FEDERAL TRANSIT ADMINISTRATION

Electronic Clearing House Operation (ECHO-Web) User Guide

Version 4.1
September 28, 2024

U.S. Department of Transportation
Federal Transit Administration

Contents

Document Revision History

Version	Date	Summary of Changes	Author
0.1		First Draft	Karim Ebeid
0.2	10/19/2022	Second Draft	
0.3	11/3/2022	General formatting updates	Thitacitta Low
0.4	11/9/2022	Removed System Admin specific sections and formatting changes.	Brian Anderson
0.5	11/17/2022 - 11/30/2022	Updates – Refreshed table of contents; Images: Changed out images to add consistency with color (*added user information to make it more professional and didn't add photo to user because of copy rights*), Removed blurry photos or images that didn't look correct, added numbering/shapes with figure descriptions to better explain to the user; Formatting: Removed unnecessary styles in blank areas, added spacing between sentences, Table design consistency, other formatting; Grammar: updated language consistency, replaced outdated information.	Chris West
0.6	12/19/2022 - 2/15/2022	Updates – Captions for figures and tables; Formatting and grammar throughout, and link setup, added a new header style.	
0.7	02/17/2023 - 02/22/2023	Updates – Corrected grammar and formatting throughout.	Alyssa Burnett
1.0	02/24/2023	Finalized	Jennifer Burton
2.0	03/13/2023	Revised – Includes more information re: User Roles; clear distinction between FTA vs. Recipients	Regional Offices
2.1	03/23/2023	Updates – Changes made to text colors for compliance purposes. Changes made to template for better spacing and alignment. Inserted Table 26 in section 5.1 User Roles and Permissions. Inserted User Role Matrix in section 5.1 User Roles and Permissions.	Greg Nesburg
2.2	03/30/2023	Updates – Accepted track changes from previous updates and updated version number and "as of" date.	Greg Nesburg
2.3	04/12/2023	Updates – Removed granular heading number from links in Table 2, paragraph under Figure 11, paragraph under Figure 17, paragraph under Figure 22, paragraph under Figure 29. All instances of "canceled" were changed to "cancelled" and instance of "cancelation" were changed to "cancellation". Updated alignments and spacing of pages.	Greg Nesburg
2.4	04/21/2023	Finalized	Greg Nesburg
2.5	05/26/2023	Updates – Table 13, #5 Completed, the reference to "no response within the expected 3 business days" to state, "no response within the expected 6 business days".	Greg Nesburg

3.1	06/07/2023	Updates – To account for changes to the User Manager and Read Only roles: Section 5.1: Clarify that User Managers can also be AO, RO, or Grantee users. Table 26: The limit of Read-Only users has been changed from "1" to "Unlimited." User Role Matrix: GSMs and Ums are no longer able to view or export payment requests.	Greg Nesburg
3.2	07/28/2023	Updated table descriptions for Approving Officials in tables 16 & 26.	Alyssa Burnett
3.3	08/25/2023	Updates – Template changed, any direct reference to "you" changed to "users" or "the user". All figure text added as Alt Text for each image.	G. Nesburg
3.4	11/13/2023	Updated FAQ section, Updated Account Management Section	Baneen Khan
3.5	12/04/2023	Updated all sections to reflect format of balance and amount as dollar	Baneen Khan
3.6	12/22/2023	Rename Electronic Business POC in ECHO to Electronic Business POC (SAM POC)	Baneen Khan
3.7	03/28/2024	Updated all account management pages to Re-implement Deactivated filter	Baneen Khan
3.8	04/26/2024	Added Suspend/Unsuspend Button Functionality	Baneen Khan
3.9	05/10/2024	Updated FAQ Section to reflect "Create New FAQ"	Baneen Khan
4.0	06/07/2024	Updated Payment Status Legend to reflect Payment Status not being the same color.	Baneen Khan
4.1	08/29/2024	Update User Information to pull directly from FACES	Baneen Khan

1. ECHO-WEB Overview

1.1. What is ECHO-Web?

Electronic Clearing House Operation (ECHO)-Web is a web application owned by the Federal Transit Administration (*FTA*) and maintained by the FTA Headquarters Office of Information Technology (*TAD-20*). The ***ECHO-Web*** application allows ***FTA*** grant recipients to request payments from their grant awards (hereafter called awards").

1.2. Accessibility

1.2.1. When can I use ECHO-Web?

You can access ***ECHO-Web*** for payment requests 7 days a week except for system outages and the year- end closing activity period (*occurring in late September/early October*).

1.2.2. How soon will my payment be processed?

Payments are processed twice a day Monday through Friday. Payments are not processed on federal holidays, during federally mandated closings, and weekends. Approved funds requested by 2:00 PM ET on federal workdays are usually deposited to the grant recipient's bank account in 1 – 3 business days. If the government is closed, processing will be delayed until the government reopens. In some cases, bank policies prevent funds from being available to users on the same day money is deposited by the Treasury.

2. User Roles and Permissions

Depending on your role permissions, you may only be able to see certain users:

FTA Only:

- **Global Viewers** – Headquarters users with read-only access to all payment requests recorded in ECHO-Web
- **Global Security Managers** (GSMs) – Headquarters users with access to add, remove, or update any user in ECHO-Web
- Any users in the system
- **Local Security Managers** (LSMs) – Regional Office POCs assign initial Recipient User Managers and Approving Officials.

Recipients Only:

- **Grantees** – These users can request payments. Each organization may have up to two (2) Grantee users.
- **Approving Official (AO)** – This role includes Read Only functionality for payment requests. The AO also cannot have the Grantee role. Each organization may have one (1) AO.
- **Read Only** (RO) – This role may be assigned to provide Read Only functionality to a user in addition to the AO. There is no restriction on the number of ROs an organization may appoint.
- **User Managers (UM)** –The UM is responsible for managing assignments of user roles within a recipient organization, according to the organization's policies and procedures. UMs can unlock Recipient User accounts, if needed. A UM can also be an AO, RO, or Grantee user. There is no restriction on the number of UMs an organization may appoint.

Role	# of Users	Functionality	Other Roles Permitted
Grantee	2	The Grantee can request payments and view payment history.	No – Approving Official Yes – User Manager No – Read Only
Approving Official	1	The Approving Official role includes read only functionality to view payment history (a separate Read Only role assignment is not necessary). **NOTE:** An Organization must have at least one AO assigned to allow Grantees to submit requests. AOs receive email notifications of Payment Requests from their Organization.	No – Grantee Yes – User Manager Yes – Read Only
Read Only	Unlimited	The Read Only role includes functionality to view payment history.	No – Grantee Yes – Approving Official Yes – User Manager
User Manager	Unlimited	The User Manager responsible for managing assignments of the Recipient User roles according to the agency's policies and procedures. UMs can unlock Recipient User accounts, if needed.	Yes – Grantee Yes – Approving Official Yes – Read Only

Table 26: An overview of Recipient User Roles.

User Role Matrix

	FTA HQ Staff		FTA Staff at the Regional Level	Recipient Users			
	Global Security Manager (GSM)	Global Viewer	Local Security Manager (LSM)	User Manager (UM)	Approving Officials	Read Only	Grantee
User Type							
FTA HQ User	✓	✓	✗	✗	✗	✗	✗
Regional FTA Users	✗	✗	✓	✗	✗	✗	✗
Organizational Users	✗	✗	✗	✓	✓	✓	✓
User Management							
Create GSM Users	✓	✗	✗	✗	✗	✗	✗
Create LSM Users	✓	✗	✗	✗	✗	✗	✗
Create User Managers	✓	✗	✓	✗	✗	✗	✗
Create Recipient Users	✓	✗	✓	✓	✗	✗	✗
Create Multiple Users	✓	✗	✓	✓	✗	✗	✗
Review Role Requests	✓	✗	✓	✓	✗	✗	✗
Review Unlock Requests	✓	✗	✓	✗	✗	✗	✗
Assign Bulk Roles	✓	✗	✓	✗	✗	✗	✗
Remove Bulk Roles	✓	✗	✓	✗	✗	✗	✗
Send Ad-Hoc Emails	✓	✗	✗	✗	✗	✗	✗
Manage Roles	✓	✗	✓	✓	✗	✗	✗
Lock Users	✓	✗	✓	✓	✗	✗	✗
Deactivate Users	✓	✗	✓	✓	✗	✗	✗
Suspend Grantees							
Restore Grantees							
Edit ECHO Contact User Information	✓	✓	✓	✓	✗	✗	✗
Edit ECHO Contact Self User Information	✓	✓	✓	✓	✓	✓	✓
Recertification Responsibilities							
Recertify GSMs	✓	✗	✗	✗	✗	✗	✗
Recertify LSMs	✓	✗	✗	✗	✗	✗	✗
Recertify User Managers	✗	✗	✓	✗	✗	✗	✗
Recertify Grantees	✗	✗	✗	✓	✗	✗	✗
Payments							

Create Payment Request			✗	✗		✗		✗	✗	✗	✓
Edit Payment Requests			✗	✗		✗		✗	✗	✗	✓
Cancel Payment Requests			✗	✗		✗		✗	✗	✗	✓
View All Payment Requests			✗	✓		✗		✗	✗	✗	✗
View All Payment Requests at the Regional Level			✗	✓		✓		✗	✗	✗	✗
View All Payment Requests at the Organizational Level			✗	✓		✓		✗	✓	✓	✓
Reports											
User Details Report			✓	✓		✓		✓	✗	✗	✗
User Deactivation History Report			✓	✓		✓		✓	✗	✗	✗
Supervisor Hierarchy Report			✓	✗		✗		✗	✗	✗	✗
Recertification Status Report			✓	✗		✗		✗	✗	✗	✗
Payments Report			✗	✓		✓		✗	✓	✓	✓

For more information on GSMs, LSMs, and UMs, please view the FACES User Guide:

Login to https://faces.fta.dot.gov/suite/ and follow the login steps below:

- 2.1 FTA Employee Login
- 2.2 Non-FTA Employee Login (Grantee Users)

1) From the ***FTA TrIAD Homepage (****or anywhere in ECHO-Web)* click on the following icon shown in the image below (*seen in the upper right corner of all web pages*).

Figure 52: The block of 9 tiles or squares next to the profile picture (located in the upper-right corner), will open a drop-down with various links.

- Click on the ***User Management*** option.

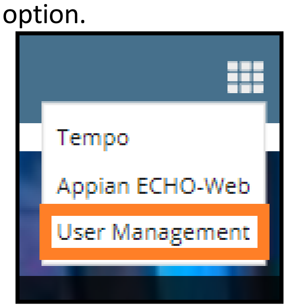


Figure 53: The possible contents of icons may contain the same names, however, all you need to do is select "User Management".

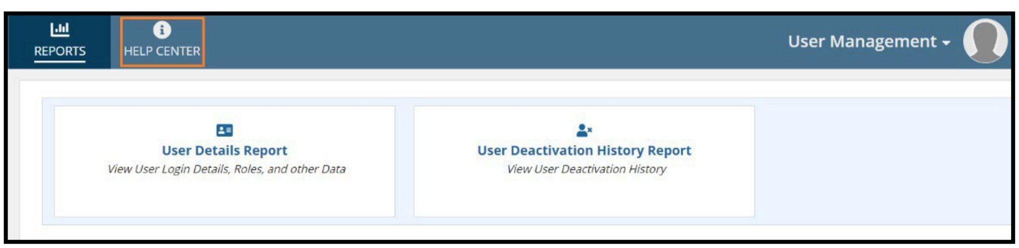


Figure 54: The HELP CENTER tab is in the upper left corner.

- Next, you will come to the ***User Management*** page.
  1. Select the ***HELP CENTER*** tab.
  2. Next, click on the ***FACES User Guide***.

Figure 55: You will find the “FACES User Guide” under “Welcome to the FACES Help Center!”.

- The ***FACES User Guide*** will open; to download it, select the ***Download User Guide*** link, or view it in the PDF preview. Go to ***Section 4: System Users***.

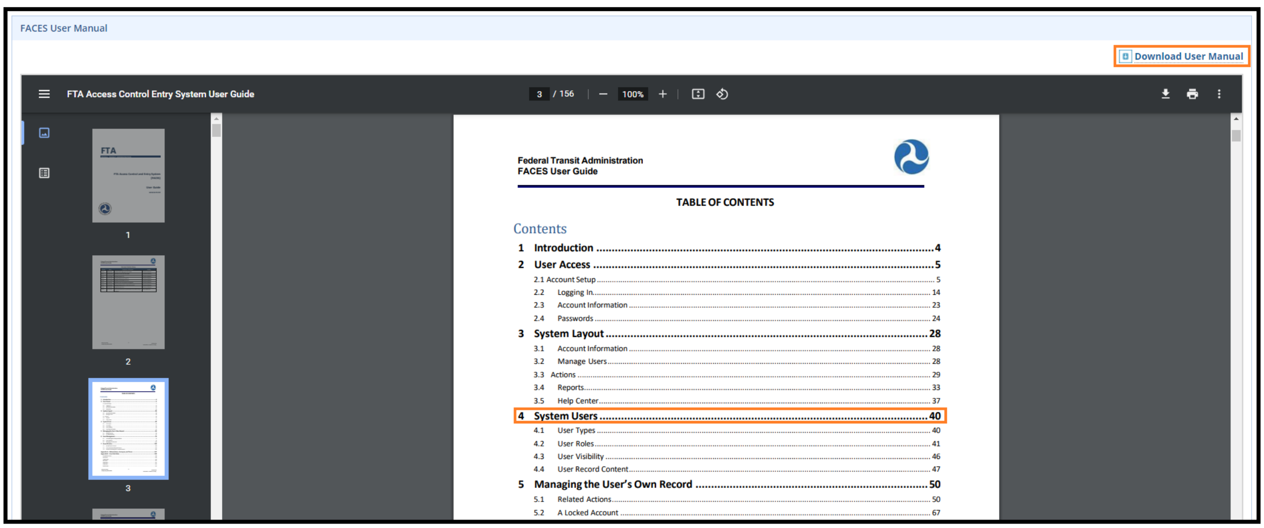


Figure 56: FACES User Guide will show as a PDF preview. Normally you first see the first page of the User Guide but for the example showing the 3rd page where you will click on Section 4: “System Users” for more information on User Role Permissions. You can download the User Manual by clicking on the “Download User Guide” link above the PDF preview.

3. System Layout

The ***ECHO-Web*** application resides on the FTA ***Transit Integrated Appian Development (TrIAD) Platform***, accessible after successful login at https://faces.fta.dot.gov, and shares a common layout with other ***FTA Appian*** applications. This section provides a high-level view of the application and how to navigate, find, and work with information within ***ECHO-Web***.

3.1. FTA Employee/Contractor Login

FTA employees should access ***ECHO-Web*** via the ***FTA*** network. To log in, take the following steps:

1. Open a web browser (e.g., Edge, Chrome) and enter the ***FACES URL:*** https://faces.fta.dot.gov/suite/
2. Read the security policy and select ***I AGREE***

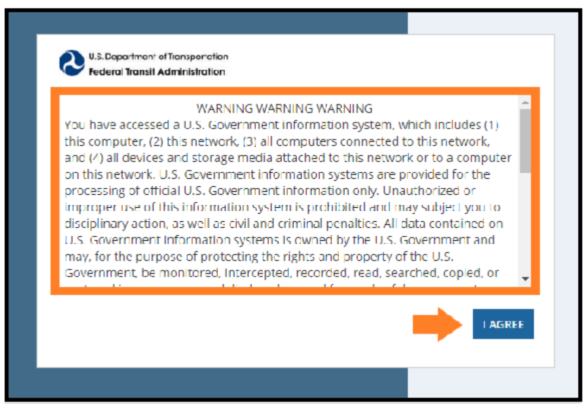
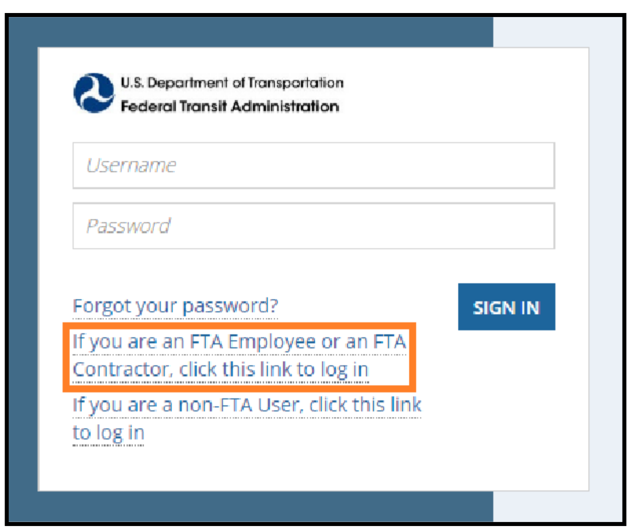


Figure 1: Security warning when accessing the FACES website.

3. On the login page, under **Forgot your password?** Select **If you are an FTA Employee or an FTA**



Contractor, and click this link to log in.

Figure 2: FACES login after the security warning. Click on the link that mentions FTA Employee or FTA Contractor.

4. Next, you will be taken to the **TrIAD Welcome page**, where you can select the application you wish to use. If you have access to more than one ***FTA*** application (*ECHO-Web, TrAMS, NTD, DGS, SSOR or FACES*), those options will also be available. Select ECHO-Web.

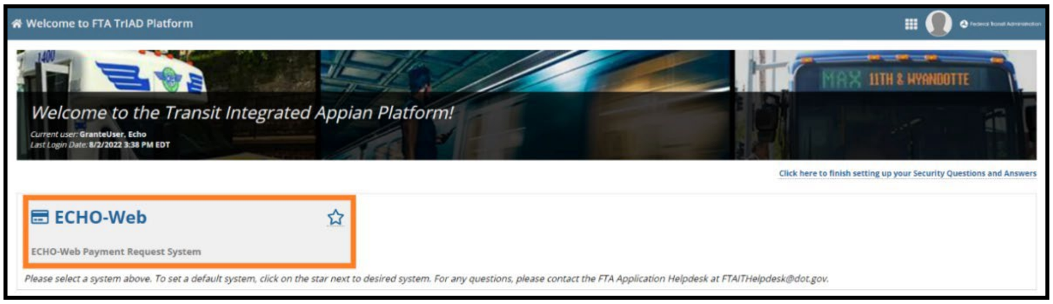


Figure 3: FTA Homepage with the option to go to the ECHO-Web system.

3.2. Non-FTA Employee/Contractor User Login (Recipient Users)

Non-FTA Employee/Contractor users will be redirected to Login.gov for authentication. To log in:

1) Open a web browser and enter the ***FACES URL***: https://faces.fta.dot.gov/suite/..
2) Read the security policy and select ***I AGREE***.

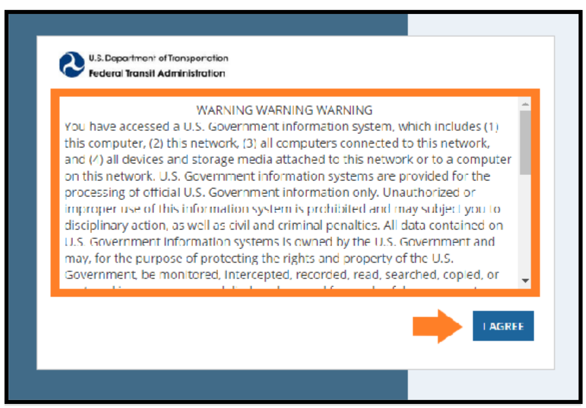


Figure 4: Security Warning when accessing the FACES website.

3) On the login page, select ***If you are a non-FTA user, click this link to log in***, 2nd link option under Forgot your password?

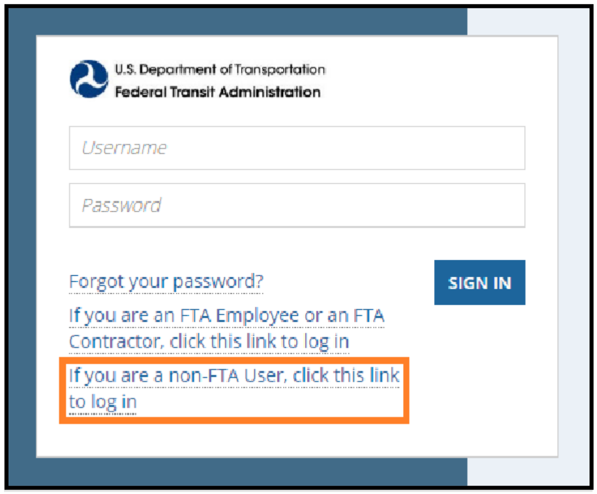


Figure 5: FACES login after the security warning. Select "If you are a non-FTA User, click this link to log in"

4) You will be redirected to ***Login.gov***, where all external users will need to sign in with the account created in ***Section 2*** of the ***FACES User Guide***. *You* will also need to be authenticated with the authentication method that you set up.

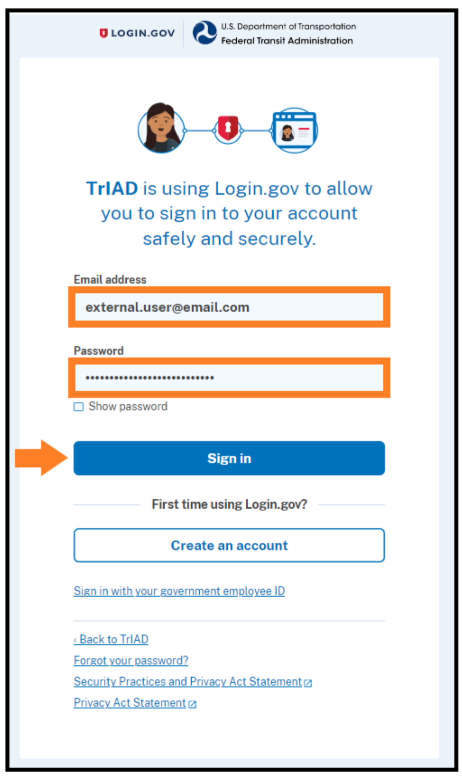


Figure 6: Login.gov login page.

5) Next, you will be taken to the **TrIAD Welcome page,** where you can select the system you wish to use. If you have access to more than one ***FTA*** application (*ECHO-Web, TrAMS, NTD, DGS, SSOR, or FACES*), those will also be available.

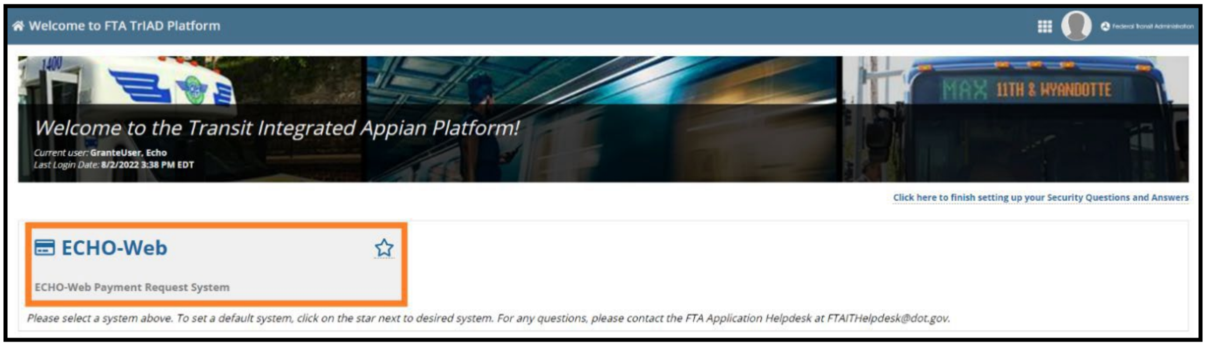


Figure 7: FTA homepage with the option to go to the ECHO-Web Payment Request System.

4. Payment Requests

When ***ECHO-Web*** is selected from the ***FTA TrIAD Welcome page***, you will be taken to the ***Payment Requests*** page. On the ***Payment Requests*** page, you have the following options:

- User Dashboard (your official personal information)
- Request Payment (only available for Grantee users)
- Filter Payment Requests
- See all the Payment Request in the Table (only shows organizations the user can access)
- Export the Payment Requests
- Go to a Payment Request Record
- Go to a Recipient Record

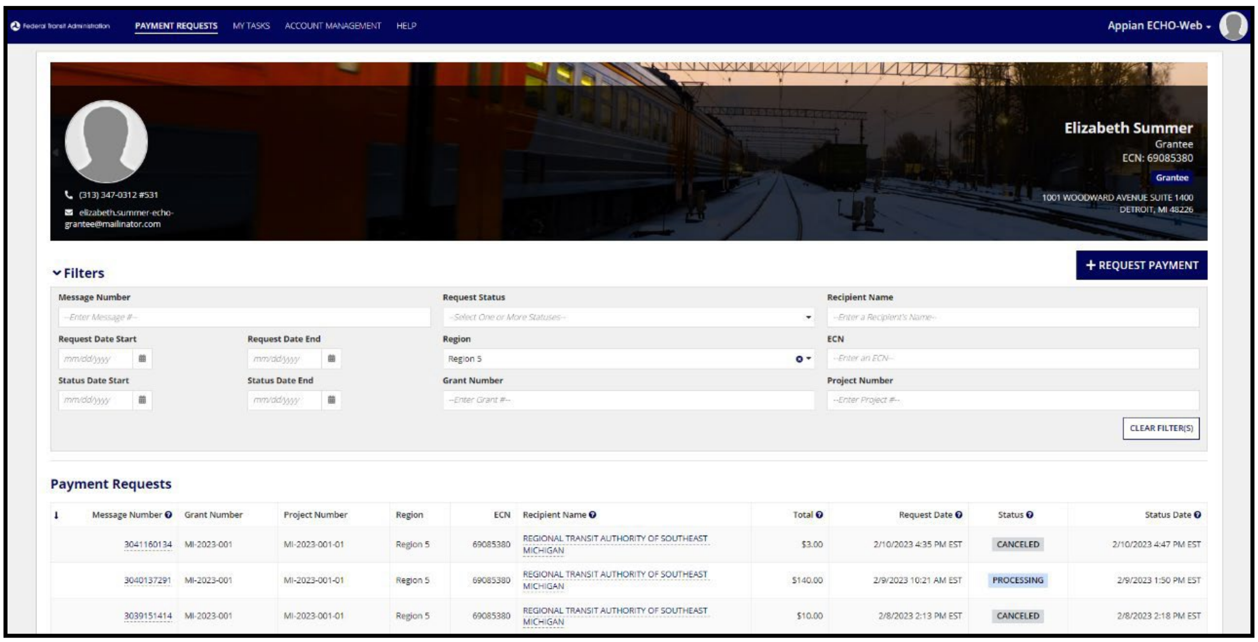


Figure 8: An example of what the initial Payment Requests page could look like for you.

4.1. User Dashboard

The User Dashboard is what you see first when accessing ***ECHO-Web.*** It contains your official personal information (*See Table 1 below for details*) and can be accessed under the following tabs:

- Account Management
- Help

#	Field	Information
1	Name	User's First (given) and Last (family or surname) names
2	Title	User's Title
3	ECN	The Recipient Organization's ECHO Control Number (ECN)
4	Address	User's Mailing Address
5	City	User's City
6	State	User's State
7	Zip Code	User's Zip Code
8	Phone Number	User's Office Phone Number
9	Email Address	User's Email Address (the same as your username)
10	User Photo	Contains the photo you uploaded or the default photo that comes with your account.

