants to apply indirect cost to a grant, is the agency able to go back and draw down on indirect costs under the grant?   A little bit of a policy question.   I've had some conversations on that particular question.   Monica, I am not the SME are subject matter expert on that.   I'd like to add this to a growing FAQ from today's sessions and follow-up and get back to you.   So if you don't mind, I will add this to the FAQ list and for everyone's benefit, I will add the FAQ as part of the resource documents that will post on the FTA public page after the sessions. Okay. What is a file pod? A file pod is right here. Here you can download or upload the files that we are providing. Again this is the presentation and an application status tip sheet as to what's editable at different stages. We will have one more resource that goes over each section -- each question in more detail and hopefully we will be able to add some more of these FAQs to that particular document as well as providing a resource with some more screenshots because we know we are updating the user guides and that will probably drag behind what we could get out to you a little bit sooner. Hopefully that helps with file pod. What is preaward authority? Preaward authority, if you are a 5307 grantee you are probably familiar with that. It is explained in the [5010] circular as well as 9030 and several others but it is the authority that allows you to incur costs in advance, but you do need to know your program as well as the Federal Register notice to know whether or not preaward authority applies to your particular fund source that you are working with. Again a little bit more [policy] probably not the most eloquently said. We are getting more [into] the policy side versus the how-to. For state DOTs, how do we handle suballocation letter language? We are designator recipient and do we include language including sub allocation? We are authorized by the state to allocate funds. First, I would say I would refer you to the Federal Register notice that goes into a little bit further that has the template language. There's also additional information in the 5307 circular that goes into a little bit further again, not my subject matter expert area, and we have had some conversation on this and I hope to provide more information in the FAQs for that particular question. Definitely something we need to provide more on. So with that what I would like to do is just finish up the slides here and then go directly into TrAMS where I can then show you what you will see when we create a brand new grant application and then do a budget revision on a TEAM grant, a budget revision on a TrAMS grant and then also do a close out. So hopefully I can find my notes here.

Okay, So create new application tips. So all the new questions must be answered to pass validation. Just know that there are only certain pieces of the first step in the create application that are required. You can always go back and update the application details are the Executive Summary Questions after you create. We will go through that as we do the demonstration. If you do not make a selection during that first step, no selection made language will populate. Just remember you do need to complete all elements to progress to the next stage. The pieces that will be required to just hit that first step is application name, type, point of contact and the preaward authority question which are the carryovers from the original application create steps. I am talking faster this session. So I think I need to slow down a bit.

*Okay, so amendment tips. Keep in mind any changes may result in the new validation. If you update the application details Executive Summary, or any of the questions, the one thing to know is that the point of contact must be selected. And I will point that out once we get into demonstration. A little bit of a nuance added there. So as soon as you start making a change to the application details page, it does require you to reselect that point of contact to be able to save that page. Suballocation questions, note that the original document will display and you can add another document if applicable. I will highlight one of the issues we have found and we will give you a little bit of a tip on how to handle it in the interim. It is also recommended to update the selections on existing awards particularly if you are amending them because the information does populate into the Award Agreement. That was one of the primary reasons for having everyone enter the information originally in the Executive Summary because the Executive Summary populates in the Award Agreement. [K]Now that you [if you don't] [inaudible] update awards that [were entered] manual[ly into the executive] summary, the questions will not populate in part six of the Award Agreement. *Okay, so where to find the information? Let's see ... let me go quickly -- before I go to the TrAMS page, one thing I wanted to alert to folks too and make a quick request. We just recently had a maintenance alert that went out. Just know that while you can make comments on these alerts, we don't have anyone formally monitoring what is added so if you do have a question about the news page post, contact your Regional Office or headquarters office. We've also added a new operating status to the TrAMS page so we will try to keep this updated as frequently as possible to active status, but if we have a maintenance alert, we will also post here or if we find the system is down for some reason, it could be AT&T or we could be having a maintenance issue, then we would be able to update the operating status [this] would be the first place you would go and look to see what the status is of the system. Before calling the helpdesk. Okay, so with that, I'm going to stop sharing this. And share my screen to show TrAMS. Okay. Let me see if I can make this a little bit bigger for folks.

