TPF TRANSPORTATION POOLED FUND

WEB USER MANUAL

May 2022

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To navigate throughout the document, move the cursor over a section and **Click (PDF)** or **Ctrl+Click (Word)**.

WHAT IS THE TPF WEBSITE?

In 1977, 23 Code of Federal Regulations (CFR) § 560.3 first defined the Transportation Pooled Fund (TPF) Program as a Federal Highway Administration (FHWA)-administered program in coordination with State departments of transportation (DOT). Historically, maintaining TPF projects involving several partners, while disseminating information to them and other parties, was a very complicated and time-consuming process. To make the communication process easier, FHWA held a "Reengineer the TPF Program" workshop for State DOTs at the Turner-Fairbank Highway Research Center in McLean, VA, in 1999. At the workshop, which primarily focused on improving the administrative efficiency of the program, the idea of an interactive website was born.

The website was launched in 2003 at www.pooledfund.org. Accessible to anyone with an interest in pooled fund studies, the site serves as a place where all project partners can post and update information. The site allows for online solicitations and commitments of prospective partners and posting of progress reports, submittals, and deliverables. It also serves as a tool for tracking and producing reports on pooled fund activities. In September 2021, the TPF website went through a streamlining and updating process to make it more efficient for users.

Site enhancements are evaluated each year as part of an ongoing effort to improve the efficiency of the TPF Program. The interactive site not only has enhanced communication among TPF Program participants but also helps to promote the great research and innovation being done through the program!

PURPOSE

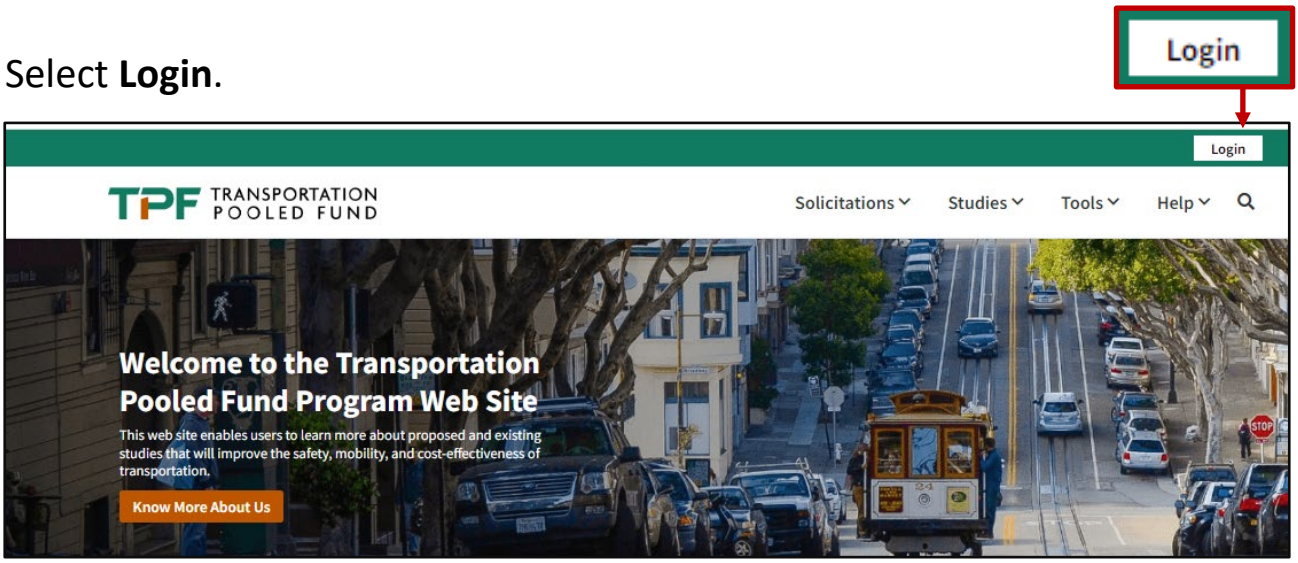
The purpose of this document is to provide the TPF website's authorized users with instructions for navigating through the many functions of the website. There are many functions that authorized users must be able to perform to carry out their duties as a lead study contact, funding contact, and other delegated duties. Knowledge of the website's functions will ensure project information is kept up to date and correct.