Table 1: User Dashboard contents and its descriptions.

4.2. Creating a Payment Request (Grantee Users)

If you are a ***Grantee*** user and you select ***+ REQUEST PAYMENT***, a dialog window will appear, which enables you to create a Payment Request.

4.2.1. First Page of the Create Payment Request Form

The first page of the ***Create Payment Request*** form contains the following:

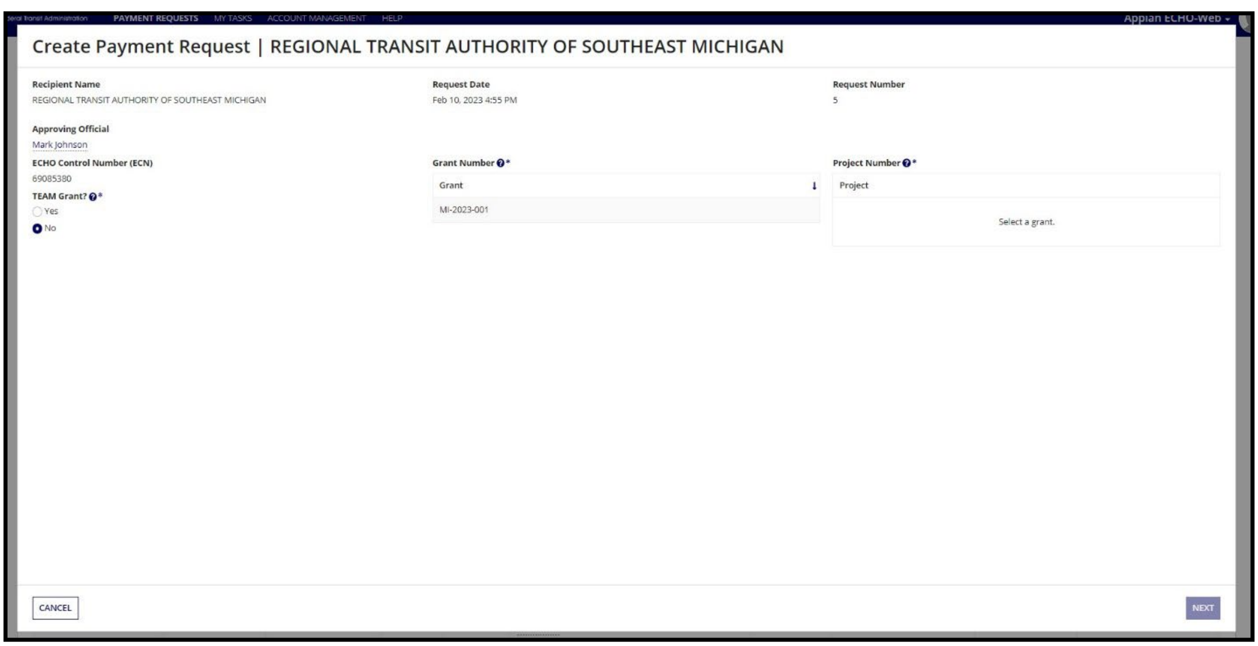


Figure 9: First page of the Create Payment Request form.

#	Form Field	Action & Descriptions
1	Form Title	• Located at the top of the form. • Value format: Create Payment Request | Recipient Name (e.g., *Create Payment Request | REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN*)
2	Form Contents	Contains the following fields:
		• Recipient Name (*e.g., REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN*) • Request Date (*e.g., Feb 10, 2023 4:55 PM*) • Request Number (*e.g., 5*) • Approving Official (*e.g., Mark Johnson*) • ECHO Control Number (*ECN, e.g., 69085380*) • TEAM Grant? (*e.g., No*) • Grant Number (*table with grant numbers, i.e. FAINs)* • Project Number (*table with project numbers; hidden for TEAM Grant*)
3	Buttons	See First Page Button Functionality

Table 2: First page of the Create Payment Request form contents and descriptions

Users with Multiple Assigned Recipient Organizations

When you come to the ***Create Payment Request form***, you will see the following fields:

#	Name	Editable	Required	Action & Descriptions
1	Recipient Name	No	No	Value is N/A (*if you have multiple ECN(s)*)
2	Request Date	No	No	Value format: MM, DD,YYYY HH:MM (*e.g., Feb 10, 2023 4:55 PM*)
3	Request Number	No	No	This value is the next incremented number for that fiscal year
4	Approving Official	No	Yes	Value is N/A (*if you have multiple ECN(s)*)
5	ECHO Control Number (*ECN*)	Yes*	Yes	• ***ECN***(*s*) are assigned to the Recipient organizations by the FTA Headquarters Office of Budget and Policy (***TBP)*** and reported back to ***TrAMS.*** You cannot change this number in ***ECHO-Web***. Your ***ECN*** is determined by what Recipient you were assigned to in ***FACES***. If you don't see an appropriate ***ECN***, then you should contact the Help Desk. • If you manage more than one Recipient, this field will be a drop-down menu (the only time ***ECN*** will be an editable field).
6	TEAM Grant?	Yes	Yes	Defaulted to No. Select Yes if the grant was created in the TEAM system.
7	Grant Number	Yes	Yes	Tool tip: Select a grant from the list below.
8	Project Number	Yes	Yes	• Tool tip: Select a project from the list below. • Hidden for TEAM Grants

Table 3: First page of the Create Payment Request form contents and descriptions

If you manage only one ***Recipient***, you will see the ***ECN*** as a read-only field, see Figure 9.

If you are assigned multiple recipients, you will see a drop-down menu that will fill in the ***Recipient Name***, ***Grant Number***, and ***Form Title*** (***Form Title*** will change based on what ECN you select. For example, in Figure 10 below, the title is currently “Create Payment Request,” but once you select an ***ECN*** it will be like Figure 11 and display a Recipient organization name.). All fields will be read-only, except for ***Grant Number***, ***Project Number***, and ***TEAM Grant***.

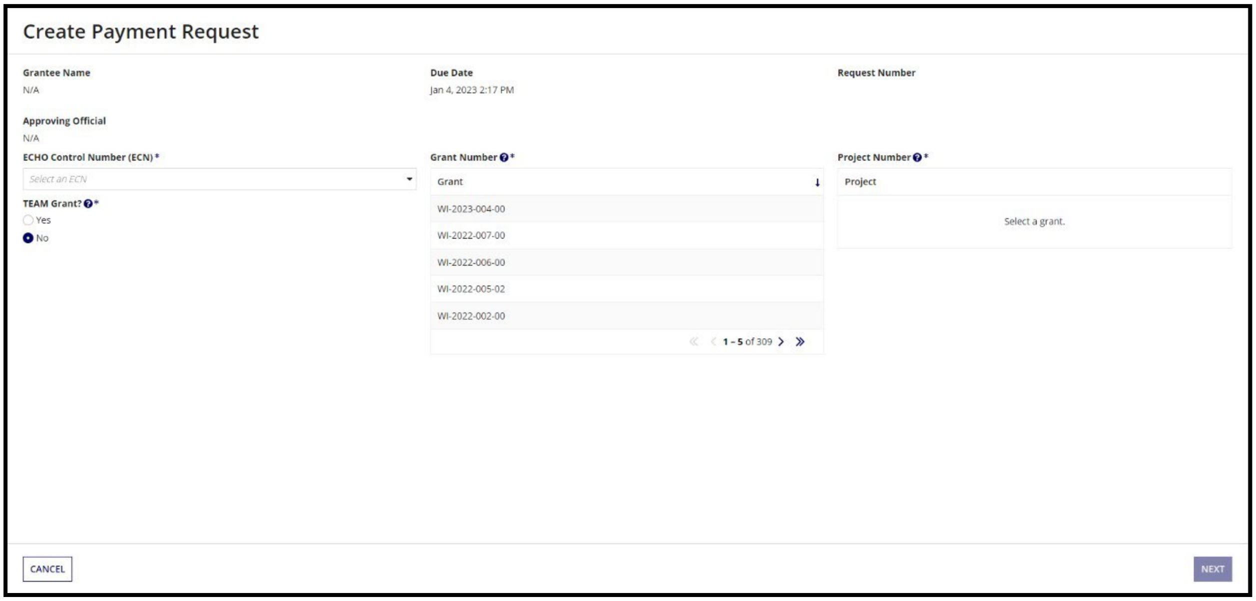


Figure 10: First page of the Create Payment Request form if your account is assigned to multiple Recipients.

After selecting an ***ECN***, you will move down to the ***TEAM Grant*** field.

- If the award is not a ***TEAM Grant***, you can leave the default setting selection for the ***TEAM Grant?*** as “No,” and the ***Grant Number*** drop-down menu will be pre-populated with non-TEAM Grants (*if applicable*).
- If the grant is a ***TEAM Grant***, select “Yes” and ***Grant Number*** drop-down menu will pre-populate with TEAM Grants (*if applicable).*

The next step is selecting a grant from the ***Grant Number*** drop-down menu. Once a ***Grant Number*** is selected it will populate the ***Project Number*** drop-down menu with rows (*if applicable; this will be hidden if the TEAM Grant selection is “Yes”*).

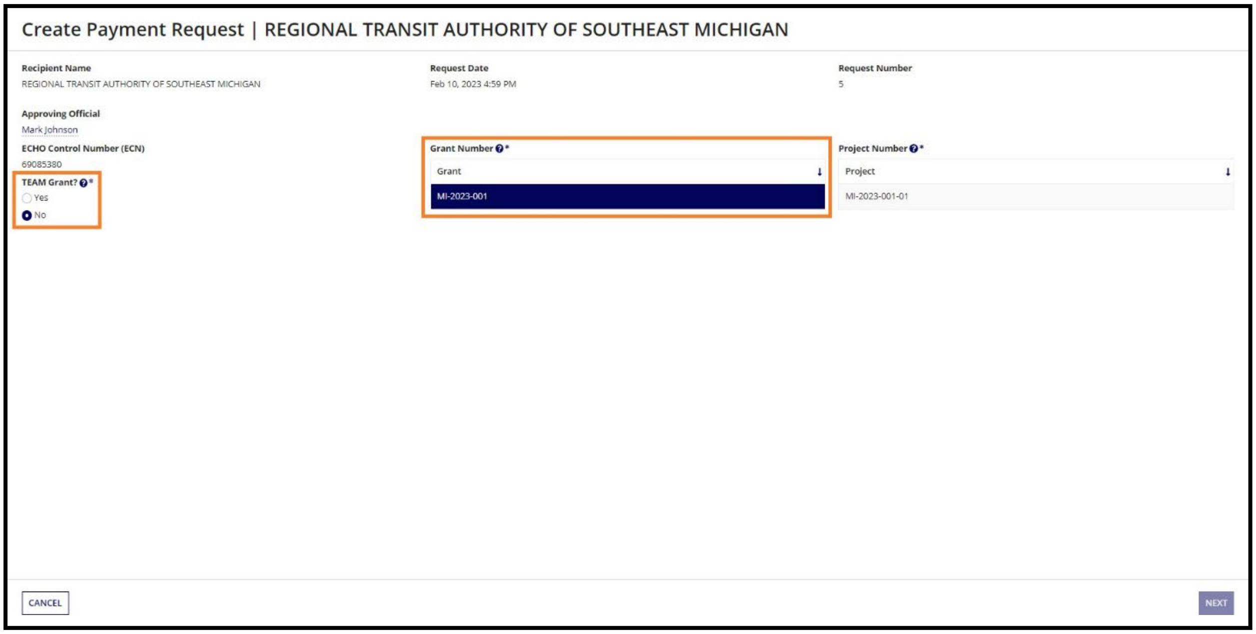


Figure 11: A Single Recipient Holder leaving TEAM Grant as "No" and selecting "MI-2023-001" as the Grant Number, with the Project Number populating afterwards.

After you have made all your selections, you will move to the next page by clicking on the ***Next*** button (*See First Page Button Functionality*). For possible validations, see First Page Validations.

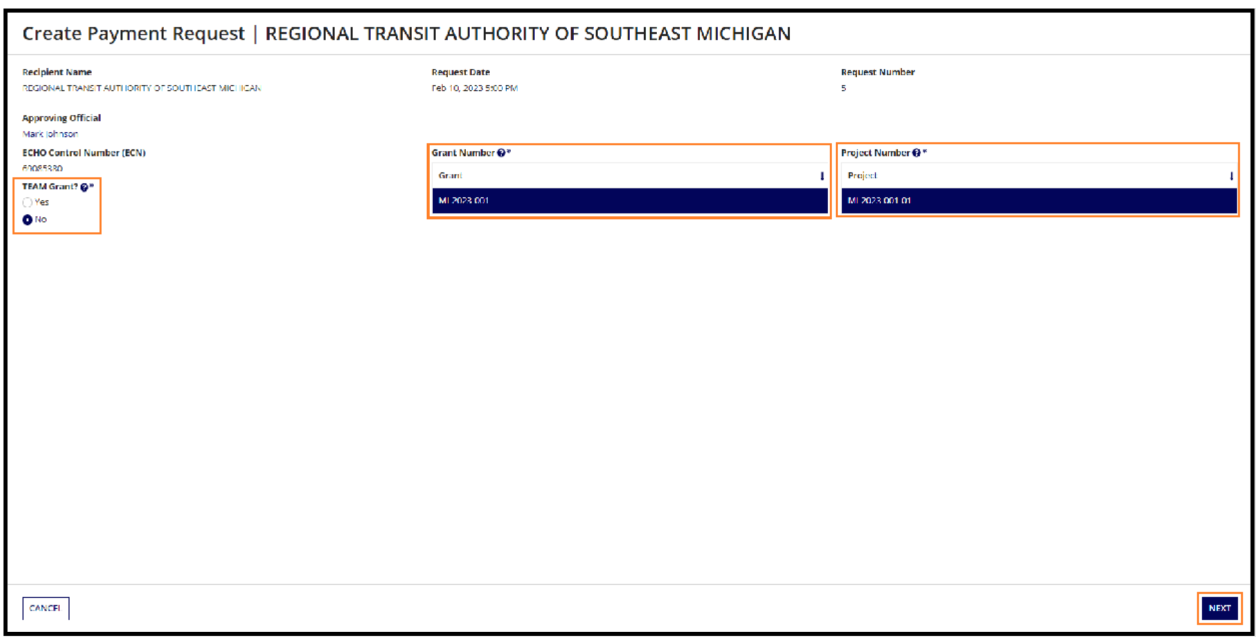


Figure 12: A Single Recipient Holder leaving TEAM Grant as "No" (default) selecting "MI-2023-001" as the Grant Number, and "MI-2023-001-01" as the Project Number. The Next button is enabled.

First Page Validations

To move on to the next page of the ***Create Payment Requests*** form, all fields must contain information and cannot be blank or contain N/A.

#	Validation Message	What causes it to appear?
1	Payment Requests cannot be created without the Approving Official role assigned to the selected Recipient User.	If the Recipient doesn't have the Approving Official User Role assigned to it.

Table 4: First Page Validations message explanations.

First Page Button Functionality

The following table below shows the ***Create Payment Request*** form first page button functionality.

Figure 13: The buttons at the bottom of the first page of the Create Payment Request.

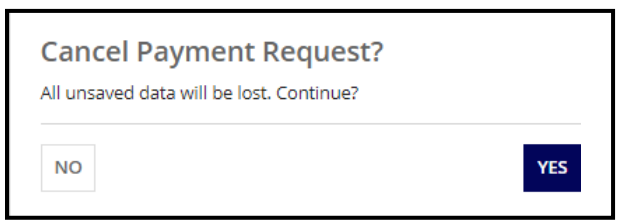


Figure 14: Cancel pop-up displayed after selecting Cancel. Use the table below for button functionality.

#	Button Label	Location	Function
1	Cancel	Bottom Left	Opens number #2.
2	Cancel Payment Request? (*pop-up*)	Opens after Cancel is selected	Description: All unsaved data will be lost. Continue? Buttons: • No – Allows you to continue creating a Payment Request. • Yes – Cancels the Payment Request, and nothing will be saved.
3	Next	Bottom Right	This will take you to the second page of the ***Create Payment Request*** form, provided that there are no validation issues and ***Next*** is not disabled.

Table 5: First page of the Create Request form button functionality explanations.

4.2.2. Second Page of the Create Payment Request Form

On the second page of the ***Create Payment Request*** form, you will see the following fields:

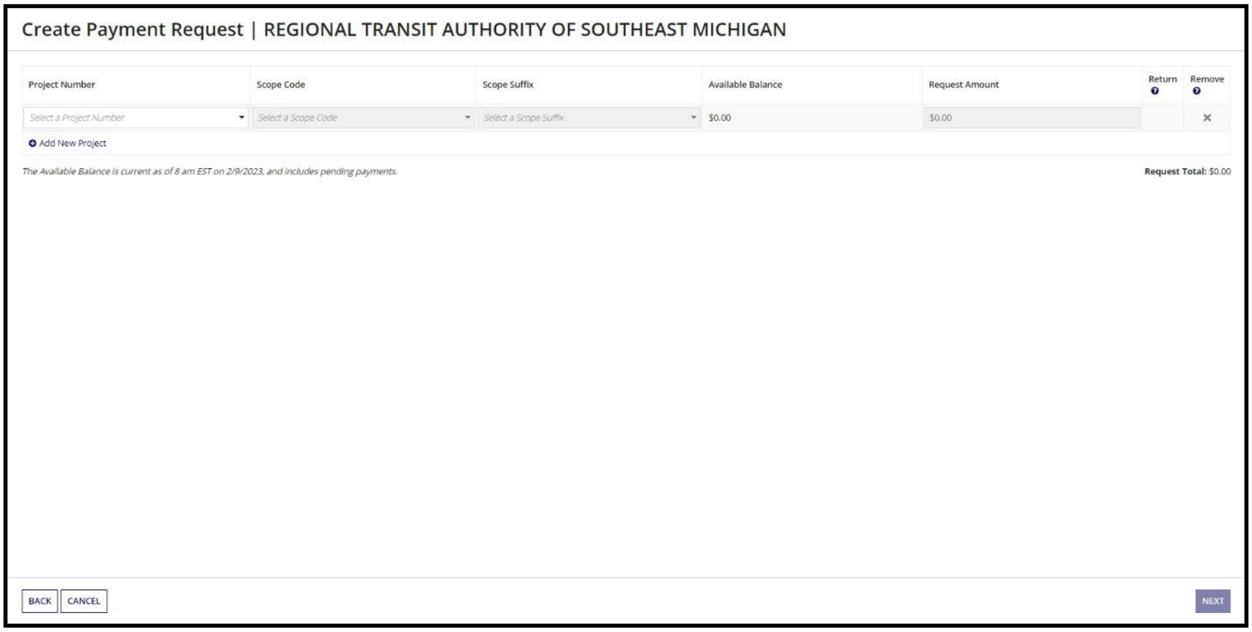


Figure 15: Second page of the Create Payment Request form, as a non-TEAM Grant. For TEAM Grants, Scope Code and Scope Suffix will not be included.

#	Field Name	Descriptions
1	Form Title	• Located at the top of the form. • <u>Value format</u>: Create Payment Request | Recipient Name (e.g., *Create Payment Request | REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN*)
2	Project Lines Table	• Pre-loaded with one row • Table will have columns that exist only for a TEAM Grant or non-TEAM Grant.
3	Request Total: $0.00	Underneath Project Lines table bottom right.
4	The Available Balance is current as of 8:00 AM ET on 12/1/2022, and includes pending payments.	Previous business day

Table 6: Second page of the Create Payment Request form descriptions.

TEAM Grant Project Lines

If you selected ***Yes*** to ***TEAM Grant*** on the previous page of the ***Create Payment Request*** form, look at the ***Project Lines*** table below.

Project Lines Table

The ***Project Lines*** table will initially have one row ready for you to make your selections. Any additional ***Project Lines*** can be added by clicking on the ***Add New Project*** link. All columns in the table are not filterable.

#	Field Name	Editable	Required	TEAM / Non-TEAM Visible?	Action & Descriptions
1	Project Number	Yes	Yes	Both	Project Numbers are defined in the award applications and are reported to ECHO-Web.
2	Scope Code	Yes	Yes	Non-TEAM Grant	• Scope Codes are defined in the award applications and are reported to ECHO-Web. • Editable after a value is selected for ***Project Number***.
3	Scope Suffix	Yes	Yes	Non-TEAM Grant	Editable after a value is selected for ***Scope Code***.
4	Available Balance	No	N/A	Both	• For non-TEAM Grants, the ***Available Balance*** will populate (*if applicable*) after a value for ***Scope Suffix*** is selected. • For TEAM Grants, the ***Available Balance*** will populate (*if applicable*) after a value for ***Project Number*** is selected.
5	Request Amount	Yes	Yes	Both	• For non-TEAM Grants, ***Available Balance*** will be editable after ***Scope Suffix*** value is selected. • If a ***TEAM Grant***, the ***Available Balance*** will be editable after a value for ***Project Number*** is selected.
6	Return	No	N/A	Both	Tool tip: Whether this payment request project line is a return.
7	Remove	No	N/A	Both	• If more than one row exists, you can click the red x. • Tool tip: Click here to delete this payment request project line.
8	Add New Project	No	N/A	Both	• Located at the bottom of the table • Adds new rows to the Project Lines • Maximum of 20 rows

Table 7: Project Lines table columns and descriptions.

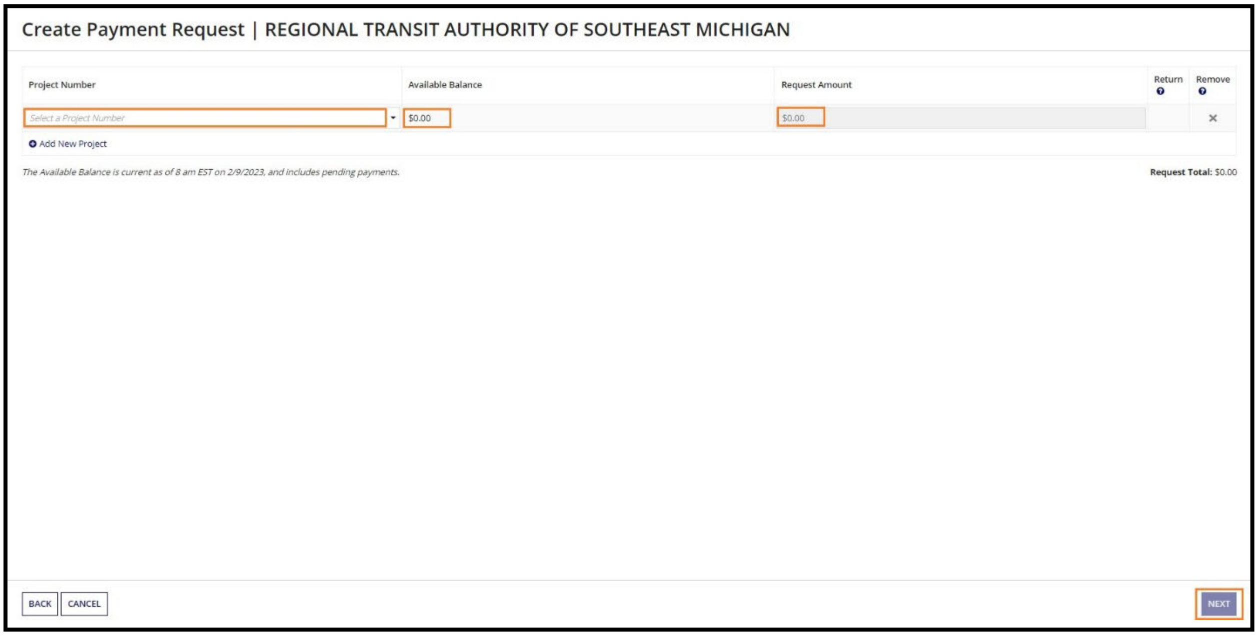


Figure 16: Second page of the Create Payment Request form, when the request is a TEAM Grant. The Project Number is an editable field, while all other fields are read-only. The Next button is disabled.

First, select a value from the drop-down menu under ***Project Number***, then the ***Available Balance*** will populate with an amount (if funds are available). ***Request Amount*** will change from read-only to editable.

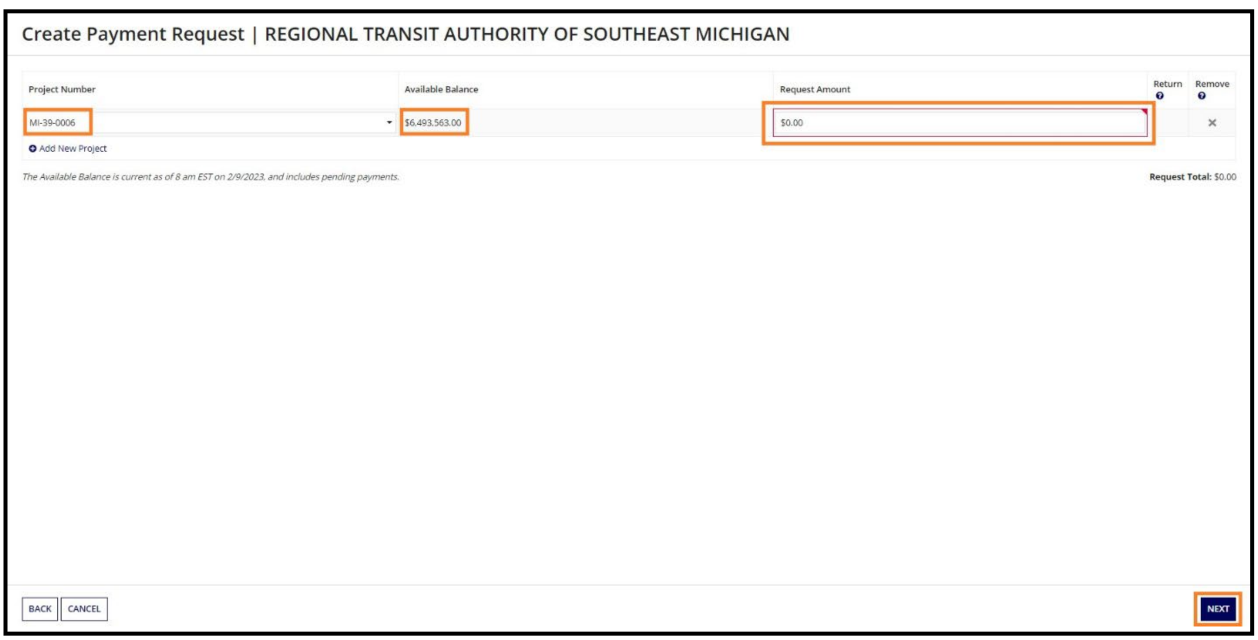


Figure 17: Second page of the Create Payment Request form, when the request is a TEAM Grant. The Project Number “MI-39-006” has been selected, Available Balance showing a balance of “$6,493,563.00,” Request Amount is now editable, showing “$0.00” with a red box around it, specifying that the amount cannot be zero. The Next button is now enabled.

