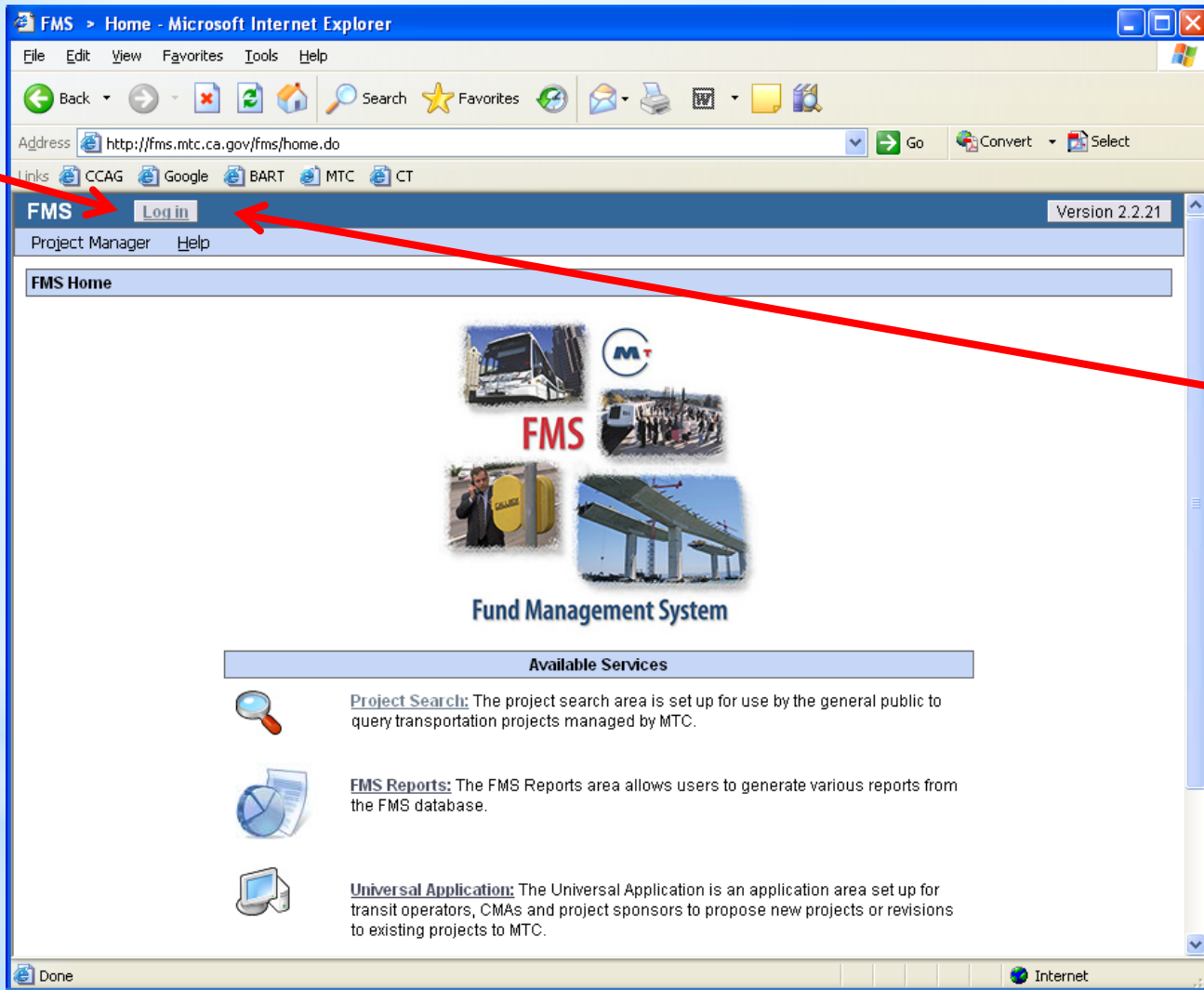


* Creating a New Project in FMS

August 2014

* FMS TIP Entry

Log in



Go to the FMS Homepage and Log In.

All agencies should have someone who can log on.

If you don't have an account see "Creating an FMS Account" module.

