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- Get Started
- Sign In
- Edit Your Account Profile
- Create a Custom TA List
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Instructions

1. **Get Started:** Microsoft Edge is recommended for PTMS.

2. Disable all pop-up blocker software before using PTMS. Instructions for this vary for different browsers.

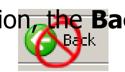
3. To view prior year TA forms in PTMS, Adobe Reader software is recommended. (See instructions later in this document.)

!

4. Please save frequently. Thirty minutes of inactivity will result in automatic log out and loss of any unsaved entries.

4. Internet fluctuations may cause slower PTMS response. Please be patient while waiting for new screens, before re-clicking any buttons.

5. When *editing* information in the system, please do not use the **Back** button. If you are just *viewing* information, the **Back** button may be

Editing: 

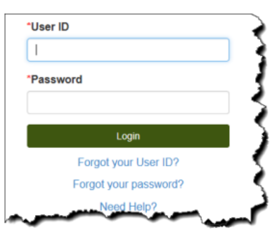
Viewing: 

1. **Sign In:** Open Microsoft Edge. Type: **https://www.michigan.gov/mdotptms**

   Press ↵ **Enter**

Tip: *Book marking as a Favorite will make future visits even faster and easier.*

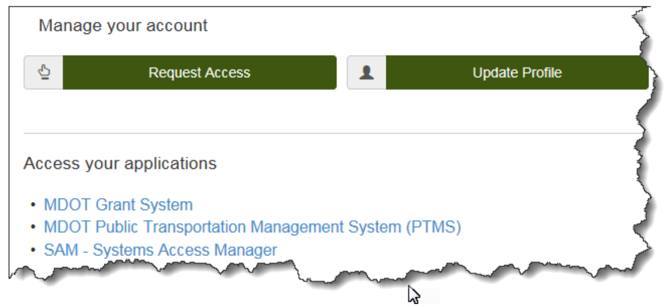
2. Enter your **User ID** and **Password**.



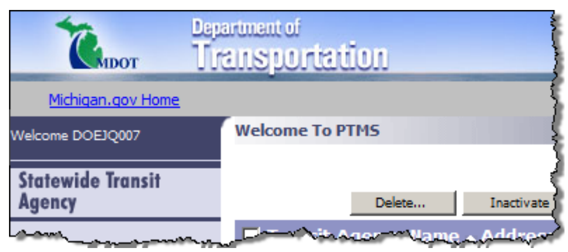
Note: *For locked accounts or forgotten IDs and passwords, click the **Need Password** button or contact the Client Service Center at (517) 241-9700 or (800) 968-2644.*

3. Then click **Login**.
   OR Press ↵ **Enter**

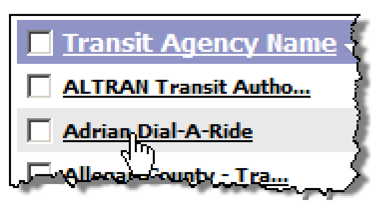
4. Click on **MDOT Public Transportation Management System (PTMS)** in the Application Portal screen.



5. The PTMS screen opens.

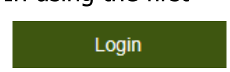


6. Click on the desired transit agency.

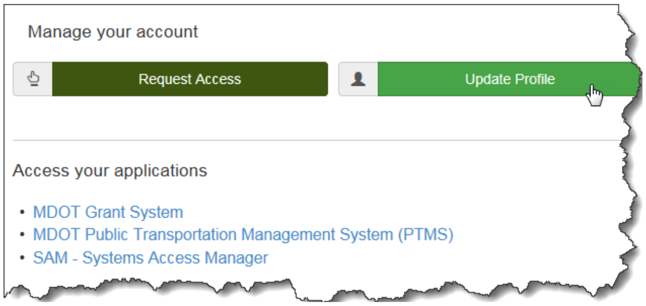


If the agency you desire is not on your screen, create a new custom list using the Search/Sort button to choose the Statewide list of TAs. Click **Apply** to get the statewide list. Then select the desired agencies and click the **Save Selected TAs** button. This is also explained on the next page.

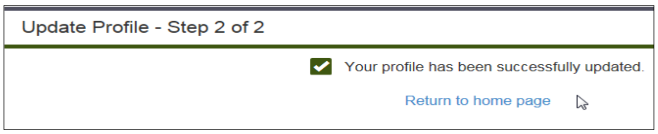
1. **Edit Your Account Profile:** Sign In using the first THREE sign in steps.



2. Click the **Update Profile** button at the top of the page.



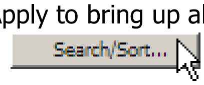
3. Click on a category and enter any needed changes.

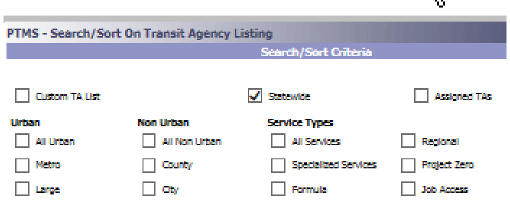


4. Click the **SUBMIT** button. MiLogin informs you of success.

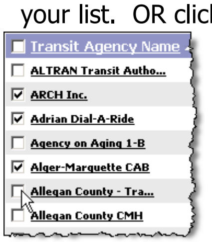
5. Click **Return to home page** to return to the Application Portal screen and then click the link to enter PTMS.

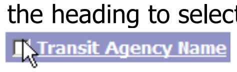
1. **__Create a Custom TA List__:** Sign in to PTMS. Click the Search/Sort button at the top of the screen, select Statewide, and click Apply to bring up all the transit agencies (TAs).





2. Click the checkbox next to each TA you want to include in your list. OR click the box in the heading to select ALL.



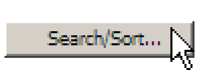


3. Click on the **Save Selected TAs** button at the top of the list.

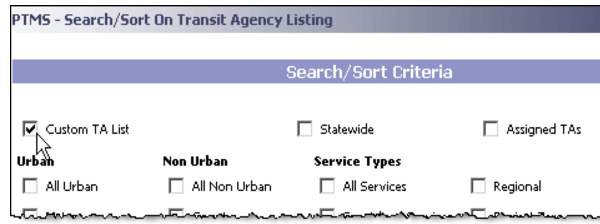
4. To change your custom list of TAs, use a search (see below) to produce a list of desired agencies, then check their boxes and click **Save Selected TAs** again.

TIP: *New agencies are sometimes added to PTMS. Keep your custom "statewide" lists current by occasionally using search/sort to re-create them.*

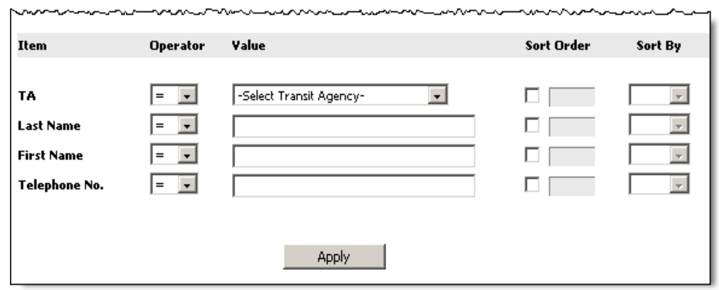
1. **__Search and Sort__:** Click the Search/Sort button at the top of the screen.



2. You can use the checkboxes in the upper half of the screen to select a desired range of TAs by category.



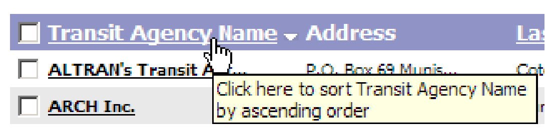
3. OR you can use the criteria at the bottom of the page to "home in" on specific TA records within the categories selected above.



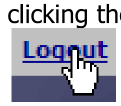
4. At the lower right side you can use the checkboxes to set the fields and order for your sorted list. Use the drop-downs to specify an ascending or descending sequence. (See previous picture.)

5. Click the Apply button at the bottom of the page to see the record(s) determined by your checkbox or criteria selections.

TIP: *Another quick way to sort in ascending or descending order directly in the list screen is by clicking the arrow next to the underlined column heading.*



1. **__Sign Out:__** To protect your data, always sign out from PTMS by clicking the Logout link in the upper right corner.



__Download Acrobat Reader:__ The Acrobat Reader is available at: [Acrobat Reader DC Get Started (adobe.com)]

[Get PTMS Help]

Annual Application • How To…

Task Overview:

- Create a New Application
- Create a New Capital Request
- Change Capital Requests
- Create Operating Requests
- Create Transit Agency (TA) Forms
- Update Vehicle/Equipment/Facility Inventories
- Submit Your Application
- View/Edit an Existing Application
- Get Help with PTMS

Instructions

For additional information, refer to the Annual Application Instructions on the Office of Passenger Transportation web page, at Public Transportation (michigan.gov), Annual Application for Funding (michigan.gov)

1. **Create a New Application:** Sign in and click on the name of your agency from the list.
2. Click on the **Application** choice from the menu on the left side of your screen.
3. To create a new application click the **New** button near the top of the screen.
4. This will create your new application and take you to the Checklist screen. For details how to complete the Checklist, go to P. 3.

