



TRANSIT  
ASSET  
MANAGEMENT

U.S. Department of Transportation  
Federal Transit Administration

# TAMPLATE User Manual

*Supplemental Guide for FTA's Transit Asset Management  
Planning Assistance Template*

February 2022

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# Introduction

## Overview of TAMPLATE

The Transit Asset Management (TAM) Plan Template, or [TAMPLATE](#), is a technical assistance resource to help transit providers develop their TAM plans in alignment with the requirements of Federal Transit Administration's (FTA) [Final Rule](#) on Transit Asset Management (49 CFR Part 625). Using TAMPLATE, you can download the most recently published agency data from FTA's [National Transit Database](#) (NTD) to support the development of your TAM plan. You can create a new TAM plan and edit the downloaded NTD data without modifying the underlying data source or impacting another organization's ability to create a plan.

The online tool is organized into the following sections, which you can access through the menu bar at the top of the TAMPLATE window (Figure 1):

- **Introduction** provides an overview of TAMPLATE's organization and capabilities.
- **Getting Started** requests basic information on your agency and downloads the relevant NTD data.
- **Chapters** includes five individual chapters covering the required TAM plan elements (see TAM Plan Requirements below).
- **Fleet Replacement Module** is an optional section to assist agencies in analyzing their future vehicle needs.
- **TAM Plan** is the final section where you can view, certify, download, and share your completed TAM plan.

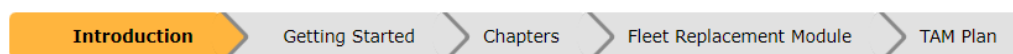


Figure 1: TAMPLATE section menu

Each section contains multiple pages, or tabs, which you should complete with the requested information for your TAM plan.

## TAM Plan Requirements

The Final Rule requires transit agencies to develop and implement a TAM plan if the agency (1) owns, operates, or manages capital assets used to provide public transportation; and (2) receives federal financial assistance under 49 U.S.C. Chapter 53 as a recipient or subrecipient.

The TAM plan requirement is intended to guide agencies towards a state of good repair (SGR) in which assets operate at a full level of performance. Transit agencies must update their TAM plans at least once every four years. See FTA's [TAM Plan webpage](#) for more information on this requirement.

According to the Final Rule, all TAM plans must contain the following elements:

- An inventory of transit assets (revenue vehicles, equipment, facilities, and guideway infrastructure)
- Condition assessments of the inventoried assets for which a provider has direct capital responsibility
- A description of a decision support tool for capital investments
- A prioritized list of capital investments

Importantly, Tier I and Tier II transit agencies face different requirements on what to include in their TAM plans.<sup>1</sup> FTA's [TAM Plan webpage](#) describes the required TAM plan elements for each agency tier. Some organizations, such as state departments of transportation (DOTs) or agencies that pass FTA funds to subrecipients, may be required to serve as a Group TAM Plan Sponsor.<sup>2</sup> A Group TAM Plan Sponsor coordinates the development of a TAM plan for a group of participating Tier II agencies. Please refer to FTA's guidance on [developing group plans](#) for additional information.

## Who is This Guide For?

The TAMPLATE User Manual is a companion document that walks you through each section of TAMPLATE to generate a TAM plan. In general, personnel who are knowledgeable about your organization's assets and responsible for asset management processes (e.g., procurement, maintenance, compliance, etc.) are best positioned to complete a TAM plan.

Tier I agencies, Tier II agencies, and Group TAM Plan Sponsors can all use TAMPLATE to meet the TAM plan requirements. See Figure 2 below for an overview of the required TAMPLATE pages for Tier I and Tier II agencies to complete a TAM plan. However, while the TAMPLATE application is designed for any user, it is likely to be most helpful for

- Tier II transit providers developing their own individual plans, or
- Group TAM Plan Sponsors developing plans for subrecipients.

Tier I transit providers may also use TAMPLATE, but because of its simplified structure, this template may be less useful for agencies with customized asset management systems.

For other users (e.g., researchers) not seeking to create a compliant TAM plan, TAMPLATE allows for an "experimental" TAM plan in which users can combine data from transit agencies across the country.

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*Access TAMPLATE online at FTA's TAM website:*

[www.transit.dot.gov/regulations-and-programs/asset-management/tamplate](http://www.transit.dot.gov/regulations-and-programs/asset-management/tamplate).

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<sup>1</sup> See FTA's "[Am I a Tier I or Tier II agency?](#)" checklist to determine whether your agency is a Tier I or Tier II provider.

<sup>2</sup> See FTA's "[Am I required to be a group TAM plan sponsor?](#)" checklist to determine whether you are required to coordinate a group TAM plan.

TAMPLATE Chapter	TAMPLATE Tab	TAM Plan Element(s)	Tier I	Tier II & Group Plan Sponsors
Chapter 1: Introduction	Basics	N/A	Required	Required
	Goals	N/A	Optional	Optional
	Policies & Evaluation	#5: TAM & SGR policy #9: Evaluation plan	Required	Optional
	Roles & Responsibilities	#8: Identification of resources	Required	Optional
Chapter 2: Capital Asset Inventory	Inventory	#1: Asset inventory	Required	Required
	Summary	N/A	Required	Required
Chapter 3: Condition Assessment	Condition	#2: Condition assessment	Required	Required
	Summary	N/A	Required	Required
Chapter 4: Decision Support	Basic	#3: Decision support tool	Required	Required
	Maintenance	#6: Implementation strategy	Required	Optional
	Overhaul			
	Disposal			
	Acquisition & Renewal			
	Risk Management	N/A	Optional	Optional
Chapter 5: Proposed Investments	Proposed Investments	#4: Prioritized investments	Required	Required
	Schedules	#7: Key annual activities	Required	Optional

Figure 2: TAMPLATE required sections to ensure a compliant TAM plan

# Getting Started

This section of the user manual explains how to create a TAMPLATE user account, start a new TAM plan, and access saved TAM plans.

## Creating a User Account

If using TAMPLATE for the first time, you will need to create a user account. All FTA applications must be accessed through the FTA Application Portal with your Login.gov credentials. Follow the steps below to create a new Login.gov account:

1. Open the [TAMPLATE](#) login page to access the FTA Application Portal.
2. Click on “Sign in with LOGIN.GOV”.
3. In the window that appears, click on “Create an account”.
4. Enter your email address and other requested information and click “Submit”.
5. You will receive an email to the address you submitted. Open the email and click on “Confirm email address”. A browser window will appear and take you back to Login.gov.
6. Create a password and set up a second layer of authentication (security key, government employee ID, authentication application, phone, or backup codes).
7. You have now successfully created your Login.gov account.

Next you will need to register the TAMPLATE application within the FTA Application Portal:

1. Sign in to the FTA Application Portal with your Login.gov account information.
2. Under the “Explore Other Application(s)” heading, click the icon labeled “TAMPLATE”
3. On the TAMPLATE Registration page, click “Register”
4. The TAMPLATE icon should now appear under the “Registered Application(s)” heading on the FTA Application Portal. You will need to re-register the TAMPLATE application following 60 days of inactivity.

For assistance with the FTA Application Portal, please see the help topics on FTA’s [Application Portal Help Page](#). For additional information on your Login.gov account, including an explanation of your options for the second layer authentication, please visit the [Login.gov Help Center](#).