<http://fms.mtc.ca.gov/fms/home.do>

* FMS TIP Entry



FMS Home

Project Manager Universal Application Report Manager Help

Version 3.0.39

FMS

Fund Management System

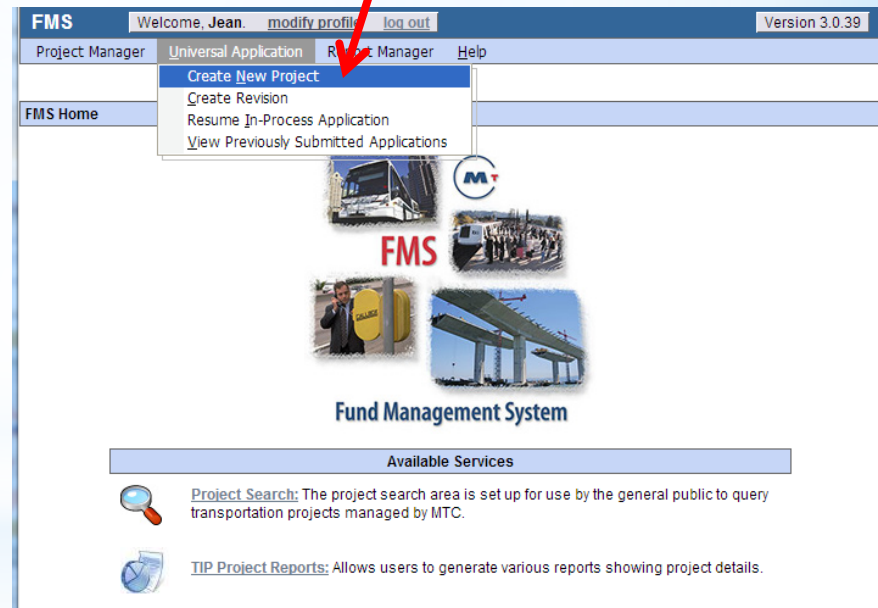
Available Services

- Project Search:** The project search area is set up for use by the general public to query transportation projects managed by MTC.
- TIP Project Reports:** Allows users to generate various reports showing project details.
- Funding Reports:** Allows users to generate various reports showing funding details.
- TIP Reports:** Allows users to generate various reports showing details related to the TIP.
- Air Quality Conformity Reports:** Allows users to generate various reports showing Air Quality Conformity related details.
- Universal Application:** The Universal Application is an application area set up for transit operators, CMAs and project sponsors to propose new projects or revisions to existing projects to MTC.
Note that this section requires an authenticated user profile to the FMS Secure Portal. If you do not have an activated user profile, please [create one](#) before proceeding.

FMS requires that web browsers have JavaScript enabled. Furthermore, for data integrity purposes, the back button of your browser has been disabled during the usage of the FMS Application. Please view the [Browser Requirements](#) for details and supported browsers.

Select the "Universal Application"

Since this is a "new" project with no previous entry select "Create a New Project".



FMS Home

Project Manager Universal Application Report Manager Help

Version 3.0.39

FMS

Fund Management System

Available Services

- Project Search:** The project search area is set up for use by the general public to query transportation projects managed by MTC.
- TIP Project Reports:** Allows users to generate various reports showing project details.

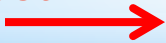
<http://fms.mtc.ca.gov/fms/home.do>

* FMS TIP Entry

If you started inputting a “new” project but didn’t finish and want to resume where you left off then select “Resume In-Process Application” and search for your project

If you are “revising” a project that was already “submitted” by the CMA and is already in the TIP, see “[Revising a project in FMS](#)” module.

Create a
new project



FMS Welcome, Jean. [modify profile](#) [log out](#) Version 3.0.39

[Project Manager](#) [Universal Application](#) [Report Manager](#) [Help](#)

[FMS Home](#)

- Create **N**ew Project
- C**reate Revision
- R**esume **I**n-Process Application
- V**iew Previously Submitted Applications

FMS

Fund Management System

Available Services

- Project Search:** The project search area is set up for use by the general public to query transportation projects managed by MTC.
- TIP Project Reports:** Allows users to generate various reports showing project details.
- Funding Reports:** Allows users to generate various reports showing funding details.