*Okay, I had a couple of questions -- I thought at one point in time we were asked to use page alerts. Q: We get comments when our applications need additional information. A: That may be something that is a process for your particular office. I am specifically talking only about any news alerts that we might post. You will see that little icon that was on the page that I was showing. It looks like a little blue line. These are basically alerts to -- not comments that are added to application, but a general news alert for all users. So hopefully that answers that. Okay. Q: Can we change the end date to the existing TEAM grants? I think we will get to that in the demonstration. Q: Funding to a neighboring county, what language is the sub allocation should be used? A: You can use the same language that is in the Federal Register notice because that would be the transfer ability language. Will there [be a link] -- on the main page so we can log in. I think we get that question frequently. I'm not sure where we stand on that but thanks for asking again. I will have to raise that forward. Let's see if there couple other questions coming through and then I would like to move on to the demonstrations. Okay, so where to find information, so this is the landing page and here we can see operating status is open so that original screenshot that I showed you was that maintenance screenshot that we had. There are changes, this is related links for new training. It's also here on the training page and here is where you can come back. Here are the coming sessions. Once we have concluded and we have our presentation and recording, we will post the information here along with additional resources, the resources will most likely also live here on our TrAMS guidance page. Here is the document associated with the required application information. This is what you have been using to provide for the summary narrative. Now if you want to take a look back, you can refer to this particular document as well. So one last thing, is that I encourage people to sign up for updates. We use this for gov delivery. So if you want to be in the know when we are adding something to the TrAMS page. Please do sign up for alerts. Here is the document from -- that people were referring to regard the required Executive Summary Questions for your reference. So with that, what I would like to first do is log in and you are going to go [through] the steps to create a brand-new grant application. Please know that I'm in an environment that's a test environment. If anyone is on from LAC MTA, my apologies. I am using your agency as a guinea pig for testing and demonstrating. Information is old so don't worry if you see something that looks a little bit off. I'm playing around with your information. All right, so ... so I am logging in as a submitter. If you have not found out by chance before, the [transmitter] role has the ability to transmit [now] but I've signed in as the submitter so I am going to go through and go through the create application. I do see somebody with their hand up. Eric, you have your hand up. Do you want to type something into the chat box? Okay. Not seeing any response, I will mosey along. Okay, so

I'm going to hit the create application. And let's just walk through this before I start off. So we have the application name. I'll try and make this a little bigger. The application name, the application type, the application point of contact and the Executive Summary. As you know, there are red asterisks here and that means it's required pieces of information to complete for the create application step. And I will select grant and my default and I am going to be very easy and my Executive Summary. After that you see the first questions populate that you had seen in the Executive Summary before. Here is the research and development [question]. It's just what we call a radio button, is it yes or no. And I just added the questions. I'm not going to make any [selections]. I want to show you the error messages. Here is the start date and it has default language and says the start date will be set to the date of award. We have the period of performance [end date]. Then we have one more red asterisks here that's for the preaward Authority question and again it will be a yes or no question. I'm not going to go through the allocation questions just yet. I want to show you the validation errors first that you can move forward without having all the questions answered. Then we have the indirect and previously whether or not your state has a review requirement. You will probably notice that for the state review that you do not see any of the familiar boxes or additional fields you might need to enter. Those [display] when you have a yes, answer. I will select no. I've not made any other selections or updated the [end] date. And I go forward and create the application. And I need my point of contact. Okay. Okay, so I proceed forward to the application. And I land on the summary page and this is what I refer to as a dashboard. You see the summary of information telling me that the period of performance [end] date is not provided as well as seeing no selection made, the default for where I did not make a selection. So to update the information, I can always -- here is where you would go to the application details related action and now you can return to each of the questions. So if you do not have your Split letter ready to add to the document you could bypass this at this point, but you would need this particular document before you