Create a New Capital Request: Click on **Capital Requests** in the left menu.

1. Click on the **New** button. A new Capital Request opens, showing the Details tab.
2. ***For replacement or expansion vehicle requests:*** Fill in the required ("*") fields.

a.) Enter a **Priority** if applying for 5310 funds. Refer to the Priority List on the screen for more information.

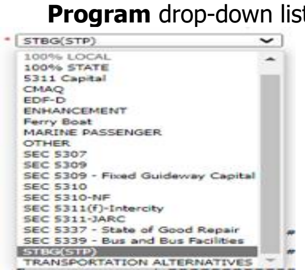
b.) Check the **TIP** box if the capital request has been included in TIP.

c.) **Justification** should identify the specific vehicle(s) to be replaced (by Local ID, VIN, or "71" number), as well as the need *and* the grounds for eligibility, age, miles, or age and miles.

d.) Choosing Vehicle as the **Type** changes the screen. Select the type of vehicle then the **Sub Type** from the drop-down list.

e.) Choose *Replace, Expand, Rehab or Remanufacture* in the **Action** field. The screen changes to add fields toward the bottom.

f.) Select an applicable funding source from the **Program** drop-down list.

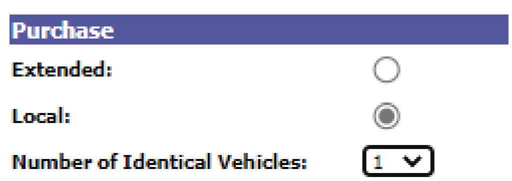


g.) Use 80% Federal and type in the State and Local percentages. Scroll down to choose Extended or Local purchase type. Extended Purchase means to purchase public transit vehicles through the State Vehicle Purchasing Program. For more details, see Guidelines for State Vehicle Purchasing Program.

Local Purchase refers to locally purchasing public transit vehicles using a combination of local, state, and federal funds. More information can be found in the Guidelines for Local Vehicle Purchase on State Administered Grants.

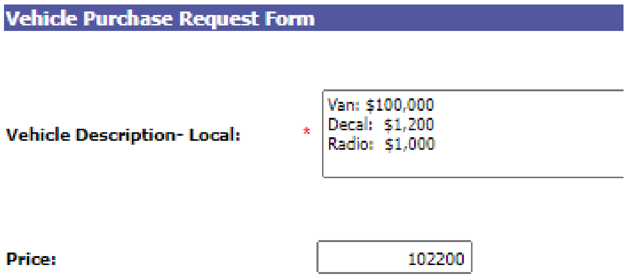
If a set amount of funding is awarded for a vehicle (STBG/STP, CMAQ), choose local purchase so that the exact amount of funding can be entered in the capital request.

h.) Indicate number of identical vehicles requested with **Requested Quantity:**



3. *For extended purchase*, complete the **Vehicle Description** and **Additional Options** fields. Insert the estimated options-only price of any additional options for *one* vehicle.
4. *For local purchase*, enter **Vehicle Description**, including any options, and total price for *one* vehicle.

Select the number of vehicles from the **Requested Quantity** drop-down list for multiple vehicles. For bus leases, the price would be the annual payment; indicate the number of vehicles and payment year in the **Justification** field (e.g. "Fifth year of 12-year lease for 100 buses").



Note: *Requests are not complete until you also move to the Vehicle financial screen and specify the vehicles and fiscal years for replacement. See the* Vehicle Inventory *quick guide for details.*

5. ***For equipment/facility* requests or *rehab/remanufacture* vehicle requests**, fill in the required ("*") fields.
   a.) Enter a **Priority** if applying for 5310 funds.
   b.) Check the **TIP** box if the capital request has been included in TIP.
   c.) **Justification** should state the need *and* the grounds for eligibility (*purchase* date if applicable), as well as the specific items to be replaced (if any).
   d.) *Choosing* the **Type** changes the screen (and may require entry of a **Subtype**).
   e.) Choose Replace or Expand in the **Action** field. The screen changes to add fields toward the bottom.
   f.) Select an applicable funding source from the **Program** drop-down list.
   g.) Remember to enter the required quantity in **Funded Qty**.
   h.) In the **Description**, describe the specific items to be purchased
   i.) *Enter* the price for the total request in **Request Total**.
   j.) Clicking or tabbing out of the **Request Total** field, use 80% Federal and type in the State and Local percentages. You may change these percentages by clicking in the appropriate percentage field. *Combined percentages must total 100%.* Clicking out will recalculate
6. Click **Save** after all Capital Request entries are done.
7. To request another item, click the **New** button again and proceed as above or below.
   a.) To get a Capital Request hard copy, click **View Report** to open Adobe; then click the **Print** button.
   b.) To delete a Capital Request in *Pre-Requested* status, check the desired request, then click the **Delete** button.
   c.) If the application is already submitted, please contact Sandy Lovell for any needed deletions.

Note: *You should update the "Replacement Requested" field in the Vehicles-Financials screen only for the vehicles in the current year's application (not the three future years in your capital request). If the"Replacement Requested" field is already populated with the previous application year, it should remain unchanged.*

1. **Changing Capital Requests:** For equipment, facilities, or rehab/remanufactured vehicle requests in pre-submit status, just select the request associated with the application year, enter changes in the capital request detail screen—and save them.

2. To alter the type or number of vehicle (expand or replace) requests, perform the following:
   a.) To delete request forms, first click the checkbox by the unwanted form(s). (Or check the box next to **Base Price** to delete *all* vehicle request forms.) Then click the **Delete Vehicle Forms** button.
   b.) To insert additional forms, select a quantity from the **Requested Quantity** dropdown and click the **Add Vehicle Forms** button.
   c.) To change local purchase vehicle type or price, delete all vehicle request forms as just described, and then add new forms with the desired changes.

Note: *You may still add capital requests to an already-submitted application. To change a request that is in Submit/Eligible/Ineligible status, open the capital request detail screen and Edit/Modify. This will activate some fields to allow changes. Refer to the directions above for changing the request. Be sure to save all changes!*

3. To delete a Capital Request in pre-submit status, open the Capital Request List screen, check the request, then click the **Delete** button. An already-submitted Capital Request can only be deleted by contacting your project manager.

1. **Create Operating Requests:** Click on **Annual Budgeted OARs** in the left menu.

Note: *Annual Budgeted OARs can only be created from within the application. However, once created, they can be accessed both in the application and through the All Operating Reports menu.*

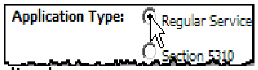
2. Click the **New** button.
3. Select the appropriate service area/type. If the selection you need does not appear, contact your project manager.

4. Verify the information in the **Summary** screen for accuracy and enter any needed Comments.
5. Click **Save**. Complete all needed entries in all other tabs.
   a.) See the Revenue and Expense Manual for code details.
   b.) OAR codes are in total by line item, not split into Administrative, Operating, and Maintenance categories.
   c.) For step-by-step instructions, see the "Operating Assistance Reports – How To" sheet/section.
6. Submit the OAR when complete by selecting Submit in the Status field of the OAR Summary screen. Then click Save.

1. **Create TA Forms**: Click on TA Forms in the left menu.

Note: *You will need Adobe Reader X or XI to view the TA forms prior to FY 2019 Application. (See the General Instructions quick guide.)*

2. Select the appropriate **Application Type**. The TA Form Types list will change accordingly.



3. Select the desired form by clicking on **Create Form (Edit Form)**. The form will open in an Adobe Acrobat window of your browser.
4. Fill in all applicable fields on the form.
5. You can print from Acrobat by clicking on **Print**.
6. Save the form by clicking **Save Form** at the top.
7. To close, click the **X** in the upper right corner.

Note*: If you need the same form for multiple application types, you only have to complete it once. Attach any support documents, Contract Clauses, published public notice, and Resolution of Intent forms. For more information, refer to the TA Forms and Related Documents Instructions, and Attachments and PIN Instructions, by clicking on HELP on the top right of the screen in PTMS.*

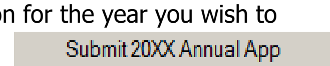
if you mis-enter one component of the capital request, you'll have to delete it and start over.

To view a sample of the completed forms, please click on the links below:

Sample Completed Section 5310 Forms
Sample Completed New Freedom Forms
Sample Completed JARC Forms
Sample Completed Regular Services Forms

Update Vehicle, Equipment, and Facility Inventories:
To complete this application submission requirement, see the Vehicle, Equipment, or Facility Inventory quick guides as well as, Part II, Requirements for a Completion Application of the Annual Application Instructions.

1. **Submit Your Application:** Click on **Application** in the left menu.
2. Click on the Submit button for the year you wish to submit. Then Click **OK** to confirm submission.