Next, you will enter the request amount in whole dollar amounts (*e.g., 5.00, 6.00*) and nothing greater than the total obligation. If you're returning funds, this will be in negative whole dollar amounts (*e.g., - 5.00, - 6.00*). For possible validations, see Second Page Validations.

After you have made all your selections, you will move to the next page by clicking on the ***Next*** button (*See Second Page Button Functionality*).

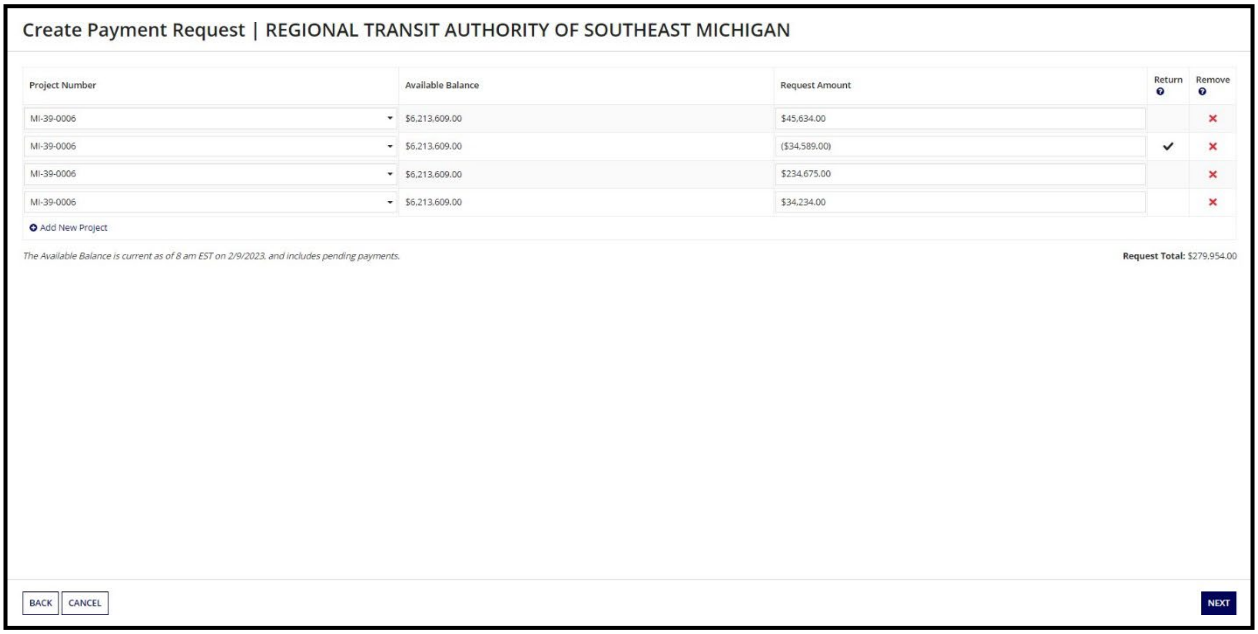


Figure 18: Second page of the Create Payment Request form, when the request is a TEAM Grant. This request has four project lines: three are requests (e.g., "$45,634.00", "$234,675.00", and "$34,234.00") and is a return (e.g., "$34,589.00"). Since there are no validations errors, the Next button is enabled. Selecting Next will take you to the Confirmation page of the Create Payment Request form (see 3.2.3 Confirmation Page of the Create Payment Request Form).

Non-TEAM Grant Project Lines

If you selected ***No*** to ***TEAM Grant*** on the previous page of the ***Create Payment Request*** form, see the ***Project Lines*** table (*See* Table 7 below).

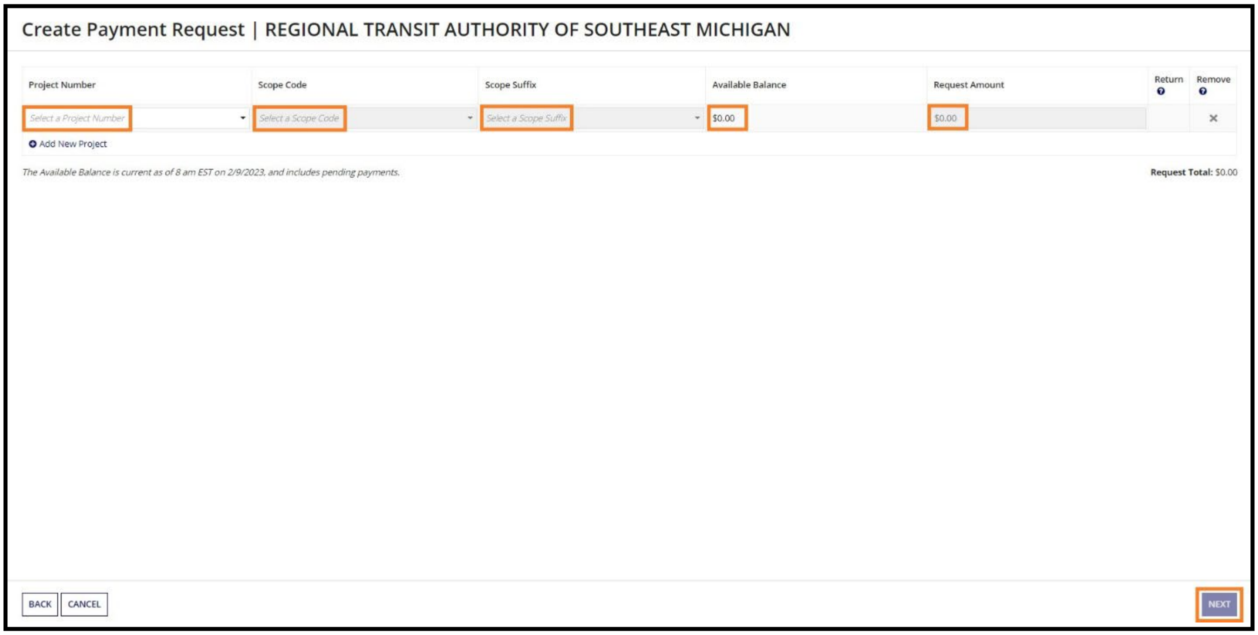


Figure 19: Second page of the Create Payment Request form, when the request is a non-TEAM Grant. The Project Number is an editable field, while all other fields are read-only and the Next button is disabled.

First, select a value from the drop-down menu under ***Project Number***, then ***Scope Code*** will become an editable drop-down menu.

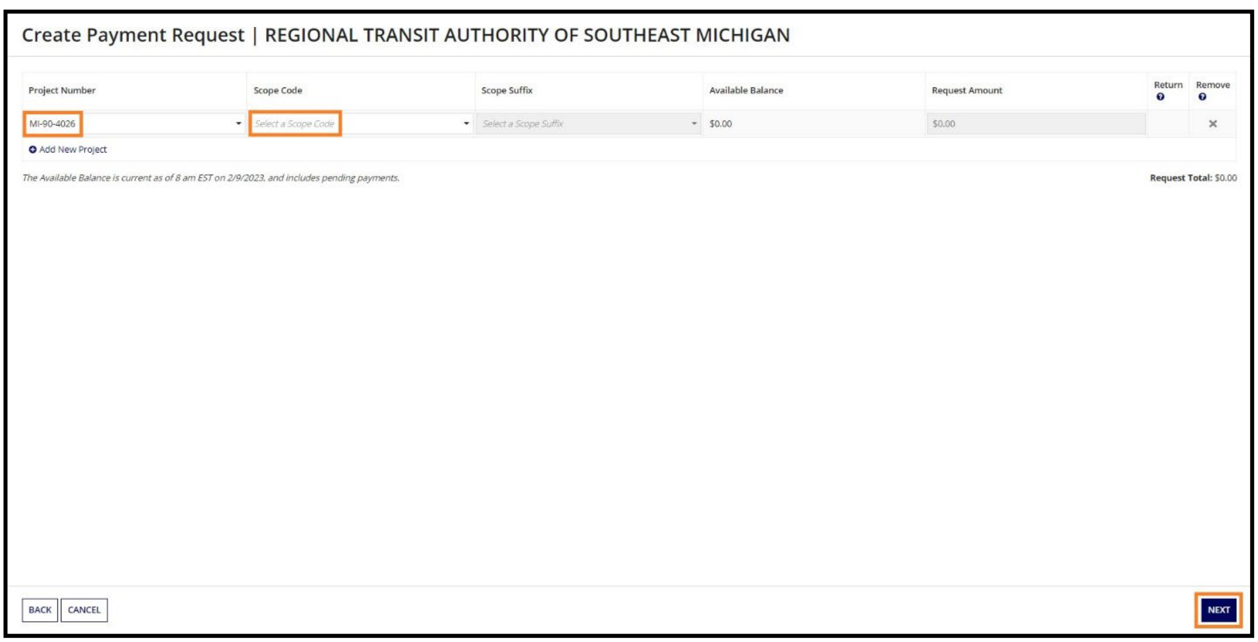


Figure 20: Second page of the Create Payment Request form, when the request is a non-TEAM Grant. The Project Number "MI-90-4026" has been selected, with Scope Code becoming editable. The Next button is enabled.

Next, select a value from the drop-down menu under ***Scope Code***, then ***Scope Suffix*** will become an editable drop-down menu.

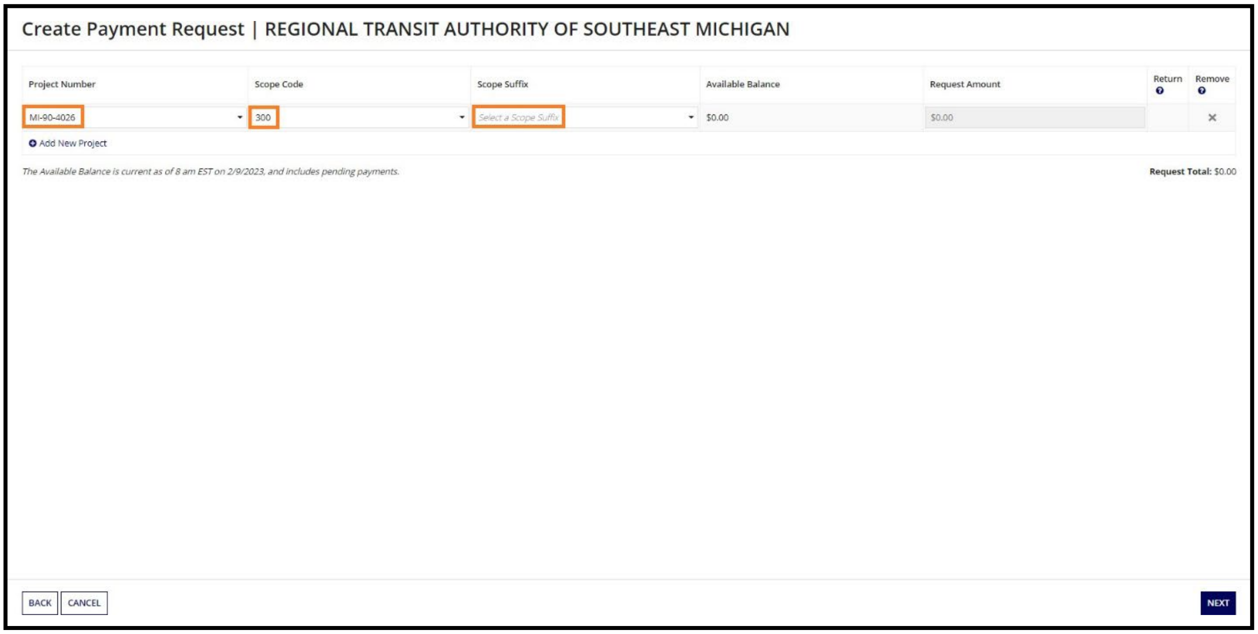


Figure 21: Second page of the Create Payment Request form, when the request is a non-TEAM Grant. Project Number "MI-90-4026" & Scope Code "300" have been selected, with Scope Suffix becoming editable.

Then, select a value from the drop-down menu under ***Scope Suffix, then Available Balance*** will populate with an amount (if there is anything). ***Request Amount*** will change from read-only to editable.

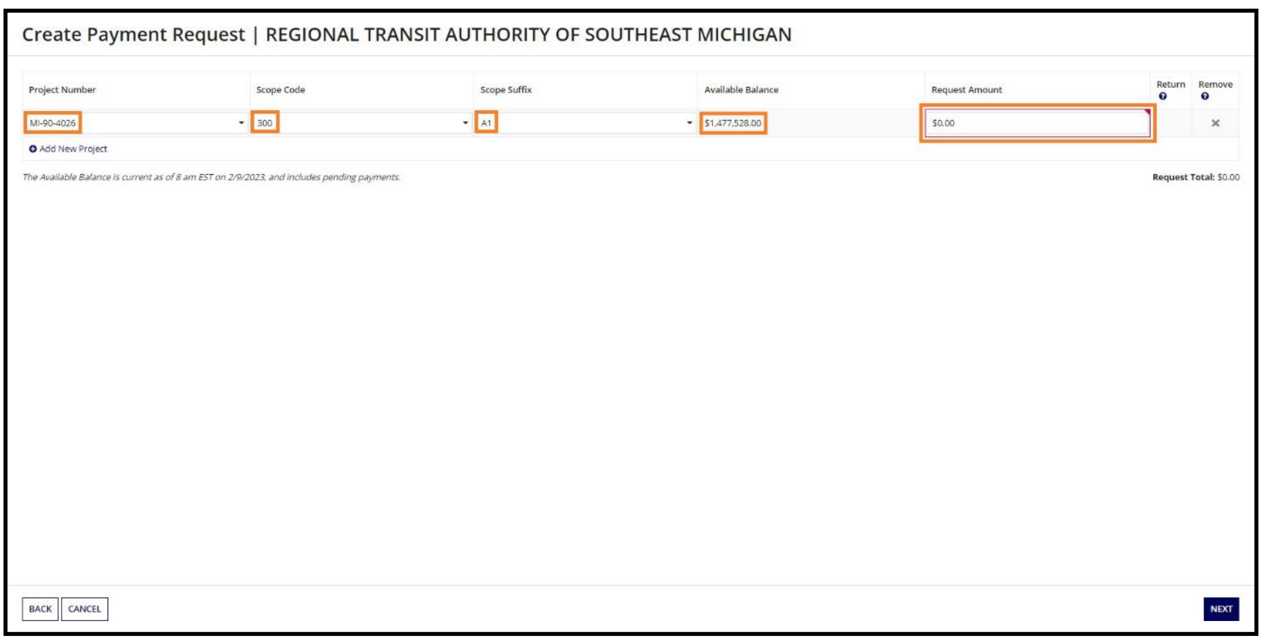


Figure 22: Second page of the Create Payment Request form, when the request is a non-TEAM Grant. The Project Number (e.g., "MI-90-4026"), Scope Code (e.g., "300"), and Scope Suffix "A1" have been selected and the Available Balance is "$1,477,528.00." Request Amount is now editable and has a red validation box around it, indicating that the amount cannot be zero dollars.

Next, enter the amount that you are requesting in whole dollar amounts (*e.g., 5.00, 6.00*) and nothing greater than ***Total Obligation***. If you're returning funds, this will be negative whole dollar amounts (*e.g., -5.00, -6.00*). You will see the total requested amount and ***Available Balance*** amounts change based on what you enter. For possible validations, see Second Page Validations.

Once you have made all your selections, you will move to the next page by clicking ***Next.*** (*See Second Page Button Functionality*).

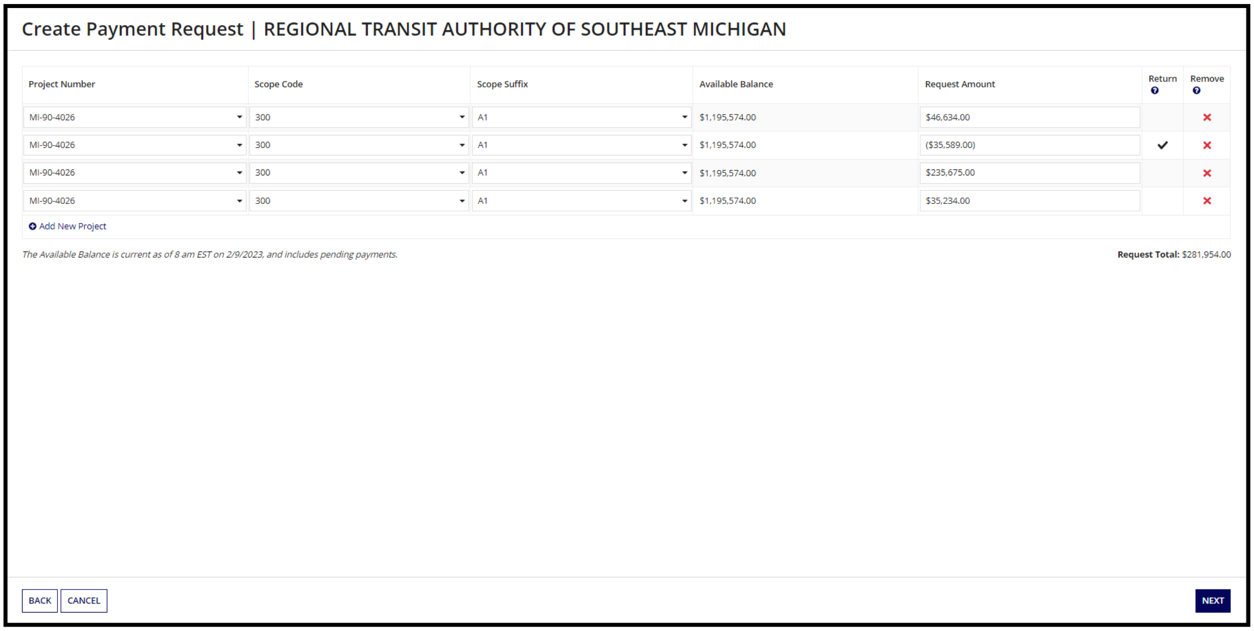


Figure 23: Second page of the Create Payment Request form, when the request is a non-TEAM Grant. This request has four project lines: three are requests (e.g., "$46,634.00", "$235,675.00", and "$35,234.00") and one is a return (e.g., "$35,589.00"). Since there are no validation errors, the Next button is enabled. Selecting Next will take you to the Confirmation Page of the Create Payment Request form (See 3.2.3 Confirmation Page of the Create Payment Request Form).

Second Page Validations

For you to move on to the next page of the ***Create Payment Request form***, all fields must have information filled out. See the table below for all possible validation messages.

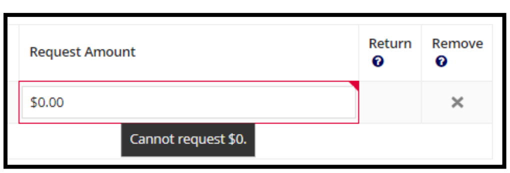


Figure 24: An example of the validation message when the Request Amount is zero dollars.

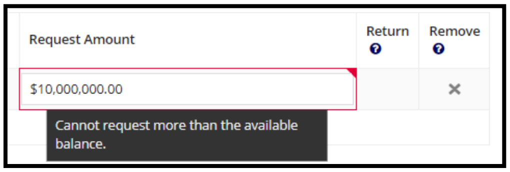


Figure 25: An example of the validation message when the Request Amount is greater than the Available Balance.

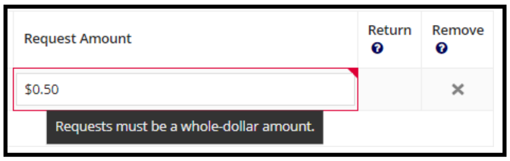


Figure 26: An example of the validation message when the Request Amount is not a whole dollar amount.

#	Validation Message	Cause
1	Cannot request $0.	If the Request Amount has just become editable and no amount has been entered.
2	Cannot request more than the available balance.	If the Request Amount is greater than the Available Balance.
3	Total request amount must be greater than $0.	If all Request Amounts combined equal $0.
4	Requests must be a whole-dollar amount.	If the Request Amounts contain cents.
5	Return payments cannot exceed the initial obligation.	If the Request Amount for a funding return is greater than the initial obligation.
6	This grant payment request exceeds $49,999,999.00. Given that this type of request requires at least 2 business days' notice to the relevant FTA Regional Office, I certify that I have provided such notice.	• If the amount is greater than $49,999,999.00 • To move forward you must certify that you have provided notice to the relevant FTA Regional Office.

Table 8: Second page of the Create Payments Request form validation messages

Create Payment Request Second Page Button Functionality

The table below shows the ***Create Payment Request*** second page button functionality.

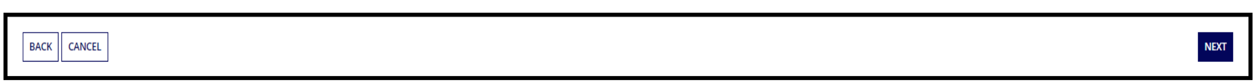


Figure 27: The buttons seen at the bottom of the Second Page of the Create Payment Request.

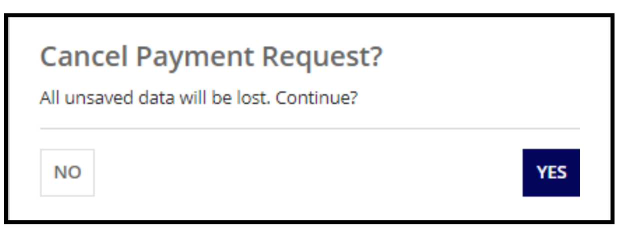


Figure 28: Cancel Pop-up after clicking Cancel.

#	Button Name	Location	Function
1	Back	Bottom Left	Takes you back to the first page (*See 3.2.1 First Page of the Create Payment Request Form*).
2	Cancel	Bottom Left After Back	Opens number #3, will allow you to decide if you are sure about cancelling.
3	Cancel Payment Request? (*pop-up*)	Opens after Cancel is Clicked	Description: All unsaved data will be lost. Continue? Buttons: • No – Allows you to continue Creating Payment Request. • Yes – Cancels the Creating Payment Request and nothing will be saved.
4	Next	Bottom Right	This will take you to the confirmation page (*See 3.2.3 Confirmation Page of the Create Payment Request Form*) as long as there are no validations issues and Next is not disabled.

Table 9: Second Page of the Create Request Form button functionality explanations.

4.2.3. Confirmation Page of the Create Payment Request Form

When you view the Confirmation page of the ***Create Payment Request*** form, you will be presented with a confirmation screen for all the information that you saw and selected on the previous form pages.

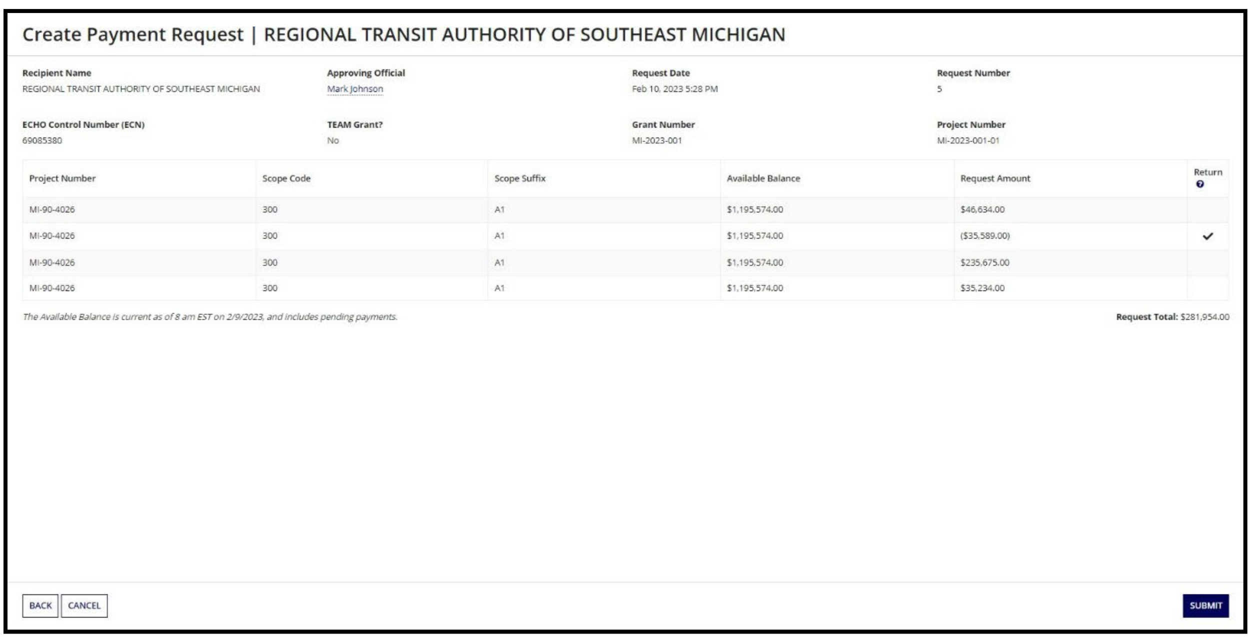


Figure 29: Confirmation page of the Create Payment Request for REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN.

If all information is good, on the confirmation page you will then click ***Submit*** (*See* *Confirmation Button Functionality*). After submission, the ***Create Payment Request*** form will close, and the ***Payment Request*** page will refresh the table with newest payment at the top (*See* *3.3.2 Payment Requests Table*).

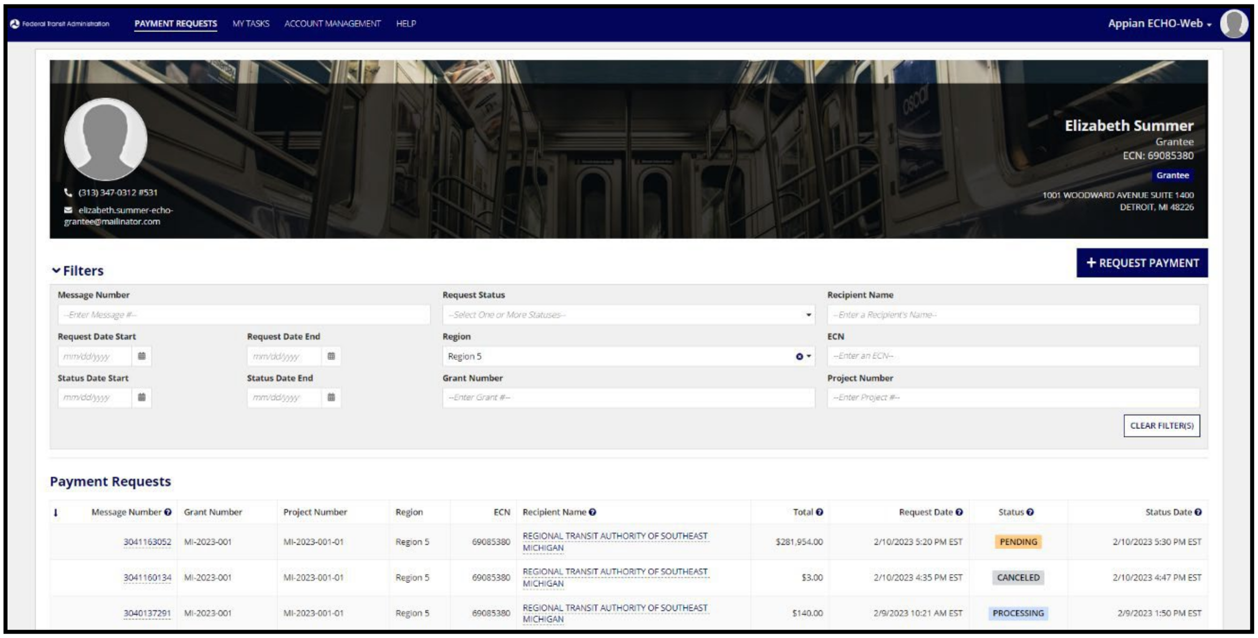


Figure 30: An example of returning to the Payment Requests page after submitting a new payment.