can validate. The same thing for indirect cost. Maybe you are still working on getting an approved rate or you are looking for your [cognizant] agency letter to upload. You could bypass it but you must provide a selection prior to transmitting so let's go ahead and let's just take a quick look if I validate and transmit at this point. What would be the validation. So I did answer that one question that I was planning not to, but did. Here you can see all of the validation methods you would see in regards to this application and the first one here is I have no associated projects and have not created a project and one [selection] must be added before I can continue the [validation and make a selection to the] suballocation, indirect an[d] end date. So as you add these selections, the validation errors will come off. So let's go to the application details so you can see how they behave a little better. So here's the period of performance end date and it's a date picker. You can add a [date and] still build your application out and come back and modified to the point of when you transmit it. The other thing to note, just as we do now, [once] the FTA assigns [the FAIN, and the application] gets submitted and [if] it needs to be returned to the grantee, once it's in that return to grantee state and in progress, the information should be available for you to modify. So let's take a look at how the sub allocation button responds. If I select no, it's just that. There is no additional [inaudible] [information] needed. In most cases you will most likely have a split letter to upload. Here we can go ahead and upload a document. Have fun with my photos. Provide -- you can add a second document if you need to [audio disruption] and you have not transmitted you can also delete and add a different document all the way to the point when you transmit. In regards to the indirect, the no indirect cost will be applied would not populate anything else and you would be able to pass validation. Same for the de minimis, but it gives you a friendly reminder that you do need to have some documentation [on the recipient] profile and if you are applying your indirect costs to the application, you will need to provide some additional details including the approved rate, the applicable base and the cost. You could also use this fields in the event that you need to provide some additional notations to FTA while it [the application] is being reviewed. I am going to select de minimis for now. And there it goes. It [the details field box] disappears. If I have federal debt that I need to explain to my FTA office, if I select yet, provide details below. Similarly if I select yes, the information here for the state review will populate and then add your applicable date. And if you know the ID, enter that as well and then of course, save your information. And if we go back to the summary dashboard landing page, you will be able to see that [the new information] has populated. One thing to note, we will see that the frequency for your milestone progress report for the MPR and the FFR have no selection as well as under the lapse date. That will not occur until the point when FTA has assigned the FAIN and they can make that determination as to what your frequency is and if the funds are lapsed. I am going to stop here and see if there are any questions about how this operates. Again we are really focusing on the how to. We can come back and then I want to show what you will see when you work on a budget revision for both a TEAM award and an existing TrAMS grant. And do a close out and then stop and take some questions. For those who are completely new to TrAMS, is there a user manual that has screenshots? We do have a user guide. It is rather lengthy. I can go back at the end of the session and show you where you can find some additional presentations where you have PowerPoint presentations that have more screenshots in it for a simple walk through so you can get an idea before diving into TrAMS. [chat box questions] Is there a hot link on FTA website to get to TrAMS? I think that was asked before. Not at the current time, it does not. I've heard that request before. I think we will have to consider that in the near future. Should we select option [for] sub allocation when we are the DR and passing through funds? As sub recipients? That was actually a follow-up question that I had was some staff to provide some additional guidance in regards to how states, for example, who might -- only apply for funds on behalf of a number of sub recipients. I don't think the intent is here to use this functionality as a replacement for where to place [the program of projects(POP)] that so please hang tight and this is one of our FAQs we will have to get back to you on. So in regards to attachment and the split letter. Once you select yes, you must upload a document. That is correct. So to be able to pass the "save" button if you are returning to your application and you select yes at that point in time, you need to upload the document. So once again, you [must] have the documentation to be able to transmit to FTA. This would be no different than if you were working on it and you had in-kind funds, you need to have documentation for the resources and also for transportation development credits or TDC. You also need to have documentation at that time you need to support your overall budget for your application. You can mark it as no, while you are working on developing your current application and then, of course, as you get close to -- right before