3. You will be required to key in a 5-digit PIN when submitting your application. It should be the unique PIN for your agency provided in 2012. For detailed instructions, refer to the Attachments and PIN Instructions, by clicking on HELP on the top right of the screen in PTMS.

Note: *The budgeted OAR must be submitted separately. Application submission does not change OAR status.*

1. **View/Edit an Existing Application**: Click on Application in the left menu.

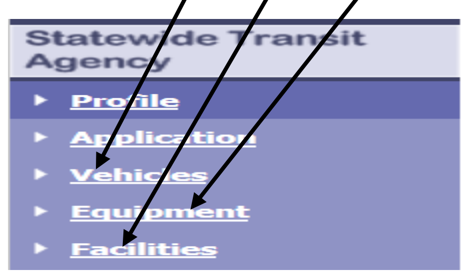
2. Click the link for the application to edit.
3. Use the left menu to find information to view/edit.
4. **TA Forms** are available for editing until your application is submitted. If changes are needed contact your MDOT project manager*. Instructions for editing a Budget (OAR) are found in the Operating Assistance Report quick guide.*

1. **Complete Checklist:** The Checklist serves as a reminder list to help you complete your application. Click on **Checklist** after you create an application.

2. Under the program for which you create the application *(e.g., Regular Services, Section 5310, etc.)*, you will see **Required Actions in PTMS**. Check off each item below as you complete it:
   - Update Profile Screen after making updates in your agency's Profile Screen.

Note: *Verify and update all of the information listed on the Profile screen, which includes TA Name, Legal Name, Agency ID, Federal ID, UEI Number (Unique Entity Identifier), Agency Name Associated with UEI Number, Mr./Ms., Title, Profile, Service Hours, County, Address, Phone, Fax, Email, Agency Web Address, and Transit Agency Additional Contacts. Your agency's contact information and MDOT Correspondence Categories are used for all MDOT correspondence (both US mail and e-mail). Contact your MDOT project manager if the check boxes are not appropriately checked under the MDOT Correspondence Categories.*

- Check off Updating Vehicle, Facility, and Equipment Inventories after completing this requirement. For details, see the Vehicle, Equipment, or Facility Inventory quick guides, as well as, Part II, Requirements for a Completion Application of the Annual Application Instructions.



Note: ***Update the actual mileage of your agency's vehicles after Oct. 1 of the current year and enter the updated mileage in PTMS by Oct.15 of the current year. The "mileage" and "mileage as***

of" fields are found on the Characteristics screen for each vehicle. Ensure that the in-service date information is completed.

3. Under the **Create and Complete the FY 20XX Application Module** in the checklist:
    - Check off Submit Annual Budgeted OAR(s) after completing the steps under the **Create Operating Requests** section on P.2.
    - Check off Complete and Save Capital Request(s) after completing the steps under the **Create a New Capital Request** section on P.1 - P.2.
    - Check off Complete and Save TA Forms after completing steps under the **Create TA Forms** section on P.3.
    - Check off Attach Any Support Documents after following instructions under the **Create TA Forms** section, Note portion on P.3.
    - Check off Submit and PIN Application after following instructions under the **Create TA Forms** section, Note portion on P.3.
4. Under the **Required TA Form** section in the checklist:
    - Check off each form after completing and saving the form as instructed in the **Create TA Forms** section, on P. 3.
5. Under the **Other Requirements** section in the checklist:
    - Check off each requirement item after completing the requirement. For details regarding each requirement item, review the section related to the program under Part III, Application Submitted by Program and Part IV, Instructions for TA Forms and Related Documents, in the Annual Application Instructions.

Get PTMS Help

• Application Attachments • *How To…*

Task Overview:

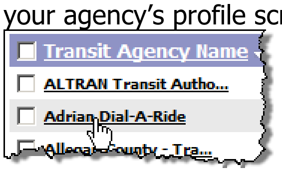
The new attachment functionality in PTMS is located within the **Application** area of PTMS. It is only available for 2014 Applications and later (not previous years), and only available if you have created your 2014 or later Annual Application.

You are allowed to upload a maximum of 20 files per application for a total of ten megabytes. Each file must be less than five megabytes in size. Each attachment must be in a separate PDF file.

Instructions

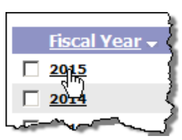
1. Log into PTMS.

2. Click on the name of your agency. (You should be at your agency's profile screen.)



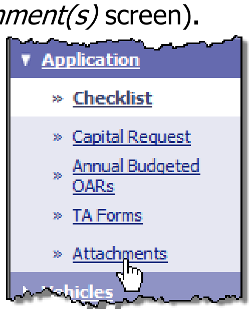
3. Click on **Application**.

4. Click on application year (in this example, 2015 is the application year). (You will see Attachments as a choice in your left navigation panel, along with Checklist, Capital Request, Annual Budgeted OAR's and TA Forms.)

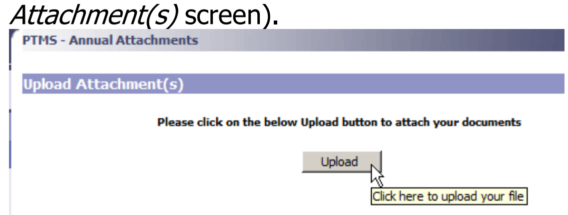


Note: *You will only see the 2015 choice if you have created your 2015 application.*

5. Click on **Attachments**. (This brings you to the *Upload Attachment(s)* screen).

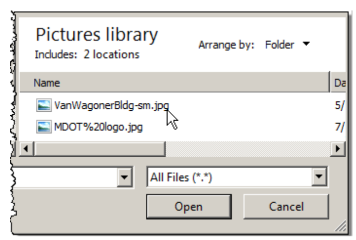


6. Click on the **Upload** button to attach a file to your application. (This brings you to the *Add Attachment(s)* screen).

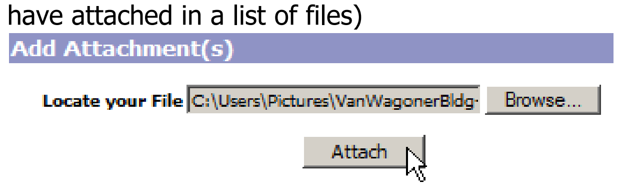


7. Click on the **Browse** button to find the file on your computer.

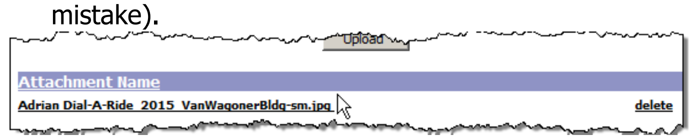
8. Click on the **file name**, then click the **Open** button. (This will return you to the Add Attachment(s) screen, with your file name in the Locate your File text box.)



9. Click on the **Attach** button (this returns you to the Upload Attachment(s) screen and shows the file you have attached in a list of files)



10. You can **click on the file to view it**, or click on the ***delete*** option to delete it (if you attached a file by mistake).



11. You can upload another file by using these same directions. You may attach up to 20 files for a total of ten megabytes.

PTMS • Application PIN Number • *How To…*

Task Overview:

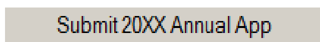
To ensure privacy and validate the identity and authority of those submitting applications for an agency, PTMS requires the use of a 5-digit PIN (Personal Identification Number). *You should have received the original PIN assigned to you, in the mail.*

Inserting and submitting your PIN also serves as an electronic signature to:

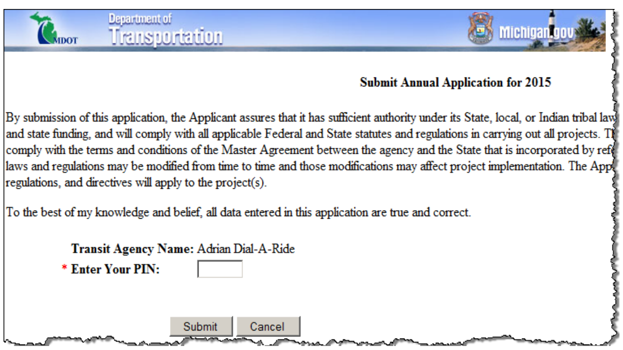
- verify agreement, compliance, and obligation regarding applicable laws, regulations, rules, contracts, or directives, and;
- assert the truth and accuracy of the application.

