



FTA

F E D E R A L T R A N S I T A D M I N I S T R A T I O N

Electronic Clearing House Operation (ECHO-Web) User Guide

Version 5.3
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U.S. Department of Transportation
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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	11/30/2022	Updated images for consistency, updated formatting, minor text updates.	Chris West
0.6	2/15/2022	Updates – Captions for figures and tables; Formatting and grammar throughout, and link setup, added a new header style.	Chris West
0.7	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.”	Greg Nesburg



		User Role Matrix: GSMs and Ums are no longer able to view or export payment requests.	
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	05/10/2024	Updated FAQ Section to reflect “Create New FAQ”	Baneen Khan
3.9	06/07/2024	Updated Payment Status Legend to reflect Payment Status not being the same color.	Baneen Khan
4.0	08/29/2024	Update User Information to pull directly from FACES	Baneen Khan
4.1	10/10/2024	Added New Available Balance Tab	Baneen Khan
4.2	12/31/2024	Added ALT text to all images, Updated User Role Matrix	Baneen Khan
4.3	01/30/2025	Added 8.5. <i>Training Video</i> Section	Baneen Khan
4.4	03/01/2025	Updated <i>New Available Balance</i> Tab (Section 5) with Screenshot and ALT Text	Baneen Khan
4.5	03/24/2025	Updated Footer to remove “Unclassified”	Baneen Khan
4.6	05/23/2025	Updated <i>User Role and Permissions</i> Tab to add New DOT External Read Only role. Updated Actor Role Matrix	Baneen Khan
4.7	07/07/2025	Updated Actor Role Matrix to demonstrate <i>Global Viewer</i> and <i>DOT External Read-Only</i> roles viewing access to <i>Available Balance</i> Tab	Baneen Khan
4.8.1	08/01/2025	Added Section 4.6.: User Suspension/Restoration	Baneen Khan
4.8.2	08/15/2025	Edited Section 4.6.: User Suspension/Restoration	Baneen Khan
4.9	08/29/2025	Updated User Role Matrix reflecting Removal of AO and removed all mention of AO	Baneen Khan
5.0	09/26/2025	Export Added under “Available Balance” Tab	Baneen Khan
5.1	10/03/2025	Updated User Role Matrix to reflect new Suspensions Tab	Baneen Khan
5.2	04/16/2026	Added Period of Performance (PoP) Suspension Information and updated Role Matrix to reflect PoP suspension visibility.	Baneen Khan
5.3	06/02/2026	Created Appendix A, updated User Role matrix. Made minor updates to text and screenshots. Added Suspension export function in Section 5.	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.

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 is 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. 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**.

2.1. 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**

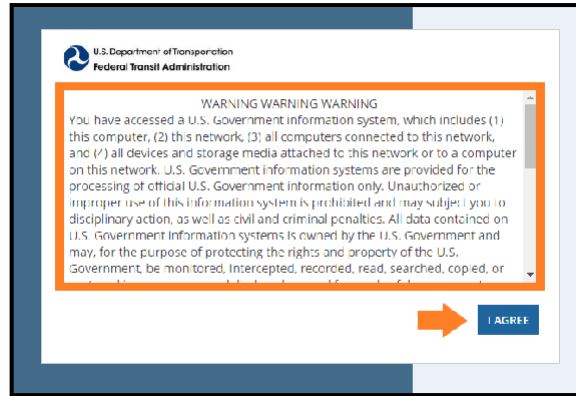


Figure 1: Security warning when accessing the FACES website.

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.**

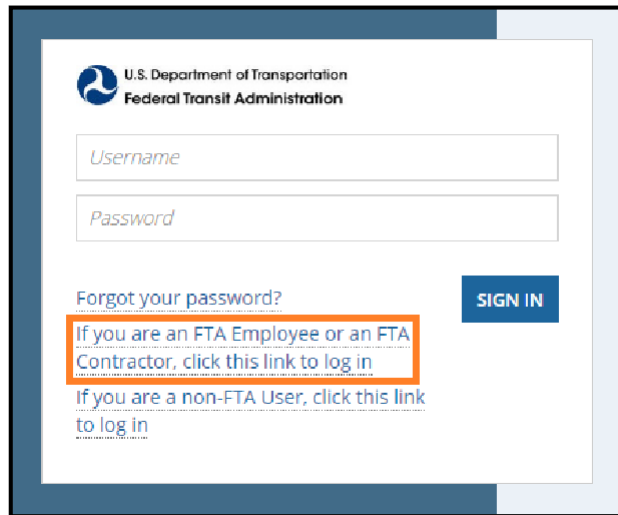


Figure 2: FACES login after the security warning. Click on the link that mentions FTA Employee or FTA Contractor.

4. Next, you will be taken to the **TriAD Welcome page** where you can select the application you wish to access. 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*.

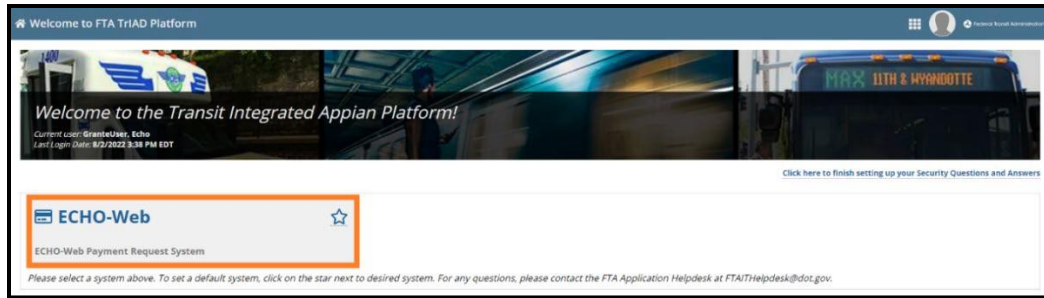


Figure 3: FTA Homepage with the option to go to the ECHO-Web system.

2.2. 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/..](https://faces.fta.dot.gov/suite/)
2. Read the security policy and select **I AGREE**

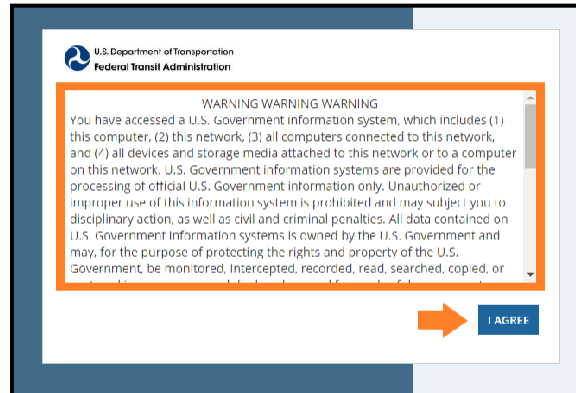


Figure 4: Security Warning when accessing the FACES website.

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?

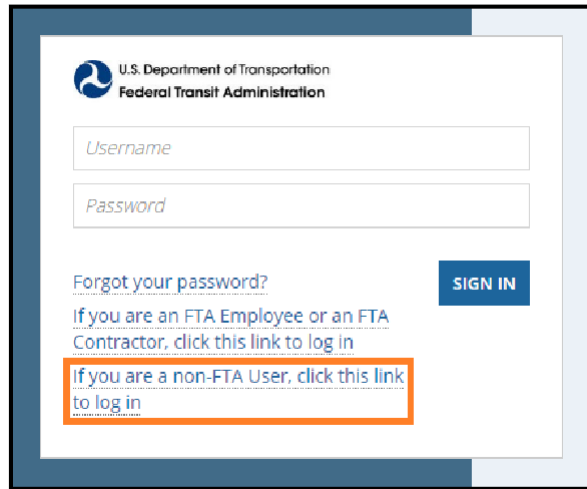


Figure 5: FACES login after the security warning. Select “If you are a non-FTA User, click this link to log in”

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.

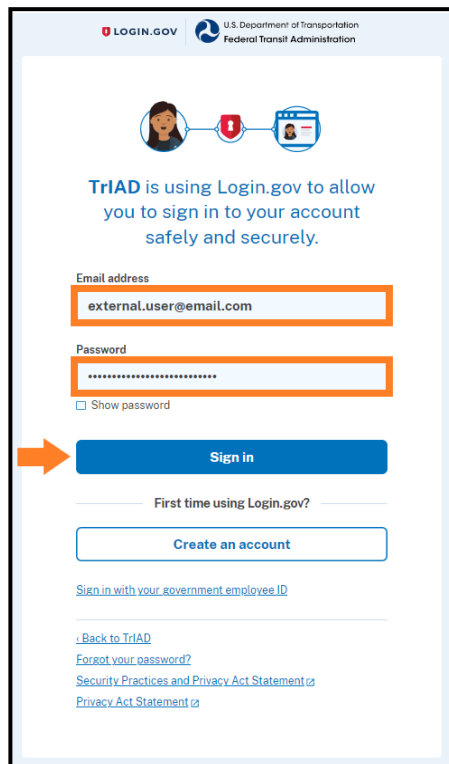


Figure 6 : Login.gov login page.



- 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.

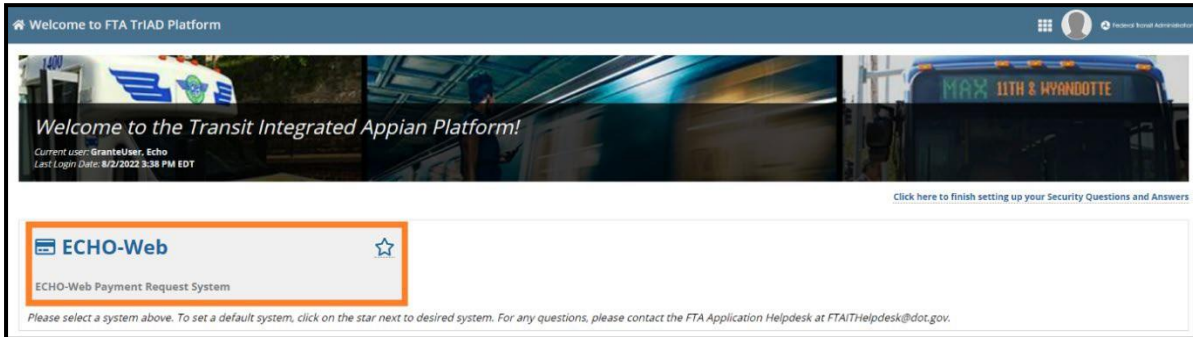


Figure 7: FTA homepage with the option to go to the ECHO-Web Payment Request System.