transmit, upload that document at that time. Good question Eric. Thank you for bringing that up. I forgot to mention. So we are -- the intent is to deploy new functionality tonight in the evening, today, May 4. And it will be available tomorrow if you start bright and early on Friday the fifth, you would then see [the new information] if you are creating a brand new grant or creating a brand new amendment. You would see the new functionality in TrAMS. Okay, so I think with that, let me make this [the chat box] a little bit smaller and come back a little bit later. I would like to move on to the next transaction so you can see how it behaves. All right, so I'm going to leave this here. For now. We can always use that a little bit later on if we need to revisit it and you want to come back to the create application stage. So I am going to open a budget revision. Okay, so I am working on a budget revision and if I scroll down, you can see my application details here and I see the familiar preaward authority, lapsing and debt question and what you see right now in regards to the application format. One other thing to note if I take a look over -- take a look at what's happening with my award fund status, what can I do, how much money do I have, look at my activities before moving forward. So just to keep things to this particular action, we are going to create a budget revision on an existing TEAM grant. To go back over real quickly [how to create a budget revision] we make the selections add some description and I'm sure that looks really descriptive. And I [select] create. Now remember that [when working on] a budget revision we are staying on the actual application. So for the budget revision I'm on the application. I can see the bread crumb [trail] and also see the “application” projects. I'm making my changes at the application level. I do not need to go to my projects and then the ALI. Everything lives right here, just as a heads up. But we are focusing today on the application details. Notice that as soon as I land on the application details, that point of contact was blue and says please select a point of contact. This was the tip I gave you earlier. If you touch anything else that's in here you need to add to a point of contact. If I had saved now it's going to tell me I need that selection so know who is the point of contact before starting out. That will be something that might throw some folks off. Let's say I'm do my test I will add a BR number 25 or 23. I'll just say number two. And then you take a look down below. Again you just see the same information that was before. So as long as you are on an existing award, you will not see the Executive Summary Questions. If you want to add it, if the information is not included here in the Executive Summary, highly encourage you to include that application information so then it populates in the Executive Summary. So once again, for existing awards, team or TrAMS that are already in the system, you take an action right now, you will not see the Executive Summary Questions. Let's move forward and take a look at a TrAMS grant. On my summary page and what I notice here, this is a new TrAMS grant already passed through the new Executive Summary Questions. I have my period of performance date here -- the start and end dates, also all of the other questions. So let's take a budget revision action on this grant. This would be a new grant and then if you come back a couple of months later and need to do a budget revision, this is what you will see. Let's go ahead to the related actions. [create] Budget revisions. Make your selections. Add your description and create budget revision. We now want to return to the application details. And I now have the ability to [edit] my period of performance. I am on a budget revision. I can make that 2019 now. If I made a mistake here and I need to make a change there and it should be no. Here I am on the preaward. As you can see, I cannot make that change. It is grayed out. It is now static. The same for the start date. If I select no, that information will disappear. I can always add another document if I need to. If it switches, I can also delete it. I've said yes, the minimus. If I need to make that selection here, here is where that validation check -- now that I've selected, [the validation is] applied. Just trying to provide you some scenarios so you can understand the functionality. I cannot save until I add my applicable details. If I was looking -- working on -- if I had no, here on sub- allocated funds and then selected one of the yes, questions, I would be prompted with the document field and I must add a document to be able to pass on the application details as well as the validation. Okay. So there are 2 scenarios for budget revisions. The first being on existing awards and the second being on an application that is created after the deployment of the Executive Summary question and then taking a budget revision. Again you have the ability to modify the end date. You have the ability to modify the questions except for the preaward authority and don't forget about making sure the point of contact, as well as documentation if you answer the question. Okay. All right, before we move on to amendments, let's see if there any questions. Okay, I will try to make it a little bit larger, Jane. Radio button and attachment section for the TDCs rather than having to attach them to each project. That's a very good suggestion I will take that back as a consideration so thank you for raising that. When updating