Confirmation Page Button Functionality

The following table shows the ***Create Payment Request*** form Confirmation page button functionality.

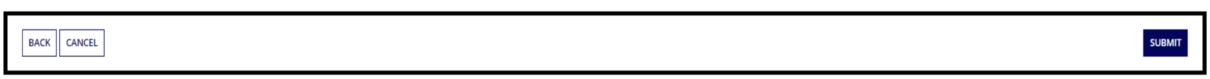


Figure 31: The buttons at the bottom of the Confirmation Page of the Create Payment Request. Use the table below.

#	Button Name	Location	Function
1	Back	Bottom Left	Takes you back to the second page (*See 3.2.2 Second Page of the Create Payment Request Form*).
2	Cancel	Bottom Left After Back	Opens number #3, will allow you to decide if you are sure about cancelling.
3	Cancel Payment Request? (*pop-up*)	Opens after Cancel is Clicked	Description: All unsaved data will be lost. Continue? Buttons: • No – Allows you to continue Creating Payment Request. • Yes – Cancels the Creating Payment Request and nothing will be saved.
4	Submit	Bottom Right	This will process the newly created payment request for you and create a status of pending.

Table 10: Confirmation page of the Create Request Form button functionality explanations.

4.3. Payment Request Filters, Table, & Generating Reports

If you click the ***Payment Requests*** tab, you will see the ***Filters*** located underneath the ***User Dashboard*** (*See 3.1 User Dashboard*), the ***Payment Requests*** table underneath the filters, and lastly the ***Generate Report*** button at the bottom right of the table.

4.3.1. Payment Request Filters

These ***Filters*** control the results in the ***Payment Requests*** table.

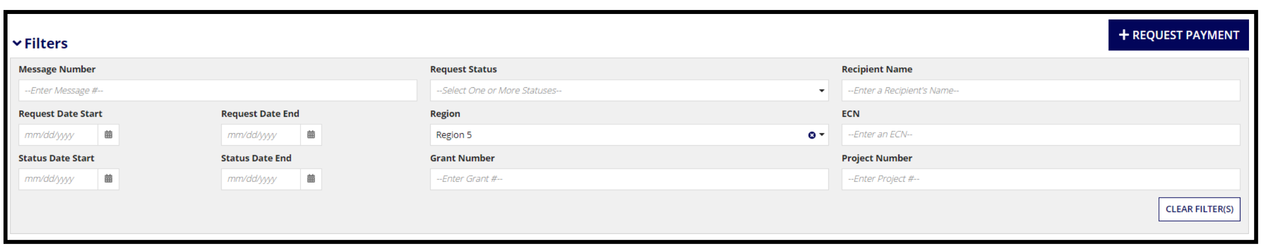


Figure 32: These are filters that you will see when coming to the Payment Requests tab. These filters will change what you see in the Payment Requests table (See 3.3.2 Payment Requests Table).

#	Field Name	Action & Description	Validations
1	Message Number	Traceable Confirmation Number	Message number cannot be longer than 10 characters.
2	Request Date Start	• Date Format: MM/DD/YYYY • Calendar button to the right for quicker input • Request Date when the Payment was requested. • Status Date was the Payment was last updated by the Status of the Payment.	Date cannot be in the future.
3	Request Date End		• Request end date must be after request start date. • Date cannot be in the future
4	Status Start Date		Date cannot be in the future.
5	Status End Date		• Status end date must be after request start date. • Date cannot be in the future
6	Request Status	Describes the state of the request.	N/A
7	Region	Recipient Organization.	N/A
8	Grant Number	Federal Award Identification Number stored in TrAMS	Grant Number cannot be longer than 14 characters, e.g. CA-2023-017-00.
9	Recipient Name	Name of the Recipient	N/A
10	ECN	Identifying Control Number	ECN cannot be longer than 8 characters.
11	Project Number	Identifier for a specific project.	Project Number cannot be longer than 17 characters, e.g. CA-2023-017-01-00.
12	Clear Filter(s)	Clears all filters	N/A

Table 11: Payment Request filters descriptions and validations

4.3.2. Payment Requests Table

The ***Payment Request*** table contains the following information:

Payment Requests

Message Number	Grant Number	Project Number	Region	ECN	Recipient Name	Total	Request Date	Status	Status Date
3041163052	MI-2023-001	MI-2023-001-01	Region 5	69085380	REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	$281,954.00	2/10/2023 5:20 PM EST	PENDING	2/10/2023 5:30 PM EST
3041160134	MI-2023-001	MI-2023-001-01	Region 5	69085380	REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	$3.00	2/10/2023 4:35 PM EST	CANCELED	2/10/2023 4:47 PM EST
3040137291	MI-2023-001	MI-2023-001-01	Region 5	69085380	REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	$140.00	2/9/2023 10:21 AM EST	PROCESSING	2/9/2023 1:50 PM EST
3039151414	MI-2023-001	MI-2023-001-01	Region 5	69085380	REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	$10.00	2/8/2023 2:13 PM EST	CANCELED	2/8/2023 2:18 PM EST
3039146154	MI-2023-001	MI-2023-001-01	Region 5	69085380	REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	$189.00	2/8/2023 12:45 PM EST	PROCESSING	2/9/2023 1:50 PM EST
2364133340	MI-2023-001-00	MI-2023-001-01-00	Region 5	69085380	REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	$2.00	12/30/2022 9:15 AM EST	COMPLETED	12/30/2022 1:50 PM EST
2363153917	MI-2023-001-00	MI-2023-001-01-00	Region 5	69085380	REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	$68,980.00	12/29/2022 2:57 PM EST	COMPLETED	12/30/2022 7:50 AM EST
2363153593	MI-2023-001-00	MI-2023-001-01-00	Region 5	69085380	REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	$313,731.00	12/29/2022 2:46 PM EST	COMPLETED	12/30/2022 7:50 AM EST

8 items

8 items

GENERATE REPORT

Figure 33: The Payment Request table with the Generate Report button below it.

#	Field Name	Description
1	Message Number	• Traceable Confirmation Number. • Message Number is a link that will take you to the Payment Request record (*See* 3.4 Payment Requests Record).
2	Grant Number	Federal Award Identification Number
3	Project Number	Project identifier
4	Region	FTA Regional Office to which Recipient is assigned
5	ECN	Recipient ECHO Control Number
6	Recipient Name	• Organization Receiving funding • Recipient Name is a link that will take you to the Recipient Record (*See* 5.6 Recipient Record).
7	Total	Total Amount Requested.
8	Request Date	Date of Payment Request.
9	Status Date	Date when the Payment Request status changed.
10	Status	Describes the State of the Request to FMS. For the different statuses, see 3.3.2.1 Payment Status Legend.

Table 12: This is the Payment Request table column names, with their descriptions.

Payment Status Legend

The following table describes the statuses you will see in the ***Payment Requests*** table, under the ***Status*** column.

#	Field Name	Color	Description
1	Legacy		Legacy ECHO-Web
2	Pending		Created and waiting to be sent for processing.
3	Cancelled		Request cancelled and will not be processed.
4	Processing		Sent to an external system for processing.
5	Completed		• Processing Completed. • Either a response has been received from an external system, or no response within the expected 6 business days.

Table 13: Payment Request Status Legend that explains the name, color, and description.

4.3.3. Generate Payment Requests Report

To Generate a ***Payment Requests Report***, scroll to the bottom of the ***Payment Requests*** table and see the ***Generate Report*** button (*bottom right*). To ***Generate Reports***, see section 7 Report Generation.

Check out the table below to see what information is provided in the report.

Payment Requests

Message Number	Grant Number	Project Number	Region	ECN	Recipient Name	Total	Request Date	Status	Status Date
3041163052	MI-2023-001	MI-2023-001-01	Region 5	69085380	REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	$281.954.00	2/10/2023 5:20 PM EST	PENDING	2/10/2023 5:30 PM EST
3041160134	MI-2023-001	MI-2023-001-01	Region 5	69085380	REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	$3.00	2/10/2023 4:35 PM EST	CANCELED	2/10/2023 4:47 PM EST
3040137291	MI-2023-001	MI-2023-001-01	Region 5	69085380	REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	$140.00	2/9/2023 10:21 AM EST	PROCESSING	2/9/2023 1:50 PM EST
3039151414	MI-2023-001	MI-2023-001-01	Region 5	69085380	REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	$10.00	2/8/2023 2:13 PM EST	CANCELED	2/8/2023 2:18 PM EST
3039146154	MI-2023-001	MI-2023-001-01	Region 5	69085380	REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	$189.00	2/8/2023 12:45 PM EST	PROCESSING	2/9/2023 1:50 PM EST
2364133340	MI-2023-001-00	MI-2023-001-01-00	Region 5	69085380	REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	$2.00	12/30/2022 9:15 AM EST	COMPLETED	12/30/2022 1:50 PM EST
2363153917	MI-2023-001-00	MI-2023-001-01-00	Region 5	69085380	REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	$68,980.00	12/29/2022 2:57 PM EST	COMPLETED	12/30/2022 7:50 AM EST
2363153593	MI-2023-001-00	MI-2023-001-01-00	Region 5	69085380	REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	$313,731.00	12/29/2022 2:46 PM EST	COMPLETED	12/30/2022 7:50 AM EST

8 items

8 items

GENERATE REPORT

Figure 34: Payment Request table with the Generate Report button available at the bottom right.

Section	Field Name	Description
Report Overview	System	TrIAD Platform - ECHO-Web Report
	Report Title	Payment Requests Report
	Report Date	Format MM/DD/YYYY HH:MM TIMEZONE
	Filters Applied	See 3.3.1 Payment Request Filters.
	Report Tabs	• Requests ○ This tab contains payment request information for requests meeting the search criteria. There is one row per request.
Requests	Columns	• Request Status • Request Date • Request Number • Grant Number
		• Project Number • PO Number • Scope • Suffix • PO Balance • Request Amount • Return Amount • Total Request Amount • Message Number • Status Date • ECN

Table 14: Payment Requests Report contents seen in the form of a Microsoft Excel file.

4.4. Payment Requests Record

You will access the ***Payment Requests Record*** when you click on the ***Message Number*** in any of the following areas:

- Payment Requests - Payment Requests Table (*See Figure 33*)
- Payment Record – Payments Page (*See* Figure 65)
- Recipients Record – Payments Page (*See Figure 76*)

The record contains information relating to a specific ***Payment Request***:

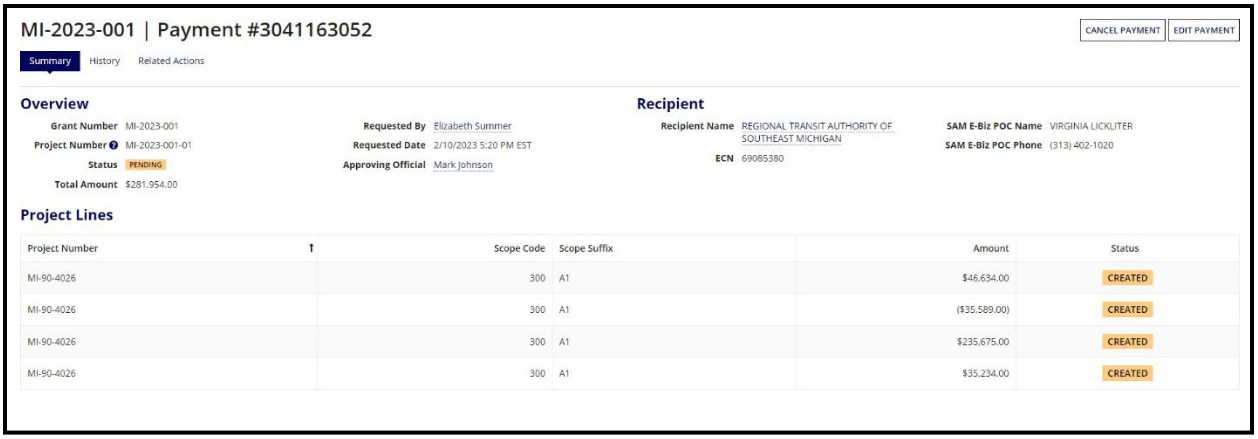


Figure 35: What you could see when landing on the Payment Request record.

#	Name	Description
1	Summary	Contains an Overview of the selected payment request, Project Lines, and Recipient information.
2	History	History of the Payment Request, such as Status changes and any edits made to the payment while still in a status of ***PENDING***.
3	Related Actions	A Grantee user can see, edit, and cancel payments with a ***PENDING*** status.

Table 15: Payment Records different pages and their descriptions.

4.4.1. Summary

The ***Summary*** page of the Payment Record contains an overview of the payment information, seen in the table below. There are two buttons in the upper-right corner that allow you to edit or cancel the payment (These only exist if the Payment Request has a status of ***PENDING***).

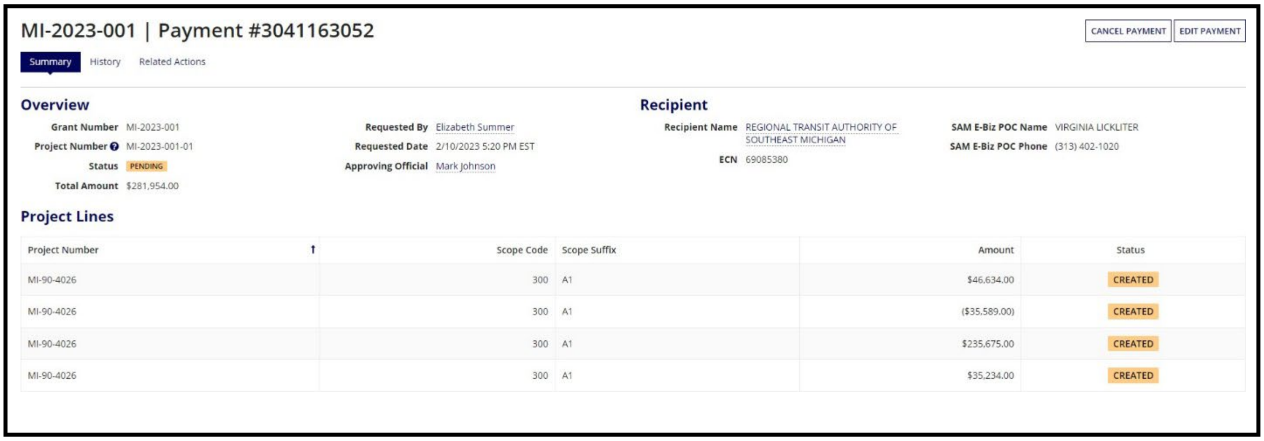


Figure 36: This is Payment Record for payment #3041163052. This contains an overview of the payment information. If you are the Grantee user who created the payment, and its status is still in ***PENDING***, you will see the Cancel/Edit Payment buttons in the upper right corner.

Section	Field Name	Description
Overview	Grant Number	Identifies the Award Number stored in TrAMS
	Project Number	• For TrAMS awards: the project identifier against which this request is made • For TEAM awards: a placeholder value, derived from the project number
	Status	The current state of the Payment Request
	Total Amount	The summation of requested funds in the Payment Request
	Approving Official	The Approving Official currently assigned to the Recipient Organization. **NOTE:** To submit a Payment Request, an Approving Official (AO) is required to be assigned to the Recipient Organization. If no AO is assigned, this field will display “N/A”.
	Requested By	The Grantee User that requested the Payment Request
	Requested Date	The date when the Payment Request was created
	Cancelled By	• The Grantee User who cancelled the Payment Request • Hidden if not cancelled
	Cancelled Date	• The date when the Payment Request was cancelled • Hidden if not cancelled
Recipient	Recipient Name	The legal business name of the Recipient organization (from SAM.gov)
	ECN	The ECHO control number for the Recipient organization
	SAM E-Biz POC Name	The Recipient point of contact’s name
	SAM E-Biz POC Phone	The phone number of the Recipient point of contact
Project Lines	Project Number	The source of funding (project) for this line
	Scope Code	• The project scope code • Only displayed for requests against TrAMS awards
	Scope Suffix	• The project scope suffix. Only displayed for requests against TrAMS awards. • For requests against TrAMS awards, the combination of project number, scope code, and scope suffix, are used to identify a unique funding source.
	Amount	• The dollar amount of the request or return • Positive if a request; negative if a return
	Status	The status of the request or return.

Table 16: An overview of what’s on Payment Record’s the Summary page.

Project Lines Legend

This is the ***Project Lines*** Legend that is located on the ***Summary*** page, under the ***Project Lines*** table of the ***Status*** column.

#	Field Name	Color	Description
1	Approved		The request has been approved, and funding has been disbursed.
2	Suspend		Suspend is if TrAMS reports it as suspended, i.e. it fails a validation on TrAMS side. This happens if TrAMS doesn't have a matching funding source, or if it doesn't have enough funds available.
3	Rejected		The payment request has been rejected and will not be processed.
4	No Response		The request is taking longer than normal to process. Please contact your Regional Office for more information.
5	Created		The request has been created.

Table 17: A legend of the types of statuses you may come across for the Project Lines.

4.4.2. History

On the ***History*** page of the ***Payment Request*** record, you will see the ***Payment Request History*** and ***Project Line History***. This contains the history of both the ***Payment Request*** and ***Project Lines***. Also, there are two buttons in the upper right corner that allow you to edit or cancel the payment (these exist if a ***Payment Request*** is ***PENDING***).

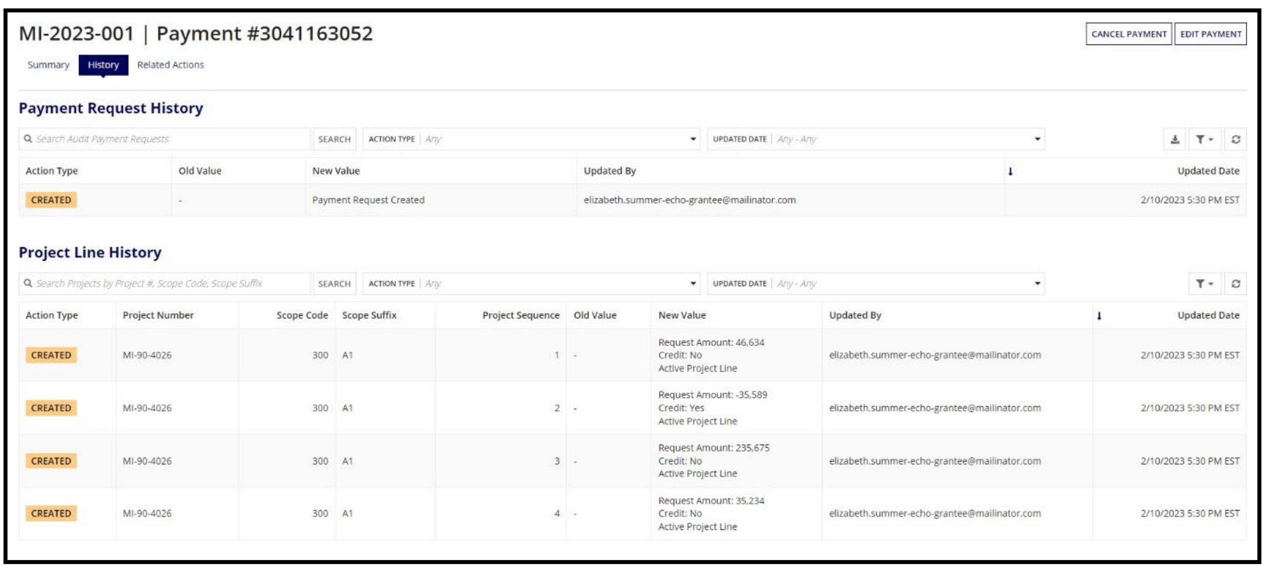


Figure 37: The history page contains the payment history and project history for MI-2023-001 | #3041163502.

Payment Request History

The ***Payment Request History*** contains the audit information for when a ***Payment Request*** was created, when a status changes, and if the project lines were edited.

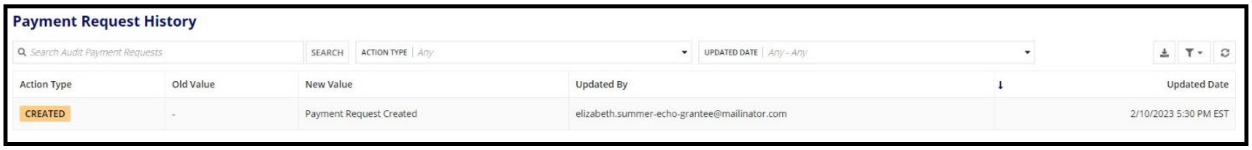


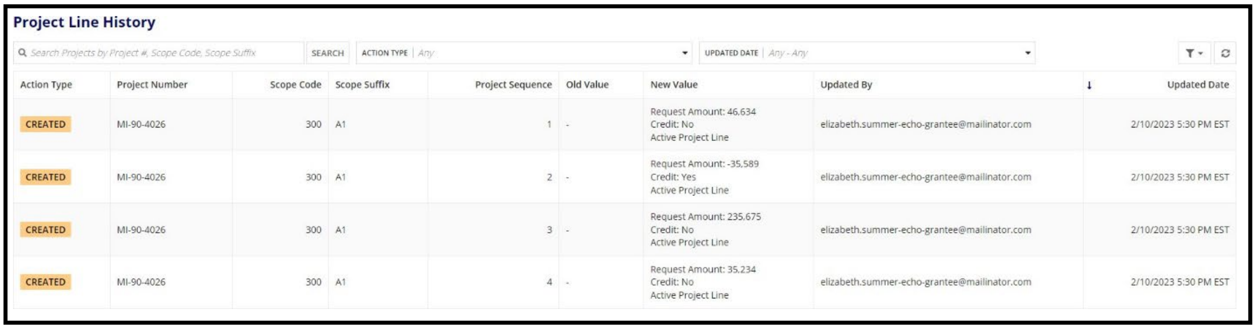
Figure 38: Payment Request History table showing the audit history for when the payment was created.

Section	Field Name	Description
Filters	Search Audit Payment Requests	Allows you search on the old and new values.
	Action Type	Allows you to select from a multi-select drop down. Has the following values: • Created • Status Changed • Request Edited
	Updated Date	The date of when the change occurred.
	Export	Allows you to export the Payment Request History as an excel. Not the same as the Generate Reports.
	Manage Filters	Allows you clear filters, save filters, and manage them (*if applicable*).
	Refresh	Allows you to refresh the history without having to refresh the browser.
Table	Action Type	Tells you the type of action that occurred. See Action Type filters for possible types.
	Old Value	Contains the old value which could be an old project line or old status.
	New Value	Contains the new value which could be about project lines updated or new status.
	Updated By	Tells you who made the change.
	Updated Date	Tells you what day & time the change occurred.

Table 18: An overview of what's in the Payment Request History.

Project Line History

The ***Project Line History*** contains the audit information for when a ***Payment Request Project Lines*** was created and edited.



Project Line History

Search Projects by Project #, Scope Code, Scope Suffix | SEARCH | ACTION TYPE | Any | UPDATED DATE | Any - Any

Action Type	Project Number	Scope Code	Scope Suffix	Project Sequence	Old Value	New Value	Updated By	Updated Date
CREATED	MI-90-4026	300	A1	1	-	Request Amount: 46,634 Credit: No Active Project Line	elizabeth.summer-echo-grantee@mailinator.com	2/10/2023 5:30 PM EST
CREATED	MI-90-4026	300	A1	2	-	Request Amount: -35,589 Credit: Yes Active Project Line	elizabeth.summer-echo-grantee@mailinator.com	2/10/2023 5:30 PM EST
CREATED	MI-90-4026	300	A1	3	-	Request Amount: 235,675 Credit: No Active Project Line	elizabeth.summer-echo-grantee@mailinator.com	2/10/2023 5:30 PM EST
CREATED	MI-90-4026	300	A1	4	-	Request Amount: 35,234 Credit: No Active Project Line	elizabeth.summer-echo-grantee@mailinator.com	2/10/2023 5:30 PM EST

Figure 39: Project Line History table showing the audit history for when the project lines were created for the payment. Also, show any changes to the project lines for the payments.

Section	Name	Description
Filters	Search Projects by Project #, Scope Code, Scope Suffix	Allows you to search based on: • Project Number • Scope Code • Scope Suffix
	Action Type	Allows you to select from a multi-select drop down. Has the following values: • Created • Status Changed • Request Edited
	Updated Date	The date of when the change occurred.
	Manage Filters	Allows you clear filters, save filters, and manage them (*if applicable*).
	Refresh	Allows you to refresh the history without having to refresh the browser.
Table	Action Type	Tells you the type of action that occurred. See Action Type filters for possible types.
	Project Number	The source of funding (project) for this line.
	Scope Code	The project scope code. Only displayed for requests against TrAMS awards.
	Scope Suffix	The project scope suffix. Only displayed for requests against TrAMS awards. For requests against TrAMS awards, the combination of project
		number, scope code, and scope suffix, are used to identify a unique funding source.
	Project Sequence	The sequence of the project lines as they exist in the project lines table seen on the summary page of the Payment record.
	Old Value	Contains the old value which could be an old project line or old status.
	New Value	Contains the new value which could be a new project line or new status.
	Updated By	Tells you who made the change.
	Updated Date	Tells you what day & time the change occurred.

Table 19: An overview of what's in the Project Line History.

Related Actions

On the ***Payment Request*** Record there are ***Related Actions***. ***Related Actions*** is a page that contains all the actions you can take on a specific record. The table below shows the different ***Related Actions*** for ***Payment Requests***.

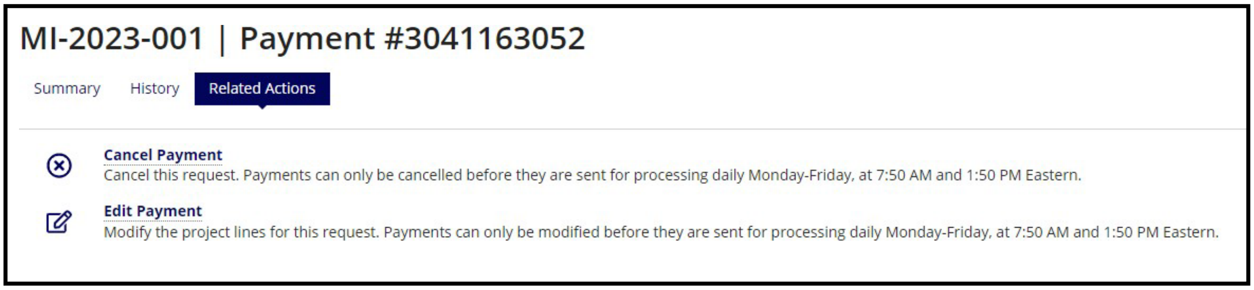


Figure 40: Payment Request for FAIN MI-2023-001 | #3041163502 Related Actions page.