* FMS TIP Entry

Note that information is required under multiple tabs

Universal Application

General Information Description Location Funding Delivery Milestones Screening Criteria Contact Information Project Documents Air Quality Review RTP Information

TIP ID County Project name Project Version Number 0 Implementing Agency FMS ID Submode

Please don't close this window. Use SAVE or CANCEL to exit. This will unlock this project for other users to edit.

General Information - Step 1 of 9 [Glossary](#) [Application Assistant](#) [Contact Us](#)

Next Save Cancel

Example

*Project Name (Not to exceed 50 characters) Project name: SR 29 Rio Del Mar Intermodal Station

*Primary Program Being Modified: Select All Primary Program Being Modified: CMAQ Clear Air Program

*County: Select One County: Napa

*Sponsor: Select One Sponsor: Amer Canyon

*Implementing Agency: Select One Implementing Agency : Amer Canyon

*Reason for Revision (Not to exceed 255 characters) Reason for Revision: Take advantage of cost savings available. Programmed funds being reduced due to cost savings with the reduced funds transferred to NAP991031.

*Description of Change (Not to exceed 2000 characters) Description of Change: Reduce CMAQ funds in FY 04 by \$250,000 and transfer the funds to NAP991031.

*Is project completed/open for traffic: Select One

*RTP Cycle: Plan Bay Area View Projects and RTP IDs in Plan Bay Area

*RTP ID: Select One

RTP Title

RTP Project Cost: \$0

<http://rtp.mtc.ca.gov/2040/>

This is just an example so you know what type of information MTC needs.

Do not type this in verbatim.

You can find your RTP ID from <http://rtp.mtc.ca.gov/2040/>

* FMS TIP Entry

Note that information is required under multiple tabs

The screenshot shows the FMS web application interface. The browser title is "FMS | Funding - Windows Internet Explorer". The URL is "http://fms.mtc.ca.gov/fms/listProjectFundingAction.do?projectVersionSeq=19567". The page title is "VIEW PROJECT San Mateo County Traffic Incident Management".

Navigation tabs include: Project Detail, **Funding**, Contacts, Location, Lineage, Comments, Delivery Milestones, Screening Criteria, Project Documents, Air Quality, and << Back to project search results.

Project Information:

TIP ID	SM-070037	Status	ACTIVE	County	San Mateo	Project name	San Mateo County Traffic Incident Management
FMS ID	4031.00	Version	8	Implementing Agency	CCAG	Sponsor	CCAG

Fund Monitoring Last Updated By kkao@mtc.ca.gov On 03/30/2012 For Funding with Programmed Amount 515,000

	Fund Code	Phase	Appn Year	Program Year	Prog Amount	Fund No	Dist	EANO	PPNO	CTC Allocation Date	CTC Allocation Amount	Prefix	Fed Proj ID	FHWA Obligation Date	FHWA Oblig Amount	FTA Grant No.	FTA Grant Date	FTA Grant Amount	Toll Credit %	Toll Credit Amount
View	CMAQ-T3-3-RO	PSE	2009	2009	367,000		04	4A9208L					6419007	01/28/2009	367,000					
View	OTHER LOCAL	PE	2009	2009	150,000															
View	RIP-T3-08-SM-ST	PSE		2009	2,000,000				2140F	10/30/2008	2,000,000									
View	RIP-T3-08-SM-ST	CON		2011	7,500,000		04		2140F	01/20/2011	5,270,000									
View	PROP-1B-TLSP	CON		2011	8,000,000															
View	RIP-T3-08-SM-ST	PSE		2010	1,000,000		04		21240F											
View	SALESTAX-MEASURE-SM	CON		2011	3,000,000		04		2140F											
View	OTHER LOCAL	CON		2010	1,000,000		04		2140F											
View	OTHER LOCAL	PE		2010	200,000		04	4A920	2140F											
View	OTHER LOCAL	PSE		2010	50,000															
View	OTHER LOCAL	ROW-CT		2010	10,000		04	4A920	2140F											

Funds should be rounded to thousands

Done, but with errors on page. Internet 100%

* FMS TIP Entry

Air Quality Tab is important. This will hold up your obligation if left blank.