*Note: The FTA Application Portal and Login.gov system went into effect on October 2, 2021. If you previously created a TAMPLATE account, you must create a new Login.gov account to access your original TAMPLATE account. If you created a TAMPLATE account under an old email address, you can register this email address as a second address within your Login.gov account settings.*



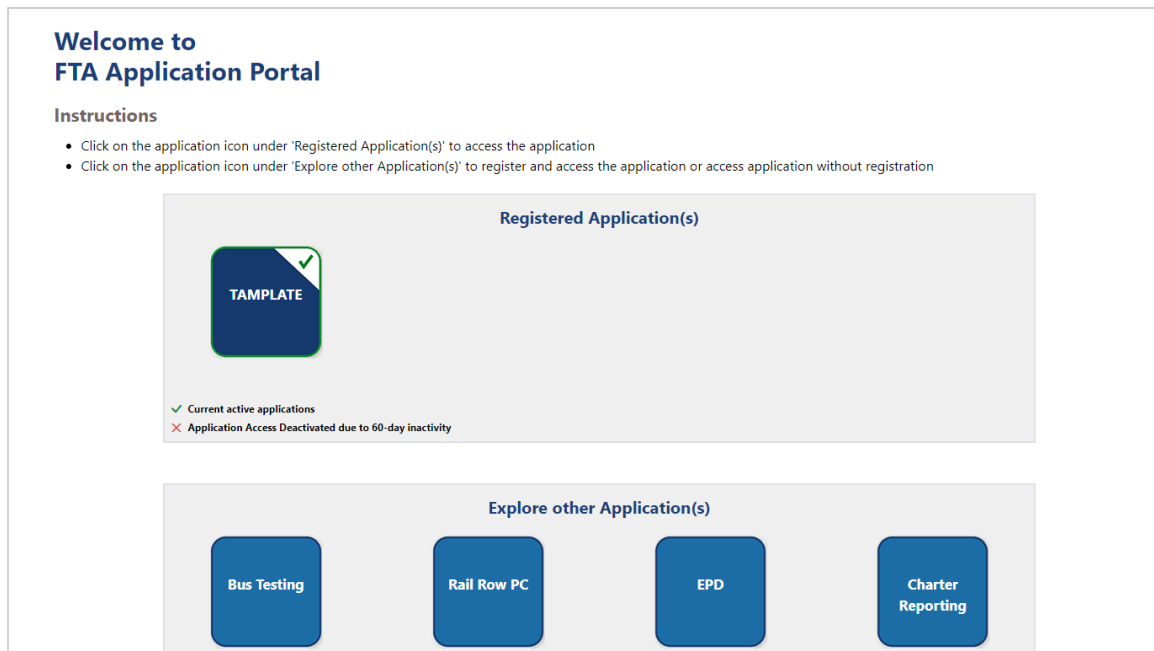


Figure 3: FTA Application Portal

## Setting Up a New TAM Plan

Log in to the FTA Application portal and click the TAMPLATE icon to open the TAMPLATE Dashboard. The Dashboard is where you can view any previously saved TAM plans. If you have not previously saved a TAM plan, this table will be empty. If you would like to copy or otherwise modify an existing plan, please see the *Modifying an Existing TAM Plan* section below.

### Create a New TAM Plan

At the top of the TAMPLATE Dashboard, click the “Create New TAM Plan” button to start a new plan for a Tier I agency, Tier II agency, or Group Plan Sponsor (Figure 4). To create an experimental TAM plan, click the “Create New Experimental TAM Plan” button. As introduced in the *Who is This Guide For?* section, this experimental plan option is intended for nontraditional users (e.g., researchers) who may want the flexibility to combine NTD data from agencies from across the U.S. Additionally, experimental TAM plans have fewer required fields than regular TAM plans in TAMPLATE.

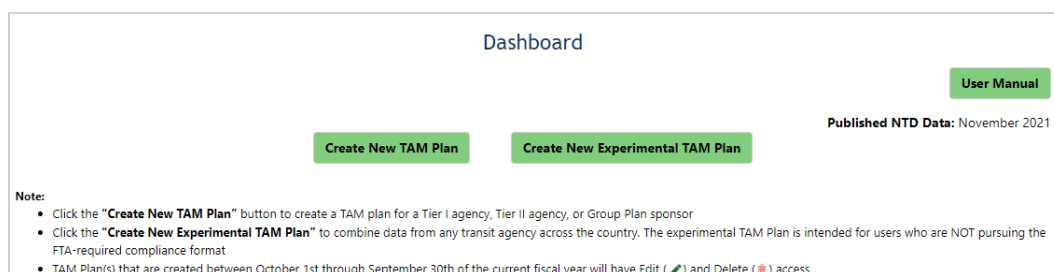


Figure 4: Create a new TAM plan from the TAMPLATE Dashboard

After you click one of the buttons to create a new plan, TAMPLATE opens the “Introduction” page which provides an overview of TAMPLATE and its capabilities. To connect to agency data and begin editing your new TAM plan, click the “Getting Started” button at the bottom of the page.

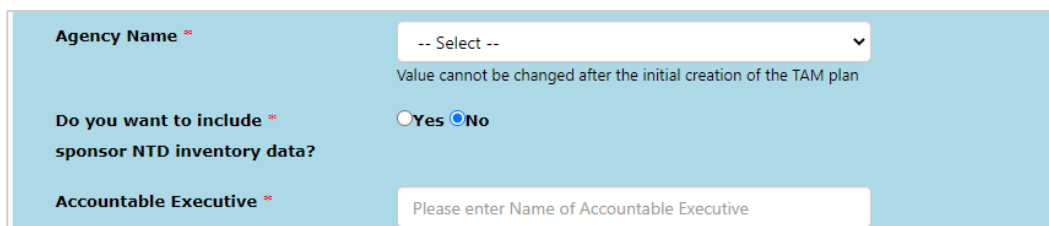
## Connecting to NTD Data

On the “Getting Started” tab, complete the following steps to connect to agency NTD data.

1. **Enter your agency information** as described below:

FIELD	INSTRUCTIONS
<i>TAM Plan Name</i>	Enter a name for your TAM plan. This name will appear in the list of saved plans on the TAMPLATE Dashboard.
<i>TAM Plan Type</i>	Select Tier I, Tier II, or Group Plan Sponsor.
<i>Agency Name</i>	Select your own agency’s name from the drop-down menu.
<i>Include Sponsor NTD Inventory Data</i>	<u>For Group Plan Sponsors:</u> select “Yes” to include your agency’s own asset data in addition to subrecipient data or select “No” to include subrecipient data only.
<i>Accountable Executive</i>	Enter the name of the person who will approve the final TAM plan.
<i>Last Modified Date</i>	If creating a new plan, select today’s date.

Shown in Figure 5, the “Include Sponsor NTD Inventory Data” field will only appear when “Group Plan Sponsor” is selected for “TAM Plan Type.”



The screenshot shows a light blue form with three fields. The first field is 'Agency Name' with a dropdown menu showing '-- Select --' and a note below it: 'Value cannot be changed after the initial creation of the TAM plan'. The second field is 'Do you want to include sponsor NTD inventory data?' with two radio buttons: 'Yes' (unselected) and 'No' (selected). The third field is 'Accountable Executive' with a text input box containing the placeholder text 'Please enter Name of Accountable Executive'.

Figure 5: Option to include own agency’s assets along with subrecipient assets (Group Plan Sponsors only)

2. **For Group Plan Sponsors: add your Group TAM Plan subrecipients.** For each subrecipient, select the agency name from the “Sub Recipient Agency Name” drop-down menu, enter a subrecipient accountable executive, and click the “Add Group TAM Plan Sub-Recipients” button (Figure 6). You can add multiple subrecipients at once (with the same accountable executive name) by clicking the check box next to multiple agency names in the drop-down menu.