#	Name	Description
1	Cancel Payment	Cancel this request. Payments can only be cancelled before they are sent for processing daily Monday-Friday, at 7:50 AM and 1:50 PM Eastern.
2	Edit Payment	Modify the project lines for this request. Payments can only be modified before they are sent for processing daily Monday-Friday, at 7:50 AM and 1:50 PM Eastern.

Table 20: An overview of the Actions that you can take on the Payment Request.

4.4.3. Cancel Payment Request (Grantee Users)

When you want to cancel a ***Payment Request***, it will need to be in the status of ***Pending*** and you will need to be the person that created it. The ***Cancel Payment Request*** form will have the following information seen in the table below.

#	Name	Action & Descriptions
1	Cancel Payment Request	• Located at the top of the form. • Description underneath: ○ Review the drawdown request below. Press 'Cancel Request' to cancel it.
2	Form Contents	Everything seen in *3.4.1 Payment Requests Record - Summary*
3	Buttons	• Cancel ○ Exits the form without changes any being saved. • Cancel Payment Request ○ Proceeds to get you to confirm the Cancellation of the Payment Request by clicking Cancel Payment in the pop-up window.

Table 21: An overview of what is seen on the first page of the Cancel form.

To get to the ***Cancel Payment Request*** you can click on the button in the upper right corner of the ***Summary*** or ***History*** page (*See Figure 35 or Figure 37*). Another way is by going to the ***Related Actions*** page and clicking the ***Cancel Payment*** link (*See Figure 40*).

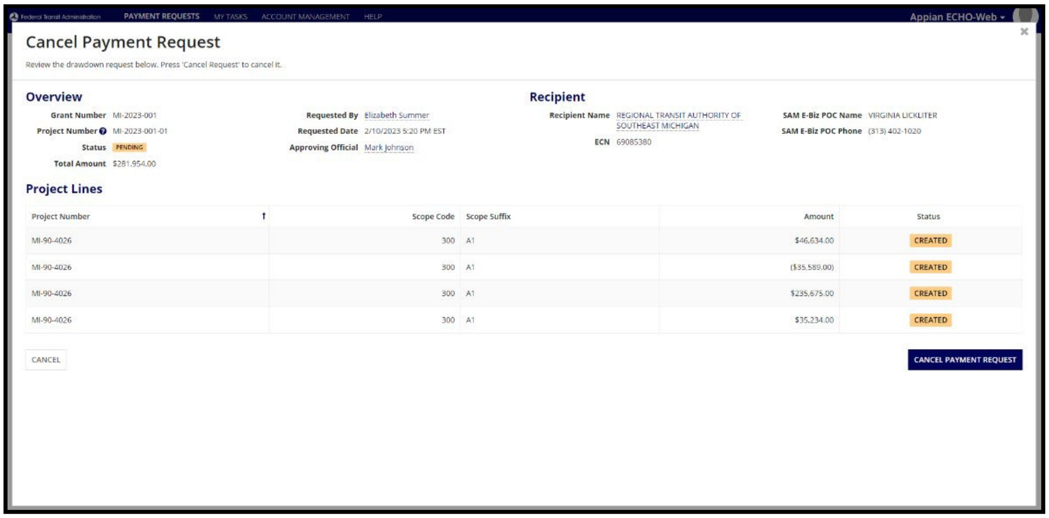


Figure 41: First page of the Cancel Payment Request after clicking Cancel Payment in the upper right corner of the Payment Request Record Summary/History page.

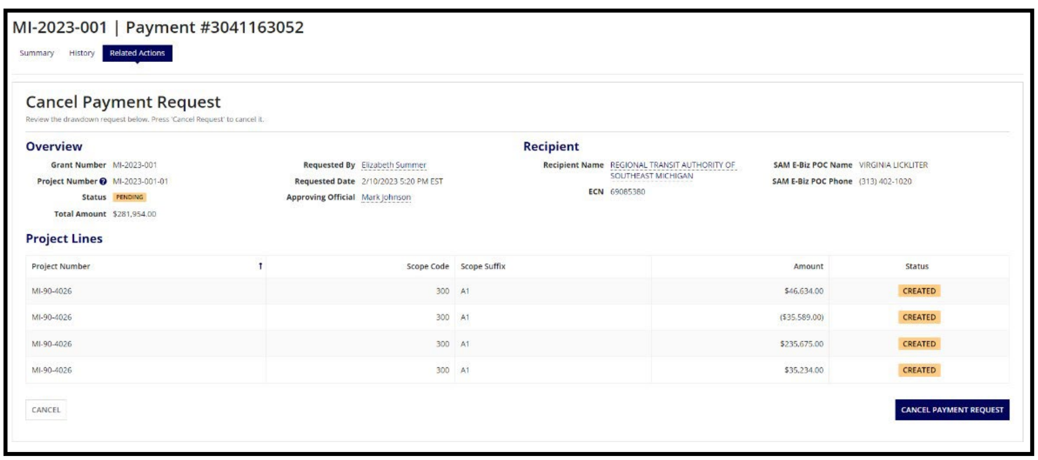


Figure 42: First page of the Cancel Payment Request after clicking Cancel Payment in the Related Actions page of the Payment Request Record.

Once you're on the ***Cancel Payment Request*** form, select ***Cancel Payment Request*** on the bottom-right to proceed. A pop-up window asking you to ***Confirm Cancellation*** will appear. By selecting ***Cancel Request***, your decision will be finalized, and the Payment will be cancelled and no longer be available for processing. If you do not wish to cancel the ***Payment Request***, select ***No***. Afterwards, selecting ***Cancel*** on the left will allow you to exit with any changes being saved.

Figure 43: This is the Confirm Cancellation pop-up window that appears after selecting Cancel Payment Request on the **Cancel Payment Request** form.

If you selected ***Cancel Payment Request*** and then ***Cancel Request***, you will see a ***Cancellation Confirmation*** with the following message:

- Payment #2364150004 (*digits after the # is the message number*) cancelled successfully on 12/30/2022 4:35 PM ET.

You can leave the page by clicking close or leaving the page. Once you leave, you will not be able to return to this page; however, you can still return to the ***Payment Request*** Record to see its details and history.

Figure 44: Payment Cancelled Confirmation page after confirming the cancellation on the Cancel Payment Request form.

4.4.4. Edit Payment Request (Grantee Users)

To edit a ***Payment Request***, it's status must be ***Pending***, and you must be the person who created it.

To get to the ***Edit Payment Request*** screen, click on the button in the upper right corner of the ***Summary*** or ***History*** page (*See Figure 35 or Figure 37*). Alternately, go to the ***Related Actions*** page and click the ***Edit Payment*** link (*See Figure 40*).

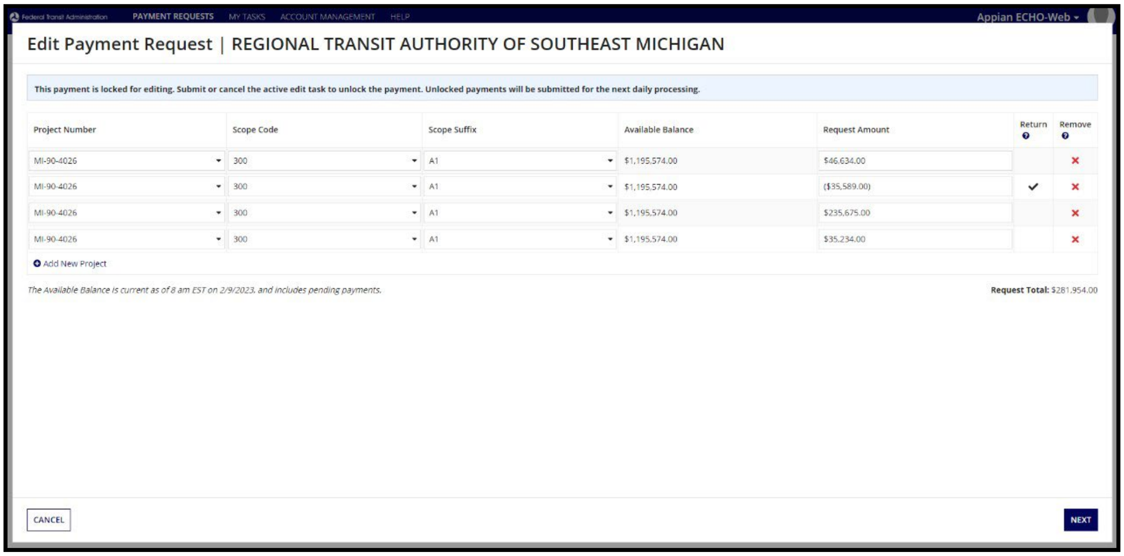


Figure 45: First page of the Edit Payment Request after clicking Edit Payment in the upper right corner of the Payment Request Record Summary/History page.

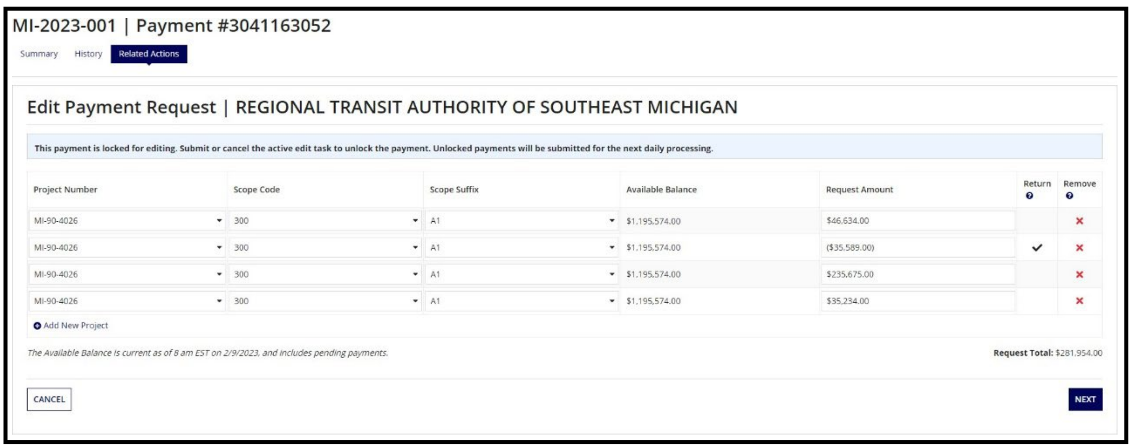


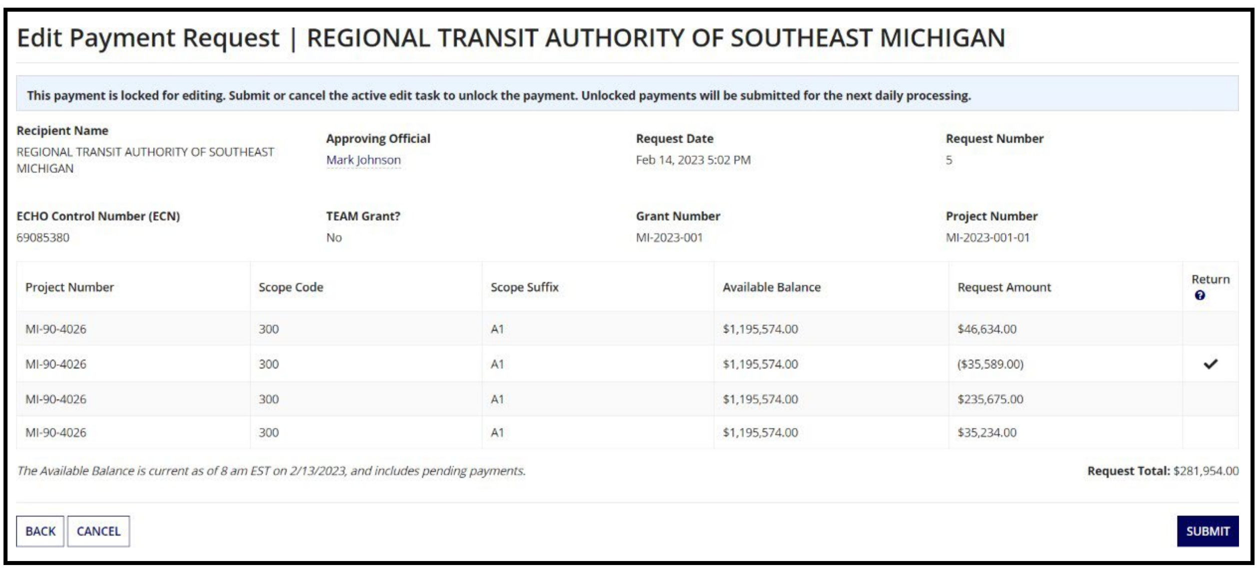
Figure 46: First page of the Edit Payment Request after clicking Edit Payment in the Related Actions page of the Payment Request Record.

4.4.5. Differences between Edit and Create Payments

The following table below explains what is the same and different between edit and create payments.

#	Form Name	Same	Different
1	Edit Payment Request First Page (See *Figure 45* or *Figure 46*)	• Validation is the same	• We start on 3.2.2 Second Page of the Create Payment Request Form. • There is a blue message at the top: ○ This payment is locked for editing. Submit or cancel the active edit task to unlock the payment. Unlocked payments will be submitted for the next daily processing.
			• Button Functionality is different for the first Edit page. See First Page Button Functionality.
2	Edit Payment Request Confirmation page (See *Figure 47*)	• Confirmation page and Button functionality (*See 3.2.3 Confirmation Page of the Create Payment Request*).	• There is a blue message at the top: ○ This payment is locked for editing. Submit or cancel the active edit task to unlock the payment. Unlocked payments will be submitted for the next daily processing.

Table 22: An overview of what is the similar and different between the edit and create payments forms.



Edit Payment Request | REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN

This payment is locked for editing. Submit or cancel the active edit task to unlock the payment. Unlocked payments will be submitted for the next daily processing.

Recipient Name	Approving Official	Request Date	Request Number
REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	Mark Johnson	Feb 14, 2023 5:02 PM	5
ECHO Control Number (ECN)	**TEAM Grant?**	**Grant Number**	**Project Number**
69085380	No	MI-2023-001	MI-2023-001-01

Project Number	Scope Code	Scope Suffix	Available Balance	Request Amount	Return
MI-90-4026	300	A1	$1,195,574.00	$46,634.00	
MI-90-4026	300	A1	$1,195,574.00	($35,589.00)	✓
MI-90-4026	300	A1	$1,195,574.00	$235,675.00	
MI-90-4026	300	A1	$1,195,574.00	$35,234.00	

The Available Balance is current as of 8 am EST on 2/13/2023, and includes pending payments.

Request Total: $281,954.00

BACK CANCEL SUBMIT

Figure 47: Confirmation page of the Edit Payment Request for REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN.

First Page Button Functionality

The table below shows the ***Edit Payment Request*** first page button functionality.

#	Button Name	Location	Function
1	Cancel	Bottom Left After Back	Opens number #2, will allow you to decide if you are sure about canceling.
2	Cancel Payment Request? (*pop-up*)	Opens after Cancel is Clicked	Description: All unsaved data will be lost. Continue? Buttons: • No – Allows you to continue Creating Payment Request. • Yes – Cancels the Creating Payment Request and nothing will be saved.
3	Next	Bottom Right	This will take you to the confirmation page as long as there are no validations issues and Next is not disabled.

Table 23: An overview of the button functionality in the first page of the Edit Payment Request form.

4.5. Locked Payment Request

A payment request is locked when it's being edited. The payment will not process until it is unlocked. To unlock the payment request, either cancel the edit or submit the changes you wish to make to the payment.

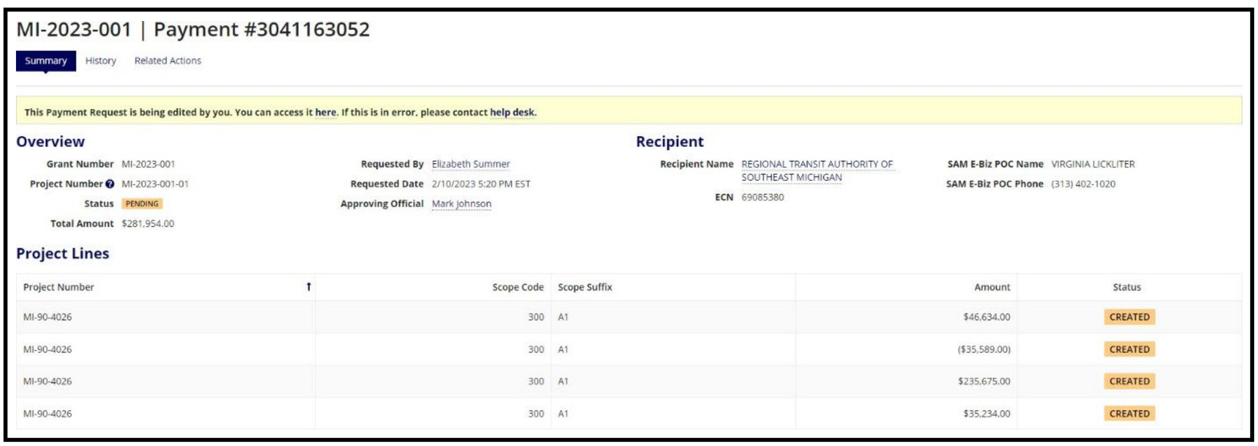


Figure 48: The Payment record message when it's locked while being edited.

5. My Tasks

When you select the ***My Tasks*** tab, you are taken to the ***My Tasks*** page. Here, you can see all the tasks that have been assigned to you. Possible M***y Tasks*** examples:

- ECHO Create Payment Request
- Update User Information for username (*e.g., email.external@email.com*)
- ECHO Edit Payment Request #3004150466

The number of tasks that are assigned to you are clearly indicated in the ***My Tasks*** tab and table name. You can filter your tasks by entering keywords into the ***Name*** search bar or selecting a status from the ***Status*** drop-down menu. The ***My Tasks*** table contains three columns: Task Name, Date Assigned, and Status for each task that was assigned to you.

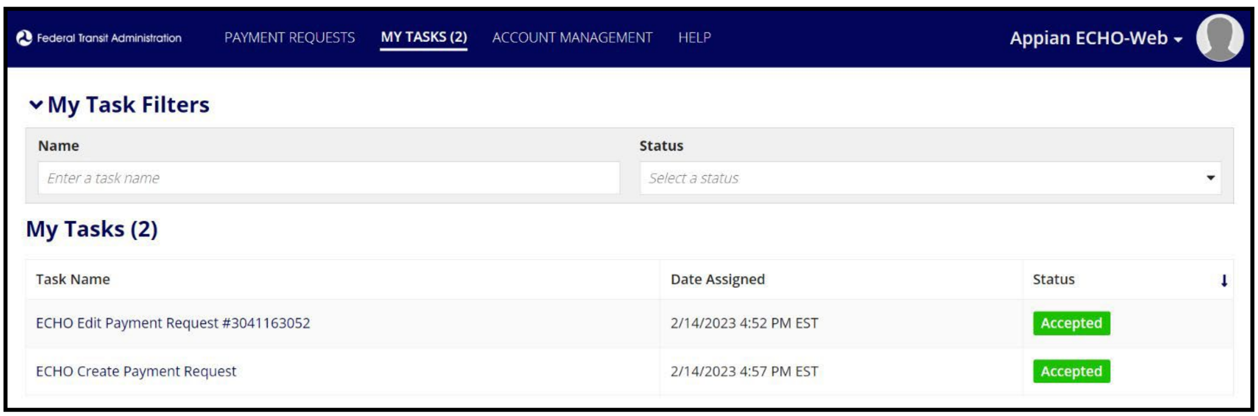


Figure 49: My Tasks page with Filters and a table showing possible tasks.

When you select the task name, you are taken to the task screen where you can carry out the task that was assigned to you.

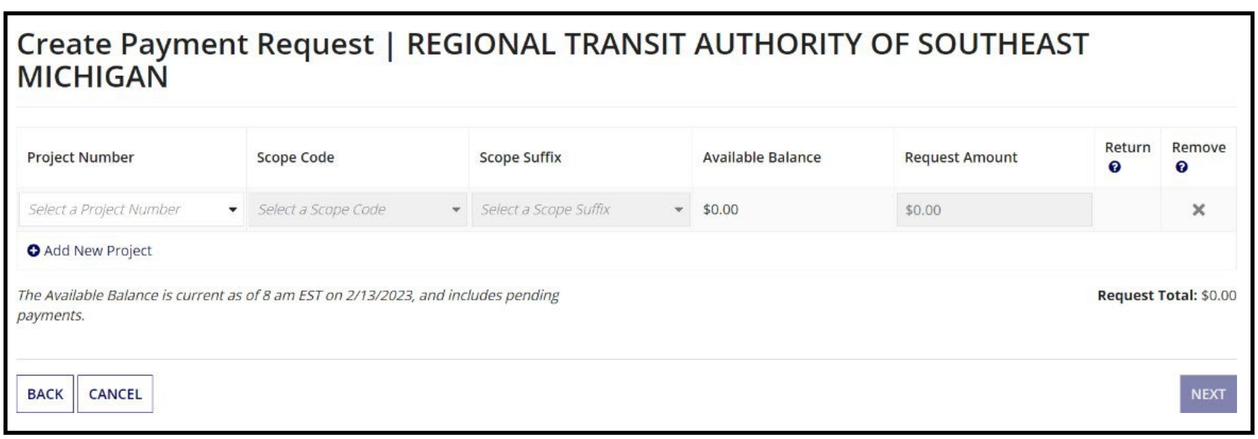


Figure 50: An example of clicking a task called ECHO Create Payment Request and being redirected from the My Tasks Page to the Create Payment Form.

5.1. My Task Status Legend

The table below describes the statuses you will see in the ***My Tasks*** table, under the ***Statu***s column.

#	Status Name	Color	Description
1	Assigned		Tasks that are assigned to you
2	Accepted		Tasks that you intend to complete.

Table 24: A legend of the types of statuses you may come across for My Tasks.

6. Account Management

When you select the ***Account Management*** tab, you are taken to the ***Account Management*** page, where you will have the following options:

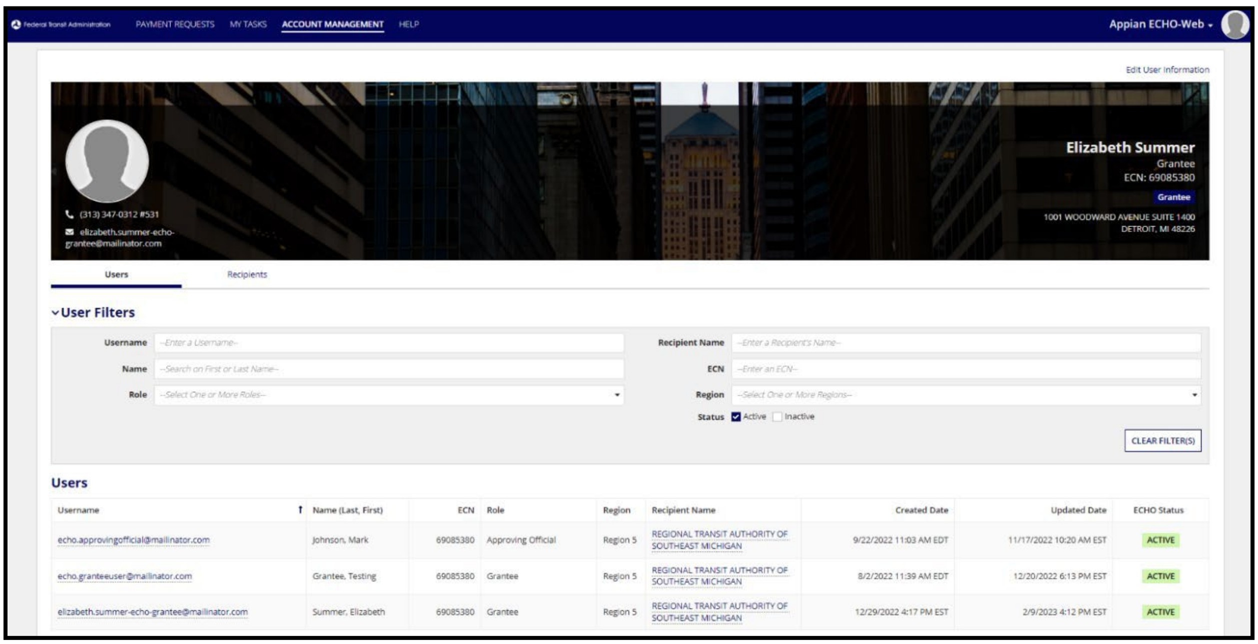


Figure 51: This is the landing page for the Account Management page. It contains the Edit User Information link (if applicable), User Dashboard (See 3.1 User Dashboard), and the Users and Recipients tabs: filters, tables, and Generate Report button.

#	Tab Name	Description
1	User's Tab	• User Filters and Table (*depending on your role you will only see certain users. See 5.1 User Role Permissions*). • Generate Users Report • Go to a User Record • See 5.3 Users Tab
2	Recipient's Tab	• Recipient Filters and Table (*depending on your role you will only see certain Recipients. See 5.1 User Role Permissions*)
		• Generate Recipient's Report • Go to a Recipient Record • See 5.5 Recipients Tab

Table 25: An overview of the information that is seen on the Account Management page.

6.1. Edit User Information

You can update your own information for ***ECHO-Web*** by clicking on ***Edit User Information*** near the top right corner of the page or going to your own record (*See 5.4 User Record*). By clicking on the ***Edit User Information,*** you will be taken to a form called ***Manage Information*** (*See Figure 57 below*) that is broken down into 3 sections:

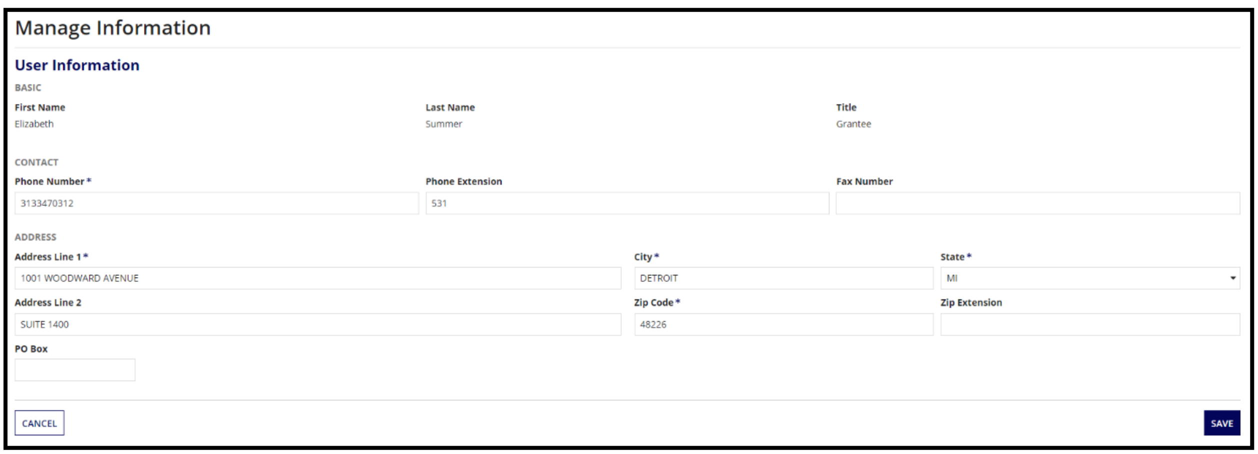

Manage Information
User Information
BASIC
First Name
Elizabeth
Last Name
Summer
Title
Grantee
CONTACT
Phone Number *
3133470312
Phone Extension
531
Fax Number
ADDRESS
Address Line 1 *
1001 WOODWARD AVENUE
City *
DETROIT
State *
MI
Address Line 2
SUITE 1400
Zip Code *
48226
Zip Extension
PO Box
CANCEL
SAVE

Figure 57: When you come to Manage Information, you will have 3 sections Basic, Contact, Address. You can look at the following table below for more information. For button functionality, see 5.2.1 Edit User Page Buttons.