3. 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 Payment Requests
- Go to a Payment Request Record
- Go to a Recipient Record

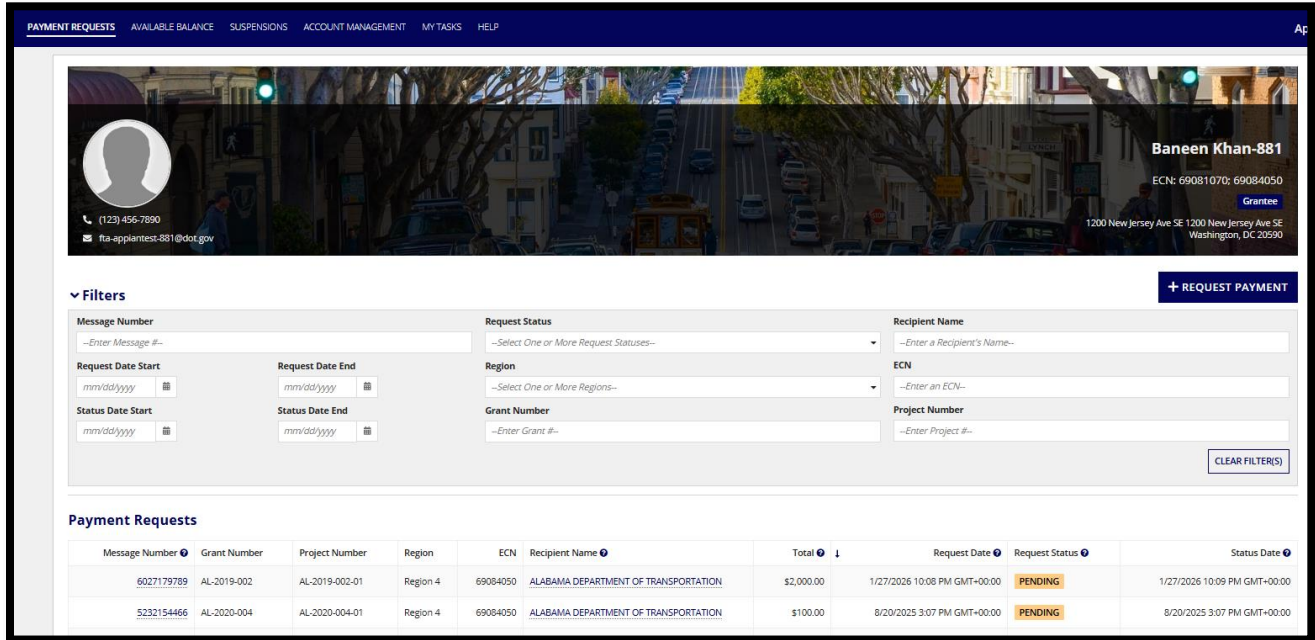


Figure 8: An example of what the initial Payment Requests page could look like for you.

3.1. 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.



3.2. 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.

3.2.1. 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	<ul style="list-style-type: none"> Located at the top of the form. Value format: Create Payment Request Recipient Name (e.g., <i>Create Payment Request REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN</i>)
2	Form Contents	<p>Contains the following fields:</p> <ul style="list-style-type: none"> Recipient Name (e.g., <i>REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN</i>) Request Date (e.g., <i>Feb 10, 2023, 4:55 PM</i>) Request Number (e.g., <i>5</i>) ECHO Control Number (ECN, e.g., <i>69085380</i>) TEAM Grant? (e.g., <i>No</i>) Grant Number (table with grant numbers, i.e. <i>FAINs</i>) Project Number (table with project numbers; hidden for <i>TEAM Grant</i>)
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	ECHO Control Number (ECN)	Yes*	Yes	<ul style="list-style-type: none"> • 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).
5	TEAM Grant?	Yes	Yes	Defaulted to No. Select Yes if the grant was created in the TEAM system.
6	Grant Number	Yes	Yes	<u>Tool tip</u> : Select a grant from the list below.
7	Project Number	Yes	Yes	<ul style="list-style-type: none"> • <u>Tool tip</u>: 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”*).



Create Payment Request | REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN

Recipient Name REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	Request Date Feb 10, 2023 4:59 PM	Request Number 5
Approving Official Mark Johnson		
ECHO Control Number (ECN) 69085380	Grant Number * Grant MI-2023-001	Project Number * Project MI-2023-001-01
TEAM Grant? * <input type="radio"/> Yes <input checked="" type="radio"/> No		

CANCEL NEXT

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](#).

Create Payment Request | REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN

Recipient Name REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	Request Date Feb 10, 2023 5:00 PM	Request Number 5
Approving Official Mark Johnson		
ECHO Control Number (ECN) 69085380	Grant Number * Grant MI-2023-001	Project Number * Project MI-2023-001-01
TEAM Grant? * <input type="radio"/> Yes <input checked="" type="radio"/> No		

CANCEL NEXT

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.

First Page Button Functionality

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



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

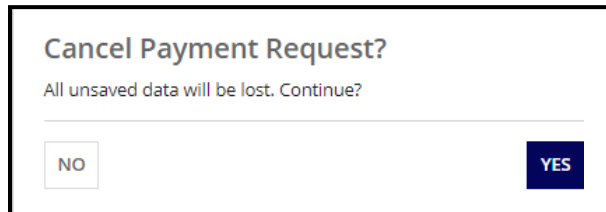


Figure 14: Cancel pop-up displayed after selecting Cancel. Use the table below for button functionality.

#	Button Label	Location	Function
1	Cancel	Bottom Left	Opens number #2.
2	Cancel Payment Request? (<i>pop-up</i>)	Opens after Cancel is selected	<p><u>Description:</u> All unsaved data will be lost. Continue?</p> <p><u>Buttons:</u></p> <ul style="list-style-type: none"> 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, if there are no validation issues and Next is not disabled.

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

3.2.2. 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	<ul style="list-style-type: none"> Located at the top of the form. <u>Value format:</u> Create Payment Request Recipient Name (e.g., <i>Create Payment Request REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN</i>)
2	Project Lines Table	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Project Numbers are defined in the award applications and are reported to ECHO-Web.
2	Scope Code	Yes	Yes	Non-TEAM Grant	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Editable after a value is selected for Scope Code.
4	Available Balance	No	N/A	Both	<ul style="list-style-type: none"> For non-TEAM Grants, the Available Balance will populate (<i>if applicable</i>) after a value for Scope Suffix is selected. For TEAM Grants, the Available Balance will populate (<i>if applicable</i>) after a value for Project Number is selected.
5	Request Amount	Yes	Yes	Both	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> <u>Tool tip</u>: Whether this payment request project line is a return.
7	Remove	No	N/A	Both	<ul style="list-style-type: none"> If more than one row exists, you can click the red x. <u>Tool tip</u>: Click here to delete this payment request project line.
8	Add New Project	No	N/A	Both	<ul style="list-style-type: none"> 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](#)).

Create Payment Request | REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN

Project Number	Available Balance	Request Amount	Return	Remove
Mi-39-0005	\$6,213,609.00	\$45,634.00		✖
Mi-39-0006	\$6,213,609.00	(\$34,589.00)	✔	✖
Mi-39-0005	\$6,213,609.00	\$234,675.00		✖
Mi-39-0005	\$6,213,609.00	\$34,234.00		✖
<input type="button" value="Add New Project"/>				

The Available Balance is current as of 8 am EST on 2/9/2023, and includes pending payments. Request Total: \$279,954.00

Figure 18: Second page of the Create Payment Request form, where 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 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](#)).

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.



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.



Create Payment Request | REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN

Project Number	Scope Code	Scope Suffix	Available Balance	Request Amount	Return	Remove
MI-90-4026	300	Select a Scope Suffix	\$0.00	\$0.00		

[Add New Project](#)

The Available Balance is current as of 8 am EST on 2/9/2023, and includes pending payments.

Request Total: \$0.00

BACK CANCEL NEXT

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.

Create Payment Request | REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN

Project Number	Scope Code	Scope Suffix	Available Balance	Request Amount	Return	Remove
MI-90-4026	300	A1	\$1,477,528.00	\$0.00		

[Add New Project](#)

The Available Balance is current as of 8 am EST on 2/9/2023, and includes pending payments.

Request Total: \$0.00

BACK CANCEL NEXT

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 are 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](#)).

Project Number	Scope Code	Scope Suffix	Available Balance	Request Amount	Return	Remove
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 2/9/2023, and includes pending payments.

Request Total: \$281,954.00

Buttons: BACK, CANCEL, NEXT

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.

Request Amount	Return	Remove
\$0.00		✗

Cannot request \$0.

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 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 from the relevant FTA Regional Office, I certify that I have provided such notice.	<ul style="list-style-type: none"> 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	<p><u>Description:</u> All unsaved data will be lost. Continue?</p> <p><u>Buttons:</u></p> <ul style="list-style-type: none"> 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.

3.2.3. 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.

Create Payment Request | REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN

Recipient Name REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	Approving Official Mark Johnson	Request Date Feb 10, 2023 5:28 PM	Request Number 5
ECHO Control Number (ECN) 69085380	TEAM Grant? No	Grant Number MI-2023-001	Project Number 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 2/9/2023, and includes pending payments. Request Total: \$281,954.00

BACK CANCEL
SUBMIT

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](#)).

Payment Requests

Message Number	Grant Number	Project Number	Region	ECN	Recipient Name	Total	Request Date	Request Status	Status Date
6027179789	AL-2019-002	AL-2019-002-01	Region 4	69084050	ALABAMA DEPARTMENT OF TRANSPORTATION	\$2,000.00	1/27/2026 10:06 PM GMT+00:00	PENDING	1/27/2026 10:09 PM GMT+00:00
5232154466	AL-2020-004	AL-2020-004-01	Region 4	69084050	ALABAMA DEPARTMENT OF TRANSPORTATION	\$100.00	8/20/2025 3:07 PM GMT+00:00	PENDING	8/20/2025 3:07 PM GMT+00:00

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.

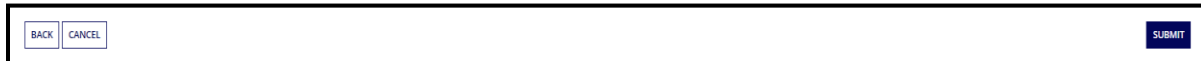


Figure 31: The buttons at the bottom of the Confirmation Page of the Create Payment Request. Use the table below.



#	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? (<i>pop-up</i>)	Opens after Cancel is Clicked	<p><u>Description:</u> All unsaved data will be lost. Continue?</p> <p><u>Buttons:</u></p> <ul style="list-style-type: none"> 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.

3.2.4. Creating Payment Requests on Suspended Grants

If a user attempts to create a payment request on a suspended grant, the system will give the user an error stating their ability to create a payment request on the grant has been suspended. If there are any questions, please contact FTAITHelpdesk@dot.gov.

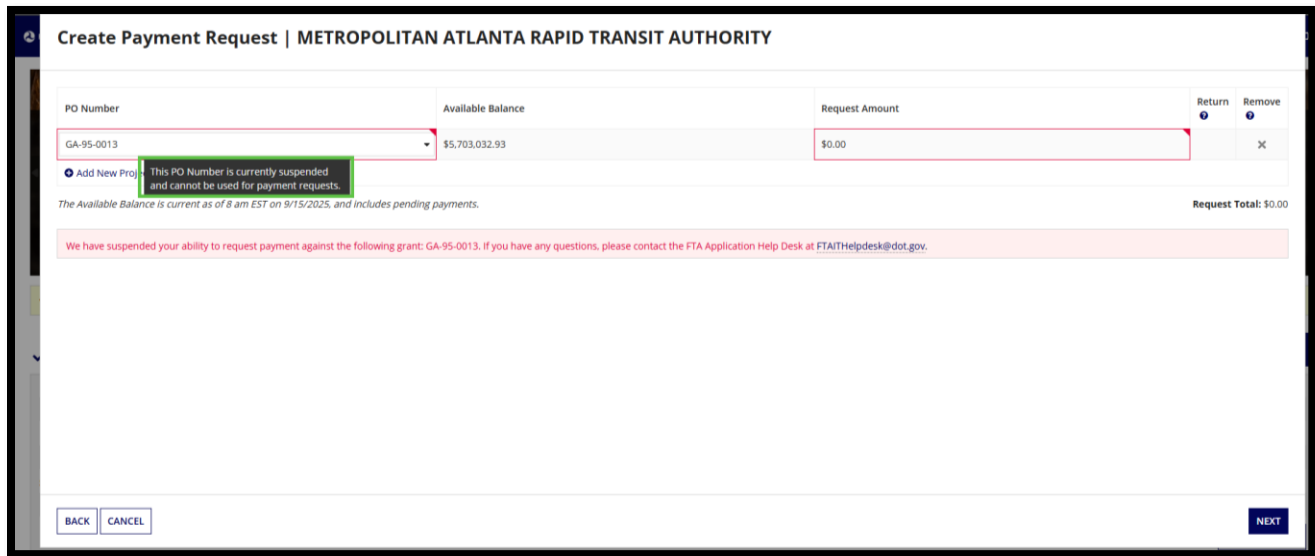


Figure 32: Grant Suspension Notification



Figure 33: Period Of Performance Suspension Notification

3.3. 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.