CAUTION

The new TPF website is **incompatible with Internet Explorer**.

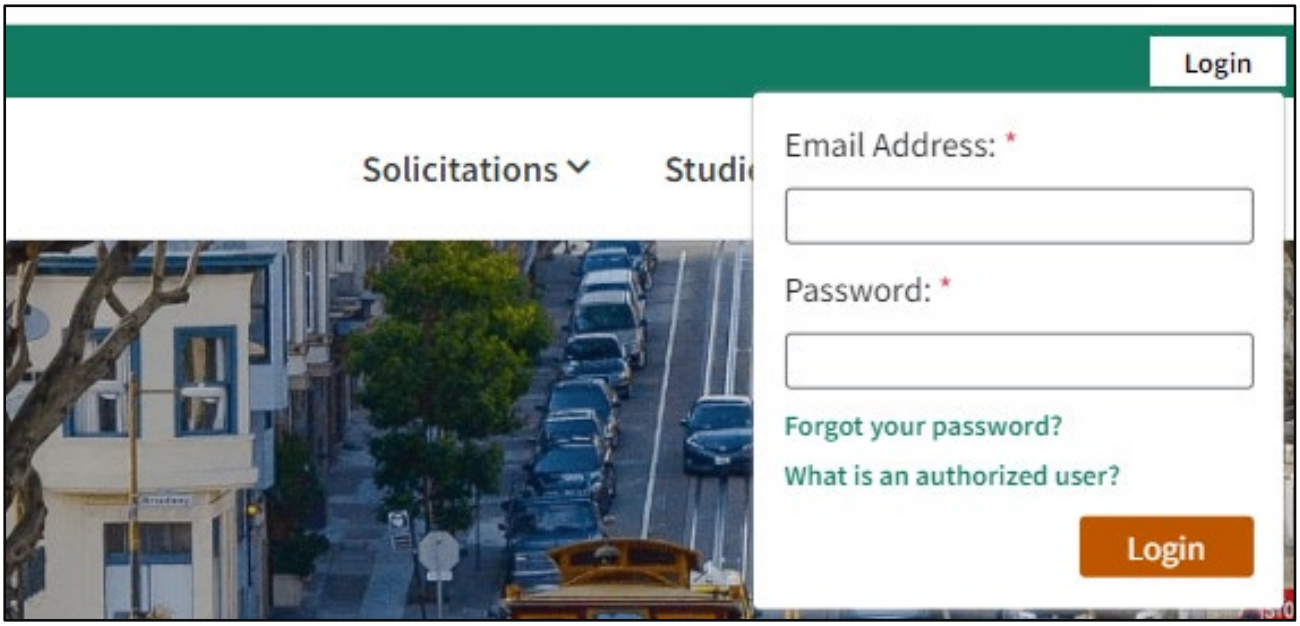
TPF WEB PAGE LOGIN

Select **Login**.



Ensure you have an account that was created by one of the TPF site webmasters. If you do not have an account, reach out to the TPF program manager.

Login with your **Email** and **Password**.