Added subrecipients appear in the subrecipient table at the bottom of the page. Click the Edit (✎) icon next to a subrecipient’s name to modify an agency’s accountable executive. Click the Trash (🗑) icon to delete that agency from the subrecipient list.





*Note: The subrecipient drop-down menu auto-populates with the Group TAM Plan Sponsor's previous subrecipients. To add a new subrecipient, select "Other" from the drop-down menu and enter the subrecipient agency's name. If you use the "Other" option, you will need to manually enter that agency's asset data in TAMPLATE Chapters 2 and 3.*

Figure 6: Adding subrecipients to a Group TAM Plan

3. Click the “Save” button at the bottom of the page.

## Modifying an Existing TAM Plan

As noted in *Creating a New TAM Plan*, the Dashboard is the first page you see upon logging into TAMPLATE. The Dashboard includes a table with your saved TAM plans and each plan’s name, type, agency, creation date, date updated, and NTD reporting year. As depicted in the Functions column of the table, you can clone, view, edit, or delete existing TAM plans (regular or experimental):

- **Cloning** (  ) a plan creates a duplicate copy of a plan. This function is available for current plans in which you modified the downloaded NTD data within TAMPLATE as well as older plans created before October 1 of the current fiscal year.
- **Viewing** (  ) a plan opens TAMPLATE’s final page in which you can view and export the compiled TAM plan.
- **Editing** (  ) a plan will open the plan in TAMPLATE so that you can continue or modify the draft plan. This option is only available for plans created or cloned on or after October 1 in the current fiscal year.
- **Deleting** (  ) a plan will permanently remove the plan from TAMPLATE. If you click this icon, a pop-up window will appear to confirm that you wish to delete that specific TAM plan. This option is only available for plans created or cloned on or after October 1 in the current fiscal year.

Please select the filter criteria:

☐ All
 ☒ TAM Plan
 ☐ Experimental TAM Plan

Show  entries

Search:





TAM Plan Name	TAM Plan Type	Agency Name	Created Date	Updated Date	NTD Data Load Report Year (RY)	Functions
EXAMPLE TAM PLAN	Group Plan Sponsor	EXAMPLE AGENCY NAME	12/29/2021 9:24:21 AM	12/29/2021 9:24:51 AM	2020	   

Figure 7: Dashboard functions for saved TAM plans

## Reloading NTD Data

TAMPLATE will automatically download NTD data for the agencies selected on the tool’s “Getting Started” page. However, at any point you can also manually refresh and reset the downloaded NTD data by clicking the “Click to reload the NTD data” button in the upper-right corner of the TAMPLATE window (Figure 8). Clicking this button will bring the latest available data into TAMPLATE. The publication data of the latest NTD data is stated above the “Click to reload NTD data” button.

*Note: Reloading the NTD data will erase all manual changes you make to the performance targets in the **Getting Started** section and to inventory tables in the **Chapters** section.*

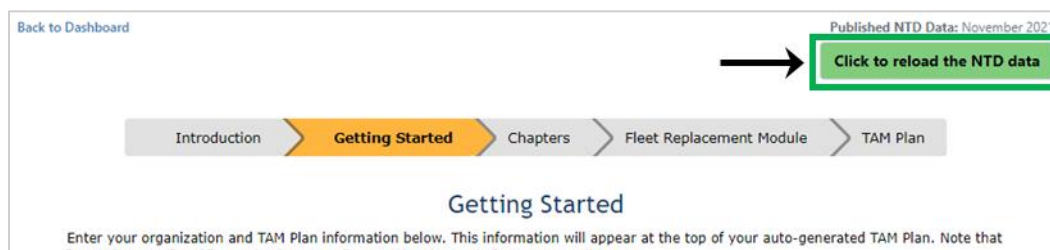


Figure 8: Button to reload the NTD data

## Suggested Resources

As you proceed through the rest of the pages in TAMPLATE, various agency documents may provide helpful information to support your TAM plan. Below are several possible sources of information:

- Asset register or inventory information (including for spare parts or equipment)
- Schedules for inspections/preventive maintenance activities
- Routine checklist for inspections/preventive maintenance activities
- Reports on asset condition
- Original Equipment Manufacturer (OEM) manual
- Warranty information
- Fleet management plan
- Facilities management plan
- Trouble log (information on asset defects, faults, and/or unplanned maintenance)
- Documentation related to risks and/or risk management
- Standard operating procedures (SOPs)

- Asset transition protocol or policy

The resources above are also listed on the “OPTIONAL – Related Documents” tab of the “Getting Started” section in TAMPLATE, as shown in Figure 9. On this tab, you can indicate whether you have access to each type of resource. Your answers are for your own tracking purposes and do not carry through to your TAM plan or any other part of TAMPLATE.

The screenshot shows a web interface with two tabs: "Getting Started" and "OPTIONAL - Related Documents". The "OPTIONAL - Related Documents" tab is selected. Below the tabs, the title "OPTIONAL - Related Documents" is centered. A paragraph of text explains the purpose of the section: "As a first step, there are a number of documents that may be helpful in facilitating development of your TAM plan, if you have them. Please indicate below by using the drop down menus where this information is available. While your agency(s) may not have the specifically named reports, you may have the information stored in other formats. If not available, the information can be collected through workshops or conversations with staff." Below this text, a bold instruction reads: "Please answer the below as best as you can, as provides most value to the agency." There are three rows, each with a text label on the left and a dropdown menu on the right. The labels are: "Asset register or inventory information including spare parts or equipment", "Routine checklist for inspections or other preventive maintenance activities", and "Reports or information on asset condition". Each dropdown menu currently displays "--Select--" and has a downward arrow icon.

OPTIONAL - Related Documents	
<p>As a first step, there are a number of documents that may be helpful in facilitating development of your TAM plan, if you have them. Please indicate below by using the drop down menus where this information is available. While your agency(s) may not have the specifically named reports, you may have the information stored in other formats. If not available, the information can be collected through workshops or conversations with staff.</p> <p><b>Please answer the below as best as you can, as provides most value to the agency.</b></p>	
Asset register or inventory information including spare parts or equipment	--Select-- ▼
Routine checklist for inspections or other preventive maintenance activities	--Select-- ▼
Reports or information on asset condition	--Select-- ▼

Figure 9: Optional tracker for related resources

# Chapter 1: TAM Plan Introduction



Information entered in Chapter 1 makes up the “Introduction” section of your TAM plan. Chapter 1 includes the following tabs:

TAB NAME	DESCRIPTION	REQUIREMENT
<i>Basic</i>	Provide an overview of your agency and enter your performance targets.	Required for all TAM plans
<i>TAM Goals</i>	Enter your agency’s TAM-related objectives.	Optional for all plans
<i>TAM Policy and Evaluation</i>	Describe your agency’s TAM policy and plan for continuous improvement.	Required for Tier I only
<i>TAM Roles and Responsibilities</i>	Identify individuals with TAM-related responsibilities.	Required for Tier I only

*Note: As you proceed through Chapter 1 and all other TAMPLATE sections, please be aware that textboxes accept plain text only. Tables and formatted text will not be preserved.*

## Basic

The following steps are required for all TAM plans:

1. In the **“Brief Overview”** textbox, describe your organization type, size, service area, and approach to asset management, and summarize your TAM plan contents and structure (2000 characters max).
2. In the **“Methods for Target-Setting”** textbox, explain the methods that your agency uses to set performance targets (2000 characters max). *Note: This section is optional for all users.*
3. Under the **“Performance Targets & Measures”** section, enter your agency’s performance targets by asset class. For existing assets in the NTD, click the Edit icon (  ) next to the appropriate entry to add/revise a target (Figure 10) or the Trash icon (  ) to delete a target. For any asset class NOT previously reported to the NTD, you will need to create a new table entry. Complete the following fields for each new asset class:

FIELD	INSTRUCTIONS
Agency Name	Select the agency name from the drop-down menu.
Asset Category	Select the appropriate asset category for the new asset.
Asset Class	Select the appropriate asset class for the new asset. This drop-down menu updates based on the selected asset category. If you select “Custom (non-rule) Category” for Asset Class, enter the custom asset type in the textbox that appears.
2022 Target	Enter a performance target for the coming year.
2023 - 2026 Target	Optionally, enter targets for up to five years in the future.