3.3.1. Payment Request Filters

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

Figure 34: 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	<ul style="list-style-type: none"> 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		<ul style="list-style-type: none"> 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		<ul style="list-style-type: none"> Status end date must be after request start date. Date cannot be in the future
6	Request Status		Describes the state of the request.
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

3.3.2. Payment Requests Table

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

Payment Requests										
I	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 35: The Payment Request table with the Generate Report button below it.



#	Field Name	Description
1	Message Number	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Organization Receiving funding Recipient Name is a link that will take you to the Recipient Record (See 7.5 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		<ul style="list-style-type: none"> 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.

3.3.3. 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 [9 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	
2364133380	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 36: 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	<ul style="list-style-type: none"> • Requests <ul style="list-style-type: none"> ○ This tab contains payment request information for requests meeting the search criteria. There is one row per request.
Requests	Columns	<ul style="list-style-type: none"> • Request Status • Request Date • Request Number • Grant Number
		<ul style="list-style-type: none"> • 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.



3.4. 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 35](#))
- Payment Record – Payments Page (See [Figure 71](#))
- Recipients Record – Payments Page (See [Figure 81](#))

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

Figure 37: 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.

3.4.1. 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**).



MI-2023-001 | Payment #3041163052

Summary
History
Related Actions

Overview

Grant Number MI-2023-001

Project Number Q MI-2023-001-01

Status PENDING

Total Amount \$281,954.00

Recipient

Requested By Elizabeth Sumner

Requested Date 2/10/2023 5:20 PM EST

Approving Official Mark Johnson

Recipient Name REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN

ECN 69085380

SAM E-Biz POC Name VIRGINIA LICKLITER

SAM E-Biz POC Phone (313) 402-1020

Project Lines

Project Number	1	Scope Code	Scope Suffix	Amount	Status
MI-90-4026		300	A1	\$46,634.00	CREATED
MI-90-4026		300	A1	(\$35,589.00)	CREATED
MI-90-4026		300	A1	\$235,675.00	CREATED
MI-90-4026		300	A1	\$35,234.00	CREATED

Figure 38: 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	Identify the Award Number stored in TrAMS
	Project Number	<ul style="list-style-type: none"> For TrAMS awards: the project identifier against which this request is made For TEAM awards: 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
	Requested By	The Grantee User that requested the Payment Request
	Requested Date	The date when the Payment Request was created
	Cancelled By	<ul style="list-style-type: none"> The Grantee User who cancelled the Payment Request Hidden if not cancelled
	Cancelled Date	<ul style="list-style-type: none"> The date when the Payment Request was cancelled Hidden if not cancelled
	Recipient	Recipient Name
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	<ul style="list-style-type: none"> The project scope code Only displayed for requests against TrAMS awards
	Scope Suffix	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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 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	Green	The request has been approved, and funding has been disbursed.
2	Suspend	Blue	Suspend is if TrAMS reports it as suspended, i.e. it fails to validate 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	Red	The payment request has been rejected and will not be processed.
4	No Response	Grey	The request is taking longer than normal to process. Please contact your Regional Office for more information.
5	Created	Orange	The request has been created.

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

3.4.2. 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**).

MI-2023-001 | Payment #3041163052 CANCEL PAYMENT EDIT PAYMENT

Summary **History** Related Actions

Payment Request History

Q Search Audit Payment Requests SEARCH ACTION TYPE Any UPDATED DATE Any - Any

Action Type	Old Value	New Value	Updated By	Updated Date
CREATED	-	Payment Request Created	elizabeth.summer-echo-grantee@mailinator.com	2/10/2023 5:30 PM EST

Project Line History

Q 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: 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.



Payment Request History										
Q Search Audit Payment Requests				SEARCH	ACTION TYPE Any		UPDATED DATE Any - Any			
Action Type	Old Value	New Value	Updated By				Updated Date			
CREATED	-	Payment Request Created	elizabeth.summer-echo-grantee@mailinator.com				2/10/2023 5:30 PM EST			

Figure 40: Payment Request History table showing the audit history for when the payment was created.

Section	Field Name	Description
Filters	Search for Audit Payment Requests	Allow you search the old and new values.
	Action Type	Allow you to select from a multi-select drop down. Has the following values: <ul style="list-style-type: none"> Created Status Changed Request Edited
	Updated Date	The date of the change occurred.
	Export	Allow 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	Allow you to refresh the history without having to refresh the browser.
	Table	Action Type
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	Tell you who made the change.
	Updated Date	Tell 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** were created and edited.

Project Line History										
Q 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 41: Project Line History table showing the audit history for when the project lines were created for payment. Also, show any changes to the project lines for the payments.



Section	Name	Description
Filters	Search Projects by Project #, Scope Code, Scope Suffix	Allow you to search based on: <ul style="list-style-type: none"> • Project Number • Scope Code • Scope Suffix
	Action Type	Allow you to select from a multi-select drop down. Has the following values: <ul style="list-style-type: none"> • Created • Status Changed • Request Edited
	Updated Date	The date of the change occurred.
	Manage Filters	Allows you clear filters, save filters, and manage them (<i>if applicable</i>).
	Refresh	Allows you to refresh the history without having to refresh the browser.
Table	Action Type	Tell 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	Tell you who made the change.
	Updated Date	Tell you what day & time the change occurred.

Table 19: An overview of what's in 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**.



MI-2023-001 | Payment #3041163052

Summary History **Related Actions**

- 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.
- 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.

Figure 42: 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.

3.5. Locked Payment Request

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

MI-2023-001 | Payment #3041163052

Summary History Related Actions

This Payment Request is being edited by you. You can access it [here](#). If this is in error, please contact [help desk](#).

Overview

Grant Number MI-2023-001
Project Number MI-2023-001-01
Status PENDING
Total Amount \$281,954.00

Requested By Elizabeth Sumner
Requested Date 2/10/2023 5:20 PM EST
Approving Official Mark Johnson

Recipient

Recipient Name REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN
ECN 69085380

SAM E-Biz POC Name VIRGINIA LICKLITER
SAM E-Biz POC Phone (313) 402-1020

Project Lines

Project Number	Scope Code	Scope Suffix	Amount	Status
MI-90-4026	300	A1	\$46,634.00	CREATED
MI-90-4026	300	A1	(\$35,589.00)	CREATED
MI-90-4026	300	A1	\$235,675.00	CREATED
MI-90-4026	300	A1	\$35,234.00	CREATED

Figure 43: The Payment record message when it's locked while being edited.

3.5.1. 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 on the table below.



#	Name	Action & Descriptions
1	Cancel Payment Request	<ul style="list-style-type: none"> Located at the top of the form. Description underneath: <ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Cancel <ul style="list-style-type: none"> Exit the form without changes any being saved. Cancel Payment Request <ul style="list-style-type: none"> 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 37](#) or [Figure 39](#)). Another way is by going to the **Related Actions** page and clicking the **Cancel Payment** link (See [Figure 42](#)).

Cancel Payment Request
Review the drawdown request below. Press 'Cancel Request' to cancel it.

Overview

Grant Number: MI-2023-001
Project Number: MI-2023-001-01
Status: **PENDING**
Total Amount: \$281,954.00

Requested By: Elizabeth Summer
Requested Date: 2/19/2023 5:20 PM EST
Approving Official: Mark Johnson

Recipient

Recipient Name: REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN
ECN: 69085380
SAM E-Biz POC Name: VIRGINIA LICKLITER
SAM E-Biz POC Phone: (313) 402-1020

Project Lines

Project Number	Scope Code	Scope Suffix	Amount	Status
MI-90-4026	300	A1	\$46,634.00	CREATED
MI-90-4026	300	A1	(\$35,589.00)	CREATED
MI-90-4026	300	A1	\$235,675.00	CREATED
MI-90-4026	300	A1	\$35,234.00	CREATED

CANCEL CANCEL PAYMENT REQUEST

Figure 44: First page of the Cancel Payment Request after clicking Cancel Payment in the upper right corner of the Payment Request Record Summary/History page.

MI-2023-001 | Payment #3041163052

Summary History **Related Actions**

Cancel Payment Request
Review the drawdown request below. Press 'Cancel Request' to cancel it.

Overview

Grant Number: MI-2023-001
Project Number: MI-2023-001-01
Status: **PENDING**
Total Amount: \$281,954.00

Requested By: Elizabeth Summer
Requested Date: 2/19/2023 5:20 PM EST
Approving Official: Mark Johnson

Recipient

Recipient Name: REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN
ECN: 69085380
SAM E-Biz POC Name: VIRGINIA LICKLITER
SAM E-Biz POC Phone: (313) 402-1020

Project Lines

Project Number	Scope Code	Scope Suffix	Amount	Status
MI-90-4026	300	A1	\$46,634.00	CREATED
MI-90-4026	300	A1	(\$35,589.00)	CREATED
MI-90-4026	300	A1	\$235,675.00	CREATED
MI-90-4026	300	A1	\$35,234.00	CREATED

CANCEL CANCEL PAYMENT REQUEST



Figure 45: 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.

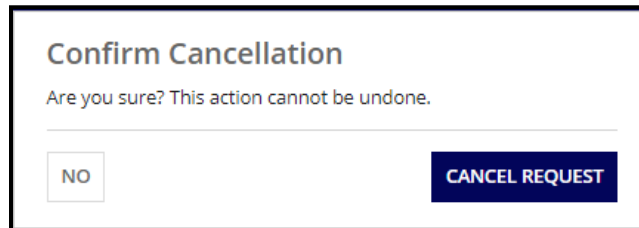


Figure 46: This is the Confirm Cancellation pop-up window that appears after selecting Cancel Payment Request on the **Cancel Payment Request** form.

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.

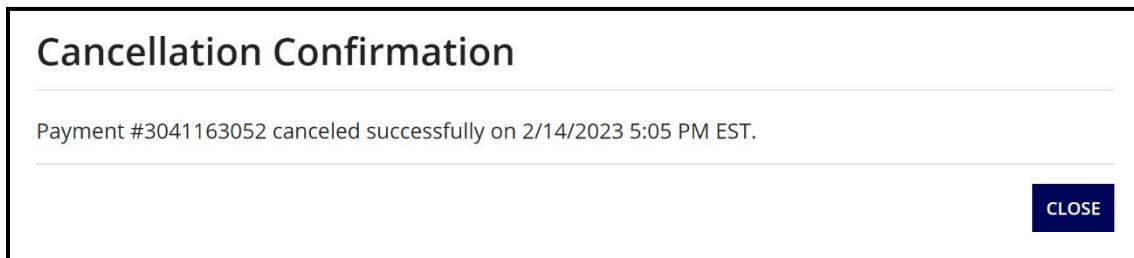


Figure 47: Payment Cancelled Confirmation page after confirming the cancellation on the Cancel Payment Request form.

3.5.2. Edit Payment Request (Grantee Users)

To edit a **Payment Request**, its 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 37](#) or [Figure 39](#)). Alternately, go to the **Related Actions** page and click the **Edit Payment** link (See [Figure 42](#))



Federal Transit Administration | PAYMENT REQUESTS | MY TASKS | ACCOUNT MANAGEMENT | HELP | Applian ECHO-Web

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.

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

[Add New Project](#)

The Available Balance is current as of 8 am EST on 2/9/2023, and includes pending payments.

Request Total: \$281,954.00

Figure 48: First page of the Edit Payment Request after clicking Edit Payment in the upper right corner of the Payment Request Record Summary/History page.