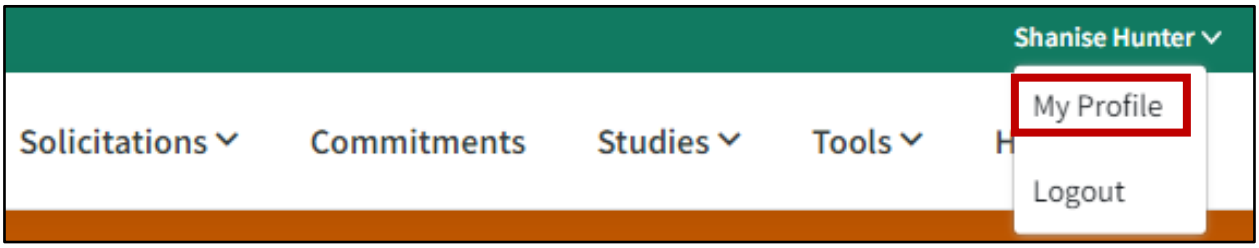
CAUTION

If you forgot your password, please click on **"Forgot your password?".**

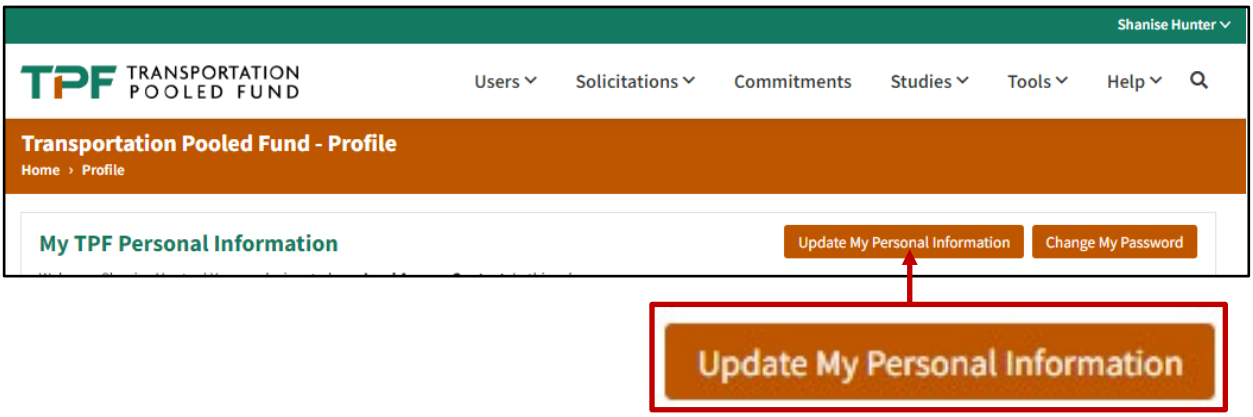
PROFILE INFORMATION

Update Profile Information

Click on your name in the top right corner of the screen and select **My Profile**.

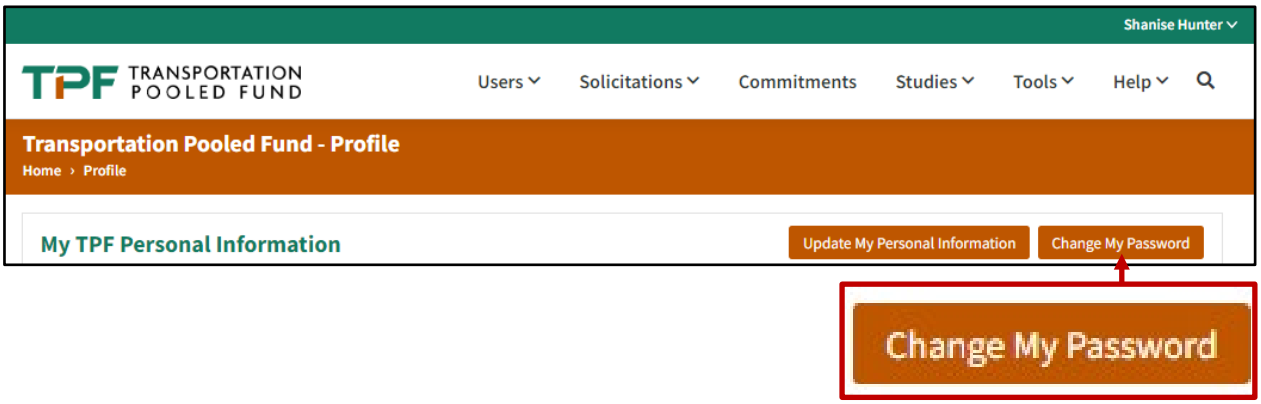


Select **Update My Personal Information** to update profile information.



