April 24, 2018.

<u>Tip Sheet for Recipient User Managers on Updating their Organization's Point of Contacts in TrAMS</u>

FTA has created a module within TrAMS that will allow User Managers to update their organization's recipient Point of Contacts (POCs). This document provides guidance, tips, and answers to questions about this module. It is intended for individuals who have the recipient User Manager role in TrAMS.

1. Q: How do recipient Point of Contacts differ from recipient Users?

A: Recipient Users have been provided a TrAMS account to access TrAMS and do business with FTA in TrAMS. Recipient Point of Contacts may also be TrAMS users, but they don't have to be. POCs can include members of an agency's Board of Directors, Union Representatives, and other individuals who don't necessarily use TrAMS, as well as individuals such as the agency's grants representative that likely have a TrAMS account.

2. Q: Who can update the recipient Point of Contacts in TrAMS?

A. Only the recipient's User Manager can edit or update the Point of Contacts on behalf of their organization. FTA Local Security Managers can also update an organization's POCs, if necessary.

3. Q: Why is it important to keep your organization's POCs up to date?

A: FTA will be relying on the POC module to send updates on important programmatic and policy matters to recipient General Managers, members of the recipients' Board of Directors, and other agency staff who are listed in the POC module. FTA regional and headquarters staff will be sending emails and attachments to recipient POCs directly from TrAMS. If the contact information in this module is not current, your organization may not receive these messages in a timely manner.

4. When I look at my existing POC information, I see blank information and/or POCs that are out of date. Why is that?

A: In the winter of 2016, FTA migrated POC information from a similar module in TEAM into TrAMS. If POC information was incomplete or out of date in TEAM, it will also be incomplete or out of date in TrAMS. When FTA deployed TrAMS, User Managers could add new points of contact but could not delete or edit existing POCs. FTA improved TrAMS in the winter of 2018 to allow User Managers to delete and edit POCs as well as add new POCs.

5. Q: How Do I Update My Organization's POCs?

A: To update your POCs, follow these four steps:

1. From the 'Records' tab, go to 'Recipient Organization' and then select your organization (see screen shots below).

April 24, 2018.

Applications / Awards
List of All Applications / Awards for Your Organization

Projects
List of All Projects for Your Organization

Recipient Organization
View Profile Information for Your Organization

Static Reports
List of TrAMS Excel Reports and Archived Reports from TEAM

Systems
View Software Release Information and FAQs

Users
Directory of users

Recipient Organization

🔍	SEARCH

Ch   **Chicago Transit Authority | CTA | 1182**
Recipient ID:1182
TrAMS Status: Active
SAM Status: ACTIVE

2. After you select your organization, a screen will display showing your organization profile information (see screen shot).

Chicago Transit Authority | CTA | 1182

Summary | Applications/Awards | TrAMS Users | Locations | Designated Recipient | Suballocations | News | Related Actions

TrAMS Profile Information

Recipient ID	**TrAMS Status**
1182	Active
Recipient Acronym	**Geographic Location Code**
CTA	170311670
Recipient Alias	**NTD Code**
CHICAGO TRANSIT AUTHORITY	5066
Recipient Cost Center	**Is MPO?**
78500	No
Is State DOT?	**Recipient ID of MPO**
No	0
Recipient OST Type	**Is DBE?**
Transit Authority	Yes
Is Designated Recipient?	**Assistance?**
Yes	Yes

SAM Profile Information

Legal Business Name	**SAM Status**

3. From the screen displaying your organization profile information go to 'POC and Union Information', off 'Related Actions' (see screen shot below).

4. The above step will take you to the 'Points of Contact' screen. You can search and filter for the POCs you wish to update by filtering by POC Contact Type. You can select one or multiple entries for contact type (see screen shot below).

5. Then select the box next to the POC that you want to update. On the bottom right hand side there will be an edit button and you will be able to update the contact information for the selected POC. You can only edit one POC at a time. However, you can delete multiple POCs if needed (see screen shots below).

April 24, 2018.

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Summary   Applications/Awards   TrAMS Users   Locations   Designated Recipient   Suballocations   News   **Related Actions**

Points of Contact

Search ❓

POC Contact Type

Union, Chief Executive Officer (CEO), Title VI ▼

Points of Contact

	Title ↑	Contact Name	Phone #	Email Address
☐	MANAGER OF DIVERSITY PROGRAMS	Thomas Smith	(312) 123-4567	fake@dminc.com
☑	PRESIDENT - BUS UNION	Michael King	(312) 123-4567	fake@dminc.com
☐	PRESIDENT and CEO	Cecilia Murphey	(312) 123-4567	fake@dminc.com

CLOSE   DELETE (1)   EDIT   NEW

Points of Contact

Basic Information

First Name *

Michael

Last Name *

King

Title *

PRESIDENT - BUS UNION

Union Name *

AMALGAMATED TRANSIT UNION LOCAL 241

Application Type

◯ Yes, Statewide Application

🔘 No, not a Statewide Application

Union POC

🔘 Yes, this will be a Union POC

◯ No, this will not be a Union POC

POC Contact Type

Select one or more values ▼

Contact Information

Email *

fake@dminc.com

Website Address

Phone Number *

(312) 123-4567

Alt Phone Number

Fax Number

(312) 123-4567

Address Information

Address 1 *

20 S. Clark Street

Address 2

Suite 850

City *

Chicago

Zip Code *

60603

Zip Ext

State *

IL ▼

CANCEL CHANGES   SAVE CHANGES

6. After you have updated your POC information, remember to save your changes on the highlighted 'Save Changes' button on the lower right-hand side (see screen shot above).

4

April 24, 2018.

You can also delete a POC, add a brand new POC, or cancel your changes if needed.

6. Can I create new POC categories or edit existing POC categories?

A: No. As of April 2018 the existing POC categories cannot be edited or expanded. The existing categories (which were also in place in TEAM) are:

- Union
- Chief Executive Officer (CEO)
- Metropolitan Planning Organization (MPO)
- Equal Employment Opportunity (EEO)
- Disadvantaged Business Enterprise (DBE)
- Title VI
- Section 504
- ECHO
- Grants
- General FTA Issues

FTA is working to update this list to include new categories and will inform TrAMS users when the list of POC categories have changed. In the interim, if a POC that you would like to add doesn't match any of the above categories, we recommend associating the individual with the "General FTA Issues" category. Multiple POCs can be associated with the same category and a single POC can be associated with multiple categories.

7. Is there information that I am required to provide when creating a new POC or updating my existing POCs?

A: Yes. For each contact, you will be required to provide the following information:

- First name
- Last name
- Title
- Email address
- Phone number
- Street Address
- City
- State
- Zip Code

If some or all of this information is not present for a pre-existing point of contact, you will need to enter it.

April 24, 2018.

8. Will I receive reminders to update my POCs?

A: Yes. TrAMS will automatically send out an annual reminder on October 1 to User Managers to update their POCs. (The ability to update POCs will not be impacted by the annual Year End Close period where TrAMS is not available for financial activities). FTA may also send additional periodic reminders to update POCs.