MI-2023-001 | Payment #3041163052

Summary | History | **Related Actions**

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.

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

[Add New Project](#)

The Available Balance is current as of 8 am EST on 2/9/2023, and includes pending payments.

Request Total: \$281,954.00

Figure 49: First page of the Edit Payment Request after clicking Edit Payment in the Related Actions page of the Payment Request Record.



3.5.3. Differences between Edit and Create Payments

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

#	Form Name	Same	Different
1	Edit Payment Request First Page (See Figure 48 or Figure 49)	<ul style="list-style-type: none"> Validation is the same 	<ul style="list-style-type: none"> We start on 3.2.2 Second Page of the Create Payment Request Form. There is a blue message at the top: <ul style="list-style-type: none"> 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 50)	<ul style="list-style-type: none"> Confirmation page and Button functionality (See 3.2.3 Confirmation Page of the Create Payment Request). 	<ul style="list-style-type: none"> There is a blue message at the top: <ul style="list-style-type: none"> 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 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 REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	Approving Official Mark Johnson	Request Date Feb 14, 2023 5:02 PM	Request Number 5
ECHO Control Number (ECN) 69085380	TEAM Grant? No	Grant Number MI-2023-001	Project Number 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 50: 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? (<i>pop-up</i>)	Opens after Cancel is Clicked	<p><u>Description:</u> All unsaved data will be lost. Continue?</p> <p><u>Buttons:</u></p> <ul style="list-style-type: none"> 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 on the first page of the Edit Payment Request form.

3.6. Organization Suspension/Restoration

A System Admin user can suspend an organization’s ability to submit payment requests without needing to remove the assigned roles of any user (e.g., Grantee). This function is performed at the **ECN level** using the **SUSPEND** button.

Steps to Suspend an Organization:

1. In the **Payment Requests** grid, locate and select a **Recipient Name** hyperlink.

The screenshot displays the 'Payment Requests' grid with various filter options. The 'Recipient Name' column is highlighted with a red box. Below is a table representing the data shown in the grid:

Message Number	Grant Number	Project Number	Region	ECN	Recipient Name	Total	Request Date	Request Status	Status Date
5213154180	CT-2018-013	CT-2018-013-01	Region 1	69082056	NORWALK TRANSIT DISTRICT	\$500.00	8/1/2025 3:02 PM GMT+00:00	PENDING	8/1/2025 3:03 PM GMT+00:00

Figure 51: Recipient Name in Payment Request Grid

2. Select **Payments** and press the **SUSPEND** button. If the SUSPEND button is grayed out, the user is unable to SUSPEND the Organization.



NORWALK TRANSIT DISTRICT

Summary **Payments** Users History

Payments

SUSPEND

Search Payments REGION Any REQUEST STATUS Any

REQUEST DATE Any - Any STATUS DATE Any - Any

Message Number	Grant Number	Project Number	Region	ECN	Recipient Name	Total	Request Date	Request Status	Status Date
9838155694	CT-2018-013	CT-2018-013-01	Region 1	69082056	Norwalk Transit District	\$43,169.00	12/20/2019 12:00 AM GMT+00:00	COMPLETED	12/20/2019 12:00 AM GMT+00:00

Figure 52: Suspend Button within Payment Tab within Recipient Name

Pressing the SUSPEND button will immediately prevent the Organization from submitting payment requests for any grant under their account. This action is applied at the ECN level, effectively blocking the Organization’s payment request access without removing any user roles. This feature streamlines account control and avoids the need to manually remove user roles.

In the Payments section, the presence of the RESTORE button confirms that an Organization has been suspended.

Steps to Restore a Grantee Organization:

1. In the **Payment Requests** grid, locate and select a **Recipient Name** hyperlink.

Filters

Message Number

Request Status

Recipient Name

Request Date Start Request Date End

Region

ECN

Status Date Start Status Date End

Grant Number

Project Number

Payment Requests

Message Number	Grant Number	Project Number	Region	ECN	Recipient Name	Total	Request Date	Request Status	Status Date
5213154180	CT-2018-013	CT-2018-013-01	Region 1	69082056	NORWALK TRANSIT DISTRICT	\$500.00	8/1/2025 3:02 PM GMT+00:00	PENDING	8/1/2025 3:03 PM GMT+00:00

Figure 53: Recipient Name in Payment Request Grid



2. Select **Payments** and locate the **RESTORE** button to unsuspend an organization. Once done, the Organization will be unsususpended.

The screenshot shows the 'Payments' section for 'NORWALK TRANSIT DISTRICT'. The interface includes a navigation bar with 'Summary', 'Payments', 'Users', and 'History'. Below the navigation, there are search filters for 'Search Payments', 'REGION', 'REQUEST STATUS', 'REQUEST DATE', and 'STATUS DATE'. A table lists payment records with columns for Message Number, Grant Number, Project Number, Region, ECN, Recipient Name, Total, Request Date, Request Status, and Status Date. A red box highlights the 'RESTORE' button in the top right corner of the table area.

Message Number	Grant Number	Project Number	Region	ECN	Recipient Name	Total	Request Date	Request Status	Status Date
9838155694	CT-2018-013	CT-2018-013-01	Region 1	69082056	Norwalk Transit District	\$43,169.00	12/20/2019 12:00 AM GMT+00:00	COMPLETED	12/20/2019 12:00 AM GMT+00:00
9838153772	N/A	N/A	Region 1	69082056	Norwalk Transit District	\$257,914.00	12/20/2019 12:00 AM GMT+00:00	COMPLETED	12/20/2019 12:00 AM GMT+00:00

Figure 54: Restore Button within Payment Tab within Recipient Name

3. To confirm that an Organization has been unsususpended, go to the Payments section and verify that the **SUSPEND** button is visible.

The screenshot shows the 'Payments' section for 'NORWALK TRANSIT DISTRICT'. The interface includes a navigation bar with 'Summary', 'Payments', 'Users', and 'History'. Below the navigation, there are search filters for 'Search Payments', 'REGION', 'REQUEST STATUS', 'REQUEST DATE', and 'STATUS DATE'. A table lists payment records with columns for Message Number, Grant Number, Project Number, Region, ECN, Recipient Name, Total, Request Date, Request Status, and Status Date. A red box highlights the 'SUSPEND' button in the top right corner of the table area.

Message Number	Grant Number	Project Number	Region	ECN	Recipient Name	Total	Request Date	Request Status	Status Date
9838155694	CT-2018-013	CT-2018-013-01	Region 1	69082056	Norwalk Transit District	\$43,169.00	12/20/2019 12:00 AM GMT+00:00	COMPLETED	12/20/2019 12:00 AM GMT+00:00

Figure 55: Suspend Button within Payment Tab within Recipient Name is Available

4. Available Balance

When a user selects the **Available Balance tab**, you are taken to the **Available Balance** page. Here, a user can see all the Grant Balances for each project.

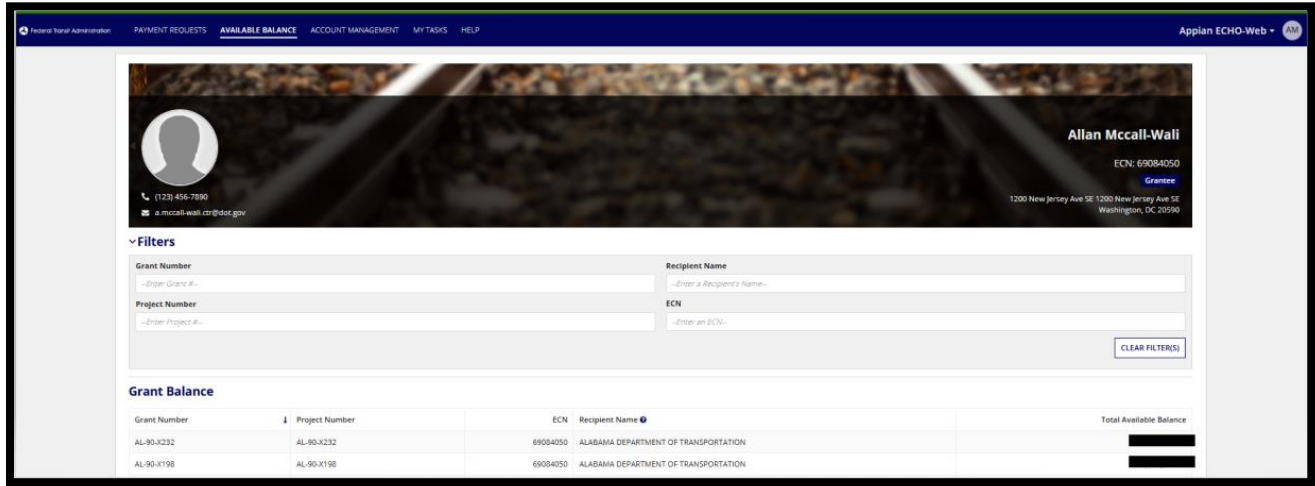


Figure 56: Available Balance Tab which shows the Grant Balance for each Grant Number

Access to this tab is limited to specific user roles. Please review the User Role Matrix in Section 2 to determine who has permission to view it. Users with access can filter results by Grant Number, Recipient Name, Project Number, or ECN.

Users are able to download reports based on specific filters towards the bottom of the **Available Balance** Tab page.

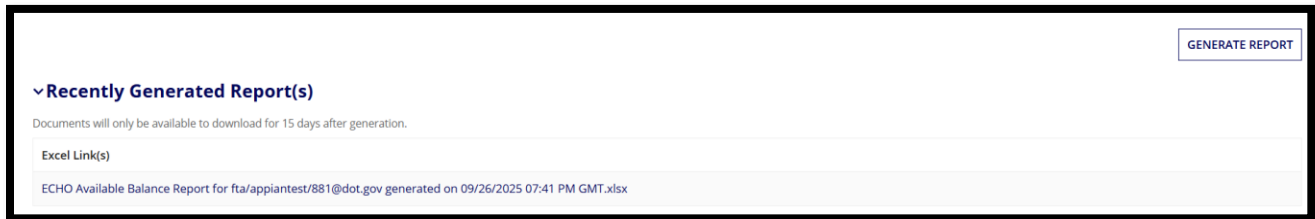


Figure 57: Available Balance Export

5. Suspensions

When a user selects the **Suspensions tab**, they are taken to the Suspensions page. This page includes a grid that lists all grants associated with the user’s organization(s) that are in a Suspended status, with the option to narrow results via the filters provided. There are two types of Suspensions, listed below.

- Grant Suspensions: initiated by FTA’s Regional Offices
- Expired Period of Performance (PoP) Suspensions: happen automatically once a grant’s PoP expires

The Suspended Grants grid displays the Recipient Name, ECN, Award, Project Number (if applicable), Scope Code (if applicable), Scope Suffix, (if applicable), Region, Suspension type, Period of Performance date, and the Suspension Exception which is regarding the Period of Performance suspension. For grant suspensions, the PoP end date will always display N/A.



Recipient Name	ECN	Award	Project Number	Scope Code	Scope Suffix	Region	Suspension Type	PoP End Date	Suspension Exception
RHODE ISLAND PUBLIC TRANSIT AUTHORITY	69081070	RI-90-X057				Region 1	Expired PoP	6/1/2011	Suspended
RHODE ISLAND PUBLIC TRANSIT AUTHORITY	69081070	RI-90-X058				Region 1	Expired PoP	2/1/2012	Suspended

Figure 58: Suspension Tab which displays the Suspended Grants

If any of the grants are in a suspended status, Recipient users will receive an email notification that lists the suspended grants and/or award numbers.

To export the Suspension grid, make sure to select any filters if needed, scroll to the bottom of the page and select “Generate Report”.