Section	Field Name	Editable	Required	Validations
Basic	First Name	No	No	No
	Last Name			
	Username			
	Title			
Contact	Phone Number	Yes	Yes	• Max Character limit is 10 (*area code + 7 digits*) • No special characters or alphabet letters
	Phone Extension		No	• Max Character limit is 5 digits • No special characters or alphabet letters
	Fax Number		No	• Max Character limit is 10 (*area code + 7 digits*) • No special characters or alphabet letters
Address	Address Line 1	Yes	Yes	• Max Character limit is 30 • No special characters except for hyphen (-) or period (.) • Must start with the primary address number (*e.g., 101 Maple St*) (See USPS Publication 28 – Postal Addressing Standards)
	Address Line 2		No	• Max Character limit is 30
	PO Box		No	• Max Character limit is 5 digits • No special characters or alphabet letters
	City		Yes	• Max Character limit is 20 • No special characters except for hyphen (-) and no digits
	State		Yes	• Drop-down menu selection with State Abbreviations
	Zip Code		Yes	• Max Character limit is 5 digits • No special characters or alphabet letters
	Zip Extension		No	• Max Character limit is 4 digits • No special characters or alphabet letters

Table 27: An overview of the fields seen in Edit User Information.

6.1.1. Edit User Page Buttons

You will see the following button functionality when editing your user information.

Figure 58: The buttons seen at the bottom of the Manage Information. See the table below of their functionality.

#	Button Name	Location	Function
1	Cancel	Bottom Left	No changes will be submitted, and you will return to the Account Management page
2	Save	Bottom Right	You will save the any changes and return to the Account Management page.

Table 28: An overview of the button functionality for Edit User Information.

6.2. Users Tab

When you come to the Account Management page, the Users tab will be the default tab that will be selected. You will see the following:

- Edit User Information (*See 5.2 Edit User Information*)
- User Dashboard (*See 3.1 User Dashboard*)
- Users tab
- Recipients tab (*See 5.5 Recipients Tab*)
- User Filters
- Users table
- Generate Report

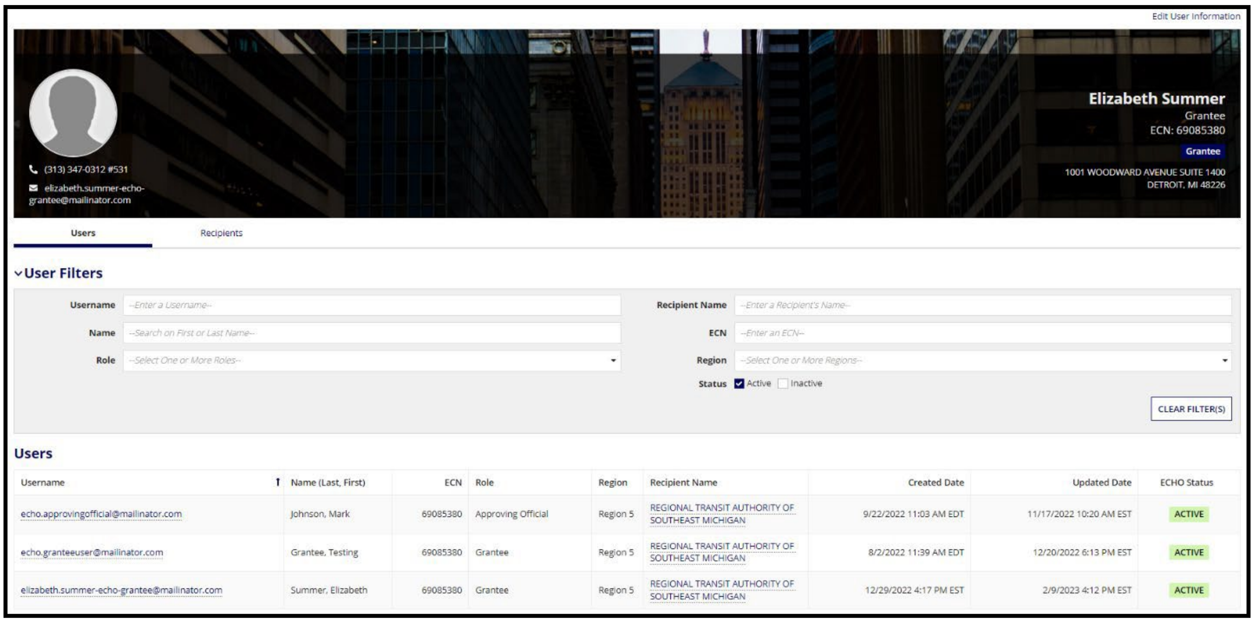


Figure 59: Account Management User's page.

6.2.1. User Filters

You can filter out users that you can see in the ***Users*** table by entering or selecting information from the ***User Filters*** fields. By pressing enter/tab/clicking out of a field you type in you will submit the filtered changes. When you select from a drop-down menu the changes will apply immediately to the table. You have the following options in ***User Filters***:

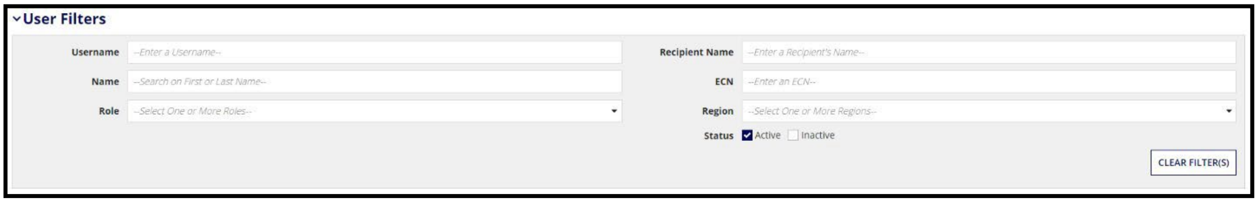


Figure 60: These filters are available on the Account Management page for the Users tab. See 5.3.2 Users Table.

#	Field Name	Description
1	Username	You can type in any part of a User's username, and it will show a drop-down menu of possible matches.
2	Name	• You can type in any part of a User's first (given) or last (family or surname) name, and it will return results in the table. • Name can't be longer than 30 characters, if longer you will receive a message under the field.
3	Role	You can select one or more roles from the multi-select drop-down menu. Available roles will be based on the type of user roles you have (*See 5.1 User Role Permissions*).
4	Recipient Name	You can type in any part of a Recipient's Name, and it will show a drop-down menu of possible matches of legal names.
5	ECN	• You can type in any part of an ECN, and it will return results in the table. • ECN can't be longer than 8 characters, if longer you will receive a message under the field.
6	Region	You can select one or more region from the multi-select drop-down menu. If you have only one region, that region will be defaulted.
7	Status	You have active (*defaulted*) and inactive.
8	Clear Filter(s)	Clears all the filters

Table 29: An overview of the User filters seen in Account Management.

6.2.2. Users Table

The ***Users*** table contains information about users the viewer has permission to see. Different roles may have different views on this table:


Users

Username	Name (Last, First)	ECN	Role	Region	Recipient Name	Created Date	Updated Date	ECHO Status
echo.approvingofficial@mailinator.com	Johnson, Mark	69085380	Approving Official	Region 5	REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	9/22/2022 11:03 AM EDT	11/17/2022 10:20 AM EST	ACTIVE
echo.granteeuser@mailinator.com	Grantee, Testing	69085380	Grantee	Region 5	REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	8/2/2022 11:39 AM EDT	12/20/2022 6:13 PM EST	ACTIVE
elizabeth.summer-echo-grantee@mailinator.com	Summer, Elizabeth	69085380	Grantee	Region 5	REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	12/29/2022 4:17 PM EST	2/9/2023 4:12 PM EST	ACTIVE

3 items

GENERATE REPORT

Figure 61: This is the Users table you will see after landing on the Account Management page.

#	Field Name	Description
1	Username	User's username
2	Name (*Last, First*)	User's on-record first and last names
3	ECN	Recipient ECHO Control Number
4	Role	Systems role user has permissions for
5	Region	Organization Receiving Funding.
6	Recipient Name	Name of the Recipient the user is assigned the role for
7	Created Date	Date when the user was created in the system
8	Updated Date	Date when the user's information was last updated
9	ECHO Status	It's Status in ECHO-Web

Table 30: This is the Users table column with their descriptions.

ECHO Status Legend

The following table below are the statuses you will see in the User table ECHO Status column.

#	Status Name	Color	Description
1	Active		Determines if a user is active in ECHO-Web.
2	Inactive		Determines if a user is inactive in ECHO-Web.

Table 31: A legend of the types of statuses you may come across for the Users table.

6.2.3. Generate User Report

To Generate a User Report, scroll to the bottom of the User table and see a ***Generate Report*** button (*bottom right*). To Generate Reports, see section 7 Report Generation. Check out the table below to see what information is provided in the report.

Users

Username	Name (Last, First)	ECN	Role	Region	Recipient Name	Created Date	Updated Date	ECHO Status
echo.approvingofficial@mailinator.com	Johnson, Mark	69085380	Approving Official	Region 5	REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	9/22/2022 11:03 AM EDT	11/17/2022 10:20 AM EST	ACTIVE
echo.granteeuser@mailinator.com	Grantee, Testing	69085380	Grantee	Region 5	REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	8/2/2022 11:39 AM EDT	12/20/2022 6:13 PM EST	ACTIVE
elizabeth.summer-echo-grantee@mailinator.com	Summer, Elizabeth	69085380	Grantee	Region 5	REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	12/29/2022 4:17 PM EST	2/9/2023 4:12 PM EST	ACTIVE

3 items

GENERATE REPORT

Figure 62: Users table with the Generate Report button available at the bottom right.

Section	Field Name	Description
Report Overview	System	TrIAD Platform - ECHO-Web Report
	Report Title	User List Report
	Report Date	Format MM/DD/YYYY HH:MM TIMEZONE
	Filters Applied	See *5.3.1 User Filters*.

	Report Tabs	• Users
		  ○ This tab contains user account and contact data for users meeting the search criteria. There is one row per user.
		• Roles
		  ○ This tab contains role data for each user on the Users tab. There is one row for each role currently assigned to a user.

Users	Columns	• Username • Name • Title • Email • Phone Number • Street Address • City • State • Zip • Created Date • Modified Date • Is Locked • Is Active
Roles	Columns	• Username • Role • Role Category • Region • Organization • ECN • Created Date • Created By

Table 32: User Report Contents seen in the form of a Microsoft Excel file.

6.3. User Record

To access ***User Record*** when you select:

- Payment Record – Summary page Overview section (*See Figure 35*)
    - ***Request By*** (*field name*) > ***Approving Official*** (*field name*) > ***Cancelled By*** (*field name*)
- Account Management – ***Users*** table under the ***Username*** column (*See Figure 61*)
- Recipient Record – ***Users*** page in the ***Recipient Users*** table, under the ***Username*** column (*See Figure 77*)

The ***User Record*** contains information that is specific to the selected user.

Figure 63: An example of Elizabeth Summer's User Record when landing on the Summary page.

#	Field Name	Description
1	Summary	Contains an overview of your information.
2	Users Roles	List of roles that you have.
3	Payments	All the payments that you have created.
4	History	History for your account, roles, and profile.
5	Related Actions	Accesses actions to update the user record.

Table 33: User Records different pages and their descriptions.

6.3.1. Summary

The ***Summary*** page of the User contains an overview of the User Information (*See Figure 63*). See table 33 below. There is a button called ***Update User Information*** (located in the *upper-right corner*) that allows you to edit your information.

#	Field Name	Description
1	First Name	Official Personal First (given) Name
2	Last Name	Official Personal Last (family or surname) Name
3	Username	Official ECHO-Web login name which is your Official Email Address
4	Title	Official Title
5	Phone Number	Official Phone Number (*Formatted as (###) ### - ####*).
6	Phone Extension	Official Phone Extension
7	Fax Number	Official Fax Number (*Formatted as (###) ### - ####*).
8	Email Address	Official Email Address (*Opens the default email application on the computer. So, you can send an email to the person*)
9	Address Line 1	Official Address Line 1
10	Address Line 2	Official Address Line 2
11	PO Box	Official PO Box
12	City	Official City
13	State	Official State
14	Zip Code	Official Zip Code
15	Zip Extension	Official Zip Extension.

Table 34: An overview of what's on User Record's the Summary page.

6.3.2. User Roles

The User Roles page contains all the roles that have been assigned to you or the specific user you are looking at.

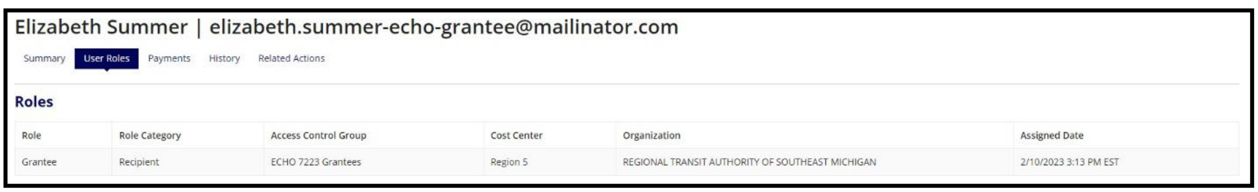


Figure 64: An example of Elizabeth Summer User Roles.

#	Field Name	Description
1	Role	Specific user role a user has permissions for
2	Role Category	Category of the role.
3	Access Control Group	Access Control Group in which the user was assigned the role for
4	Cost Center	Cost Center in which the user was assigned the role for
5	Organization	Organization in which the user was assigned the role for
6	Assigned Date	The date when the user role was assigned to the user

Table 35: An overview of the information in the Roles table.

6.3.3. Payments

In the Payments page of the User record, you will see the Payment Request history.

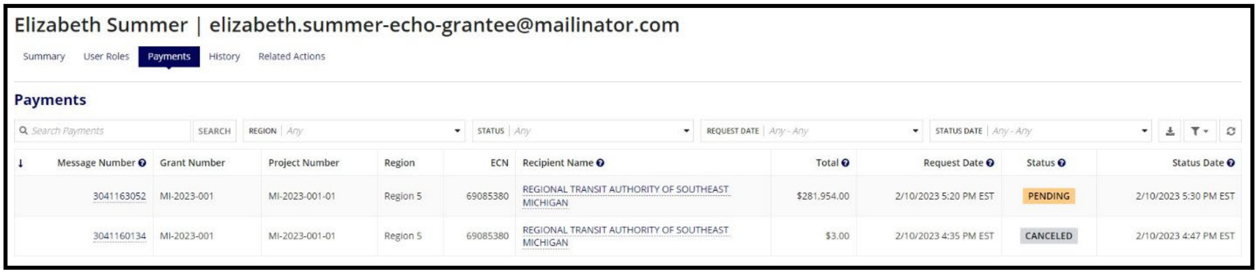


Figure 65: An example of Elizabeth Summer Payment History.

Section	Field Name	Description
Filters	Search Payments	Allows you to search over the Message Number, Grant Number, Project Number, or ECN.
	Region	Allows you to select from a multi-select drop down for regions that are available to you.
	Status	Allows you to select from a multi-select drop down. For what statuses are available see *3.3.2.1 Payment Status Legend*
	Request Date	Tells you when a payment was requested.
	Status Date	Tells you when a payment status changed.
	Export	Allows you to export the Payment Request History as an excel. Not the same as the Generate Reports.
	Manage Filters	Allows you clear filters, save filters, and manage them (*if applicable*).
	Refresh	Allows you to refresh the history without having to refresh the browser.
Table	Columns	See *3.3.2 Payment Request Table*

Table 36: An overview of what's in the Payments table.

6.3.4. History

When you come to the History page you will have 3 tables:

1. Account History
2. Role History
3. Profile History

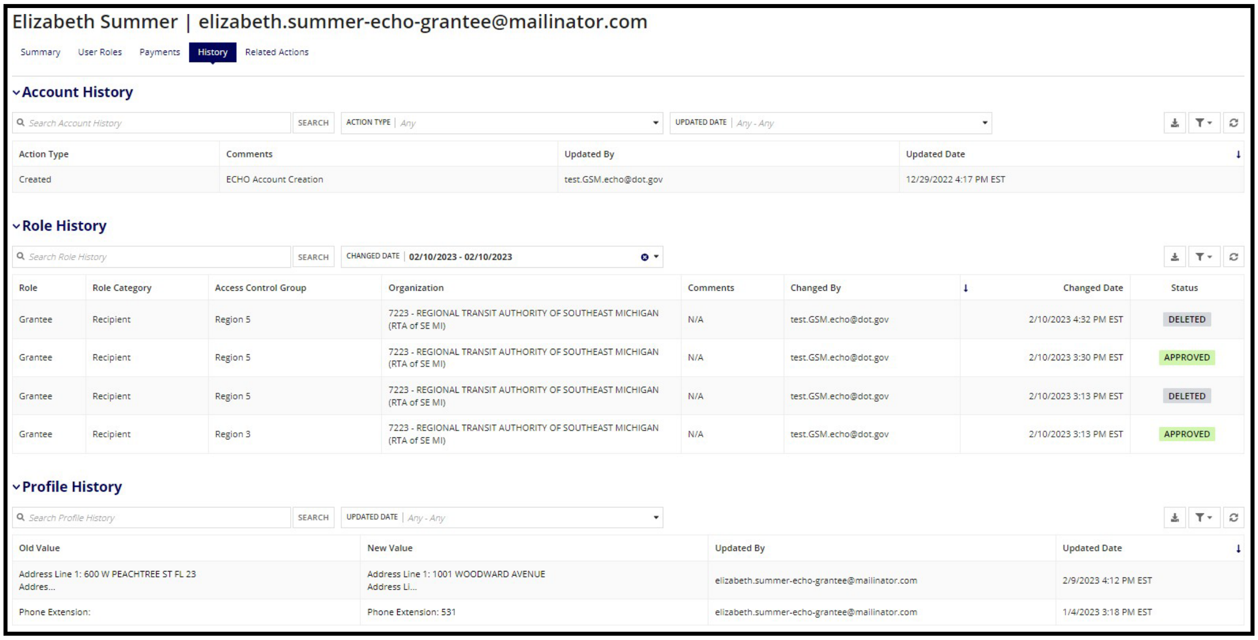


Figure 66: History Page of a User Record contains 3 sections: Account History, Role History, and Profile History.

Account History

Account history contains information on when an account is created, deactivated, and reactivated.

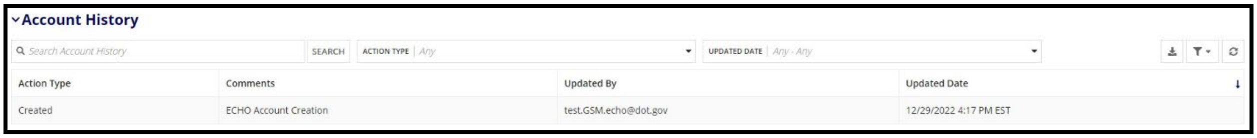


Figure 67: An example of Elizabeth Summer Audit History for the when the Account information gets updated.

Section	Field Name	Description
Filters	Search Account History	Allows you to search history grid on Comments and Updated By.
	Action Type	Allows you to filter the history grid by action types.
	Updated Date	Allows you to filter the history grid by updated dates.
	Export	Allows you to export the Payment Request History as an excel. Not the same as the Generate Reports.
	Manage Filters	Allows you clear filters, save filters, and manage them (*if applicable*).
	Refresh	Allows you to refresh the history without having to refresh the browser.
Table	Action Type	The type of recorded action done on a user account.
	Comments	Notes recorded when performing actions on a user account.
	Updated By	The user who performed the action on the user account in question.
	Updated Date	The date when the account action happened.

Table 37: An overview of what's in the Account History table.

Role History

Role history contains information on when roles were added to a user account.

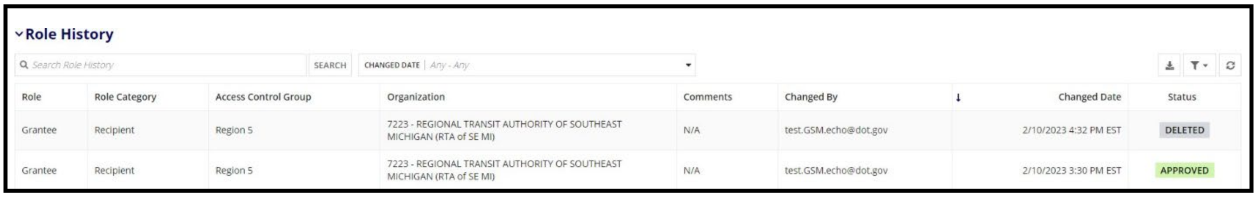


Figure 68: An example of Elizabeth Summer Audit History for the when the Role information gets updated.

Section	Field Name	Description
Filters	Search Role History	Allows you to search the Role History grid on all columns except the Changed Date.
	Changed Date	Allowed you to filter the Role History Grid by changed date.
	Export	Allows you to export the Payment Request History as an excel. Not the same as the Generate Reports.
	Manage Filters	Allows you clear filters, save filters, and manage them (*if applicable*).
	Refresh	Allows you to refresh the history without having to refresh the browser.
Table	Role	Specific role to a user that permits certain permissions.
	Role Category	Category of the role.
	Access Control Group	Access Control Group in which the user was assigned for their specific role.
	Organization	Organization in which the user was assigned for their specific role.
	Comments	Comments recorded when role was added or modified.
	Changed By	The user that added or modified the user role.
	Changed Date	The date when the user role was added or modified.
	Status	The activity status of the user role.

Table 38: An overview of what's in the Role History table

Profile History

Profile History contains an audit history of profile changes made to a user's account.

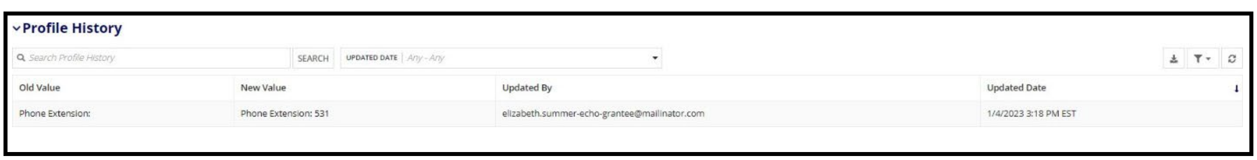


Figure 69: An example of Elizabeth Summer Audit History for the when the Profile information gets updated.

Section	Field Name	Description
Filters	Search Profile History	Allows you to search Profile History all columns except Updated Date.
	Updated Date	Allows you to file profile history by updated date.
	Export	Allows you to export the Payment Request History as an excel. Not the same as the Generate Reports.
	Manage Filters	Allows you clear filters, save filters, and manage them (*if applicable*).
	Refresh	Allows you to refresh the history without having to refresh the browser.
Table	Old Value	The previous values of profile data before a change.
	New Value	The new values of profile data after a change.
	Updated By	The user that modified the profile's data.
	Updated Date	The date when the profile data was modified.

Table 39: An overview of what's in the Profile History table.

6.3.5. Related Actions

On the User record there are Related Actions. **Related Actions** is a page that contains all the actions you can take on a record. The most commonly available action is the Update User Information, which will allow you to update official personal information (*See* *5.2 Edit User Information*).

Figure 70: An example of User Record Elizabeth Summer. The Related Actions page with Update User Information link.

6.4. Recipients Tab

When you come to the ***Account Management*** page, the ***Recipients*** tab will be right of the defaulted ***Users*** tab. You will see the following:

- Edit User Information (*See* *5.2 Edit User Information*)
- User Dashboard (*See* *3.1 User Dashboard*)
- Users Tab (*See* *5.3 Users Tab*)
- Recipient Filters
- Recipients table
- Generate Report

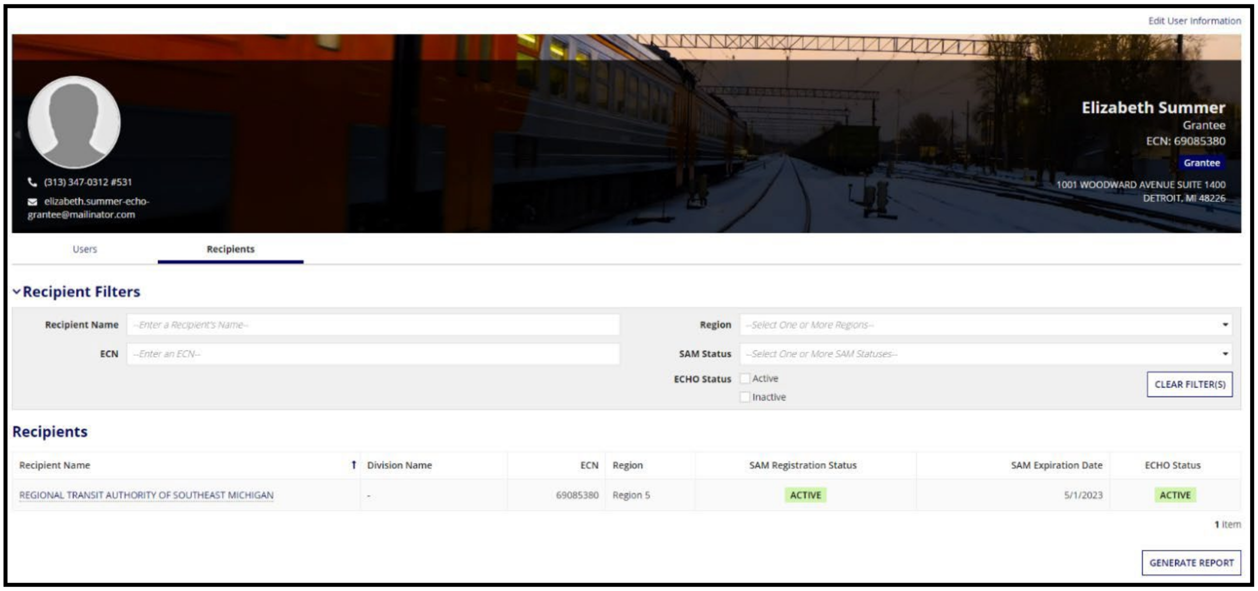


Figure 71: Account Management Recipient page contains the Edit User Information, User Dashboard, Recipient Filters, Recipients table, and Generate Report.