Instructions

1. Once your application is ready to submit, click on the **Submit** button for the year you wish to submit.

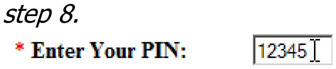


2. You will be required to key in a 5-digit PIN when submitting your application. The Submit Annual Application Screen will open

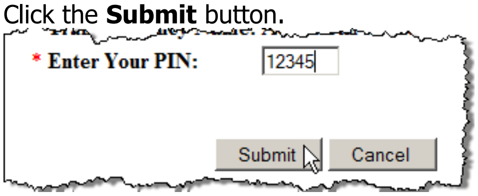


3. **Carefully read the text at the top of the screen** to understand the agreement and assertions you are making. *Contact your project manager with any questions you may have.*

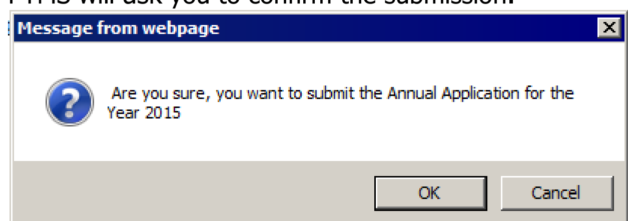
4. Click in the white box and type your PIN. *See note at step 8.*



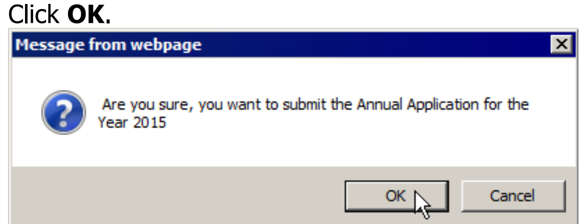
5. Click the **Submit** button.



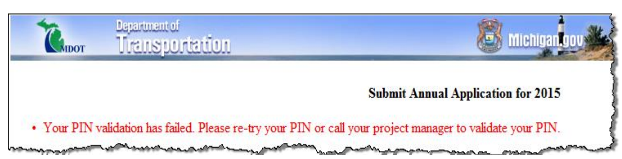
6. PTMS will ask you to confirm the submission.



7. Click **OK**.



8. If the PIN you entered is not valid*, PTMS will tell you. You can try to re-enter your PIN, in case it was mis-typed, or contact your project manager for help.



*__Note:__ *Your valid PIN already exists in the PTMS database. The PIN you enter must match the one stored there. You should have received your assigned PIN in the mail in 2012. If you did not receive a PIN, or need to validate your PIN, contact your project manager.*

[**Get PTMS Help**]

PTMS • Operating Assistance Report • *How To…*

Task Overview:

- Create a New Operating Assistance Report (OAR) – Quarterly or Reconciled
- View/Print an Existing OAR
- Edit an Existing/Submitted OAR
- Get Help with PTMS

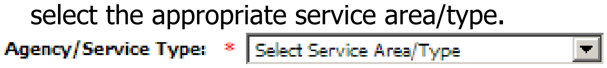
Instructions

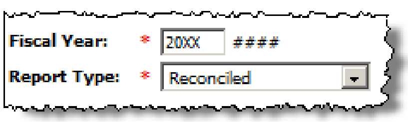
1. **Create a New OAR (Quarterly, Reconciled):** Sign in and click on the name of your agency from the list. From the left side navigation menu, choose **All Operating Reports**.

Note: *To create a new budget, see the* Annual Application *instructions.*

2. Click the **New** button.

3. Use the **Agency/Service Type** drop-down to select the appropriate service area/type.





4. Enter the **Fiscal Year** field and use the drop-down to select the appropriate **Report Type**.

5. Type **Comments** into the text box as needed.
   (1,000 characters are allowed)

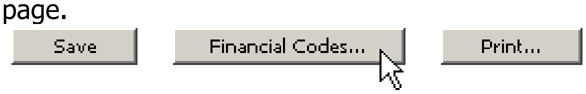
6. Click the **Save** button at the bottom center of the screen.

7. Click the **Revenue**, **Expense**, and/or **Non-Financial** schedule tabs to enter data. You must **Save** after each tab. See the Revenue and Expense Manual for code details.

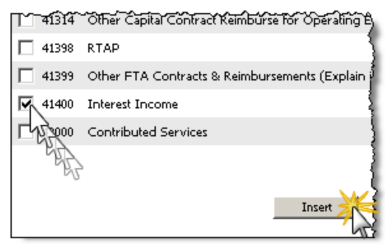
Tips:
Enter whole dollar amounts without punctuation.
Enter data by row using the ***Tab*** *key.*
Enter data by column using the ***Enter*** *key.*

8. After all data is entered, click **Save**.

9. To insert any missed financial code, click **Financial Codes** near the top or bottom of the page.

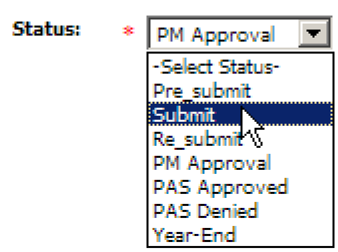


Check the needed codes (or use the box to the left of the "Code" title to select all) and then click **Insert**.



Always **Save** changes!

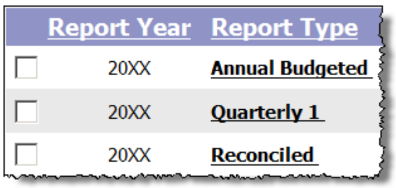
10. Submit the OAR when complete by selecting Submit in the **Status** field of the OAR Summary screen.



Then click **Save**.

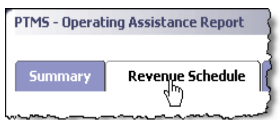
11. Your project manager will be automatically notified by e-mail when your report is submitted.

1. **View & Print an OAR:** From the left side navigation menu, choose **All Operating Reports**.

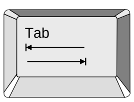


2. Click the line for the report you want to view.

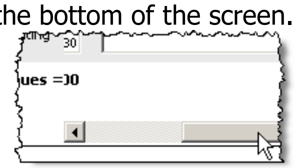
3. Move from tab to tab to view information.



4. To view columns not shown on screen, use the tab key or the scroll bar at the bottom of the screen.

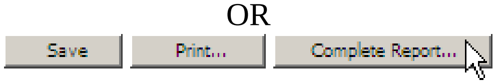


OR

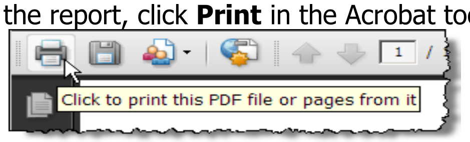


5. Choose the **Print** button at the top or bottom of each screen to print individual pages. Or click the **Complete Report** button to print the entire report.

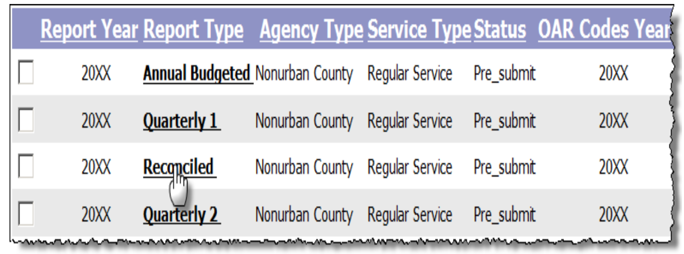
OR



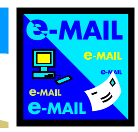
6. This will open Adobe Acrobat in your browser. To print the report, click **Print** in the Acrobat toolbar.

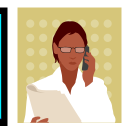


1. **Edit an Existing/Submitted OAR:** From the left side navigation menu, choose **All Operating Reports**.

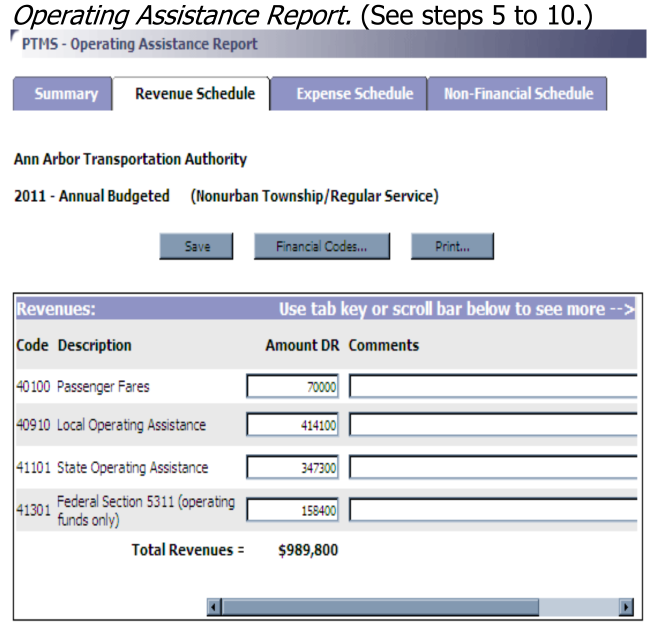


2. The OAR status must be in "Resubmit" to make changes. If necessary, ask your project manager to change the report Status to "Resubmit".





3. Edit any required information, following the instructions given above under the topic *Creating an Operating Assistance Report.* (See steps 5 to 10.)