Recipient Name	ECN	Award	Project Number	Scope Code	Scope Suffix	Region	Suspension Type	PoP End Date	Suspension Exception
AK STATE DEPARTMENT OF PUBLIC TRANSPORTATION	69088529	AK-85-X001				Region 10	Expired PoP	6/30/2011	Suspension Active - Click to create PoP Exception
AK STATE DEPARTMENT OF PUBLIC TRANSPORTATION	69088529	AK-37-X011				Region 10	Expired PoP	No Approved End Date	Suspension Active - Click to create PoP Exception
AK STATE DEPARTMENT OF PUBLIC TRANSPORTATION	69088529	AK-37-X014				Region 10	Expired PoP	6/30/2011	Suspension Active - Click to create PoP Exception
AK STATE DEPARTMENT OF PUBLIC TRANSPORTATION	69088529	AK-04-0023				Region 10	Expired PoP	6/30/2014	Suspension Active - Click to create PoP Exception
AK STATE DEPARTMENT OF PUBLIC TRANSPORTATION	69088529	AK-18-X042				Region 10	Expired PoP	6/30/2011	Suspension Active - Click to create PoP Exception

Items per page: 10 25 50 100

GENERATE REPORT

Figure 59: Suspended Grants Grid Export



6. My Tasks

When a user selects 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 **My 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.

Task Name	Date Assigned	Status
ECHO Edit Payment Request #3041163052	2/14/2023 4:52 PM EST	Accepted
ECHO Create Payment Request	2/14/2023 4:57 PM EST	Accepted

Figure 60: 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.

Project Number	Scope Code	Scope Suffix	Available Balance	Request Amount	Return	Remove
Select a Project Number	Select a Scope Code	Select a Scope Suffix	\$0.00	\$0.00		X

Request Total: \$0.00

Buttons: BACK, CANCEL, NEXT

Figure 61: An example of clicking a task called ECHO Create Payment Request and being redirected from the My Tasks Page to the Create Payment Form.



6.1. My Task Status Legend

The table below describes the statuses you will see on the **My Tasks** table, under the **Status** 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.

7. Account Management

The screenshot displays the 'Account Management' interface. At the top, there are navigation tabs: 'PAYMENT REQUESTS', 'MY TASKS', 'ACCOUNT MANAGEMENT', and 'HELP'. The user profile for Elizabeth Summer is shown, including her contact information and address. Below the profile, there are two tabs: 'Users' and 'Recipients'. The 'Users' tab is active, showing a 'User Filters' section with input fields for Username, Name, Role, Recipient Name, ECN, Region, and Status. A 'CLEAR FILTERS' button is also present. Below the filters is a table with the following data:

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

Figure 62: 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.

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

#	Tab Name	Description
1	Users Tab	<ul style="list-style-type: none"> User Filters and Table (<i>depending on your role you will only see certain users. See Appendix A</i>). Generate Users Report Go to a User Record See 7.2 Users Tab



2	Recipients Tab	<ul style="list-style-type: none"> Recipient Filters and Table (<i>depending on your role you will only see certain Recipients. See Appendix A</i>) Generate Recipient’s Report Go to a Recipient Record See 7.4 Recipients Tab
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Table 25: An overview of the information that is seen on the Account Management page.

7.1. 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 [7.3 User Record](#)). By clicking on the **Edit User Information**, you will be taken to a form called **Manage Information** (See [Figure 63](#) below) that is broken down into 3 sections:

Manage Information

User Information

BASIC

<small>First Name</small> Elizabeth	<small>Last Name</small> Summer	<small>Title</small> Grantee
--	------------------------------------	---------------------------------

CONTACT

<small>Phone Number*</small> 3133470312	<small>Phone Extension</small> 531	<small>Fax Number</small>
--	---------------------------------------	---------------------------

ADDRESS

<small>Address Line 1*</small> 1001 WOODWARD AVENUE	<small>City*</small> DETROIT	<small>State*</small> MI
<small>Address Line 2</small> SUITE 1400	<small>Zip Code*</small> 48226	<small>Zip Extension</small>

PO Box

Figure 63: When you come to Manage Information, you will have 3 sections Basic, Contact, Address. You can look at the table below for more information. For button functionality, see [7.1.1 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	<ul style="list-style-type: none"> Max Character limit is 10 (<i>area code + 7 digits</i>) No special characters or alphabet letters
	Phone Extension		No	<ul style="list-style-type: none"> Max Character limit is 5 digits No special characters or alphabet letters
	Fax Number		No	<ul style="list-style-type: none"> Max Character limit is 10 (<i>area code + 7 digits</i>) No special characters or alphabet letters
Address	Address Line 1	Yes	Yes	<ul style="list-style-type: none"> Max Character limit is 30 No special characters except for hyphen (-) or period (.) Must start with the primary address number (<i>e.g., 101 Maple St</i>) (See USPS Publication 28 – Postal Addressing Standards)
	Address Line 2		No	<ul style="list-style-type: none"> Max Character limit is 30
	PO Box		No	<ul style="list-style-type: none"> Max Character limit is 5 digits No special characters or alphabet letters
	City		Yes	<ul style="list-style-type: none"> Max Character limit is 20 No special characters except for hyphens (-) and no digits
	State		Yes	<ul style="list-style-type: none"> Drop-down menu selection with State Abbreviations
	Zip Code		Yes	<ul style="list-style-type: none"> Max Character limit is 5 digits No special characters or alphabet letters
	Zip Extension		No	<ul style="list-style-type: none"> Max Character limit is 4 digits No special characters or alphabet letters

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



7.1.1. Edit User Page Buttons

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



Figure 64: The buttons 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 changes and return to the Account Management page.

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

7.2. 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 [7.1 Edit User Information](#))
- User Dashboard (See [3.1 User Dashboard](#))
- Users tab
- Recipients tab (See [7.4 Recipients Tab](#))
- User Filters
- Users table
- Generate Report

Elizabeth Summer
Grantee
ECN: 69085380
Grantee
1001 WOODWARD AVENUE, SUITE 1400
DETROIT, MI 48226

Users Filters

Username:
 Name:
 Role:
 Recipient Name:
 ECN:
 Region:
 Status: Active Inactive

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.granteuser@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

Figure 65: Account Management Users page



7.2.1. 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 66: These filters are available on the Account Management page for the Users tab. See [7.2.2 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	<ul style="list-style-type: none"> 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 Appendix A).
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	<ul style="list-style-type: none"> 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 regions from the multi-select drop-down menu. If you have only one region, that region will be defaulted.
7	Status	You have active (<i>defaulted</i>) and inactive.
8	Clear Filter(s)	Clears all the filters

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

7.2.2. Users Table

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



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.granteuser@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

Figure 67: 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.

7.2.3. 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 [9 Report Generation](#). Check out the table below to see what information is provided in the report.

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.granteuser@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

Figure 68: 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 7.2.1 User Filters .
	Report Tabs	<ul style="list-style-type: none"> • Users <ul style="list-style-type: none"> ○ This tab contains user account and contact data for users meeting the search criteria. There is one row per user. • Roles <ul style="list-style-type: none"> ○ 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	<ul style="list-style-type: none"> • Username • Name • Title • Email • Phone Number • Street Address • City • State • Zip • Created Date • Modified Date • Is Locked • Is Active
Roles	Columns	<ul style="list-style-type: none"> • 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.

7.3. User Record

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

- Payment Record – Summary page Overview section (See [Figure 35](#))
- **Request By** (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.

Elizabeth Summer | elizabeth.summer-echo-grantee@mailinator.com UPDATE USER INFORMATION

Summary | User Roles | Payments | History | Related Actions

User Information

BASIC

First Name Elizabeth	Last Name Summer
Username elizabeth.summer-echo-grantee@mailinator.com	Title Grantee

CONTACT

Phone Number (313) 347-0312	Phone Extension 531
Fax Number	Email Address elizabeth.summer-echo-grantee@mailinator.com

ADDRESS

Address Line 1 1001 WOODWARD AVENUE	City DETROIT	State MI
Address Line 2 SUITE 1400	Zip Code 48226	Zip Extension
PO Box		

Figure 69: 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.

7.3.1. Summary

The **Summary** page of the User contains an overview of the User Information (See [Figure 63](#)). See table 34 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 Summary page.

7.3.2. User Roles

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

Role	Role Category	Access Control Group	Cost Center	Organization	Assigned Date
Grantee	Recipient	ECHO 7223 Grantees	Region 5	REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	2/10/2023 3:13 PM EST

Figure 70: 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.



7.3.3. Payments

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

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

Figure 71: 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 the Payments table.

7.3.4. History

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

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



Elizabeth Summer | elizabeth.summer-echo-grantee@mailinator.com

Summary User Roles Payments **History** Related Actions

Account History

Q Search Account History SEARCH ACTION TYPE | Any UPDATED DATE | Any - Any

Action Type	Comments	Updated By	Updated Date
Created	ECHO Account Creation	test.GSM.echo@dot.gov	12/29/2022 4:17 PM EST

Role History

Q Search Role History SEARCH CHANGED DATE | 02/10/2023 - 02/10/2023

Role	Role Category	Access Control Group	Organization	Comments	Changed By	Changed Date	Status
Grantee	Recipient	Region 5	7223 - REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN (RTA of SE MI)	N/A	test.GSM.echo@dot.gov	2/10/2023 4:32 PM EST	DELETED
Grantee	Recipient	Region 5	7223 - REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN (RTA of SE MI)	N/A	test.GSM.echo@dot.gov	2/10/2023 3:30 PM EST	APPROVED
Grantee	Recipient	Region 5	7223 - REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN (RTA of SE MI)	N/A	test.GSM.echo@dot.gov	2/10/2023 3:13 PM EST	DELETED
Grantee	Recipient	Region 3	7223 - REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN (RTA of SE MI)	N/A	test.GSM.echo@dot.gov	2/10/2023 3:13 PM EST	APPROVED

Profile History

Q Search Profile History SEARCH UPDATED DATE | Any - Any

Old Value	New Value	Updated By	Updated Date
Address Line 1: 600 W PEACHTREE ST FL 23 Address...	Address Line 1: 1001 WOODWARD AVENUE Address L...	elizabeth.summer-echo-grantee@mailinator.com	2/9/2023 4:12 PM EST
Phone Extension:	Phone Extension: 531	elizabeth.summer-echo-grantee@mailinator.com	1/4/2023 3:18 PM EST

Figure 72: History Page of a User Record contains 3 sections: Account History, Role History, and Profile History.

7.3.5. Account History

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

Account History

Q Search Account History SEARCH ACTION TYPE | Any UPDATED DATE | Any - Any

Action Type	Comments	Updated By	Updated Date
Created	ECHO Account Creation	test.GSM.echo@dot.gov	12/29/2022 4:17 PM EST

Figure 73: 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.



7.3.6. Role History

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

Role History								
Q Search Role History		SEARCH	CHANGED DATE Any - Any					
Role	Role Category	Access Control Group	Organization	Comments	Changed By	Changed Date	Status	
Grantee	Recipient	Region 5	7223 - REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN (RTA of SE MI)	N/A	test.GSM.echo@dot.gov	2/10/2023 4:32 PM EST	DELETED	
Grantee	Recipient	Region 5	7223 - REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN (RTA of SE MI)	N/A	test.GSM.echo@dot.gov	2/10/2023 3:30 PM EST	APPROVED	

Figure 68: An example of Elizabeth Summer Audit History for 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	Allows 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 <i>(if applicable)</i> .
	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

7.3.7. Profile History

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

Profile History			
Q Search Profile History		SEARCH	UPDATED DATE Any - Any
Old Value	New Value	Updated By	Updated Date
Phone Extension:	Phone Extension: 531	elizabeth.summer-echo-grantee@mailinator.com	1/4/2023 3:18 PM EST

Figure 74: An example of Elizabeth Summer Audit History for when 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 <i>(if applicable)</i> .
	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.