Functions	Agency Name ▾	Asset Category ▾	Asset Class ▾	2021 Target ▾	2022 Target ▾	2023 Target ▾	2024 Target ▾	2025 Target ▾
 	EXAMPLE AGENCY NAME	Equipment	AO - Automobile	XX %				
 	EXAMPLE AGENCY NAME	Equipment	Steel Wheel Vehicles	XX %				
 	EXAMPLE AGENCY NAME	Equipment	Other Rubber Tire Vehicles	XX %				

Figure 10: Edit performance targets for an existing asset class

4. Click the “Save” button. Then click “Next” to proceed to the next tab.

*Performance measures for all asset categories are the percent of assets NOT in a state-of-good-repair. See FTA’s [Performance Management](#) webpage for additional information on calculating performance measures and setting targets.*

## TAM Goals

The following steps are optional for all users:

1. In the “TAM Vision” textbox, describe your agency’s goals related to TAM (1000 characters max). What does your agency hope to achieve with TAM?
2. **Describe specific goals** that you wish to achieve and how asset management can help your agency achieve its objectives (Figure 11). For each goal, use the “Goal” textbox to describe the goal (500 characters max). Then in the “Objective(s)” textbox, list the steps your agency will take to achieve that goal (1000 characters max). Click the “Add” button to save your new goal.

3. **After saving your first goal**, a list of all saved goals will be created. Continue to add goals to this list. Click the Trash icon (🗑️) to delete a previously saved goal from the table.
4. **Click the “Save” button**. Then click “Next” to proceed to the next tab.

The screenshot shows the TAM Goals tab interface. It has a light blue background. At the top, there are two text input fields. The first is labeled "Goal" and contains the example text "Example: Increase customer satisfaction score by 20 percent in fiscal year." The second is labeled "Objective(s)" and contains the example text "Example: Respond to customer feedback from past survey by mid-fiscal year, Respond to customer complaints (through 511) within one week of complaint, ...". Below these fields is a note: "Note: Please use a comma to separate each Objective." Under the note are two buttons: a green "Add" button and a blue "Clear" button. At the bottom, there is a table with three columns: "Functions", "Goal", and "Objectives". The "Functions" column has a trash icon. The "Goal" column has the text "EXAMPLE GOAL". The "Objectives" column has the text "EXAMPLE ACTIONS TO ACHIEVE GOAL". Below the table is a pagination bar with buttons for navigation: "<<", "<", "1", ">", and ">>".

Figure 11: Saving goals and objectives in the TAM Goals tab

## TAM Policy and Evaluation

The following steps are required for users creating a Tier I TAM plan and optional otherwise:

1. **In the “TAM and State of Good Repair (SGR) Policy” textbox**, describe your agency’s expectations for employees as well as executives in managing assets and pursuing a state of good repair (5000 characters max). This description could be a short statement or a more detailed policy.
2. **In the “Continuous Improvement” textbox**, describe how you will monitor and update your approach to TAM over time.
3. **Optionally**, upload your agency’s previous TAM narrative report. This file will be listed in a table of attachments in your TAM plan, with active links to download the file when viewed online within the final **TAM Plan** section of TAMPLATE.
4. **Click the “Save” button** (Figure 12). Then click “Next” to proceed to the next tab.



Basic  
(Required)

TAM Goals  
(Optional )

TAM Policy and Evaluation  
(Tier I)

TAM Roles and Responsibilities  
(Tier I)

Please elaborate on your TAM and State of Good Repair (SGR) Policy as well as your plan for evaluation and continuous improvement. When you are finished, click "Save" to save this page, or click "Next" to save and proceed to the next page in this chapter.

**TAM and State of Good Repair (SGR) Policy \***

What is your agency's TAM and/or State of Good Repair (SGR) policy? Here, you can document expectations for your employees and demonstrate executive-level direction to support the goals of the TAM system. This can be a short statement or a detailed policy. Describe your TAM plan context including the contents and structure. Could include time horizon interdependencies of asset groups and other relevant details.

**Continuous Improvement \***

What is your continuous improvement approach? How do you monitor and update your TAM approach to incorporate lessons learned? What is the threshold "trigger" to amend your TAM plan? What is the threshold "trigger" to update it?

**Previous Narrative Report**

Choose File

No file chosen

[OPTIONAL]

Upload File type (pdf, doc, docx, xls, xlsx, ppt, pptx 20MB or less). Maximum of 1 file.

Upload File

Functions	Document Name
No data found	

Figure 12: Adding agency TAM policies and previous narrative report

## TAM Roles and Responsibilities

This tab is required for users creating a Tier I TAM plan and optional otherwise. Please identify the individuals or departments with TAM-related responsibilities (Figure 13). For each individual or department, enter the following information:

FIELD	INSTRUCTIONS
<i>Department/Individual</i>	Enter the name of the individual or department (500 characters max).
<i>Role</i>	Enter the title or description of the individual or department (500 characters max).
<i>Sub-Recipient</i>	<u>For Group Plan Sponsors:</u> select the agency to which the individual or department belongs. For other users, select your own agency.

Click the “Add” button to add each individual or department to the roles and responsibilities table. When you are finished, click the “Next” button to proceed to Chapter 2.

**Basic (Required)**   **TAM Goals (Optional)**   **TAM Policy and Evaluation (Tier I)**   **TAM Roles and Responsibilities (Tier I)**

What roles have been assigned to your employees to achieve the goals of the TAM system? Who owns the TAM Plan and is responsible for monitoring and updating it? Who is your accountable executive?  
Please add one person at a time.

**Department / Individual**

Example: Jane Doe

**Role (Title and/or Description)**

Example: Director of Asset Management

**Sub-Recipient** ← **[IF APPLICABLE]**

-- Select --

**Add**   **Clear**

Figure 13: Adding roles and responsibilities

# Chapter 2: Capital Asset Inventory

Chapter 2 presents the asset data for your agency(ies) and includes the tabs listed below. The summary table makes up the “Capital Asset Inventory” section of your TAM plan while the inventory table(s) are included in the TAM plan appendix.