Make sure that Step 1 status is completed and says project is exempt.

Task force will meet and make a determination. Then you get an email.

Save the email you will need it to obligate funds later.

The screenshot shows the FMS Air Quality interface. The 'Air Quality' tab is selected, and the 'Air Quality' sub-tab is active. The interface displays project details, regional conformity information, and a project conformity analysis summary.

Project Details:

TIP ID	SM-110029	Status	ACTIVE	County	San Mateo	Project name	Pacifica FY 2010-2011 Pavement Rehab Program
FMS ID	4921.00	Version	1	Implementing Agency	Pacifica	Sponsor	Pacifica

Regional Conformity:

Air Quality Code	1.10	Air Quality Description	EXEMPT (40 CFR 93.126) - Pavement resurfacing and/or rehabilitation
Air Basin	San Francisco Bay Area	Air District	Bay Area AQMD

Project Conformity Analysis Summary:

Milestone	Status	Comments
Step 1 - Project Identification	Completed	Project exempt from both regional and project level air quality conformity as per 40 CFR 93.126.(Safety - Pavement resurfacing or rehabilitation) Project is NOT a POAQC per the exemption code listed above Date of Consultation: 3/07/2011 Date of Action: 3/07/2011
Sponsor Input	Completed	
System Determination	Completed	
Task Force Determination	Completed	
Step 2 - Interagency Consultation	N/A	
Sponsor Input		
Task Force Determination		
Step 3 - PM 2.5 Hot Spot Analysis	N/A	
Sponsor Input		

* FMS TIP Entry

Add a
funding line

Because there are a lot of
questions about entering the
fund lines.....

Universal Application

General Information	Description	Location	Funding	Delivery Milestones	Screening Criteria	Contact Information	Project Documents	Air Quality	Review
---------------------	-------------	----------	---------	---------------------	--------------------	---------------------	-------------------	-------------	--------

TIP ID		Project Version number	0	FMS ID	5563.00
County	San Mateo	Implementing agency		Mode	LOCAL ROAD
Project name	Sample				

Funding - Step 4 of 7 [Glossary](#) [Application Assistant](#) [Contact Us](#)

Note: Non-editable fund lines represent data from the active project and are only displayed for informational purposes. Only the editable fund lines will be added to the project revision. To deleted newly added fund lines simply click the link that corresponds to the fund line(s) to be deleted. For historical purposes, existing fund lines cannot be deleted, users can only update a zero amount to the fund line to indicate that the Fund Source is no longer used.

Note: At least one funding line should be entered.

Error on page. Internet 100%

* FMS TIP Entry

Entering fund information

Click "Fund Code." The screen below will pop up.

Use pull down to find general fund usually "CMAQ" or "STP" or "Local"

Then click here and select fund code from drop down list

"Select" appropriate fund code. To be provided by MTC or C/CAG. We will forward that to awarded project sponsors or just ask us for the fund code.

The screenshot shows the 'Add Fund Monitoring' form. It has a 'Save' and 'Cancel' button at the top. Below is the 'Project Information' section with a table:

TIP ID	County	Project Name	Sponsor	Implementing Agency	FMS ID	Status	Version	Revision No	Last Update
	San Mateo	Sample	CCAG		5563.00	INPROCESS	0		10/26/2012

Below the table are fields for 'Sponsor DUNS No', 'Implementing Agency DUNS No', and 'County FIPS Code'. The 'Fund Programming Information' section contains several dropdown menus and input fields:

*Fund Code	*Phase	Appn Year	*Prog Year	*Prog Amount	Approved Funding	Non TIP
	Select One	Select One	Select One		Yes	No

The screenshot shows the 'Fund Codes - Windows Internet Explorer' window. The URL is <http://fms.mtc.ca.gov/fms/selectFundCode.do?fundCode=>. The page asks to 'Please select filter parameters to find available fund code(s):'. There are several dropdown menus for filtering:

- *Fund source: Select One
- Authorization: Select One
- Cycle (Use with STP/CMAQ/RIP/IIP fund sources only): Select One
- County (Use with RIP only): Select One
- Urbanized Area (Use with FTA fund sources only): Select One

At the bottom, there are 'Find Available Fund codes' and 'Clear' buttons. Below the buttons, it says 'No Records found. Please select proper combination of Fund Source and Cycle. Close this window by selecting "Close Window" text below. Close Window'.