7.3.8. 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 [7.1 Edit User Information](#)).



Figure 75: An example of User Record Elizabeth Summer. The Related Actions page with Update User Information link.

7.4. 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 [7.1 Edit User Information](#))
- User Dashboard (See [3.1 User Dashboard](#))
- Users Tab (See [7.2 Users Tab](#))
- Recipient Filters
- Recipients table
- Generate Report



Figure 76: Account Management Recipient page contains the Edit User Information, User Dashboard, Recipient Filters, Recipients table, and Generate Report.

7.4.1. 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 77: 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 [7.4.2 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	<ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> Deleted Unknown Expired Active
5	ECHO Status	You have active (<i>defaulted</i>) and inactive.
6	Clear Filter(s)	Clears all the filters

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

7.4.2. Recipients Table

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

Recipient Name	Division Name	ECN	Region	SAM Registration Status	SAM Expiration Date	ECHO Status
REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	-	69085380	Region 5	ACTIVE	5/1/2023	ACTIVE

Figure 78: 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 table below shows the statuses you will see in the Recipients table ECHO Status and SAM Registration Status columns.

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

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

7.4.3. 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 [9 Report Generation](#). The table below shows information provided in the report.

Recipient Name	Division Name	ECN	Region	SAM Registration Status	SAM Expiration Date	ECHO Status
REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	-	69085380	Region 5	ACTIVE	5/11/2023	ACTIVE

1 Item

Figure 79: 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 7.4.1 Recipient Filters .
	Report Tabs	<ul style="list-style-type: none"> • Recipients <ul style="list-style-type: none"> ○ This tab contains recipient information for recipients meeting the search criteria. There is one row per recipient. • Users <ul style="list-style-type: none"> ○ This tab contains user account and contact data for users meeting the search criteria. There is one row per user.
Recipients	Columns	<ul style="list-style-type: none"> • Recipient Name • SAM Unique Identifier (UEI) • Division Name • ECN • Region • SAM Registration Status • SAM Expiration Date • ECHO Status • Created Date • Created By
Users	Columns	<ul style="list-style-type: none"> • 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.

7.5. 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 67](#))
- Account Management – Recipients table (See [Figure 78](#))
- Payment Requests – Payment Requests table (See [Figure 35](#))
- Payment Record – Summary tab under the Recipient section (See [Figure 37](#))

The record contains information relating to the specific Recipient:



REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN

Summary
Payments
Users
History

Registration Information

Legal Name REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN	Division
Region Region 5	TrAMS Recipient ID 7223
UEID HMVNL4CLMP9	

SAM Status

SAM Status ACTIVE	SAM Expiration 5/1/2023
---	-------------------------

ECHO Status

ECN 69085380	ECHO Status ACTIVE
Created By echo.administrator	Created Date 12/27/2022 9:51 AM EST

Addresses

Address <input type="text" value="Mailing Address"/>	
Address Line 1 1001 WOODWARD AVE, STE 1400	City DETROIT
Address Line 2	State MI
Zip Code 48226	

Point of Contact

Contact <input type="text" value="Electronic Business POC"/>	
First Name VIRGINIA	Last Name LICKLITER
Phone Number (313) 402-1020	Phone Extension
Email Address vlickliter@rtamichigan.org	Fax Number (313) 961-4869
Address Line 1 1001 WOODWARD AVENUE	City DETROIT
Address Line 2 SUITE 1400	State MI
Zip Code 48226	

Figure 80: 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.

7.5.1. Summary

When you come to the Recipient record, you will first see the summary page, see [Figure 80](#). 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. <i>(Formatted as (###) ### - ####)</i>
	Phone Extension	Point of Contact's Phone Number Extension
	Email Address	Point of Contact's Email. <i>(Opens the default email application on the computer. So, you can send an email to the person)</i>
	Fax Number	Point of Contact's Fax Number. <i>(Formatted as (###) ### - ####)</i> .
	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.

7.5.2. Payments

When you come to the **Payments** page of the Recipient record you will see the Payments information for the selected Recipient.



REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN

Summary **Payments** Users History

Payments

Q 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 81: Payments contains the Payment information made for the Recipient.

7.5.3. 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

Q 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 82: 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: <ul style="list-style-type: none"> • Active (<i>defaulted</i>) • 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 (<i>if applicable</i>).
	Refresh	Allows you to refresh the history without having to refresh the browser.
Table	Columns	<ul style="list-style-type: none"> • 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.

7.5.4. History

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

- Creation Details
- Recipient History
- Recipient ECN History



REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN

Summary Payments Users **History**

Creation Details
Created Date 12/27/2022 9:51 AM EST Created By echo.administrator

Recipient History

Q Search Recipient History SEARCH SAM STATUS Any SAM EXPIRATION DATE Any-Any SAM SYNC DATE Any-Any

Legal Name	Division	UEID	SAM Status	SAM Expiration Date	SAM Sync Date
No items available					

Items per page: 10 25 50 100

Recipient ECN History

Q Search Recipient ECN History SEARCH UPDATED DATE Any-Any

Old Value	New Value	Updated By	Updated Date
No items available			

Items per page: 10 25 50 100

Figure 83: 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.

Creation Details
Created Date 12/27/2022 9:51 AM EST Created By echo.administrator

Figure 84: 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.

Recipient History

Q Search Recipient History SEARCH SAM STATUS Any SAM EXPIRATION DATE Any-Any SAM SYNC DATE Any-Any

Legal Name	Division	UEID	SAM Status	SAM Expiration Date	SAM Sync Date
No items available					

Items per page: 10 25 50 100

Figure 85: 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 <i>(if applicable)</i> .
	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.

Old Value	New Value	Updated By	Updated Date
No items available			

Figure 86: 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 filter the grid based on the updated date.
	Export	Allows you to export the Recipient ECN History as an excel document. 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.

8. 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.

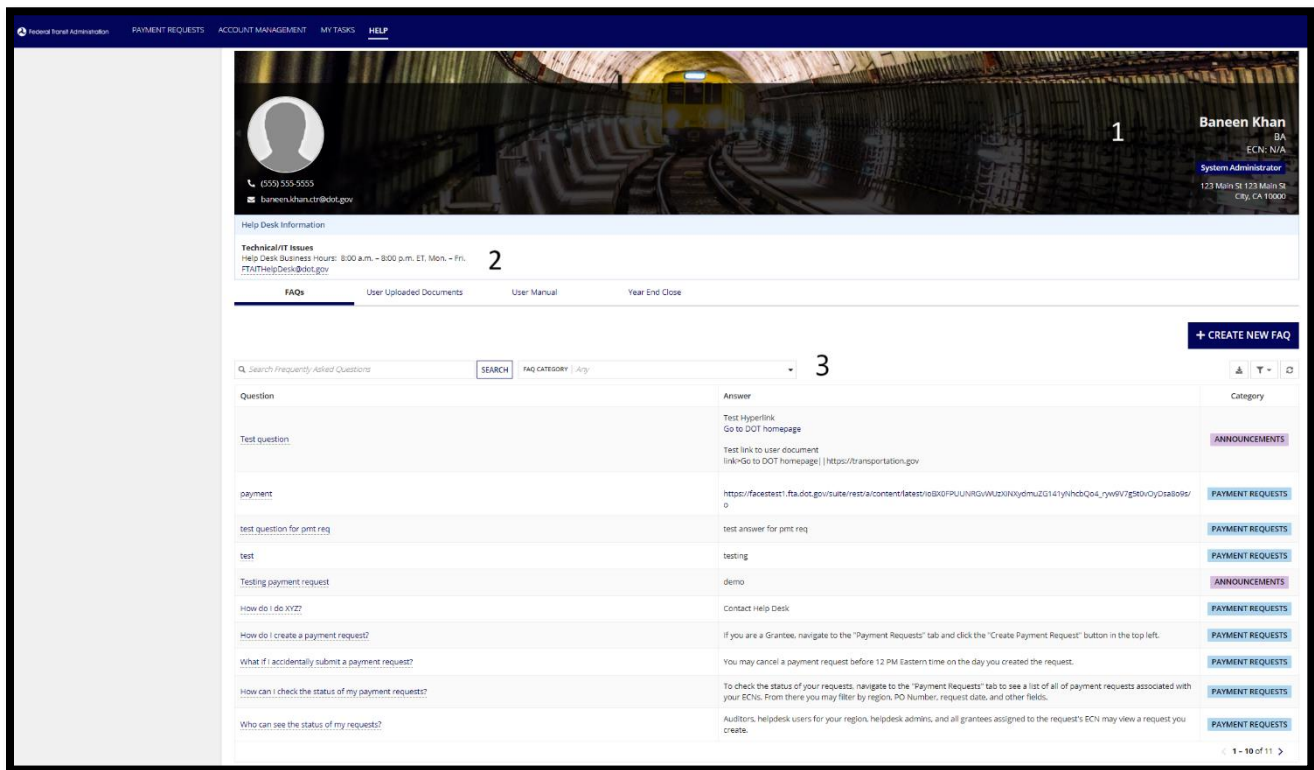


Figure 87: 1) User Official Personal Information (Name, Title, ECN, Address, City, State, Zip Code, Phone Number, Email Address, and User photo). 2) Help Desk Information. 3) Application Help Documents (FAQs, User Uploaded Documents, and User Manual).



8.1. 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.

8.2. 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.

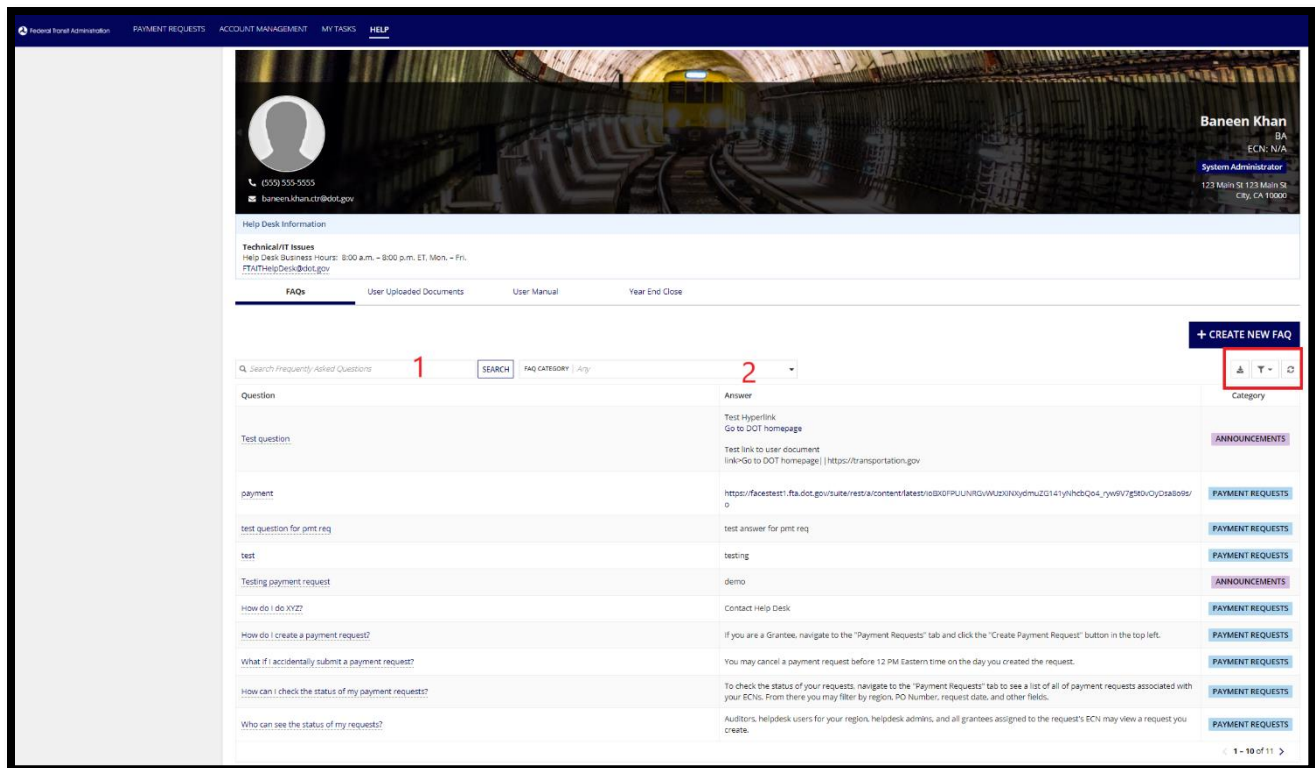


Figure 88: 1) Search bar that allows you to enter keywords that pertain to the Question or Answer of the FAQ. 2) FAQ Category drop-down (multi-select) menu. 3) Starting from the left most icon out of the three in the box: a) Export the current table with any filters (if they were set); b) Save filters 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.