Tip: *Use the Revenue and Expense (R & E) Manual when completing Operating Assistance Reports. To view the R & E Manual, go to the Office of Passenger Transportation web page Public Transportation (michigan.gov), under "Resources," "Audit/Accounting Information." See Appendix G on the R&E Manual for the At-a- Glance OAR Instructions.*

Get PTMS Help

Reports Module • How To…

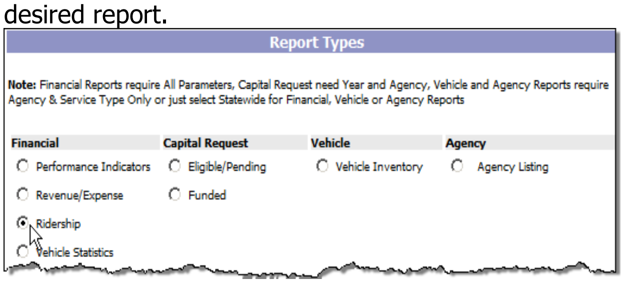
<u>**Task Overview:**</u>

- Choose the Type of Report
- Enter Report Parameters
- View the Report
- Print the Report
- Clear Report Parameters
- Produce an OAR Formula Report
- Get Help with PTMS

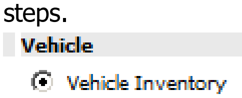
Instructions

1. <u>**Choose Report Type:**</u> From the menu on the left side of the screen (left menu), choose **Reports**.

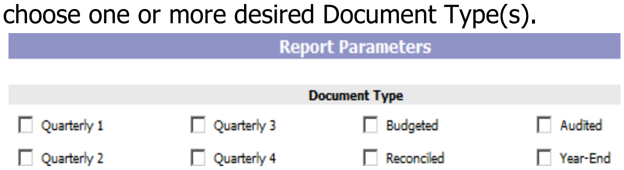
2. Under *Report Types*, click the radio button for the desired report.



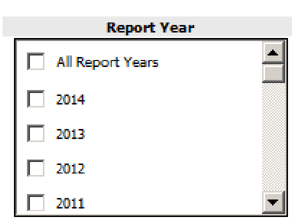
3. If you choose *Vehicle Inventory*, skip the next three steps.



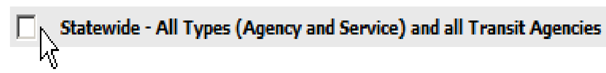
1. <u>**Enter Report Parameters:**</u> Under Report Parameters, choose one or more desired Document Type(s).



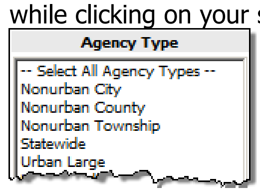
2. Under Report Parameters, choose one or more desired *Years.* Clicking a year will alternately select and deselect the checkbox.



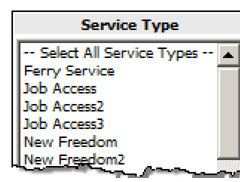
3. For a statewide report click Statewide on the left and skip the next four steps.



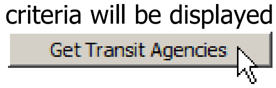
4. Under *Report Parameters*, choose one or more desired Agency Types in the *Transit Agency Selection Criteria* section. To obtain all types, choose Select All Agency Types. For multiple agency types, hold the control key while clicking on your selections.



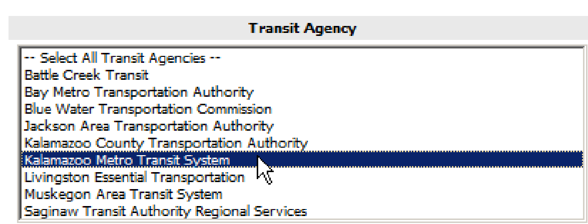
5. Under *Report Parameters*, choose one or more desired Service Types in the *Transit Agency Selection Criteria* section. To obtain all types, choose Select All Service Types. For multiple service types, hold the control key while clicking on your selections.



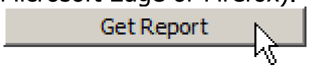
6. When selections have been made, click the **Get Transit Agencies** button. A list of agencies meeting the defined criteria will be displayed in the Transit Agency field.



7. Under Transit Agency, choose one or more desired Agencies. To obtain all agencies, choose Select All Transit Agencies. For multiple agencies, hold the control key while clicking your selections.

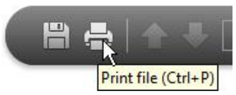


1. **View the Report:** To view the report defined by the parameters you chose, click the Get Report button. This will open Acrobat within your web browser (e.g., Microsoft Edge or Firefox).

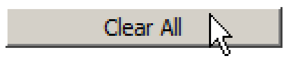


1. **Print the Report:** To print the report, click the Print button or icon from within Acrobat.

OR

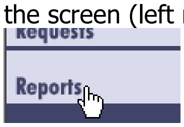


1. **Clear Parameters:** To clear the report parameters, click the Clear All button at the bottom of the screen.



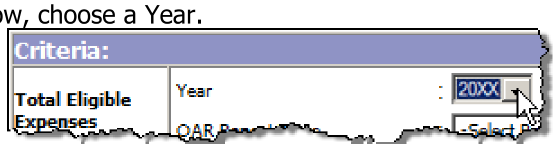
! **Note:** *If you choose a Document Type of Audited, you will not get any non-financial data. Non-financial data is not audited. To see non-financial data, please choose another document type.*

1. **OAR Formula Report:** From the menu on the left side of the screen (left menu), choose **Reports**.

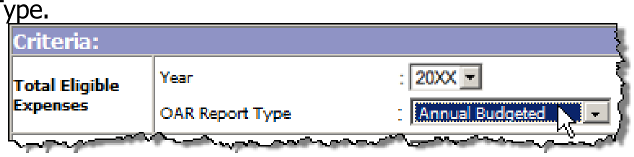


2. Click on **OAR Formula Rpt** in the left side menu.

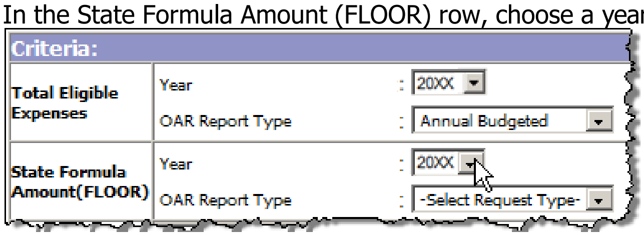
3. Enter criteria for your report. In the Total Eligible Expenses Row, choose a Year.



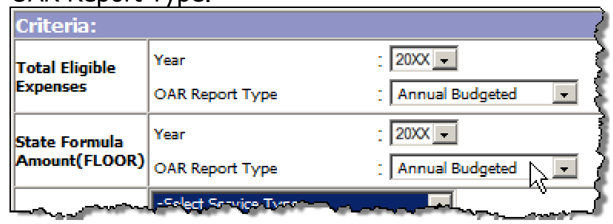
4. In the Total Eligible Expenses Row, choose an OAR Report Type.



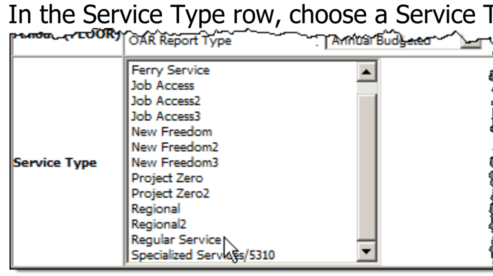
5. In the State Formula Amount (FLOOR) row, choose a year.



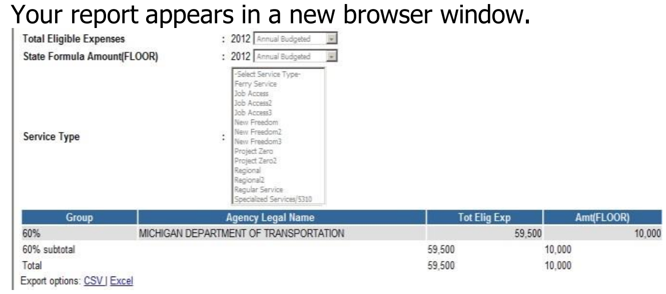
6. In the State Formula Amount (FLOOR) row, choose an OAR Report Type.



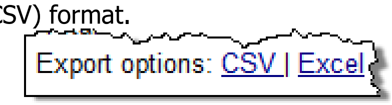
7. In the Service Type row, choose a Service Type.



8. Your report appears in a new browser window.



9. To save a copy of the report, click one of the two Export options links at the lower left corner of the report. You can choose to save in Excel file format or comma-separated values (CSV) format.



Get PTMS Help

PTMS • # Milestone Reporting • *How To…*

Task Overview:

- Create a New Milestone Report – Quarterly
- View/Print an Existing Milestone Report
- Edit an Existing/Submitted Milestone Report
- Get Help with PTMS

Tips:

- *Enter whole dollar amounts without punctuation.*
- *Enter data by row using the **Tab** key.*
- *Enter data by column using the **Enter** key.*

Instructions

1. **Creating a New Milestone Report:** On the first day of the following quarter sign in to your agency. From the left side navigation menu, choose **Milestone Reporting.**

2. You will see each project for all open authorizations. Click the **Authorization #** for the milestone you wish to complete. Note: Any milestone marked *Project Complete* should not be redone. **The milestones marked *Project Complete* will not leave the milestone report area until all lines on the authorization have been completed.**

3. Click the **Milestone Report tab** at the top of the screen. The *Project Description tab* will be populated by MDOT program managers based on your verification form and should not be editable.