The screenshot shows the 'Fund Codes - Windows Internet Explorer' window with a list of available fund codes. The table has the following columns: Fund Code, Fund Source Code, Authorization, Cycle, Cat.1, Cat.2, Cat.3, Cat.4, Cat.8, County, and Urbanized Area.

Fund Code	Fund Source Code	Authorization	Cycle	Cat.1	Cat.2	Cat.3	Cat.4	Cat.8	County	Urbanized Area
select CMAQ-T2-FY00-CM	CMAQ	T2	FY00	CM						
select CMAQ-T2-FY00-CS	CMAQ	T2	FY00	CS						
select CMAQ-T2-FY00-OTHER	CMAQ	T2	FY00	OTHER						
select CMAQ-T2-FY00-RA8	CMAQ	T2	FY00	RA8						
select CMAQ-T2-FY00-RE	CMAQ	T2	FY00	RE						
select CMAQ-T2-FY00-RT	CMAQ	T2	FY00	RT						
select CMAQ-T2-FY01-TLC	CMAQ	T2	FY01	TLC						
select CMAQ-T2-FY02-TLC	CMAQ	T2	FY02	TLC						
select CMAQ-T2-FY99-TLC	CMAQ	T2	FY99	TLC						
select CMAQ-T2-FY99-30	CMAQ	T2	FY99	30						
select CMAQ-T2-FY99-CBDM	CMAQ	T2	FY99	CBDM						
select CMAQ-T2-FY99-RE	CMAQ	T2	FY99	RE						
select CMAQ-T2-FY99-TLC	CMAQ	T2	FY99	TLC						
select CMAQ-T2-GOL-AYD	CMAQ	T2					GOL			
select CMAQ-T2-TEA-21	CMAQ	T2		TEA-21						
select CMAQ-T3-1-A-D	CMAQ	T3	1	A-D						
select CMAQ-T3-1-A-D-SPN	CMAQ	T3	1	A-D-SPN						

* FMS TIP Entry

Entering fund information

Fill in remaining information then save

Project Manager Universal Application Report Manager Help

Add Fund Monitoring

Save Cancel

Project Information

TIP ID	County	Project Name	Sponsor	Implementing Agency	FMS ID	Status	Version	Revision No	Last Update
	San Mateo	Sample	CCAG		5563.00	IPROCESS	0		10/26/2012

Sponsor DUNS No Implementing Agency DUNS No County FIPS Code

Fund Programming Information

*Fund Code	*Phase	Appn Year	*Prog Year	*Prog Amount	Approved Funding	Non TIP
	Select One	Select One	Select One		Yes	No

Monitoring Information

Project Detail Funding Contacts Location Lineage Comments Delivery Milestones Screening Criteria Pr Toll Credit Toll Credit

TIP ID	Status	County	Project name
SM-110026	ACTIVE	San Mateo	Skyway/Shoreway Bike Route Im

FMS ID	Version	Implementing Agency	Sponsor
4945.00	2	Redwood City	Redwood City

Fund Monitoring Last Updated By marand@mtc.ca.gov On 04/03/2012 For Funding with Programmed Amount 218,000

	Fund Code	Phase	Appn Year	Program Year	Prog Amount	Fund No	Dist	EANO	PPNO	CTC Allocation Date	CTC Allocation Amount	Prefix	Fed Proj ID	FHWA Obligation Date	FHWA Oblig Amount	FTA Grant No.	FTA Grant Date	FT/ Gra Amo
View	CMAQ-T4-1-RBP-CO	CON	2012	2012	218,000		04	04120001911L0				CML	5029028	03/16/2012	159,000			
View	OTHER LOCAL	CON		2012	28,200													
View	OTHER LOCAL	PE		2012	5,000													
View	CMAQ-T4-1-RBP-CO	PE	2012	2012	38,000			0400021136L				CML	5029028	10/18/2011	38,000			

Repeat this process for each line of funds.....example:

- Federal PE funds
- Local match for PE funds
- Federal CON funds
- Local match for CON funds