attached docs sho[ould] older versions be kept for the purpose of tracking are obsolete and be deleted? Thank you for bringing that up. Something I did not talk about. So we will get to it a little bit later in regards to amendments, but for a budget revision, when you are here, remember [you are] on the original application, here you would want to retain and add on top because you don't want to lose the integrity of the original award. So a little bit of a difference depending on the Post award action because if you delete this, this would be removed from the original award. One thing to also note, a change that will look to enhance in the future, right now any document you add here to support your sub allocation lives on the application. It does not live on the related action that we are more familiar to in regard to application documents. So the intent would be to make sure that in a future enhancement that the information would live in both places, not just on the application and here. I will talk a little bit more about this in regards to amendments as well. Okay, so -- and I think I left the chat box open here and you probably did not see everything. Okay, so again there is a question about -- so question about whether what happens to current activities that are already in the system. Anything you are working on in the system right now, you will not see the [new] Executive Summary [questions]. Continue to use the Executive Summary narrative and include the information there as you have been in the past. Please refer back to the document that was highlighted and if I need to I can revisit that again at the end of the session to basically manually type in the responses for each of your current awards or Post award actions you might be working on. So hopefully that clarifies that. Selection of the IDC option is not available in my application. It is not going to be there right now. All of the new questions you are seeing here today, they will be deployed tonight and they will be available for you when you create a brand-new application in TrAMS starting tomorrow, May 5. If you create a brand-new amendment tomorrow, you will also see the Executive Summary Questions, just as I showed you. So hopefully that clarifies that. When a budget amendment is made for a TEAM grant, does the project milestones need to be updated as well? This is a familiar question we get. Just as a reminder, and if there's anyone new to working in TrAMS, if you are working on -- actually any grant, regardless if it's a TEAM grant or a TrAMS grant, existing or in the future, as it currently stands, if you are working on a post award action, any existing milestones cannot be modified while you are working on that Postaward action. It must be done in the MPR. If you add a brand-new [activity line item and] to your existing award, of course, you will need to include a milestone because that is part of completing that new ALI. So anything existing [in] a budget revision or amendment, existing milestone cannot be modified at that point in time. You must wait until you get to the next MPR to update the [existing] milestones. So the best thing to do, what is recommended, make a notation in your ALI narrative. You can also make notations in your submission remarks that milestone[s] will need to be updated et cetera. So refer to your particular Regional Office as to how they would like to see that information so they are alerted to the forthcoming changes that will be needed in the next MPR. Still no new [amendments to] TEAM grants. Again that depends. I would refer you, Kelly, to the guidance that we have on the FAQs page. I will point later when we return to that particular information page. Just a functionality question. The current TrAMS does not work very well in the print function for budget. Will this be improved? I hope so. I know we have a long laundry list in regard to the view print. We also have some new functionality coming to the overall platform so I am sure that we will see some changes based on the new platform changes to our view print. But, yes, we are aware of some of the view print issues that we have. Okay. So one more question then I'm going to jump into the next one and then come back to questions. Will every completion date change necessitate a grant amendment, or will we simply be able to change the completion date and the MPR? We are touching a little bit on guidance. I know there is some questions that have been raised regards to 5010. I would like to punt on that one for right now in regards to that but you do have the ability during right now in the system to modify the end date if you are working on a brand-new TrAMS grant as you move forward and anything after the Executive Summary of changes deployed and you can do it both instances whether it's an amendment or a budget revision. So the functionality is there. Please work with your FTA point of contact so you can both be alerted to the appropriate changes and then it can be reflected accordingly in the MPR or vice versa as mentioned before. Always put some additional documentation to FTA to alert them if a date has changed or must be changed if you are working on a Post award action then you must wait until the next MPR. Okay, that was heavy breath. Okay. One more question then I back to TrAMS. Are transcripts of this session number two available for download later? Yes. You can actually save the transcript right away by using the "save" button right above where the captioner is typing and we will also post this to the FTA page with the presentation