How do I create a payment request?

Summary Related Actions

FAQ Information

Question	How do I create a payment request?	Created By	echo.administrator
Answer	If you are a Grantee, navigate to the "Payment Requests" tab and click the "Create Payment Request" button in the top left.	Created Date	June 6, 2022 10:50 AM
Category	Payment Requests	Modified By	echo.administrator
		Modified Date	June 6, 2022 10:50 AM

Figure 89: 1) FAQ Information that can be seen on the FAQ table. 2) More details about the FAQ Information.

8.2.1. Create New FAQ

The screenshot shows the user profile for Baneen Khan, a System Administrator. The interface includes navigation tabs for 'FAQs', 'User Uploaded Documents', 'User Manual', and 'Year End Close'. A red box highlights the '+ CREATE NEW FAQ' button in the bottom right corner.

Figure 90: User can add new FAQs by selecting the “Create New FAQ”.

System Administrators are able to add new FAQs by selecting “Create New FAQ”

Create FAQ(s)

To insert links into the Answer text, the format is <link>TEXT || URL</link> where TEXT is the clickable text of the link and URL is the URL the link should direct the user to. Ex. <link>Go to DOT homepage || https://transportation.gov/</link>

Category *	Question *	Answer *
-- Select --		

+ Add New FAQ

CANCEL CREATE

Figure 91: “Create FAQ(s)” page

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



Figure 92: “Create FAQ(s)” page with **Category**, **Question**, and **Answer** fields filled out.

Question	Answer	Category
Test question	Test Hyperlink Go to DOT homepage	ANNOUNCEMENTS
payment	Test link to user document link-Go to DOT homepage https://transportation.gov	PAYMENT REQUESTS
test question for prnt req	test answer for prnt req	PAYMENT REQUESTS
test	testing	PAYMENT REQUESTS
Testing payment request	demo	ANNOUNCEMENTS
How do I do XYZ?	Contact Help Desk	PAYMENT REQUESTS
How do I create a payment request?	If you are a Grantee, navigate to the "Payment Requests" tab and click the "Create Payment Request" button in the top left.	PAYMENT REQUESTS
What if I accidentally submit a payment request?	You may cancel a payment request before 12 PM Eastern time on the day you created the request.	PAYMENT REQUESTS
How can I check the status of my payment requests?	To check the status of your requests, navigate to the "Payment Requests" tab to see a list of all of payment requests associated with your ECNs. From there you may filter by region, PO Number, request date, and other fields.	PAYMENT REQUESTS
Who can see the status of my requests?	Auditors, helpdesk users for your region, helpdesk admins, and all grantees assigned to the request's ECN may view a request you create.	PAYMENT REQUESTS

Figure 93: FAQ Page

The FAQs are posted.

8.2.2. 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	Orange
2	Announcements	Purple



3	Account Management	
4	Payment Requests	

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

8.3. 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.

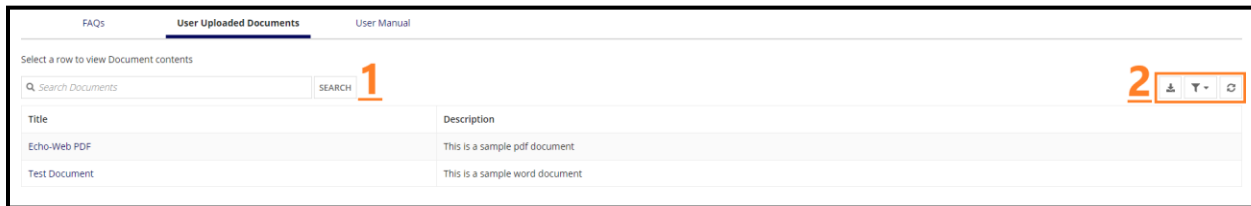


Figure 94: 1) The Search bar allows you to enter keywords that pertain to the Title or Description of the Document. 2) Starting from left most icon out of the three in the box: a) Export the current table with any filters if they were set; b) Save filters and manage those saved filters; c) Refreshes 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).

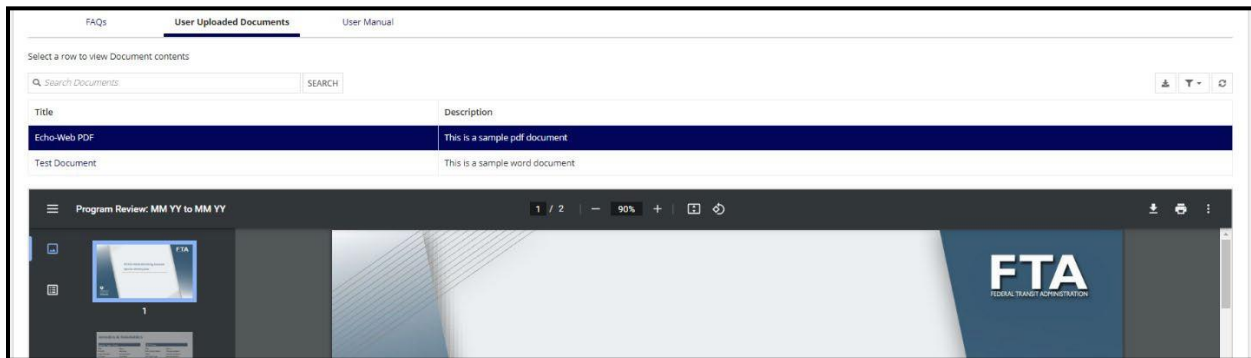


Figure 95: A PDF preview being viewed, after selecting "ECHO-Web PDF".

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*).



Echo-Web PDF			
Summary		Related Actions	
Document Information			
Title	Echo-Web PDF	Created By	faces.systemadministrator@dot.gov
Description	This is a sample pdf document	Created Date	June 29, 2022 3:27 PM
Type	N/A	Updated By	faces.systemadministrator@dot.gov
Category	N/A	Updated Date	July 14, 2022 11:40 AM

Figure 96: This is the record for ECHO-Web PDF, that contains document information about the file.

8.4. 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.

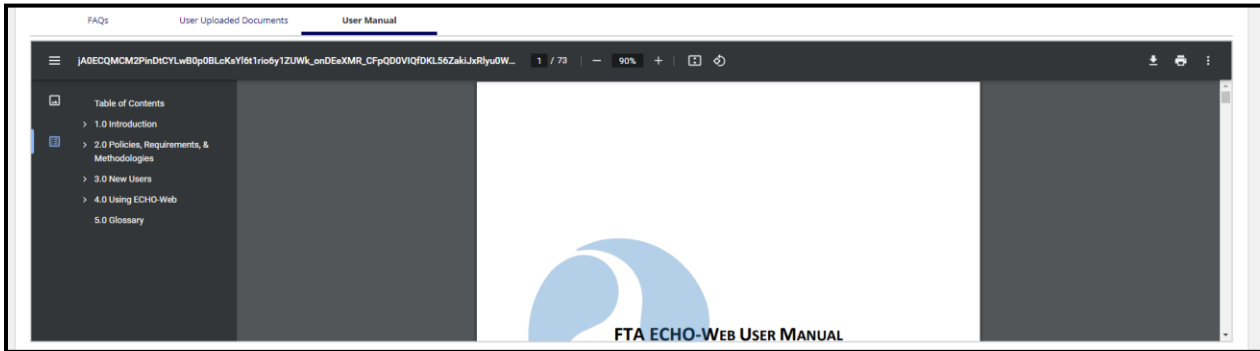


Figure 97: The User Guide being viewed from a Chrome browser.

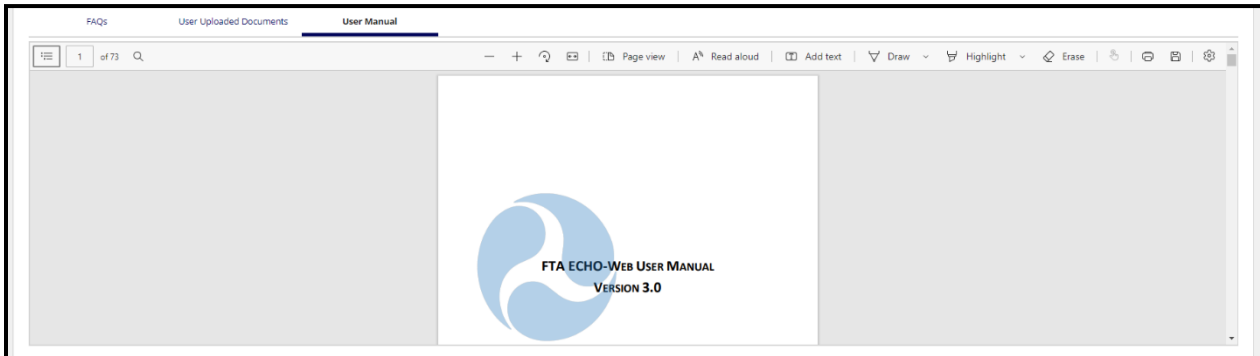


Figure 98: The User Manual being viewed from a Microsoft Edge browser.

8.5. Training Videos

When a user clicks the **Training Video** option, they are presented with a video preview of the ECHO-Web Training Video.

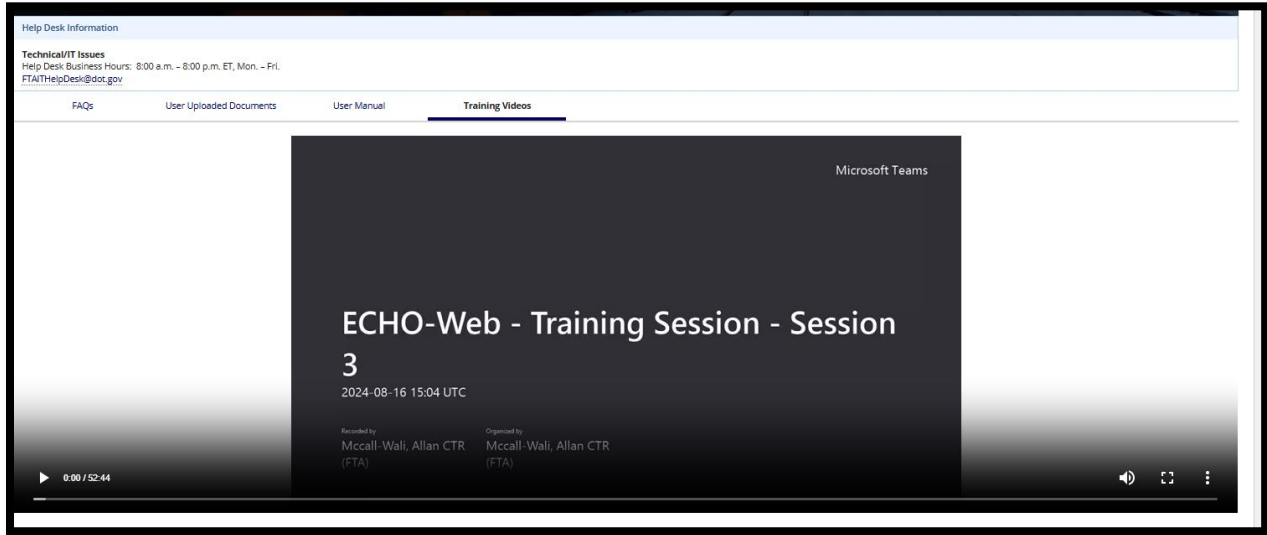


Figure 99: Training Videos within Help Tab

9. 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 [8.1 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:
 - a. **Yes** – Generates the Report.
 - b. **No** – Cancels the Report Generation.