TAB NAME	DESCRIPTION	REQUIREMENT
<i>Inventory Table(s)</i>	Your asset inventory as downloaded from the NTD. You can modify assets in these tables and add additional entries.	Required for all TAM plans
<i>Summary</i>	A table with summary metrics by asset category and asset class. The summary table updates based on information in the Inventory Table(s) tab.	Required for all TAM plans

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*You are responsible for including all assets covered by the TAM Final Rule in your TAM plan, including assets not reported to the NTD. If needed, manually add assets to the inventory table in Chapter 2 to help ensure a compliant TAM plan.*


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## Inventory Table(s)

This tab includes your asset inventory as downloaded from the NTD. Assets are organized into separate tables by category (revenue vehicles, equipment, facilities, and infrastructure). Each row in the Revenue Vehicles table represents an individual fleet type and may contain multiple vehicles. You can edit the inventory tables in the following ways:

### Modify an Existing Asset

To modify an existing asset...

1. Click the Edit icon (  ) in the asset’s row.
2. Make any changes within the “Update Capital Asset Inventory” page that appears (Figure 14).
3. Click the “Save” button at the bottom of the page to return to the inventory table. To instead exit this page without saving, click the “Back to Inventory Table” link at the top of the page.

To delete an asset from the table, click the Trash icon (  ) in the asset’s row.

[Back to Inventory Table](#)

### Update Capital Asset Inventory

**Agency Name \***

**Asset Category \***

**Asset Class \***

**Asset Name \***

Asset Name is required

**Asset Owner \***

**Year in Service**

**Manufacture Year \***

**NTD ID \***

Figure 14: Update capital assets for the inventory table

#### Notes on the “Update Capital Asset Inventory” Form

##### Required Form Fields

Some of the data fields may not pull from NTD but are still required form fields, as indicated with an asterisk (\*). For example, as in Figure 14, TAMPLATE displays an error message when the current asset record does not have a value for “Asset Name”, which is a required form field. You will need to manually enter all required information in order to save any changes. If you do not have all information on hand, you can enter a space or any number/text as a placeholder.

##### Grayed-Out Fields

Some fields will be grayed out depending on other field values. For example, if you set the “Count/Fleet” field to “Count”, you can edit “Count/Total Number of Vehicles” and “Average Vehicle Mileage” but **NOT** “No of Active Fleet Vehicles” or “Total Active Fleet Mileage”. If you instead set the “Count/Fleet” field to “Fleet” the editing permissions for these fields will be flipped.

## Add a New Asset

To add a new asset not currently in the NTD...

1. Click the “Create New Capital Asset Inventory” button at the top-right of the page (Figure 15).
2. Add all required information in the “Add New Capital Asset Inventory” page that appears.

3. Click the “Add” button at the bottom of the page. To instead exit this page without saving, click the “Back to Inventory Table” link at the top of the page.

*Note: If you select “Custom (non-rule) Category” as the asset class, the form will prompt you to name your custom class.*

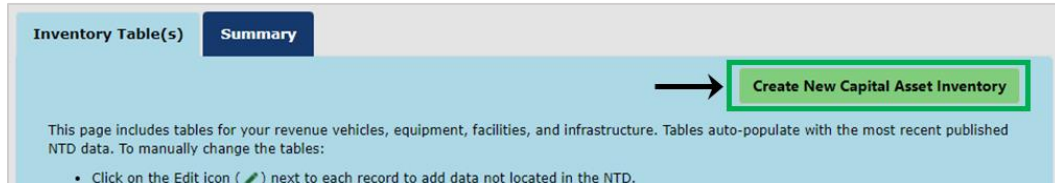


Figure 15: Create a new capital asset entry

## Summary Table

The summary table presents the total number, average age, average mileage, average replacement cost, and total replacement cost by asset category, then asset class, as applicable. Review your summarized asset data and make any changes to the inventory table(s) to ensure this summary accurately reflects your agency’s asset inventory. You are not able to directly edit the summary table within TAMPLATE.

---

*Any edits made within TAMPLATE apply only to your current TAM plan. The underlying NTD data will not be changed.*

---

# Chapter 3: Condition Assessment

Chapter 3 presents the asset data for your agency(ies) and includes the following tabs:

TAB NAME	DESCRIPTION	REQUIREMENT
<i>Condition Table(s)</i>	Your asset inventory as specified in Chapter 2 and supplemented with condition information from NTD.	Required for all TAM plans
<i>Summary</i>	A table with summary metrics by asset category and asset class. The summary table updates based on information in the Condition Table(s) tab.	Required for all TAM plans

Recall that TAM measures performance towards a state of good repair for each asset class within an asset category. For reference, the performance measure for each asset category is summarized below:


ASSET CATEGORY	FTA-ESTABLISHED PERFORMANCE MEASURE
<i>Revenue Vehicles</i>	% of revenue vehicles that meet or exceed the useful life benchmark (ULB)
<i>Equipment</i>	% of non-revenue service vehicles that meet or exceed the ULB
<i>Facilities</i>	% of facilities rated under 3.0 on the TERM scale
<i>Infrastructure</i>	% of track segments under performance restriction

## Condition Table(s)

This tab includes your asset inventory, as specified in Chapter 2, with additional columns for asset condition. As in Chapter 2, assets are organized into separate tables by category, beginning with revenue vehicles.

### Revenue Vehicles and Equipment

The performance measure for revenue vehicles and equipment depends on the asset age and useful life benchmark (ULB). In the revenue vehicle and equipment tables in Chapter 3, the “Useful Life Benchmark (Yrs)” column presents the ULB as previously reported to the NTD. For any new assets that you created in Chapter 2, the ULB column auto-populates with the [FTA default value](#) for that asset class.

You can manually edit an asset’s ULB by clicking the Edit icon (  ) in a row. On the “Update Useful Life Benchmark (ULB)” page (Figure 16), you will be prompted to enter an explanation for the change or upload supporting documentation. If uploading documentation, the file’s name will be included in a table in your TAM plan, with active links to download the file when viewed online from the **TAM Plan** section of TAMPLATE.

### Update Useful Life Benchmark (ULB)

Please enter notes or upload supporting documentation if the useful life benchmark value for the record is being updated from the default value.

**Useful Life Benchmark (Yrs) \***

**Notes \***

**Supporting documentation \***  
Upload File Type(pdf, doc, docx, xls, xlsx, ppt, pptx, 20MB or less). There is no limit to the number of files that can be uploaded.

14

Notes field is mandatory if the Useful Benchmark value has been updated

Choose File

No file chosen

Upload File

Functions	Document Name
No data found	


Save

Cancel

Figure 16: Update ULB for the asset condition table


*The “Default Useful Life Benchmark” column states whether the value in the “Useful Life Benchmark (Yrs)” matches the FTA default value, and the “Past Useful Life Benchmark” column states whether the asset’s age exceeds the entered ULB. Both columns automatically update to reflect any changes to an assets age or ULB.*

## Facilities

The performance measure for facilities depends on the TERM scale condition for each asset. In the facilities table in Chapter 3, the “TERM Scale Condition” column presents this rating as previously reported to the NTD. The TERM scale runs from 1 for poor condition to 5 for excellent condition. You can manually add or edit an asset’s TERM scale condition and condition assessment date by clicking the Edit icon (  ) in the appropriate row.

You will need to add a TERM rating for any new facilities that you created in Chapter 2. If a facility’s condition has not yet been assessed, set the TERM scale condition to N/A, and set the assessment date to the date the facility was built.

## Infrastructure

The performance measure for infrastructure depends on the miles of track under performance restrictions. In the infrastructure table in Chapter 3, the “Track Under Performance Restriction” column presents this number in miles as previously reported to the NTD. To change this value, you will need to edit the asset’s entry in TAMPLATE Chapter 2. Specifically, click the click the Edit icon (  ) next to the asset in Chapter 2, and on the “Update Capital Asset Inventory” page, find and update the “Track Under Performance Restriction” field. You can also provide this value when manually adding new assets within Chapter 2.