and additional attachments. So on that note, it will be posted here. This is the TrAMS landing page. We have a training page and we have the upcoming and past sessions. You will find information posted here and you will be able to get the presentation and the recording and we can make the transcript available by request or maybe we will just add it, but if you go to the recording, you would see it as well and I think you can actually download the transcript, even from the recording, but you can do it at the end of the session today as well. So with that, all right, so we have done the 2 budget revisions, and now we need to move on to amendments. So let's move on to an amendment. [inaudible] award. So again we have an existing award. This would be the same functionality that you would see if you have an existing TrAMS grant. No start and end date. Scroll all the way down to the details. No Executive Summary Questions populating here. You go to the related action to create an amendment, make our selections. I want to do it all. And yes, we are aware that this is now outdated [guidance reference to 5010]. It is on our list to remove the old reference information. And then let's create the amendment. And let's go to amendment. We are now on 01 and I have my period of performance, I have a start date and I have a period of performance end date. It's populated. Okay. So we are on a TEAM grant. So how can you check where did these dates come from? These are coming directly from the last Milestone Progress Report that was submitted in TEAM. So if you go to your application and you pull up your last Milestone Progress Report, you should see the begin and end date or start and end date fields these dates populated. So the start date will reflect the award date and here we have the period of performance end date [what] was last reported in your Milestone Progress Report. I go further down, I now see the additional questions. They are all indicated with no selection made and now I can go to the application details. And modify as applicable. I see that blue marker and that means I've got to make my selection for my point of contact. Note that everything else is really optional. I have not touched anything. My end date is populated. So that is the key here. If I'm looking at a TrAMS grant that's existing the first time, it should be blank and therefore, I need to populate a date. Here it's pulling from the MPR. So if I save here, it did not stop me. I did not make any other changes. Just changed the point of contact. Let's go back. Now if I make another selection, I then would have to make sure I also do any other changes that are required to validate. So as soon as I make a yes, selection here, I must add the details here to be able to save. So if I am here [indirect question] , it's going to keep me on that page until I hit the save. So all of the questions become optional for existing awards. If you are working on an existing TrAMS grant, the information is most likely, hopefully, already in the Executive Summary. It would be ideal to include and update all selections that are applicable here so the information on this amendment now populates in the part six of the Award Agreement. So I can say maybe, yes here. I would need to add a document for ease of purposes I will select no, right now. I also need to indicate whether I have research. Maybe I want to change the date of my period of performance. I would most likely take a look back at my most recent Milestone Progress Report and take a look at my projected end date, take a look at what is happening with the progress and of course, determine what might be the appropriate end date to include. And then save. And if I scroll -- I'm not on that page anymore. Let me go to the summary dashboard. I will now see my updated information. Here is my new updated information and my selections that were made. So with that, that is an amendment on an existing award. What I would like to do next is to show you from our earlier session with a new TrAMS grant. So here was the original award and we have an amendment. So this particular grant list, let's take a look. So this is after - after the deployment of the Executive Summary Questions. I see all of my information here. I see what I selected last. One thing to note and highlight here is on the related actions if I also go to the [application level related actions] “Award and Execution Summary” dashboard, this is another view. We call it a dashboard and I can see here a summary of the questions that are now included. These were not there before so I can see the type of grant, my reporting cycles, the start and end date, et cetera. I think I also have the Award Agreement [View Print] up so let me pull that over as well. Real quickly. So part two, the award information, here is where you are going to start see the information populated. There is the award and end date. The additional highlighted in yellow, the research and activities [and] sub allocation and indirect cost questions are now added. If I go further down to part six which is the Award Agreement, we also now see the award information and the Executive Summary Questions that are now part of the application process. They populate here as well. One thing to also know when we see the word award here as well as award name and start date, if you look and you are working on a grant application, just know that during the development stage, part six will now display so you will be able to see it. Previously you would only see it if it was after the award was -- after