6.4.1. Recipient Filters

You can filter out ***Recipients*** that you can see in the Recipients table by entering or selecting information from the Recipient filter fields. By pressing enter/tab/clicking out of a field you type in you will submit the filtered changes. When you select from a drop-down menu the changes will apply immediately to the table. You have the following options in ***Recipient Filters***:

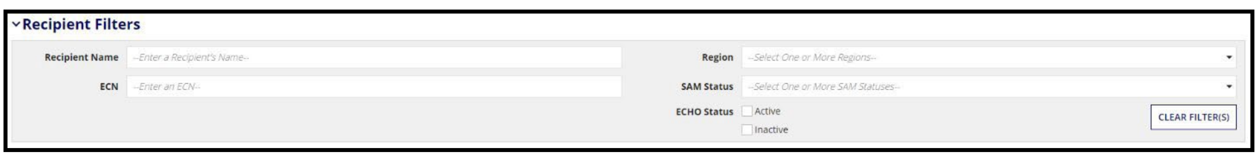


Figure 72: These are filters that you will see when coming to the Account Management page for the Recipient tab. These filters will change what you see in the Recipient table. See 5.5.2 Recipients Table.

#	Field Name	Description
1	Recipient Name	You can type in any part of a Recipient's Name, and it will show a drop-down menu of possible matches.
2	ECN	• You can type in any part of an ECN, and it will return results in the table. • ECN can't be longer than 8 characters, if longer you will receive a message under the field.
3	Region	You can select one or more FTA Regional Offices from the multi-select drop-down menu. If you have only one region, that region will be defaulted.
4	SAM Status	You can select one or more SAM Statuses from the multi-select drop-down menu: • Deleted • Unknown • Expired • Active
5	ECHO Status	You have active (*defaulted*) and inactive.
6	Clear Filter(*s*)	Clears all the filters

Table 40: An overview of the Recipient Filters in the Account Management.

6.4.2. Recipients Table

The ***Recipients*** table shows the following information:

Figure 73: This is the Recipients table you will see after landing on the Account Management page and clicking on the Recipient tab right of the User tab (See Figure 71).

#	Field Name	Description
1	Recipient Name	The Recipient displayed name
2	Division Name	Division the Recipient is under
3	ECN	Identifying Control Number for Recipient in ECHO
4	Region	The Region the Recipient is associated with
5	SAM Registration Status	The SAM status of the Recipient
6	SAM Expiration Date	The SAM Expiration Date of the Recipient
7	ECHO Status	The status of the Recipient in ECHO

Table 41: An overview of what's in the Recipients table.

Recipient Status Legend

The following table below are the statuses you will see in the Recipients table ECHO Status and SAM Registration Status columns.

Section	Status Name	Color	Description
ECHO	Active		The User is active in ECHO-Web
	Inactive		The User is inactive in ECHO-Web
SAM Registration Status	Deleted		The Recipient is deleted in SAM
	Unknown		The Recipient is not found in SAM with the given parameters
	Expired		The Recipient is expired in SAM
	Active		The Recipient is active in SAM

Table 42: A legend of the types of statuses you may come across for the Recipients table.

6.4.3. Generate Recipient Report

To Generate a Recipient Report, scroll to the bottom of the Recipient table where you will see a ***Generate Report*** button (*bottom right*). To Generate Reports, see section 7 Report Generation. The table below shows information provided in the report.

Figure 74: Underneath the Recipients table on the Account Management tab of the Recipient tab the Generate Report button exists. It could be unclickable if the button has already been clicked or no data exists in the table.

Section	Field Name	Description
Report Overview	System	TrIAD Platform - ECHO-Web Report
	Report Title	Recipient Report
	Report Date	Format MM/DD/YYYY HH:MM TIMEZONE
	Filters Applied	See 5.5.1 Recipient Filters.
	Report Tabs	• Recipients ○ This tab contains recipient information for recipients meeting the search criteria. There is one row per recipient. • Users
		○ This tab contains user account and contact data for users meeting the search criteria. There is one row per user.
Recipients	Columns	• Recipient Name • SAM Unique Identifier (*UEI*) • Division Name • ECN • Region • SAM Registration Status • SAM Expiration Date • ECHO Status • Created Date • Created By
Users	Columns	• Grantee Name • Username • Name • Role • Role Category • Region • Created Date • Created By • Is Locked • Is Active

Table 43: Recipient Report Contents seen in the form of a Microsoft Excel file.

6.5. Recipient Record

You will view the Recipient record when you click on the Recipient Name in any of the following areas:

- Account Management – Users table (*See Figure 61*)
- Account Management – Recipients table (*See Figure 73*)
- Payment Requests – Payment Requests table (*See Figure 33*)
- Payment Record – Summary tab under the Recipient section (*See Figure 35*)

The record contains information relating to the specific Recipient:

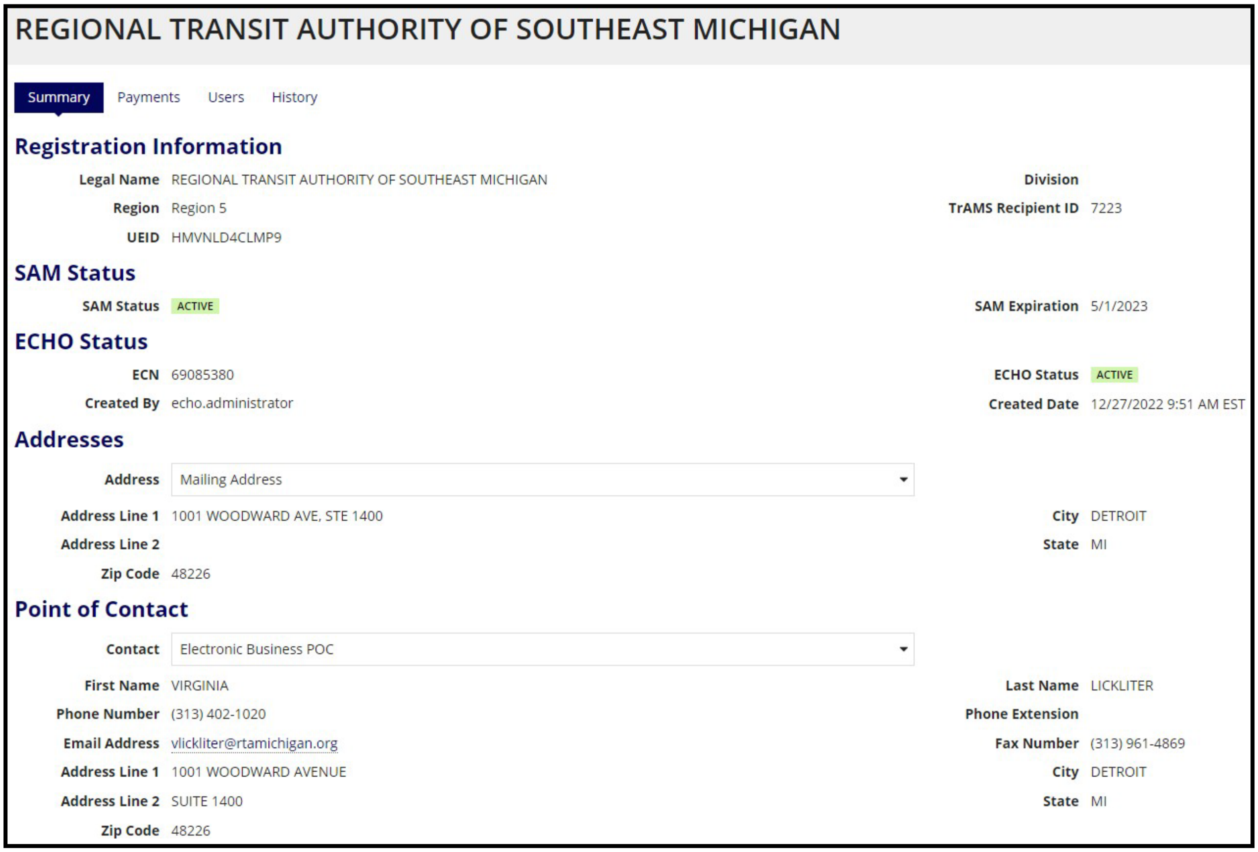


Figure 75: First page you will see when you come to the Recipient record is the Summary page.

#	Field Name	Description
1	Summary	Contains information on the Registration Information, SAM Status. ECHO Status, Addresses, and Points of Contact.
2	Payments	Contains information on the Payments made for the Recipient.
3	Users	Contains information on what users belong to the Recipient.
4	History	Contains information on the Creation Details, Recipient History, and Recipient ECN History.

Table 44: Recipient Records different pages and their descriptions.

6.5.1. Summary

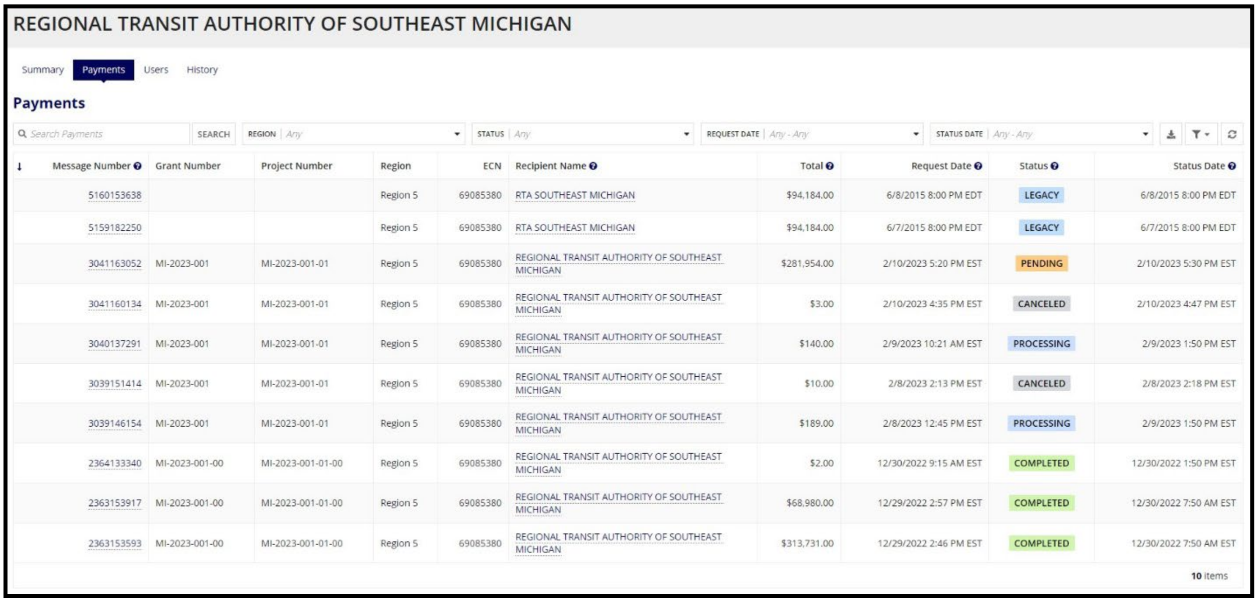
When you come to the Recipient record, you will first see the summary page, see **Figure 75**. The Summary page contains information about the Recipient (*Registration Information, SAM Status, Address, Points of Contact*) as well as the ECHO Status.

Section	Field Name	Description
Registration Information	Legal Name	Displayed legal name for the Recipient (from SAM.gov)
	Division	Recipient associated Division
	Region	Recipient associated FTA Regional Office
	TrAMS Recipient ID	Identifying recipient number in TrAMS
	UEID	Recipient's Unique identifier in SAM
SAM Status	SAM Status	Recipient's Status in SAM
	SAM Expiration	Recipient's Expiration Date in SAM
ECHO Status	ECN	The identifying control number of the Recipient
	ECHO Status	The status of the Recipient in ECHO-Web
	Created By	The user that created the Recipient
	Created Date	The date when the Recipient was created
Addresses	Address	Recipient's Address Location Selector
	Address Line 1	Recipient's Address Line 1
	City	Recipient's Address City
	Address Line 2	Recipient's Address Line 2
	State	Recipient's Address State
	Zip Code	Recipient's Address
Points of Contact	Contact	Point of Contact's Type Selector
	First Name	Point of Contact's First Name
	Last Name	Point of Contact's Last Name
	Phone Number	Point of Contact's Phone Number. (*Formatted as (###) ### - ####*)
	Phone Extension	Point of Contact's Phone Number Extension
	Email Address	Point of Contact's Email. (*Opens the default email application on the computer. So, you can send an email to the person*)
	Fax Number	Point of Contact's Fax Number. (*Formatted as (###) ### - ####*).
	Address Line 1	Point of Contact's Address Line 1
	City	Point of Contact's Address City
	Address Line 2	Point of Contact's Address Line 2
	State	Point of Contact's Address State
	Zip Code	Point of Contact's ZIP Code

Table 45: An overview of the contents of the Recipient Record Summary page.

6.5.2. Payments

When you come to the ***Payments*** page of the Recipient record you will see the Payments history. See Payments.



REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN

Summary | Payments | Users | History

Payments

Search Payments | SEARCH | REGION Any | STATUS Any | REQUEST DATE Any - Any | STATUS DATE Any - Any

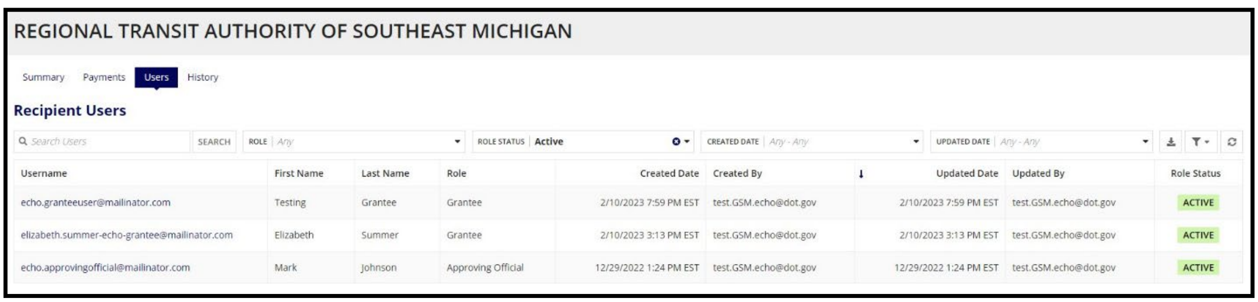
Message Number	Grant Number	Project Number	Region	ECN	Recipient Name	Total	Request Date	Status	Status Date
5160153638			Region 5	69085380	RTA SOUTHEAST MICHIGAN	$94,184.00	6/8/2015 8:00 PM EDT	LEGACY	6/8/2015 8:00 PM EDT
5159182250			Region 5	69085380	RTA SOUTHEAST MICHIGAN	$94,184.00	6/7/2015 8:00 PM EDT	LEGACY	6/7/2015 8:00 PM EDT
3041163052	MI-2023-001	MI-2023-001-01	Region 5	69085380	REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	$281,954.00	2/10/2023 5:20 PM EST	PENDING	2/10/2023 5:30 PM EST
3041160134	MI-2023-001	MI-2023-001-01	Region 5	69085380	REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	$3.00	2/10/2023 4:35 PM EST	CANCELED	2/10/2023 4:47 PM EST
3040137291	MI-2023-001	MI-2023-001-01	Region 5	69085380	REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	$140.00	2/9/2023 10:21 AM EST	PROCESSING	2/9/2023 1:50 PM EST
3039151414	MI-2023-001	MI-2023-001-01	Region 5	69085380	REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	$10.00	2/8/2023 2:13 PM EST	CANCELED	2/8/2023 2:18 PM EST
3039146154	MI-2023-001	MI-2023-001-01	Region 5	69085380	REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	$189.00	2/8/2023 12:45 PM EST	PROCESSING	2/9/2023 1:50 PM EST
2364133340	MI-2023-001-00	MI-2023-001-01-00	Region 5	69085380	REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	$2.00	12/30/2022 9:15 AM EST	COMPLETED	12/30/2022 1:50 PM EST
2363153917	MI-2023-001-00	MI-2023-001-01-00	Region 5	69085380	REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	$68,980.00	12/29/2022 2:57 PM EST	COMPLETED	12/30/2022 7:50 AM EST
2363153593	MI-2023-001-00	MI-2023-001-01-00	Region 5	69085380	REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	$313,731.00	12/29/2022 2:46 PM EST	COMPLETED	12/30/2022 7:50 AM EST

10 items

Figure 76: Payments contains the Payment information made for the Recipient.

6.5.3. Users

When you come to the ***Users*** page of the Recipient record, you will see all the users that have existed for the Recipient. Their role statuses will either be active or inactive.



REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN

Summary | Payments | Users | History

Recipient Users

Search Users | SEARCH | ROLE Any | ROLE STATUS Active | CREATED DATE Any - Any | UPDATED DATE Any - Any

Username	First Name	Last Name	Role	Created Date	Created By	Updated Date	Updated By	Role Status
echo.granteeuser@mailinator.com	Testing	Grantee	Grantee	2/10/2023 7:59 PM EST	test.GSM.echo@dot.gov	2/10/2023 7:59 PM EST	test.GSM.echo@dot.gov	ACTIVE
elizabeth.summer-echo-grantee@mailinator.com	Elizabeth	Summer	Grantee	2/10/2023 3:13 PM EST	test.GSM.echo@dot.gov	2/10/2023 3:13 PM EST	test.GSM.echo@dot.gov	ACTIVE
echo.approvingofficial@mailinator.com	Mark	Johnson	Approving Official	12/29/2022 1:24 PM EST	test.GSM.echo@dot.gov	12/29/2022 1:24 PM EST	test.GSM.echo@dot.gov	ACTIVE

Figure 77: Recipients Users section contains all the users for the Recipient with the Role Status filter defaulted to Active to show only active user roles.

Section	Field Name	Description
Filters	Search Users	Allows you to search the Users grid
	Role	Allows you to filter the grid by Role
	Role Status	Allows you to filter the grid by Role Status: • Active (*defaulted*) • Inactive
	Created Date	Allows you to filter the grid by Created Date
	Updated Date	Allows you to filter the grid by Updated Date
	Export	Allows you to export the Users page as an excel. Not the same as the Generate Reports.
	Manage Filters	Allows you clear filters, save filters, and manage them (*if applicable*).
	Refresh	Allows you to refresh the history without having to refresh the browser.
Table	Columns	• Username • First Name • Last Name • Role • Created Date • Created By • Updated Date • Updated By • Role Status

Table 46: An overview of what's in the Recipient Users table.

6.5.4. History

When you come to the History page you will have 3 sections:

- Creation Details
- Recipient History
- Recipient ECN History

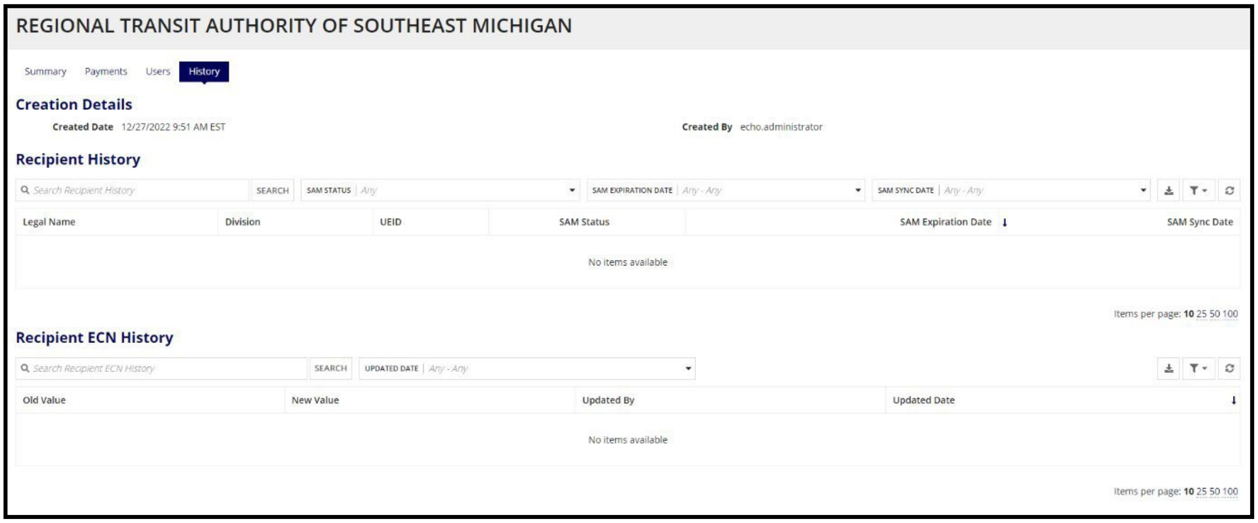


Figure 78: History Page of the Recipient Record contains 3 sections: Creation Details, Recipient History, and Recipient ECN History.

Creation Details

In ***Creation Details***, you can see when the Recipient was added to ***ECHO-Web*** and who added it.

Figure 79: Creation Details is the section on the History page. It has Created Date on the left with the format as MM/DD/YYYY HH:MM TIMEZONE. On the right, you have Created By and the username.

Recipient History

In the ***Recipient History*** section on the ***History*** page, you will find the audit history of when Recipients sync to ***SAM***. The table below shows more information on the Recipient History contents.

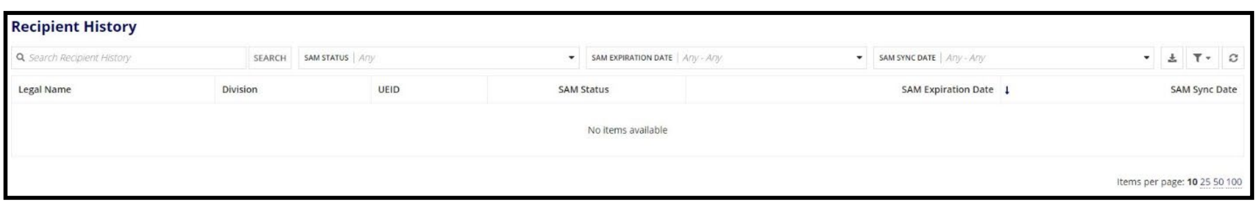


Figure 80: Recipient History is the section after Creation Details and before Recipient ECN History on the History page. For more information about the section look at the table below.

Section	Field Name	Description
Filters	Search Recipient History	Allows you to search the Recipient History grid.
	SAM Status	Allows you to filter the grid by the SAM Status.
	SAM Expiration Date	Allows you to filter the grid by the SAM Expiration Date.
	SAM Sync Date	Allows you to filter by the SAM Sync Date.
	Export	Allows you to export the Recipient History as an excel. Not the same as the Generate Reports.
	Manage Filters	Allows you clear filters, save filters, and manage them (*if applicable*).
	Refresh	Allows you to refresh the history without having to refresh the browser.
Table	Legal Name	The displayed legal name of a Recipient (from SAM.gov).
	Division	The division the Recipient is associated with.
	UEID	Recipient's Unique identifier in SAM.
	SAM Status	Recipient's Status in SAM.
	SAM Expiration Date	Recipient's Expiration Date in SAM.
	SAM Sync Date	The last date when the data was synced with SAM.

Table 47: An overview of what's in the Recipient History table.

Recipient ECN History

When you look at the ***Recipient ECN History*** table on the ***History*** page, you may find the table to be either empty or have data. It will depend on if ***SAM*** changes the ***ECN*** for the recipient. The table below shows more information on the Recipient ECN History contents.

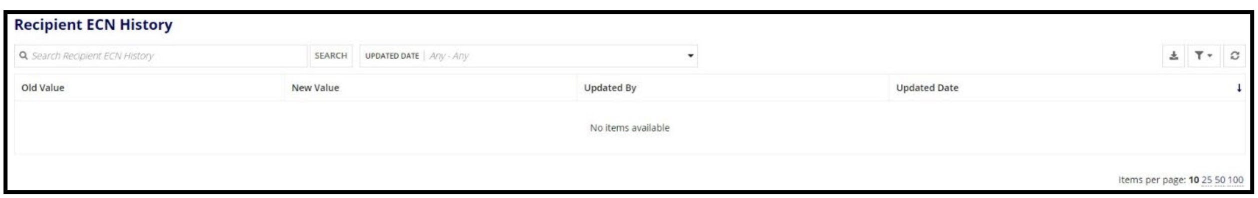


Figure 81: Recipient ECN History is the last section on the History page.

Section	Field Name	Description
Filters	Search Recipient ECN History	Allows you to search the Recipient's ECN history.
	Updated Date	Allows you to filer the grid based on the updated date.
	Export	Allows you to export the Recipient ECN History as an excel. Not the same as the Generate Reports.
	Manage Filters	Allows you clear filters, save filters, and manage them (*if applicable*).
	Refresh	Allows you to refresh the history without having to refresh the browser.
Table	Old Value	The previous values before a change to a Recipient's ECN.
	New Value	The new values after a change to a Recipient's ECN.
	Updated By	The user that modified the Recipient's ECN.
	Updated Date	The date when the Recipient's ECN was modified.

Table 48: An overview of what's in the Recipient ECN table.

7. Help

When you click on the Help tab, you will come to the help page. From here, you can see your User Dashboard, Help Desk Information, and access any Help Documents about the application.

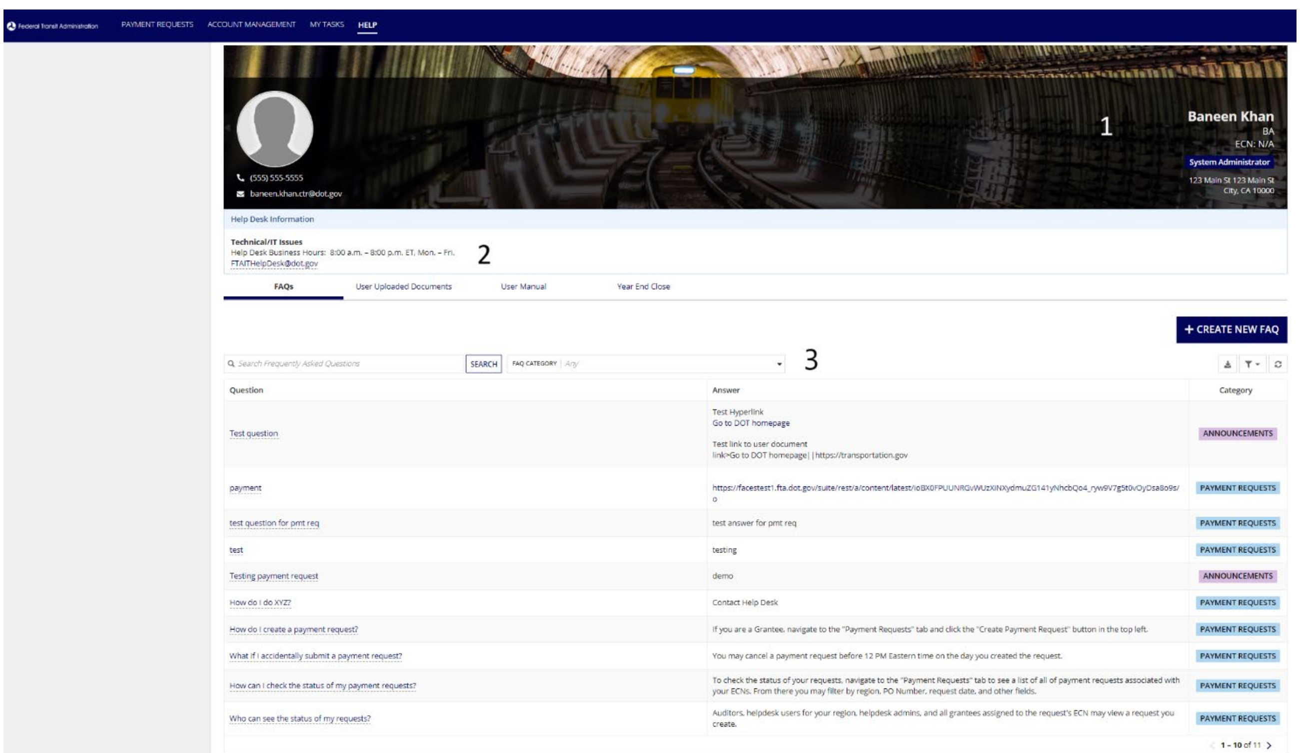


Figure 82: 1) User Official Personal Information (Name, Title, ECN, Address, City, State, Zip Code, Phone Number, Email Address, and User photo). 2) Help Desk Information. 3) Application Help Documents (FAQs, User Uploaded Documents, and User Manual).