---

*In cloned TAM plans, highlighted rows in the inventory tables indicate records that were modified from the underlying NTD data in the older TAM plan.*

---

## Summary Table

The summary table presents the following information by asset class:

- **Inventory Information** such as the total number, average age, average mileage, average replacement cost, and total replacement cost from Chapter 2.
- **% At or Exceeds ULB**, which is the percentage of vehicles with an age at or exceeding the ULB in years. *Note: This column applies to revenue vehicles and equipment only.*
- **% of Track Miles in Slow Zone**, which is the percentage of track that has performance restrictions. *Note: This column applies to infrastructure only.*
- **Number of Facilities with Less than 3 on TERM Scale**, which is the count of facilities with a condition rating of “poor” or “marginal” based on the TERM scale. *Note: This column applies to facilities only.*

Review your summarized asset data and make any changes on the “Inventory Table(s)” tab in Chapter 2 or on the “Condition Table(s)” tab to ensure this summary accurately reflects your agency’s asset conditions. You are not able to directly edit the summary table within TAMPLATE.



# Chapter 4: Decision Support

Information entered in Chapter 4 makes up the “Decision Support” section of your TAM plan. Chapter 4 includes the following tabs:

TAB NAME	DESCRIPTION	REQUIREMENT
<i>Basic</i>	Describe the methods your agency uses to make asset management decisions.	Required for all TAM plans
<i>Maintenance, Overhaul, Disposal, Acquisition and Renewal</i>	On these FOUR separate tabs, describe your agency’s strategies for each of these four asset management activities.	Required for Tier I only
<i>Risk Management</i>	Identify your agency’s risks and mitigation strategies.	Optional for all plans

## Basic

This tab is required for all TAM plans. The table on this tab lists the processes and tools your agency uses to support investment decision-making.

For each process/tool your agency uses...

1. Click the “Create New Decision Support Entry” button (Figure 17).
2. On the “Add New Decision Support” page that appears, name and briefly describe the process/tool (3000 characters max per textbox).
3. Click “Add” to save the process/tool.

Figure 17: Create a new decision support process

Click the Edit icon (✎) in a row to modify an existing table entry. Click the Trash icon (🗑) in a row to delete an existing entry.

## Maintenance Strategy

This tab is required for users creating a Tier I TAM plan and optional otherwise. The table on this tab lists your agency's regularly planned maintenance activities, such as inspections and routine preventive maintenance.

For each asset class and regular maintenance activity...

1. Click the "Create New Maintenance Strategy" button (Figure 18).
2. On the "Add New Maintenance Strategy" page that appears, select the appropriate asset category and class.
3. Enter the frequency, average duration (in hours), and cost of the maintenance activity.
4. In the textbox, briefly describe the maintenance activity (500 characters max).
5. Click "Add" to save the new strategy.

Figure 18: Create a new maintenance strategy

Click the Edit icon (✎) in a row to modify an existing table entry. Click the Trach icon (🗑) in a row to delete an existing entry. Optionally, beneath the strategy table as shown in Figure 19, describe any unplanned maintenance needs that your agency encounters (5000 characters max), and click the "Save" button.

Functions	Asset Category ▾	Asset Class ▾	Maintenance Activity ▾	Frequency ▾	Avg Duration (Hrs) ▾	Cost ▾	Updated Date ▾
No data found							

Unplanned Maintenance Needs

Example: How does your agency address unplanned maintenance needs?

Previous

Save

Next

Figure 19: Add agency's approach to unplanned maintenance

## Overhaul Strategy

This tab is required for users creating a Tier I TAM plan and optional otherwise. The table on this tab lists your agency's overhaul strategies for different asset classes. How and when do assets get replaced, and what occurs during the overhaul process?

For each asset class and overhaul strategy...

1. Click the "Create New Overhaul Strategy" button (Figure 20).
2. On the "Add New Overhaul Strategy" page that appears, select the appropriate asset category and class.
3. In the textbox, describe the overhaul strategy (3000 characters max).
4. Click "Add" to save the new strategy.

Basic (Required)	Maintenance Strategy (Tier I)	Overhaul Strategy (Tier I)	Disposal Strategy (Tier I)	Acquisition and Renewal Strategy (Tier I)	Risk Management (Optional)
<div> <div>→</div> <div>Create New Overhaul Strategy</div> </div>					

Overhaul Strategy

Please describe your asset overhaul strategies for different asset types. Consider when and how assets get replaced and what activities occur during the overhaul process, e.g., for mini, mid-life, or major overhaul. As applicable, describe any planned changes or improvements to these processes.

To create a new table entry, click the "Create New Overhaul Strategy" button in the upper right corner of the page. For existing table entries, click the Edit icon (✎) to edit a row, or click on the Trash icon (🗑) to delete it. This table will appear in an "Overhaul Strategy" subsection of your compiled TAM plan.

Functions	Asset Category ▾	Asset Class ▾	Overhaul Strategy ▾	Updated Date ▾
No data found				

Figure 20: Create a new overhaul strategy

Click the Edit icon (✎) in a row to modify an existing table entry. Click the Trash icon (🗑) in a row to delete an existing entry.

# Disposal Strategy

This tab is required for users creating a Tier I TAM plan and optional otherwise. The table on this tab lists your agency's disposal strategies for different asset classes. What are your approval processes and procedures for physical removal of an asset?

For each asset class and disposal strategy...

1. Click the "Create New Disposal Strategy" button (Figure 21).
2. On the "Add New Disposal Strategy" page that appears, select the appropriate asset category and class.
3. In the textbox, describe the disposal strategy (2000 characters max).
4. Click "Add" to save the new strategy.

Basic (Required)	Maintenance Strategy (Tier I)	Overhaul Strategy (Tier I)	Disposal Strategy (Tier I)	Acquisition and Renewal Strategy (Tier I)	Risk Management (Optional)										
<div>Disposal Strategy</div> <p>Please describe your asset disposal strategies for different asset types. Consider your organization's approval processes and procedures for physical removal of the asset. As applicable, describe any planned changes or improvements to these processes.</p> <p>To create a new table entry, click the "Create New Disposal Strategy" button in the upper right corner of the page. For existing table entries, click the Edit icon (pencil) to edit a row, or click on the Trash icon (trash) to delete it. This table will appear in a "Disposal Strategy" subsection of your compiled TAM plan.</p> <table border="1"><thead><tr><th>Functions</th><th>Asset Category</th><th>Asset Class</th><th>Disposal Strategy</th><th>Updated Date</th></tr></thead><tbody><tr><td colspan="5">No data found</td></tr></tbody></table>						Functions	Asset Category	Asset Class	Disposal Strategy	Updated Date	No data found				
Functions	Asset Category	Asset Class	Disposal Strategy	Updated Date											
No data found															

Figure 21: Create a new disposal strategy

Click the Edit icon (pencil) in a row to modify an existing table entry. Click the Trash icon (trash) in a row to delete an existing entry.

# Acquisition and Renewal Strategy

This tab is required for users creating a Tier I TAM plan and optional otherwise. The table on this tab lists your agency's acquisition and renewal strategies for different asset classes. How and when does your agency decide to begin new acquisition activities?

For each asset class and acquisition and renewal strategy...