the award of the application. Know when you are working on it, the word award will show as “applications” [for example] the application name and start date and application end date. Once it is awarded it will then show and display as award date and award end date. So just something to be aware of when you are looking at your view prints. Okay. So let's go back to this particular award. And this is the amendment and if I'm on the related actions, just so you understand and see what it looks like when you are taking an amendment on a prior award, particularly the sub allocations. So this is what I would like to highlight and talk about here. So right now as it stands, if you say yes, here [on suballocation question] and say I add more information and I want to save, it is keeping me here because it's looking for a document. The intent was to keep the previous sub allocation and allow for that to carry forward so we will be working to allow for that functionality so the validation does not stop you at this point. In most cases when you work on amendments you might do what we call a 0-dollar amendment or maybe a different type of amendment but we don't want this to stop you particularly if the prior one [document] is still valid. In this case -- -- if this is no longer applicable be able to delete it and update a new one. So know that this functionality is behaving in this way currently. We are looking at a format to enhance this so it does not stop you at this point. I would say in the interim if that is the case you may select no. That document goes away and you will be able to pass validation. The original document will still live on the original or the last version where the document resided. I would include some information in the Executive Summary and your submission remarks to clarify as to why, particularly if they know that you are a direct recipient and receiving designated funds, why it is not showing as a yes. Just wanted to alert you to that. I think that is amendments. And the next thing was closeouts, but I realize I am going to get stuck because I did not complete the MPR from the last quarter and I am going to get stuck. So in light of not having access to be able to do a closeout. Let's double check unless our contractor has gotten rid of them for me, I will give it a shot, but I have a feeling we look at the validation error that you will now see. I need one more zero. As a reminder, you do need the dashes in here because it is a text field so once again, I do not see the Executive Summary Questions here on my original board. And if I go to close out I'm probably going to get the error message. Yes. So same thing applies. It is an amendment. So just as we were looking at an amendment, you will see all of the questions populate and the only case for where you will need to add information that will be required is when you are looking at an existing TrAMS grant and you must add a date. So if you did not do any amendments on a particular TrAMS grant and it still does not have any of the current Executive Summary Questions populated and you are doing it for the first time, then you will see these questions the very first time at closeouts and the end date will show as a date picker field that needs to be populated. So you will need to take a look at your last MPR and populate a date and the date cannot be earlier -- sorry, not later than the date you created the close out. So that would be the validation check. It will tell you. It populates just like when you are working on a progress report if you put in a date that does not comply, you will get an error message and it will tell you exactly what it can or cannot do. If you are working on a grant, team or TrAMS, that has been amended or is brand-new after deployment of the Executive Summary Questions, they will already be there and, again, be optional for you to update at that point in time and then you can submit your closeout. So I think that covers the tips in regards to the close out. If you are working on a TEAM grant, just like when we did an amendment on the TEAM grant, you will see those dates populate. Once again, they will reference from the last MPR and you can update them accordingly. Okay. I think with this, let me make the chat box a little bit bigger here and see if we can't get some questions. Okay. Transcripts -- sorry about the connectivity . And, yes, the transcripts will be available. To change the end date, can this be done through an amendment or can it be done on a budget revision? The functionality is there and both the budget revision and amendment. Will the slides be available to look at once the presentation ended? Actually, you can download it right now. Is the second document in the pod up above so you can download that today. I do consider them drafts, but they will be posted and final on the TrAMS page. The next one, if I close out in May, then this would be okay if the second quarter MPR's were updated. Correct? I am not sure if I know [what you mean]. If you do a close out on May 5, the information, the questions will populate and you would then be presented with the questions to complete. Again they would be optional. The one thing to note again depending on if it's a TEAM grant or TrAMS grant, you might need to add that end date to make sure it passes validation. If it's a TEAM grant, there will be a date there, but do make sure it is reasonable. If it ended in 2012 and has not been updated and it is 2017, probably will get sent back to you to update. So take a look at your last MPR. Can the project