4. If applicable, select the appropriate year and quarter from the **Fiscal Year and Quarter** drop-down boxes. (These fields should be auto-populated.)

5. Enter the dollar amount (in whole numbers) in the **Total Cost to Date** field. This should be the amount which has been reimbursed to your agency from MDOT. If the purchase is being made with multiple authorizations, list only the portion being paid from the authorization associated with the milestone you are completing. The **Total Cost to Date** should not exceed the authorization amount. Local funds spent above the authorization amount should not be included. Any cost you have not yet incurred should not be included. i.e. a bus that has been ordered but not delivered.

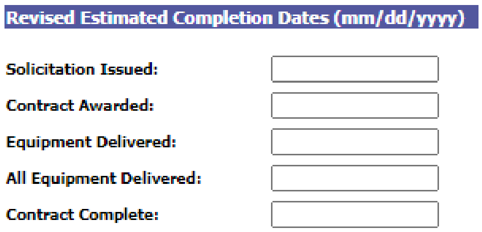
6. The **Original Estimated Completion Dates** will be entered by the program managers based on your verification forms. If you are purchasing vehicles from the state vehicle contract, the **Solicitation Date** and **Award Date** should be the dates the state contract was solicited and awarded. Dates are available on MDOT's state vehicle website listed under Current Contracts.

7. The **Previous Estimated Completion Dates** will already be populated with the data entered in the previous quarterly milestone report. The history button will show all activity over the entire project.

8. If the project is not yet complete the **Revised Estimated Completion Dates** fields need to be entered. You *should not* have **Revised Estimated Completion Dates** AND **Actual Completion Dates** for the same activity. If this authorization has multiple projects the **Solicitation Issued, Contract Awarded, Order Date,** and **Delivery Date** should be populated for the first item completed. Once the final item of the authorization has been completed the **All Items Delivered** and **Actual Completion** dates can be entered. The **Actual Completion** date should be the date that you received final reimbursement for the project or the authorization expiration date. The **Quarterly Activity** field can be used to show the progress dates of each different project within the authorization. Dates should not be entered into the **Revised Estimated Completion Dates** area unless there is a change from the previous estimated dates.

Actual Completion Dates (mm/dd/yyyy)	
Solicitation Issued:	02/14/2020
Contract Awarded:	02/17/2020
Equipment Delivered:	02/27/2020
All Equipment Delivered:	03/20/2020
Contract Complete:	03/22/2020

9. All dates entered into the **Revised Estimated Completion Dates** section should be future dates from the date the report is being completed, not a previous date.


Revised Estimated Completion Dates (mm/dd/yyyy)

Solicitation Issued:

Contract Awarded:

Equipment Delivered:

All Equipment Delivered:

Contract Complete:

10. If the **Revised Estimated Completion Dates** are later than the dates in the **Previous Estimated Completion Dates** field, then an explanation will need to be entered in the **Explain Delay** field. According to the project authorization <u>all funds must be obligated</u> (buses ordered, issue third party contracts, purchase equipment, complete facility improvements, etc.) <u>within six months</u> of receiving an executed project authorization. If later than six months, provide an explanation in the **Explain Delay** field

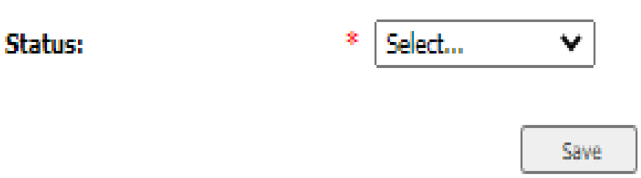
11. **Multiple Grants** - click either the yes or no button. If the yes button is chosen, list all other grants, authorization numbers, and total budget amounts that are funding this project.

12. **Contract on Schedule** - click either the yes or no button. If no, enter an explanation in the **Explain Delay** field. A project is not on schedule if the **Original Estimated Completion Dates** or **Revised Estimated Completion Dates** have been exceeded. If a project was not on schedule in a previous quarter, but is now back on schedule mark yes that the project is on schedule.

13. **Anticipated Next Quarter Activity**– enter a narrative explaining what will be accomplished in the next quarter. There should be anticipated activity on all open projects.

14. **MDOT Comments** - for MDOT staff use only.

15. When the milestone report is complete select **Submit** from the **Status** field. Then click **Save**.


Status: * Select...

Save

16. Your project manager will be automatically notified by email when your report is submitted.

---

1. <u>**View & Print a Milestone Report:**</u> From the left side navigation menu, choose **Milestone Reporting**. You will see each of the authorization #'s in bold that has a milestone report to print for each grant that is open.

2. Click the bolded **Authorization #** for the milestone that you wish to view/print.

3. Click the **Milestone Report tab** at the top of the screen.

4. Click on the **Generate PDF Report** at the bottom of the screen to view/print the report.

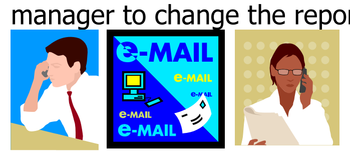
---

1. <u>**Edit an Existing/Submitted Milestone Report**</u>**:** From the left side navigation menu, choose **Milestone Reporting.** You will see each of the authorization #'s in bold that has a milestone report to complete for each grant that is open.

2. Click the bolded **Authorization #** for the milestone that you wish to edit.

3. Click the line for the report you want to view.

4. The milestone **Status** must be in "Resubmit" to make changes. If necessary, ask your project manager to change the report Status to "Resubmit."



5. Edit any required information, following the instructions given above under the topic *Creating a New Milestone Report.* (See steps 1 to 15.)

6. When the milestone report is complete select **Submit** from the **Status** field. Then click **Save**.

7. Your project manager will be automatically notified by e-mail when your report is resubmitted.

Get PTMS Help

Equipment Inventory — *How To…*

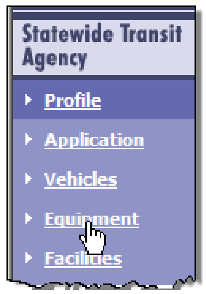
Task Overview:

- Add New Equipment
- Change Current Equipment Information
- Document Local Sale and Disposal of Equipment
- Change Equipment Status to Disposed
- Verify/Complete an Annual Application
- Get Help with PTMS

Instructions

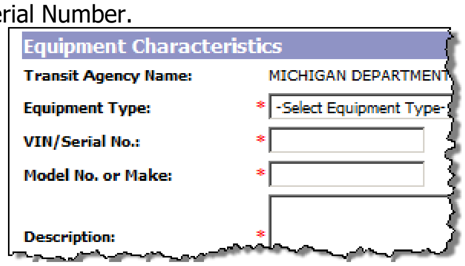
1. **Add New Equipment:** Sign in and click on the name of your agency from the list.

   From the left side navigation menu, choose **Equipment**.



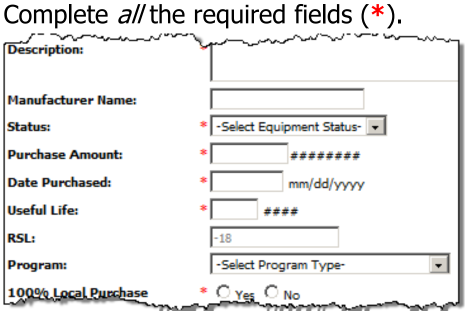
2. Click the **New** button.

3. Enter equipment information on *Equipment Characteristics* screen. Be sure to fill the many required fields ("*"). Be very careful when entering the Vehicle ID Number (VIN) or Serial Number.



! Extreme care must be exercised in entering the Vehicle Identification Number (VIN). Once saved, this is the vehicle's data key and is difficult to change. Be sure to enter a VIN in all caps and double check the vehicle title to assure letters/numbers are used correctly. If you make an error entering a VIN, or if the VIN already exists in PTMS, please notify Jeff Turner (contact information on next page).

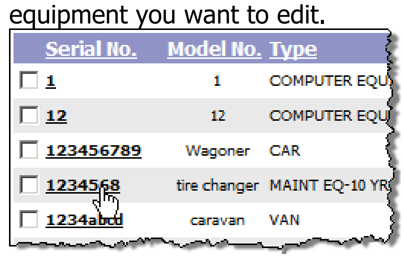
4. Complete *all* the required fields (*).



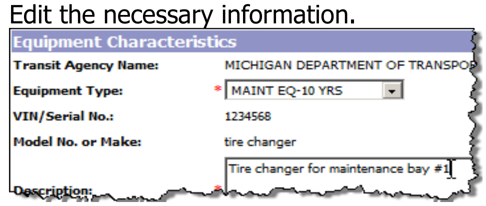
5. Click the **Save** button at bottom of screen.