1. Click the "Create New Acquisition and Renewal Strategy" button (Figure 22).
2. On the "Add New Acquisition and Renewal Strategy" page that appears, select the appropriate asset category and class.
3. In the textbox, describe the acquisition and renewal strategy (2000 characters max).
4. Click "Add" to save the new strategy.

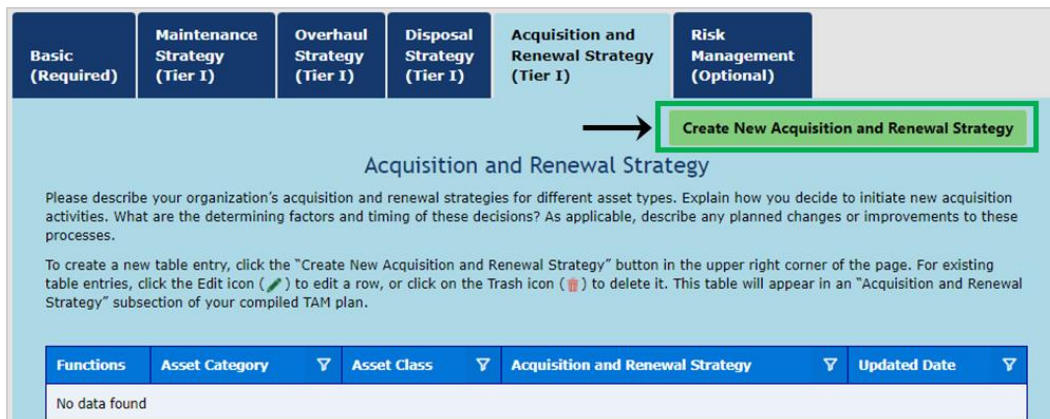


Figure 22: Create new acquisition and renewal strategy

Click the Edit icon (pencil) in a row to modify an existing table entry. Click the Trash icon (trash) in a row to delete an existing entry.

## Risk Management

This tab is optional for all users. The table on this tab lists the risks that your agency faces and your corresponding strategies to manage those risks. Please think of general types of risk that your asset management strategies may introduce (e.g., service level impacts from preventive maintenance) or mitigate (e.g., safety-related risks).

For each risk management strategy...

1. Click the "Create New Risk Management Entry" button (Figure 23).
2. Describe the risk your agency faces and your strategies to mitigate this specific risk (3000 characters max per textbox).
3. Click "Add" to save the new strategy.



Figure 23: Create new risk management entry

Click the Edit icon (pencil) in a row to modify an existing table entry. Click the Trash icon (trash) in a row to delete an existing entry.

# Chapter 5: Investment Prioritization

Information entered in Chapter 5 makes up the “Investment Prioritization” section of your TAM plan. Chapter 5 includes the tabs listed below. Attached plans and schedules will be included in the appendix of your TAM plan.

TAB NAME	DESCRIPTION	REQUIREMENT
<i>Proposed Investments</i>	Describe the investments needed for your agency to achieve/maintain a state of good repair.	Required for all TAM plans
<i>Capital Investment Activity Schedules</i>	Attach any plans or schedules for capital investment activities.	Required for Tier I only

## Proposed Investments

The following steps are required for all TAM plans:



1. In the “Investment Prioritization” textbox, depicted in Figure 24, provide an overview of the investments needed for your agency to maintain or achieve a state of good repair (5000 characters max).

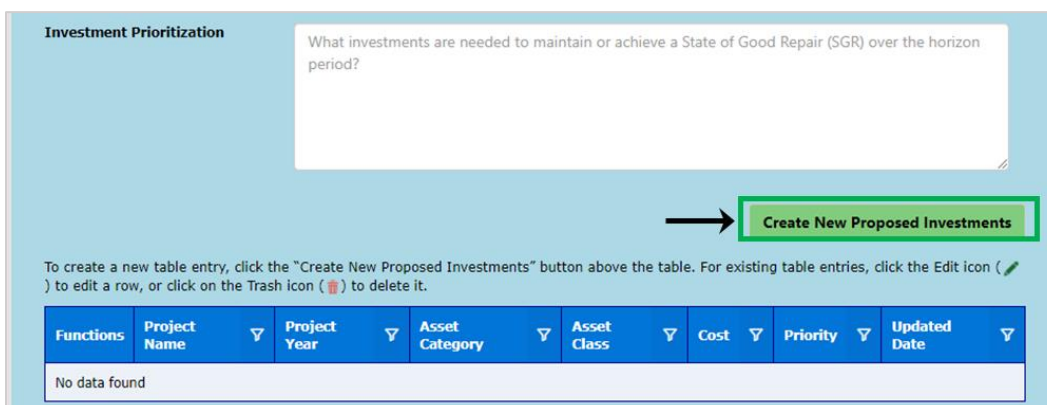
Figure 24: Overview of investments needed

2. Click the “Save” button at the bottom of the page *before proceeding to the next step*.
3. **List out your agency’s proposed investments.** For each investment under consideration, click the “Create New Proposed Investment” button (Figure 25). On the “Add New Proposed Investments” page that appears, fill out the following fields, and click the “Add” button:



FIELD	INSTRUCTIONS
<i>Project Name</i>	Enter a project name (5000 characters max).
<i>Project Year</i>	Enter the year of proposed implementation.
<i>Asset Category</i>	Select the asset category targeted by this project.
<i>Asset Class</i>	Select the asset class targeted by this project. This drop-down menu updates based on the selected asset category. If you select “Custom (non-rule) Category” for Asset Class, enter the custom asset type in the textbox that appears.
<i>Cost</i>	Enter the expected project cost.
<i>Priority</i>	Use the drop-down menu to assign a priority (high, medium, low, or other” to the project. If you select “Other”, enter a custom priority label in the textbox that appears.



Within the proposed investment table, click the Edit icon (  ) in a row to modify an existing table entry. Click the Trash icon (  ) in a row to delete an existing entry.



**Investment Prioritization**

What investments are needed to maintain or achieve a State of Good Repair (SGR) over the horizon period?

**Create New Proposed Investments**

To create a new table entry, click the “Create New Proposed Investments” button above the table. For existing table entries, click the Edit icon (  ) to edit a row, or click on the Trash icon (  ) to delete it.


Functions	Project Name ▼	Project Year ▼	Asset Category ▼	Asset Class ▼	Cost ▼	Priority ▼	Updated Date ▼
No data found							

Figure 25: Create new proposed investment

## Capital Investment Activity Schedules.

This tab is required for users creating a Tier I TAM plan and optional otherwise. Following the arrows in Figure 26, attach any work plans or schedules for capital investment activities:

1. Click the “Choose File” button.
2. In the pop-up window, locate the file to attach and click “Open”.
3. Click the “Upload File” button to add the document to the table.

If desired, you can attach multiple files. To delete a previously uploaded file, click the Trash icon (  ). Uploaded documents will be listed in a table in your TAM plan; when viewed online within the **TAM Plan** section of TAMPLATE, this table will include active links to download attachments.

Proposed Investments  
(Required)

Capital Investment Activity Schedules  
(Tier I)

### Capital Investment Activity Schedules

You may attach any work plans or schedules you have for capital investment activities as separate files when delivering this template. Click the "Choose File" button to select a file and then click the "Upload File" button to complete the upload. In the table, click the Trash icon (🗑️) to delete any previously uploaded documents. Uploaded documents will be included in an appendix of the generated TAM Plan.