end date be changed in a pre-existing TEAM grant? So this is where we get terminology a little bit jumbled. When we think of TEAM grant per se, everything within each grant is considered a project. When we looked at a TrAMS formatted grant, we can have an application which includes one or more projects in it. So when we look at a TEAM grant, the project and the application end date are probably the same. If you get to the point -- this is where you probably need to work with your FTA counterpart to document if your period of performance needs to change. If it's been reflected in the MPR, make sure they are aware of it and you work with them accordingly to document the change. And then if the TEAM grant is going to get closed out soon, you can update at that point to reflect the documented change. Hopefully that is enough. Again going into some policy that is not my purview. I'm here to really focus on the how to. I could definitely add this to the FAQs because I think that is something that might be helpful. I can certainly go back into any applications and revisit TrAMS. I think I talked about – at warp speed -- a little bit faster today in this session. So hopefully everyone caught all the words. If not, we have the transcript here and you can read all of my silliness. Are there any other questions at this time or a request to go back into TrAMS and see how the functionality works? Just be aware of that sub allocation document when you are creating brand-new ones and if you make an amendment later on. We will have some more documentation or at least guidance in regards to designated recipients and sub recipients, how to respond to that question so I think we've had some very good questions in the first session about that and we will take that back and try to further develop that document -- develop directions on how to use these questions and apply them appropriately. Is it the after lunch and [its] I am too tired to ask questions? Am I going to get off easy this time? No. Okay. Rachel's got a question. Great. Kenneth, I would say probably, yes in that case. Perhaps you've said, but will there be a recorded presentation posted? Yes, there will be a recorded presentation on the TrAMS page. Please come back here to the training page for other resources as well as the help and guidance page. We have a couple of more people typing. We will wait for those questions. Don't worry if you want to call it a day, feel free to skedaddle. I will not take it personally. Thank you for attending everyone and I appreciate all the questions. They do help us in making sure our FAQs are well developed to be able to answer the questions. And again this will get deployed tonight and be there tomorrow so -- okay, there's a question. I'm brand-new and I have the link to the TrAMS logon, but could you give us the URL for the training page? Yes. Will there be new training for new personnel? We just had a basic session so please take a look at that. That has already been posted, I believe, a refresher training -- that was for the recipient user managers. We are going to have the basics training specifically to go over the functionality of TrAMS, like if, you were a read only user but it will give you some good tips about how to navigate the system as well as go over reports. So I think there are some more training sessions we will be having throughout the summer. Again please sign up for the alerts on the TrAMS page. [let me] Go back there one more time because we use the -- how can I get over there. Over here, sign up for updates. We use the gov delivery system and that does allow us to get you the information right off the bat, as we post the registration to the TrAMS training page. Highly recommend that as well. We also use our help desk to make sure we get the correct user roles for our training. Will there be a test environment for people to practice? We hope in the future, probably not this fiscal year. We do know that [it] is something that people used in TEAM but it is something we are still looking into. Thank you for the question. We recently discovered that TrAMS was having technical issues and lost a new grant application. We've not heard yet from the helpdesk as to the status on this issue. Will it be safe to retry reentering the grant application tomorrow? I would say yes please do. If you have it in a word doc, as some people do, cut and paste does work in from Word to TrAMS. So, yes, I would definitely give it another shot. Does TrAMS have a calendar view for reporting cycles on all required reports. This is the first time I have received that question. I don't know exactly what you might be referring to. Maybe you could give me a little bit more to go on. I'm guessing may be a report of all of your applications and knowing what the reporting cycle is for each application. [question] I'm only asking because we've transitioned responsibilities and pending tasks disappeared. [response] It may be that people have claimed the task and therefore, need to actually close it and return it to the group particularly if it's on an FFR or MPR. That may also be the point of contact information. I would -- in that case if you know that you need to get a task reassigned, please contact the helpdesk and coordinate that with your FTA point of contact. I see more and more people dropping so I'm actually going to say thank you, thank you everyone and I'm going to call it a little bit earlier. Feel free to call it a day. And please let us know how it goes with the new Executive Summary Questions. Thanks so much everyone.