7.1. Help Desk Information

The Help Desk Information contains the contact information for any Technical or IT issues:

Help Desk Business Hours	Contact
8:00 a.m. – 8:00 p.m. ET, Mon. – Fri.	*FTAITHelpDesk@dot.gov*

Table 49: Help Desk hours and email address.

7.2. FAQs

When you select the ***FAQs*** option, you are presented with a table that shows the category of each FAQ, along with the question and its related answer. You can narrow down ***FAQ*** results by entering keywords into the search bar, or by selecting one or more categories from the FAQ category drop-down menu.

You can also export the FAQs in Excel format, save the filters that you applied (*saved filters can be managed*), and refresh the table.

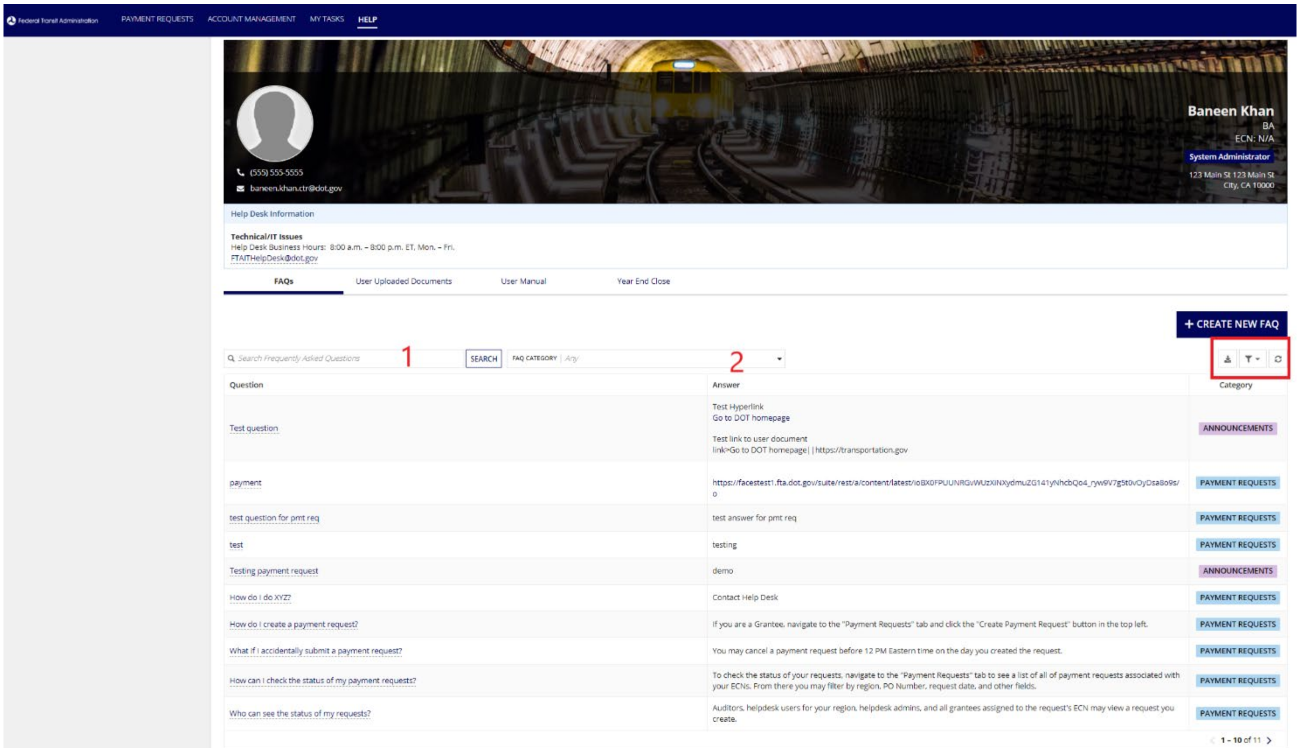


Figure 83: 1) Search bar that allows you to enter keywords that pertain to the Question or Answer of the FAQ. 2) FAQ Category drop-down (multi-select) menu. 3) Starting from the left most icon out of the three in the box: a) Export the current table with any filters (if they were set); b) Save filters and manage those saved filters; c) Refreshes the table (only if a new question or answer has been added).

If you select any of the FAQ questions, you will be taken to the page of that FAQ. Under ***Summary***, you will see the same information that is displayed on the main FAQ screen, but with a few more details, such as: who created it, when it was created, who modified it (*if applicable*), and when it was modified (*if applicable*). There are no available actions in the Related Actions tab.

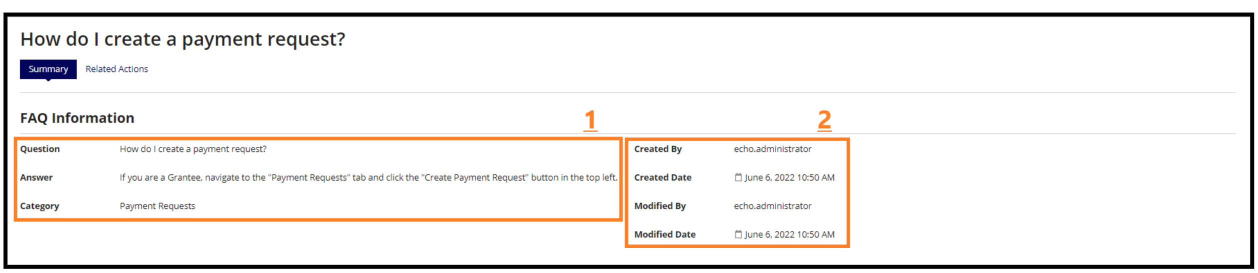


Figure 84: 1) FAQ Information that can be seen on the FAQ table. 2) More details about the FAQ Information.

7.2.1. Create New FAQ

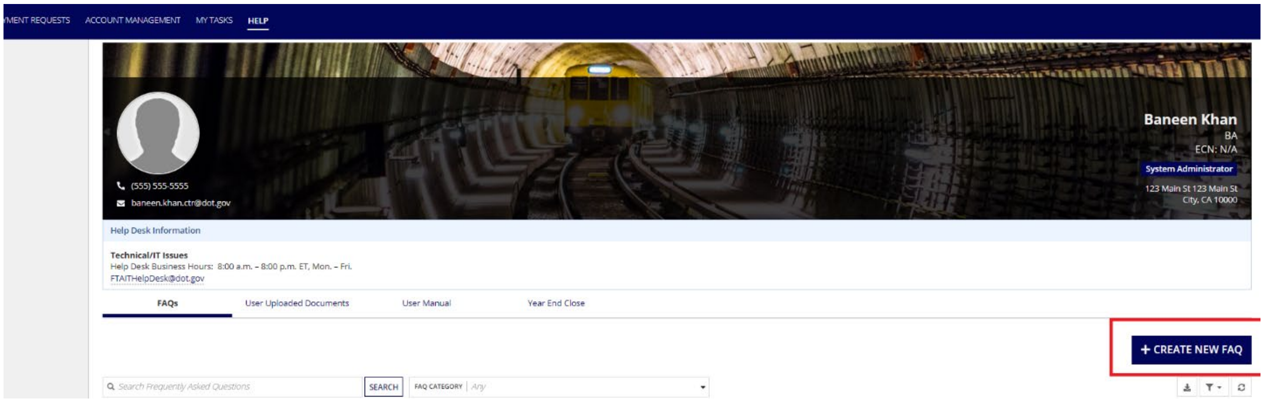


Figure: User can add new FAQs by selecting the "Create New FAQ".

Users are able to add new FAQs by selecting "Create New FAQ"

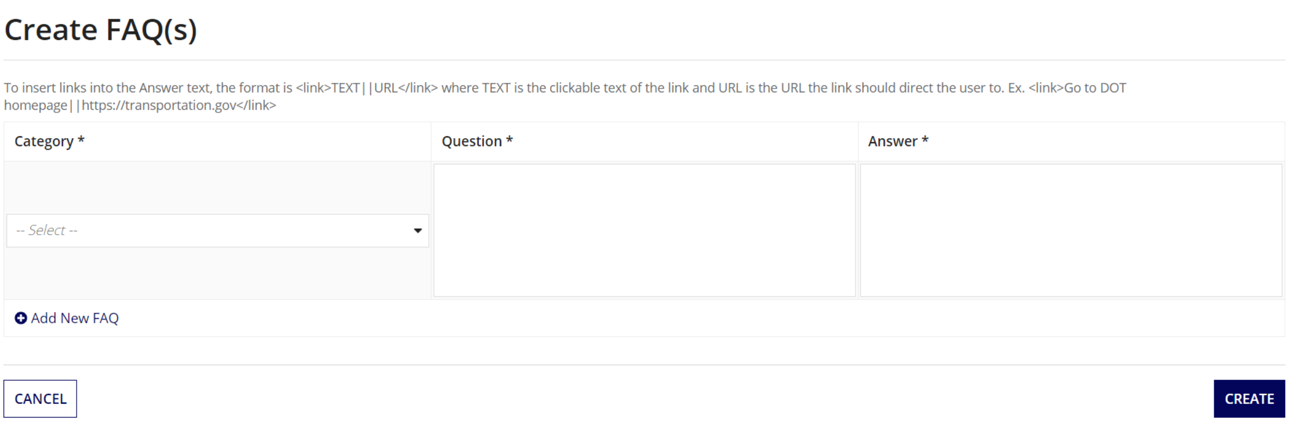


Figure: "Create FAQ(s)" page

Create FAQs by adding the **Category**, **Question**, and **Answer** as a hyper link to the DOT homepage.

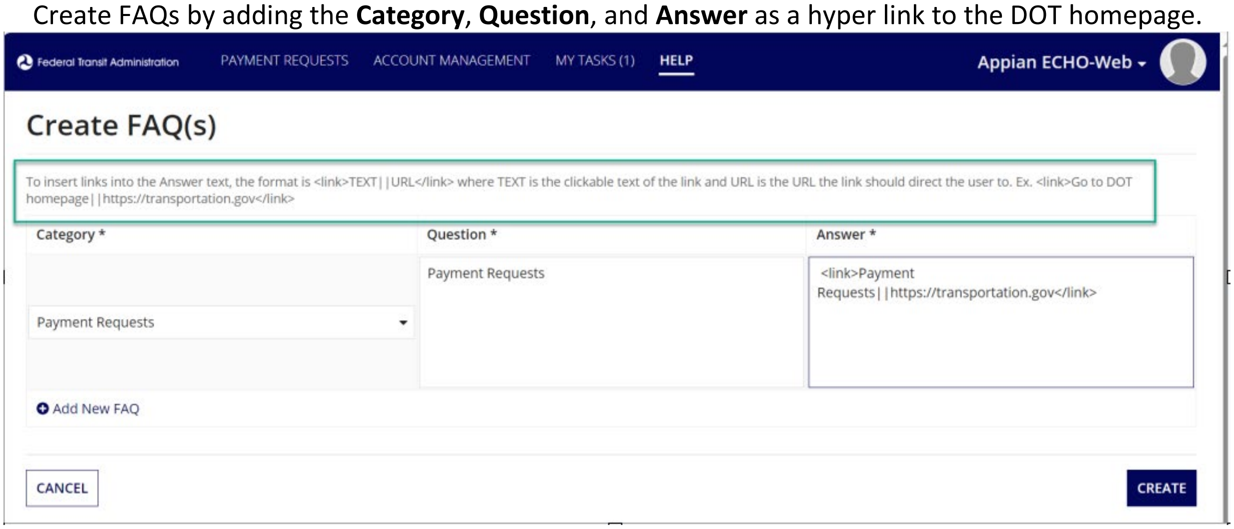


Figure: "Create FAQ(s)" page with **Category**, **Question**, and **Answer** fields filled out.

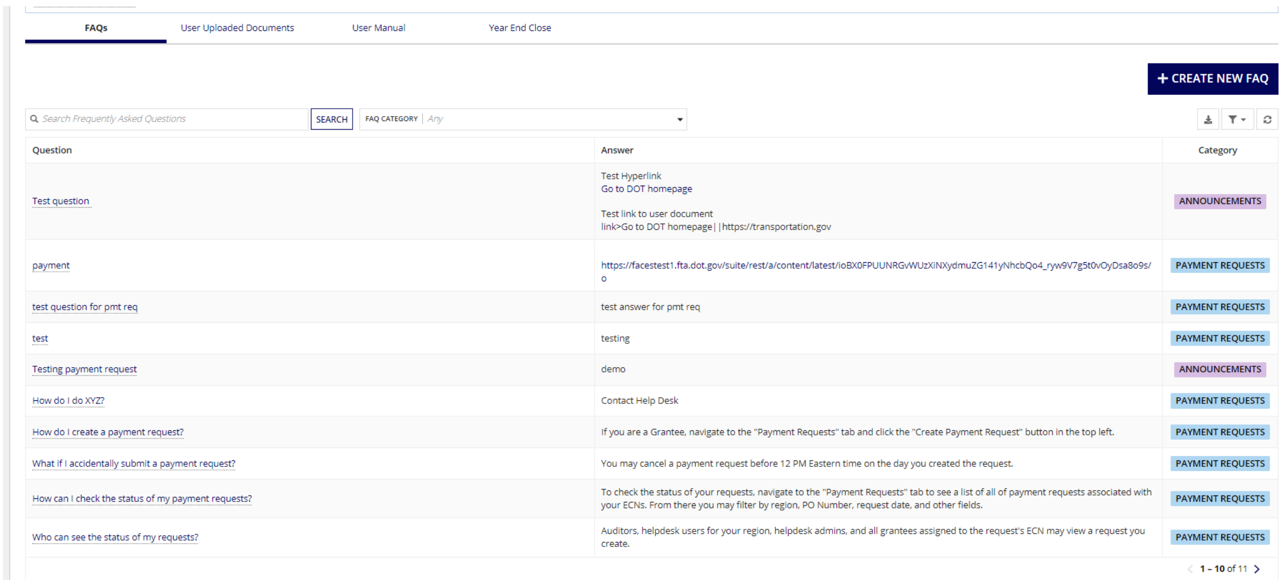


Figure: FAQ Page

The FAQs are posted.

7.2.2. FAQ Category Legend

The table below explains the colors you will see in the ***FAQ*** table, under the ***Category*** column.

#	Category Name	Color
1	My tasks	
2	Announcements	
3	Account Management	
4	Payment Requests	

Table 50: A legend of the type of categories you may come across for the FAQ table.

7.3. User Uploaded Documents

When you select ***User Uploaded Documents***, you are presented with a table that shows the title and description of each uploaded document. You can narrow down the search by entering keywords into the search bar. To export the User Uploaded Documents in Excel format, save the filters that you applied (saved filters can be managed), and refresh the table.

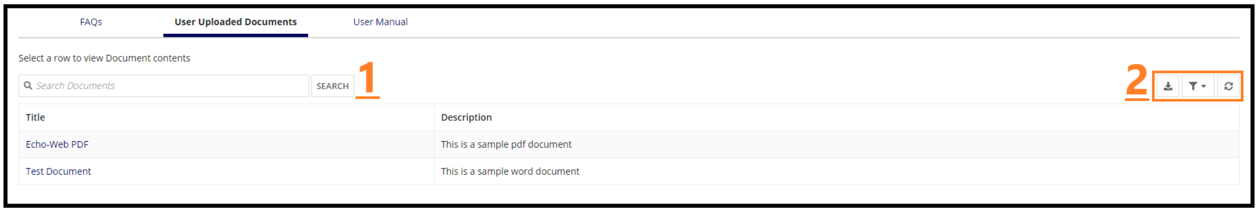


Figure 85: 1) The Search bar allows you to enter keywords that pertain to the Tile or Description of the Document. 2) Starting from left most icon out of the three in the box: a) Export the current table with any filters if they were set; b) Save filters and manage those saved filters; c) Refreshes table only if a new question or answer has been added.

If you click on a table row, it will either download the file or give you the option to download the document (depending on the browser). If the file is a PDF, you can preview the document and download it, as well as have other features that exist with viewing PDFs in-browser (depending on the browser).

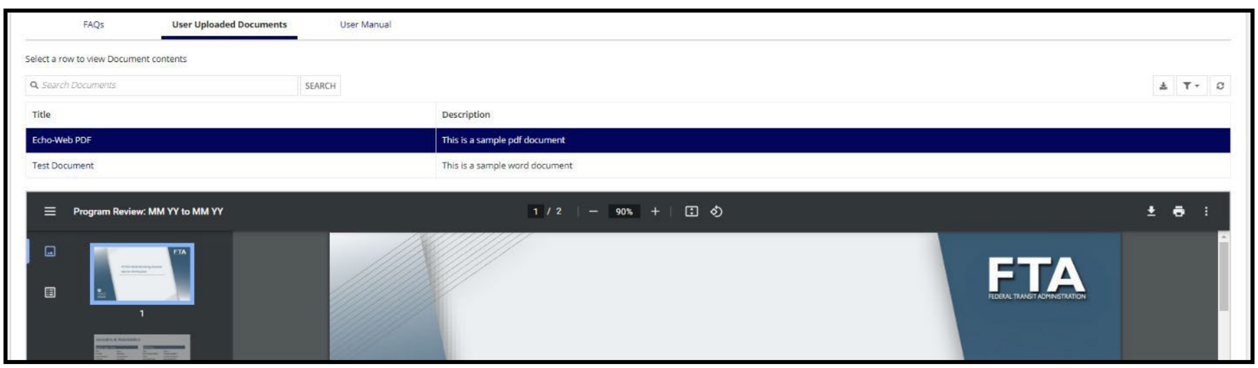


Figure 86: A PDF preview being viewed, after selecting "Echo-Web PDF".

If you select any of the documents, you will be taken to the page of that document. On the ***Summary*** page you will see the same information that is displayed on the main document screen, but with a bit more detail such as: who created it, when it was created, who modified it (*if applicable*), and when it was modified (*if applicable*).

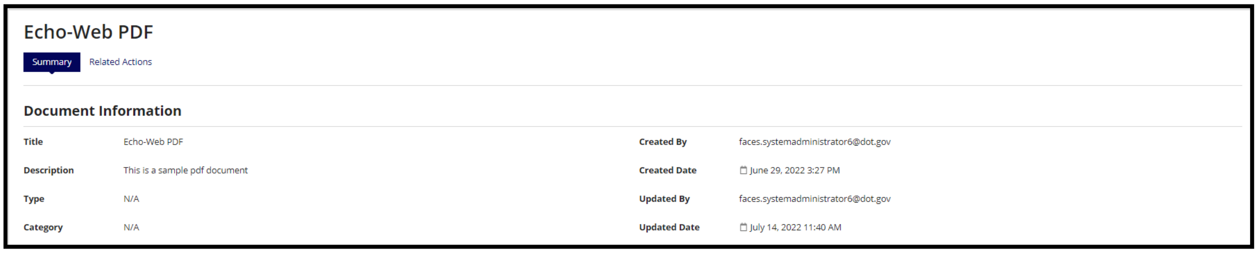


Figure 87: This is the record for Echo-Web PDF, that contains document information about the file.

7.4. User Guide

When you click the ***User Guide*** option, you are presented with a PDF preview of the User Guide. You can choose to download the guide or print a copy.

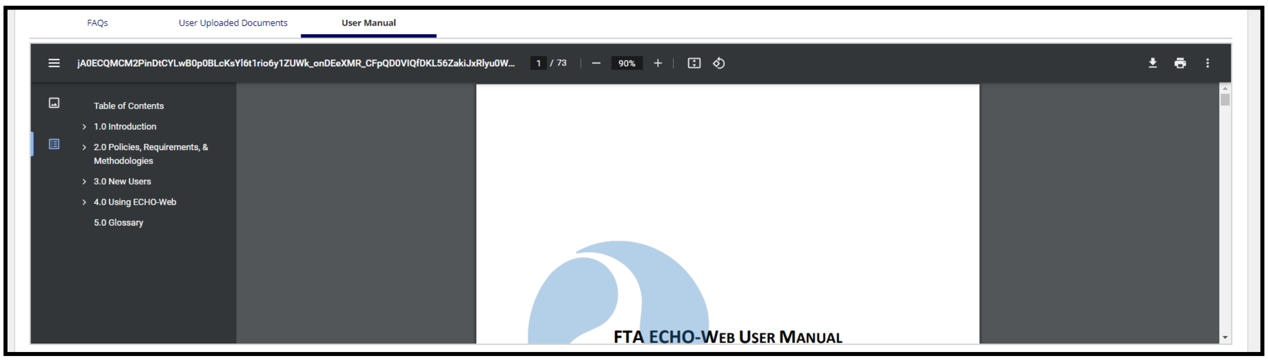


Figure 88: The User Guide being viewed from a Chrome browser.

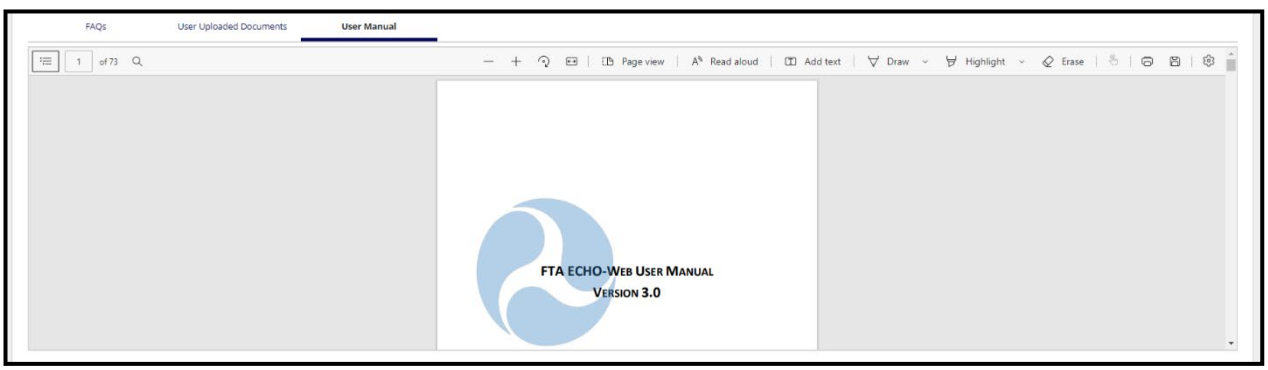


Figure 89: The User Manual being viewed from a Microsoft Edge browser.

8. Report Generation

You can generate an Excel report on the ***Payment Requests*** and ***Account Management*** pages. Reports have a maximum limit of ten thousand (10,000) rows. Contact the ***Help Desk*** for assistance (*See* [6.1 Help Desk Information](#)). For information on what's included in each report, see:

- 3.3.3 Generate Payment Requests Report
- 5.3.3 Generate User Report
- 5.5.3 Generate Recipient Report

To generate a report, you will need to do the following steps:

1. Select Generate ***Report.*** You will be prompted to choose if you want to generate a report. Select one of the following options:

- ***Yes*** – Generates the Report.
- ***No*** – Cancels the Report Generation.

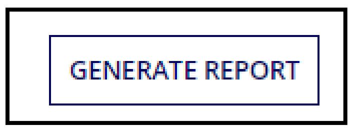


Figure 90: The Generate Report button is located underneath Payment Requests (See Figure 33), Users (See Figure 61), and Recipients (See Figure 73).

Figure 91: Pop-up window after clicking Generate Report button.

2. If you clicked ***Yes***, then a message will appear above the ***Generate Report*** button:
    a. Your document is being generated and will be available for download in a few minutes. You will also receive an Email with a download link that will be valid for 15 days. Click refresh to see if your report is ready.

Figure 92: After confirming "Yes," the message above will pop-up, containing the Generate button and Refresh link.

3. Once the report is ready, it will appear in the ***Recently Generated Report(s)*** (located underneath the ***Generate Report*** button).

Figure 93: When the report is ready, it will appear in the Recently Generated Report(s).

4. Select the link in the table to download the report.

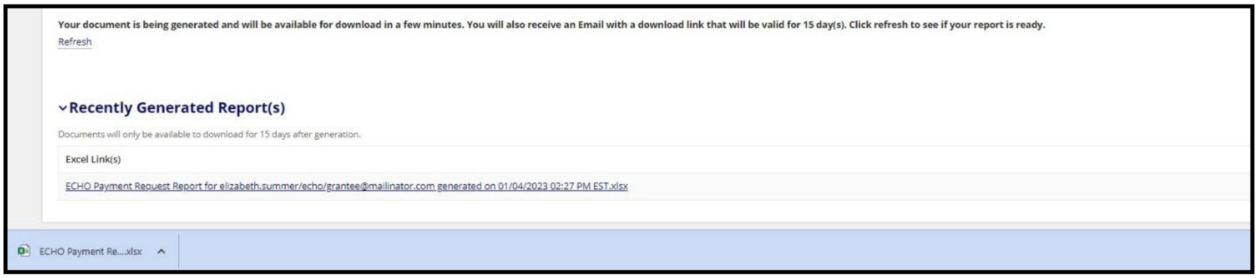


Figure 94: Select the link (e.g., ECHO Payment Request Report…) in the table, then you can download the Excel link.

Appendix – Abbreviations, Acronyms, and Terms

Abbreviation	Definition
CRM	Contact Relationship Management
DOT	Department of Transportation
ECHO	Electronic Clearing House Operation
FACES	FTA Access Control and Entry System
FAIN	Federal Award Identification Number
FTA	Federal Transit Administration
DGS	Discretionary Grant System
NTD	National Transit Database
SAM	System for Award Management
OTrak	Oversight Tracking System
SSOR	State Safety Oversight Reporting
TrAMS	Transit Award Management System
TrIAD	Transit Integrated Appian Development Platform