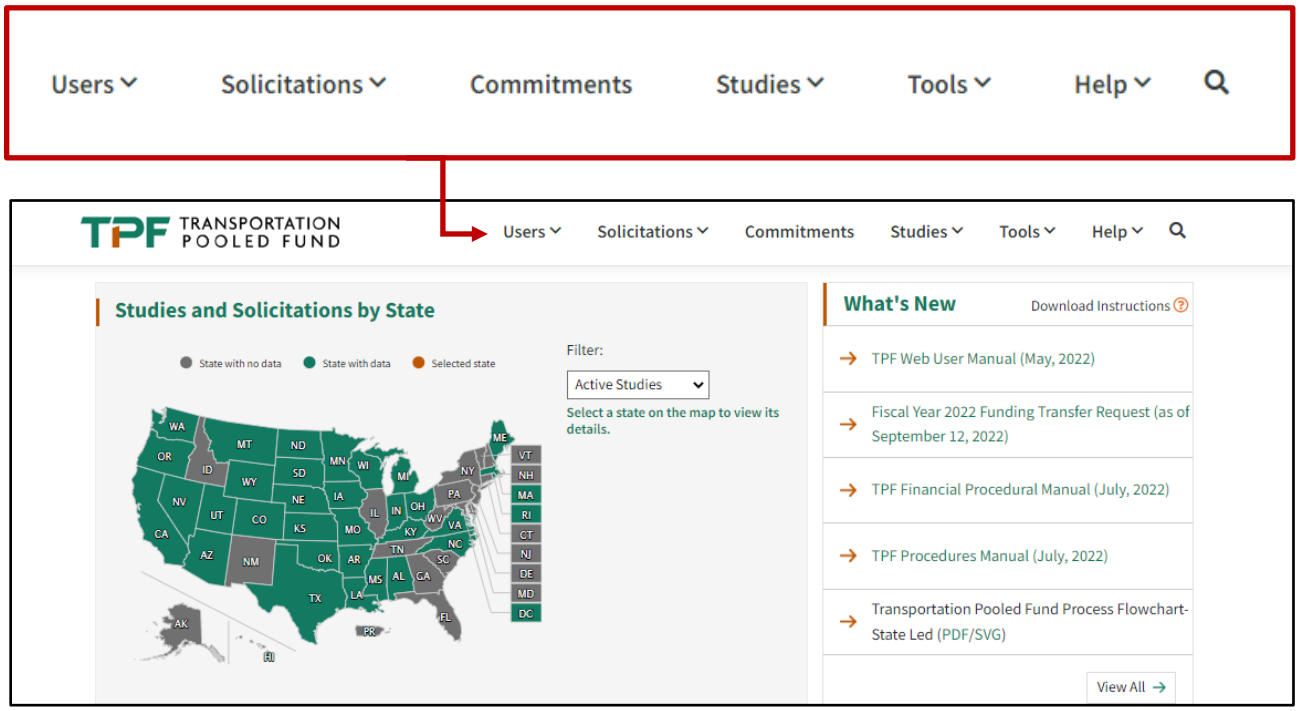
Password

To manage your password, select **Change My Password** and update as needed.



HOME PAGE OVERVIEW

From the **home page**, you can navigate to any page in the navigation menu located at the top. There are six tabs at the top that users can select from. The tabs have the following resources (Note: Additional information for each section will be described in other chapters of this manual.):



Users—View and filter organization users and organizations.

Solicitations—View open solicitations, all solicitations, or post a new solicitation.