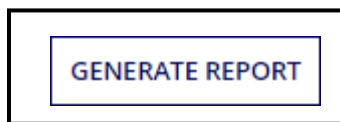


Figure 100: The Generate Report button is located underneath Payment Requests (See [Figure 33](#)), Users (See [Figure 61](#)), and Recipients (See [Figure 73](#)).

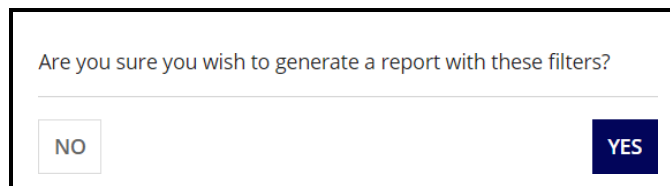




Figure 101: Pop-up window after clicking Generate Report button.

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.

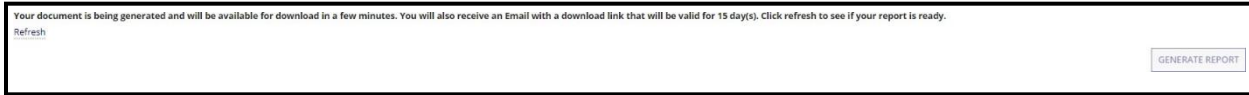


Figure 102: After confirming “Yes,” the message above will pop-up, containing the Generate button and Refresh link.

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



Figure 103: 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.

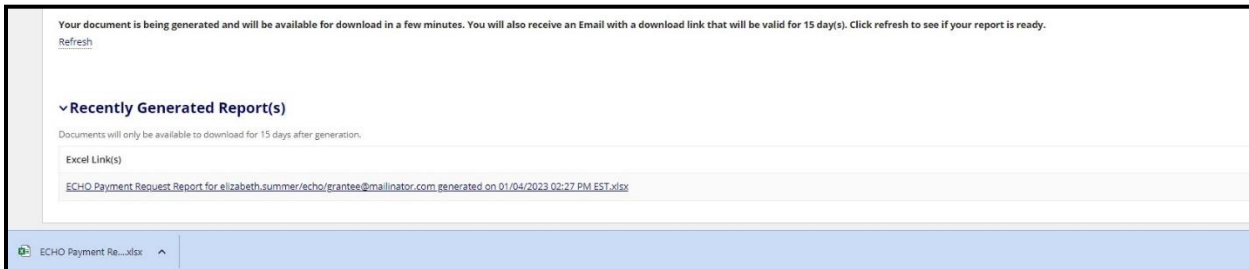


Figure 104: Select the link (e.g., ECHO Payment Request Report...) in the table, then you can download the Excel link.



Appendix A. ECHO-Web User Roles and Permissions

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

DOT Only:

- **External Read Only** – This role includes Read Only Functionality for All Payment Requests (Payment Requests tab), Recipient Organization Information (Account Management tab), Users Information (Account Management tab), View Help tab contents (Help tab), and View Assigned/Accepted Tasks (My Tasks tab).

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

Recipients Only:

- **Grantees** – These users can request payments. Each organization may have up to two (2) Grantee users.
- **Read Only (RO)** – This role may be assigned to provide Read Only functionality to a user. 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 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.	Yes – User Manager No – Read Only
Read Only	Unlimited	The Read Only role includes functionality to view payment history.	No – Grantee Yes – User Manager
User Manager	Unlimited	The User Manager is 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 – Read Only

Table A1: An overview of Recipient User Roles.

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 and Contractor Login](#)
- [2.2 Non-FTA Employee Login \(Grantee Users\)](#)
 - 1) From the **FTA TRIAD Homepage** (or anywhere in ECHO-Web) click the waffle menu shown in the image below (seen in the upper right corner of all web pages).

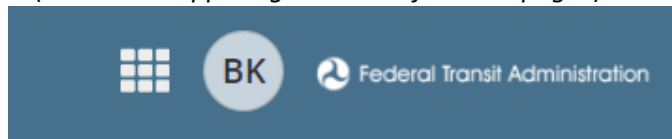


Figure A1: The waffle menu next to the profile picture (located in the upper-right corner), will open a drop-down with various links.

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

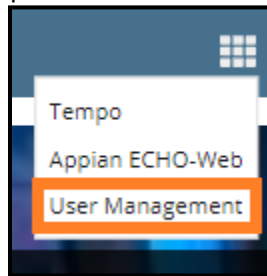


Figure A2: Select “User Management”.





Figure A3: The HELP CENTER tab is in the upper left corner.

- Next, you will come to the **User Management** page.
 - i. Select the **HELP CENTER** tab.
 - ii. Next, click on the **FACES User Manual**.

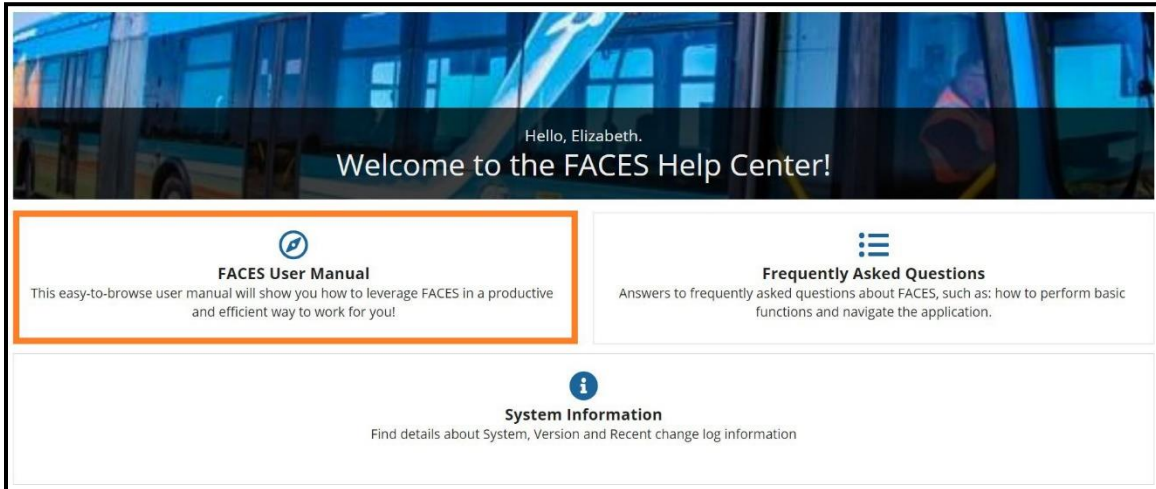


Figure A4: You will find the “FACES User Manual” under “Welcome to the FACES Help Center!”.

- The **FACES User Manual** will open; to download it, select the **Download User Manual** link or view it in the PDF preview.

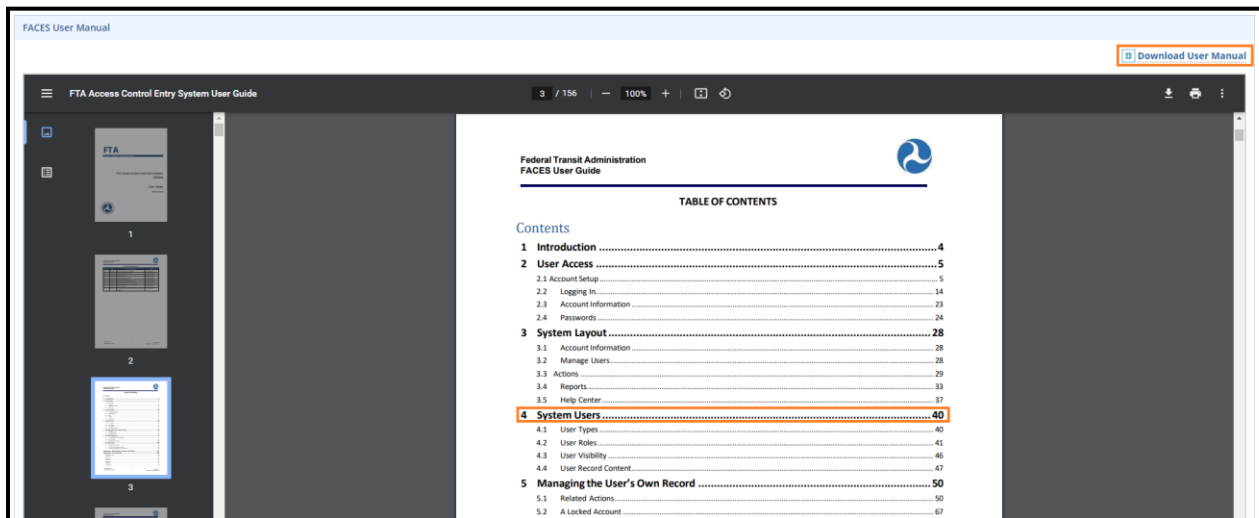


Figure A5: FACES User Manual will show as a PDF preview. Normally you first see the first page of the User Manual but for the example showing the 3rd page where you will click on Section 4: “System Users” for more information on User Role Permissions. You can download the User Manual by clicking on the “Download User Manual” link above the PDF preview.



User Role Matrix

Role Category	Roles	My Tasks	Payment Requests				Available Balance			
		View Assigned/ Accepted Tasks	Create Payment Requests	Edit Payment Requests	Cancel Payment Request	Generate Payment Request Report	View All Payment Requests	View Grant Balance	Generate Available Balance Report	
External User to FTA/DOT	DOT User	External Read Only	X					X	X	X
FTA USERS	FTA STAFF	Local Security Manager (LSM)	X							
	Global User	Regional Viewer	X					X		
		Global Security Manager (GSM)	X							
		Global Viewer	X					X	X	X
ORG	Recipient	System Administrator	X				X	X	X	X
		Grantee	X	X	X	X	X		X	X
		User Manager	X							
		Read Only	X					X		

Role Category	Roles	Suspensions			Account Management				Help				
		View PoP and Grant Suspensions	Create PoP Exception	Generate Suspension Report	View Users Information	View Recipients Information	Restore/ Suspend Users	Create New Organization	View FAQ/ User Uploaded Documents/ User Manual	View Year End Close	Create FAQ and New Document	Create Year End Close	
External User to FTA/DOT	DOT User	External Read Only	X		X	X	X			X			
FTA USERS	FTA STAFF	Local Security Manager (LSM)	X		X	X	X			X			
	Global User	Regional Viewer	X		X	X	X			X			
		Global Security Manager (GSM)	X		X	X	X			X			
		Global Viewer	X		X	X	X			X			
ORG	Recipient	System Administrator	X	X	X	X	X	X	X	X	X	X	X
		Grantee	X		X	X	X			X			
		User Manager	X		X	X	X			X			
		Read Only	X		X	X	X			X			

Figure A6: ECHO-Web User Role Matrix



Appendix B: 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

Table B1: Table of Acronyms commonly used with ECHO-Web