Choose File

No file chosen

[STEP 1]

[STEP 2]

Upload File

Max file size to be 20 MB and file types as pdf, doc, docx, xls, xlsx, ppt, pptx

Functions	Document Name
No data found	

Figure 26: Upload capital investment activity schedules



# Fleet Replacement Module

The Fleet Replacement Module is designed to help you quantify your agency's future fleet needs. **This module is OPTIONAL for all users** and contains the five tabs listed below. Tables from the "New Fleet" and "New Fleet Inflation" tabs make up an appendix in your TAM plan.

*Note: This module is being considered for future updates.*

TAB NAME	DESCRIPTION
<i>Existing Fleet</i>	Lists your revenue vehicle assets as reference (Figure 27).
<i>Existing Fleet Remaining Per Year</i>	Ages your fleets and calculates the number of vehicles within their useful life benchmark over the next five years.
<i>Fleet Required</i>	Provide the number of scheduled and spare vehicles to calculate vehicle needs over the next five years.
<i>New Fleet</i>	Summarizes the number of new vehicles to purchase and the resulting cost over the next five years.
<i>New Fleet Inflation</i>	Enter an inflation rate to calculate total fleet replacement costs in future years.

Existing Fleet

Existing Fleet Remaining Per Year

Fleet Required

New Fleet

New Fleet Inflation

Existing Fleet

This is a listing of your revenue vehicle assets. The table auto-populates with information entered in Chapter 3 and is provided in this module for your reference.

Asset Category ▾	Asset Class ▾	Asset Name ▾	Manufacturer ▾	Model ▾	Count ▾	RVI ID ▾	Asset Owner ▾	Manufacture Year
Revenue Vehicles	AB - Articulated Bus		EXAMPLE MANUFACTURER	EXAMPLE MODEL NUMBER	24	EXAMPLE RVIID	EXAMPLE ASSET OWNER	2016

Figure 27: Existing Fleet tab in the Fleet Replacement Module

# Completing Your TAM Plan

After completing the other TAMPLATE sections, click the “TAM Plan” link at the top of the page (Figure 28) to compile and load your TAM plan. On this final page of TAMPLATE, you can certify, view, download, and share your TAM plan. Note that TAMPLATE does NOT automatically submit your plan to FTA.

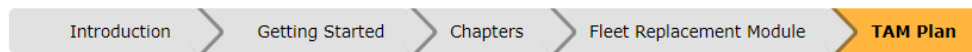


Figure 28: The final section (“TAM Plan”) in TAMPLATE

## Certifying your TAM Plan

You will need to certify that the information provided in the TAM plan is accurate, correct, and complete.<sup>3</sup> Certifying the plan is NOT the same as obtaining Accountable Executable<sup>4</sup> approval. You will need to separately obtain the Accountable Executive’s signature after downloading your TAM plan.

To certify your TAM plan, scroll to the gray certification box. The Accountable Executive’s name will auto populate in this field; however, you may edit the field as needed before clicking the “Certify” button. You can still edit the plan after certifying, but you cannot remove your certification or recertify with a different name.

Figure 29: Certifying your TAM plan

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*Cloning a certified TAM plan within the TAMPLATE dashboard will remove the certification statement. You will need to separately certify a cloned plan.*

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<sup>3</sup> Users creating an Experimental TAM Plan will not see an option to certify the plan.

<sup>4</sup> Each transit provider must designate an Accountable Executive (49 CFR 625.5) to ensure appropriate resources for implementing the agency's TAM plan.

# Sharing Your TAM Plan

## Sending to Your Subrecipients

Group Plan Sponsors have the option to share their TAM plan with subrecipients for their certification. Click the “Share TAM Plan with Subrecipients” button, and in the pop-up window, enter an email address to share your plan and click “Send Email”. Recipients will be emailed a link that takes them to a page in TAMPLATE in which they can view the plan and add their names to certify the plan on behalf of their respective agencies. Subrecipients are NOT able to directly edit the TAM plan, but you as the plan preparer are able to continue making changes within TAMPLATE even after obtaining subrecipient certification. A table of subrecipient certifications is automatically added to your TAM plan.

## Sharing with FTA

After certifying your plan, a button will appear with the option to share the completed TAM plan with FTA. Sharing your TAM plan with FTA is optional, and your shared plan will only be utilized for research purposes and to further future development of the TAM program. Your plan is only reviewed for compliance during your Triennial and/or State Management review.

Figure 30 below shows both the buttons to request subrecipient certification and to share the plan with FTA.

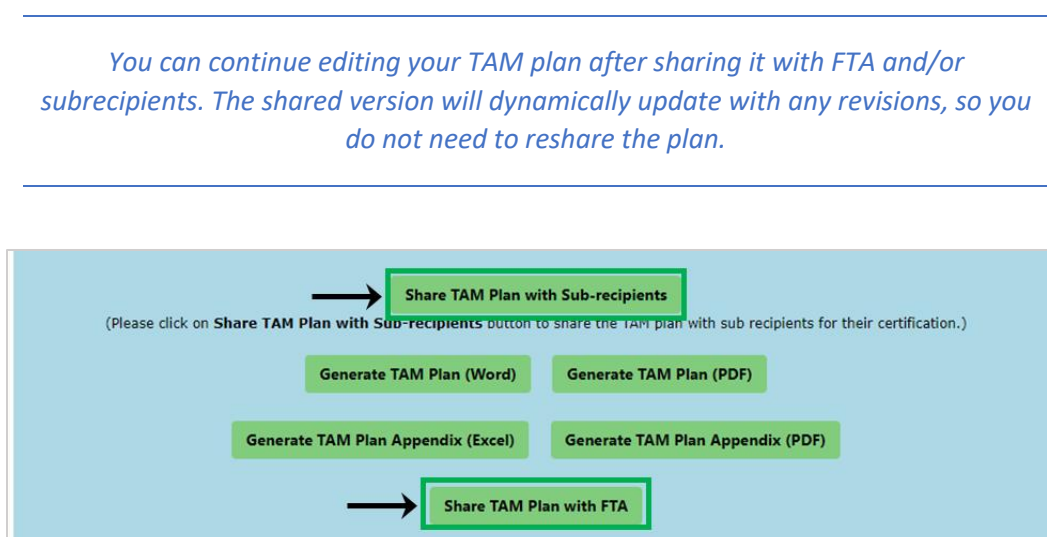


Figure 30. Options to share plan with subrecipients (visible for Group Plans only) and FTA

# Downloading Your TAM Plan

Download your TAM plan by clicking the green “Generate” buttons at the top of the page. You can generate and download the TAM plan in a Microsoft Word format or as a PDF. You can also generate and download the TAM plan appendices as an Excel file or as a PDF.

# Questions or Feedback?

FTA's [TAM webpage](#) is a resource for TAM policies, practices, and examples. In addition, you may email the TAM question mailbox at [TAM@dot.gov](mailto:TAM@dot.gov) for specific questions relating to the concepts of the TAM plan development, or to provide feedback on the TAMPLATE tool. Visit the [TAM Resource Table](#) for a full list of available TAM resources.

Additional resources for transit asset management include your state DOT, FTA regional office, and industry organizations such as the American Public Transportation Association (APTA), the Community Transportation Association of America (CTAA) and the National Rural Transit Assistance Program (RTAP).

For specific technical issues with the tool please contact DOT IT Services at 202-385-4357 or 1-866-466-5221 or email [5-Help Service Center](#). A ticket will be created, and the developer should reach out to you within 1-2 business days.

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*Please contact FTA at [TAM@dot.gov](mailto:TAM@dot.gov) with any questions or feedback on TAMPLATE or this user guide.*

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