1. **Changing Current Equipment Information:** From the left side navigation menu, choose **Equipment**.

2. Click the line displaying summary information for the equipment you want to edit.



3. Edit the necessary information.



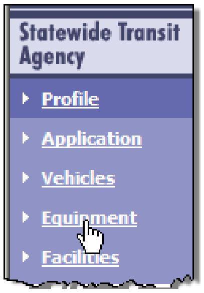
4. When you have completed your changes, click **Save**.

1. **Equipment Local Sale & Disposal:** Submit the required paperwork to MDOT if the equipment is being sold. Please complete the Equipment Disposal/Transfer Request Form, which is available at https://mdotcf.state.mi.us/public/webforms/public/3651.pdf. For details, refer to the OPT website at https://www.michigan.gov/mdot/travel/mobility/pub-transit, Resources, Reference Manual for Transit Agencies, Equipment-Facilities, Local Disposal of Vehicles or Equipment.

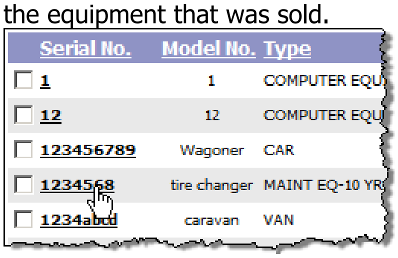
2. When a piece of equipment is approved for disposal by your project manager, you may proceed with the disposal.

3. **Once the equipment is disposed of**, you will need to change the *status* of the equipment to *Disposed*. (See below.)

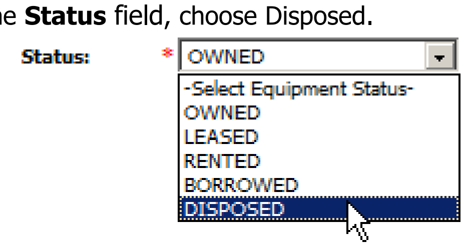
a. **Change Equipment Status to Disposed:** From the left side navigation menu, choose **Equipment**.



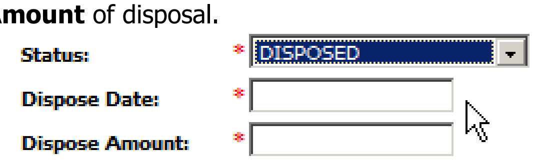
b. Click on the line displaying summary information for the equipment that was sold.



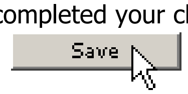
c. In the **Status** field, choose Disposed.



d. Enter other requested information such as **Date** and **Amount** of disposal.

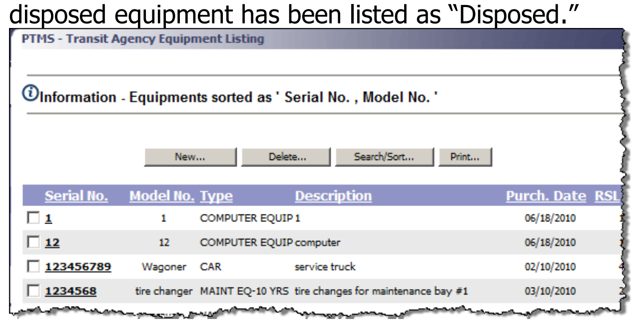


e. When you have completed your changes, click **Save**.

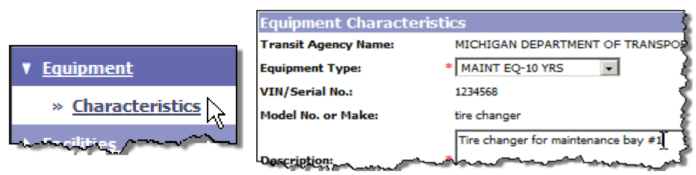


1. **Verify/Complete Annual Application:** From the left side navigation menu, choose **Equipment**.

2. Verify all equipment is listed in the inventory, and all disposed equipment has been listed as "Disposed."



3. On the *Equipment Characteristics* screen, make necessary updates, and verify/complete all other data.



4. When you have completed your changes, click the **Save** button at the bottom of the screen.

Note: *RSL (Remaining Service Life) field will automatically populate with the number of years before the asset meets its useful life.*

Get PTMS Help

Facility Inventory • *How To…*

Task Overview:

- Add New Facility
- Change Current Facility Information
- Document Local Sale and Disposal of a Facility
- Change Facility Status to Disposed
- Verify/Complete an Annual Application
- Get Help with PTMS

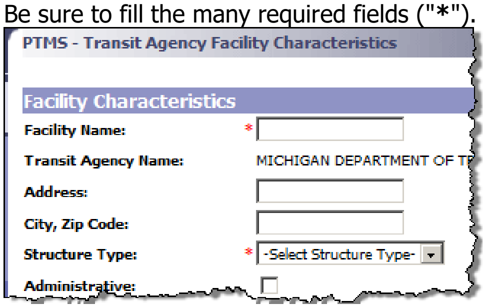
Instructions

1. **Add New Facility:** Sign in and click on the name of your agency from the list.

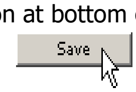
   From the left side navigation menu, choose **Facilities**.

2. Click the **New** button.

3. Enter facility information on *Facility Characteristics* screen. Be sure to fill the many required fields ("*").



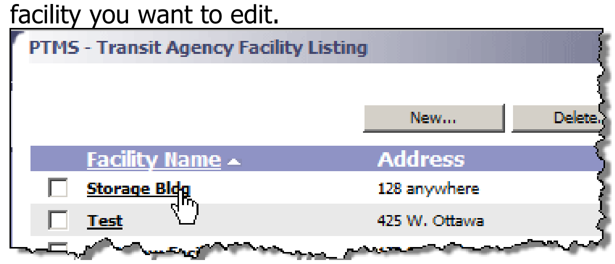
4. Click the **Save** button at bottom of screen.



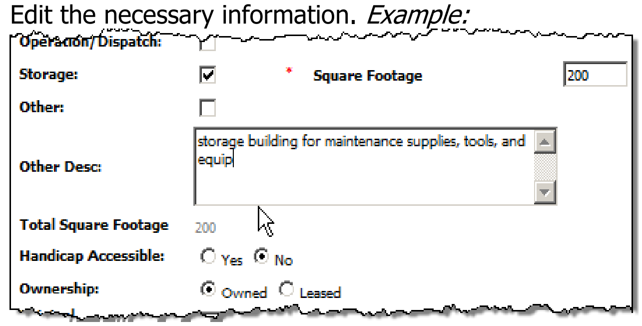
Note: *The Improvement area is only used when a facility is being renovated.*

1. **Changing Current Facility Information:** From the left side navigation menu, choose **Facilities**.

2. Click the line displaying summary information for the facility you want to edit.



3. Edit the necessary information. *Example:*



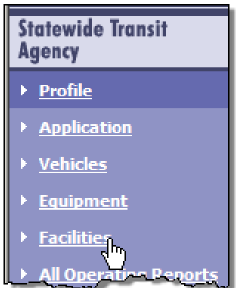
4. When you have completed your changes, click **Save**.

1. **Local Disposal of Transit Real Property:** Submit the required paperwork to MDOT if the facility is being sold. Please complete the Excess Real Property Inventory and Utilization Plan form which is available at https://mdotcf.state.mi.us/public/webforms/public/2917.pdf. For details, refer to the OPT website at Public Transportation (michigan.gov), Resources, Reference Manual for Transit Agencies, Equipment-Facilities, Local Disposal of Transit Real Property.

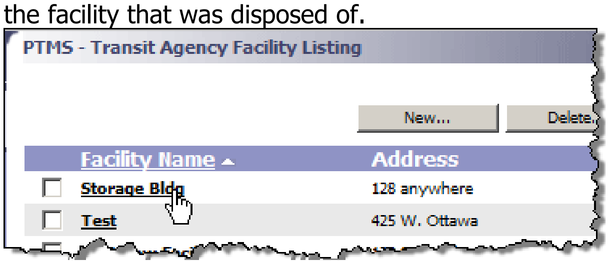
2. Dispose of the facility according to the approved disposal method, **after** receiving MDOT's written notice to proceed.

3. Once the facility is disposed of, you will need to change the *status* of the facility to *Disposed*. (See below.)

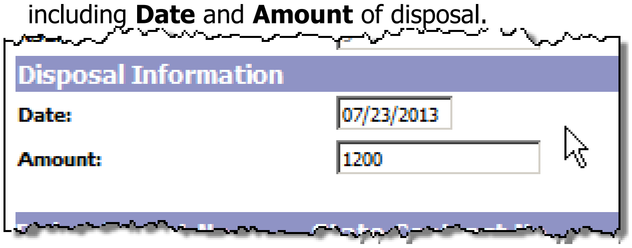
a. **Change Facility Status to Disposed:** From the left side navigation menu, choose **Facilities**.



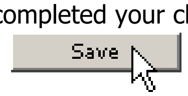
b. Click on the line displaying summary information for the facility that was disposed of.



c. Scroll down to enter requested Disposal Information including **Date** and **Amount** of disposal.

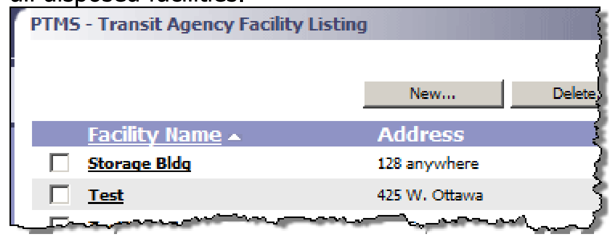


d. When you have completed your changes, click **Save**.

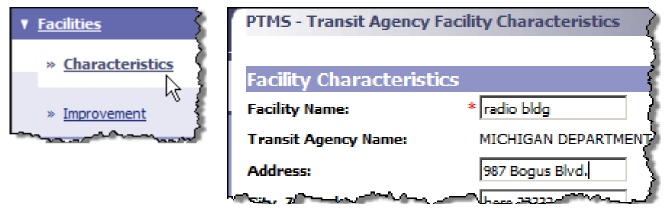


1. **Verify/Complete Annual Application:** From the left side navigation menu, choose **Facilities**.

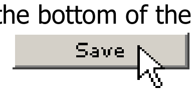
2. Verify all facilities are listed in the inventory, including all disposed facilities.



3. On the *Facility Characteristics* screen, for each facility, make all the necessary updates, and verify/complete all other data.



4. When you have completed your changes, click the **Save** button at the bottom of the screen.



Get PTMS Help

Task Overview:

- Add a New Vehicle
- Change Current Vehicle Information
- Document Local Sale and Disposal of a Vehicle
- Change Vehicle Status to Disposed
- Verify/Complete an Annual Application
- Get Help with PTMS

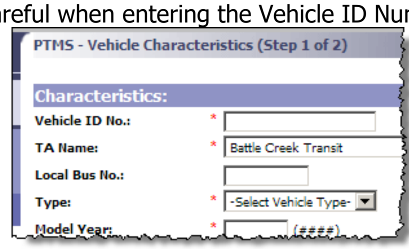
Instructions

1. **Add a New Vehicle:** Sign in and click on the name of your agency from the list.

   From the left side navigation menu, choose **Vehicles**.

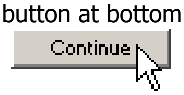
2. Click the **New** button.

3. Enter vehicle information on *Vehicle Characteristics* screen. Be sure to fill the many required fields ("*"). Be very careful when entering the Vehicle ID Number (VIN).

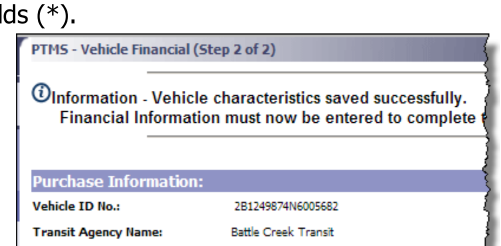


! Extreme care must be exercised in entering the Vehicle Identification Number (VIN). Once saved, this is the vehicle's data key and is difficult to change. Be sure to enter a VIN in **all caps** and double check the vehicle title to assure letters/numbers are used correctly. If you make an error entering a VIN, or if the VIN already exists in PTMS, please notify Jeff Turner (contact information on next page).

4. Click the Continue button at bottom of screen.



5. Enter vehicle information on the *Financial Information* screen, *using no punctuation*. Complete all the required fields (*).



   1) be sure to enter the in-service date on the Characteristics page.
   2) the State Contract Number and Federal Grant Number can be found on the first page of your project authorization
   3) enter the correct funding split 80/20, 90/10, etc. for the vehicle
   4) project number is the job number found on the upper right hand corner of the project authorization
   5) useful life of the vehicle can be found on the top of the vehicle order form or the Altoona testing certificate

6. Click the **Save** button at the bottom of the screen.

7. **Note:** *The Improvement area is only used when vehicles are being rehabbed.*

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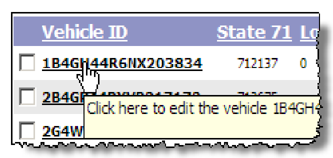
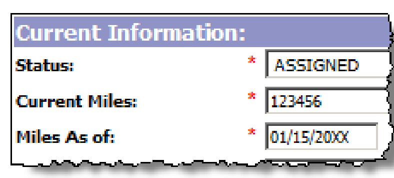
1. **Changing Current Vehicle Information:** From the left side navigation menu, choose **Vehicles**.

2. Click the line displaying summary information for the vehicle you want to edit.



3. Edit the necessary information. For mileage updates, please enter new values for **Current Miles** and **Miles As Of** date.



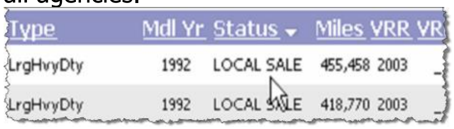
4. When you have completed your changes, click **Save**.

1. **Vehicle Local Sale & Disposal:** Submit the required paperwork to MDOT if the vehicle is being sold. Please complete the Vehicle Disposal/Transfer Request Form, which is available at https://mdotcf.state.mi.us/public/webforms/public/3650.pdf.

For details, refer to the OPT website at www.Michigan.gov/MDOTOPT, Resources, Reference Manual for Transit Agencies, Equipment-Facilities, Local Disposal of Vehicles or Equipment.

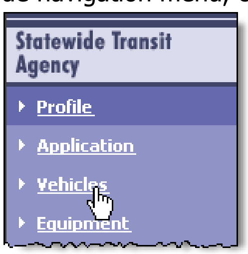
2. If vehicle titles show the State of Michigan as first secured party, send the title(s) to your project manager along with the vehicle disposal form.

3. When a vehicle is approved for disposal, MDOT will change the PTMS *status* of that vehicle to *Local Sale* for all agencies.

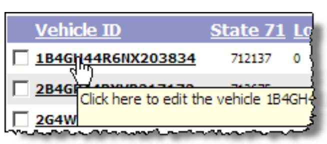


4. **Once the vehicle is sold**, you will need to change the s*tatus* of the vehicle to *Disposed*. (See below.)

a). **Change Vehicle Status to Disposed:** From the left side navigation menu, choose **Vehicles**.



b). Click on the line displaying summary information for the vehicle that was sold.



c). In the **Status** field, choose Disposed.

d). PTMS will ask you to confirm the status change. Click OK to continue.

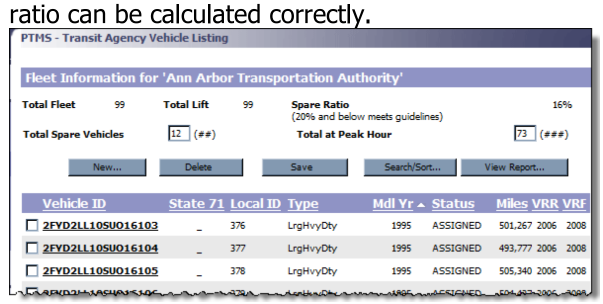
e). Scroll down to enter other requested information such as **Date** and **Amount** of disposal, and update **Current Miles** and **Miles As Of** fields. The same dollar amount should be recorded on the quarterly OAR that corresponds to the sale of the vehicle

f). When you have completed your changes, click **Save**.

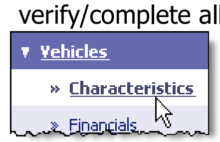
Note: *Once you have changed the Status to Disposed and Saved the record, that vehicle will no longer appear on your inventory. However, the vehicle can still be viewed in the Statewide Vehicle section on the left side of the screen.* **Your project manager will receive notification when submitted.**

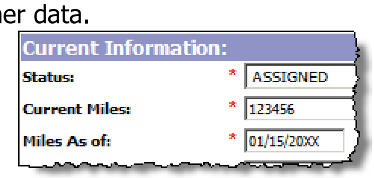
1. **Verify/Complete Annual Application:** From the left side navigation menu, choose **Vehicles**.

2. Verify all revenue vehicles are listed in the inventory, and all disposed vehicles have been removed. Also verify the numbers in the Total Spare Vehicles field and Total at Peak Hour field to ensure that the total of both fields matches the number in the Total Fleet field so the spare ratio can be calculated correctly.



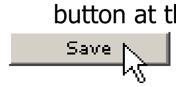
3. On the *Vehicle Characteristics* screen, for each vehicle, update the **Miles** and **Miles As Of** date, and verify/complete all other data.





4. On the Financial screen, for each vehicle, indicate if a replacement for this vehicle has been requested, and verify/complete all other data.

5. When you have completed your changes, click the **Save** button at the bottom of the screen.



Get PTMS Help