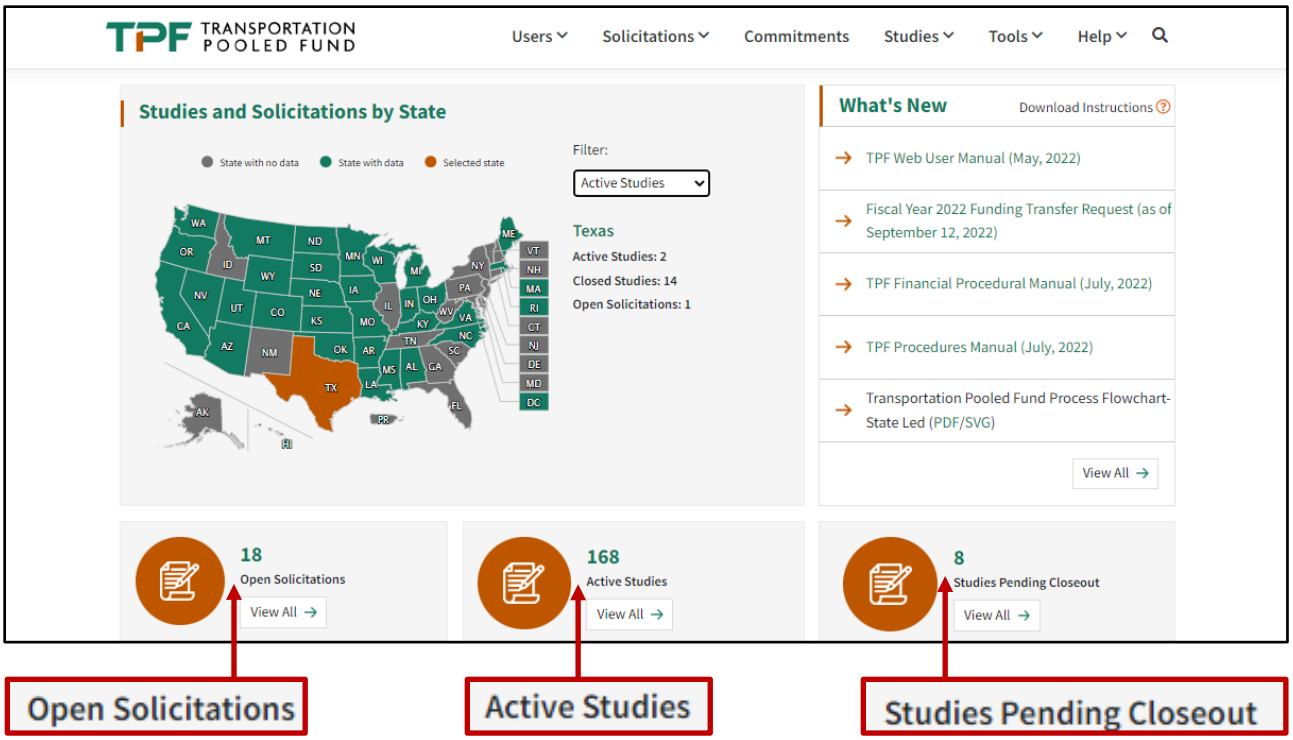
Commitments— Utilize the smart grid search to view commitment information for each study or make or update commitments by your organization.

Studies—View all active studies or all studies. Utilize the smart grid search to filter by number, title, status or lead organization.

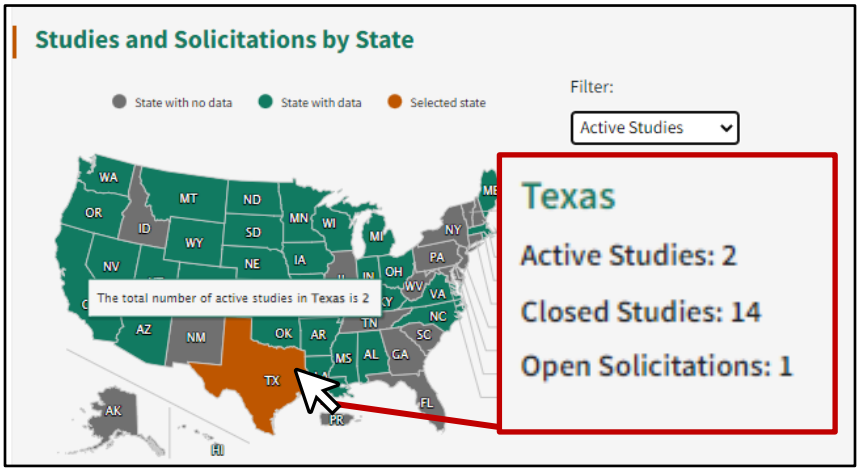
Tools—Includes the What's New section, Frequently Used Resources tab, Funding Transfer Requests, Search Records, and the ability to query and generate reports.

Help—Includes Related Links, Email Alerts, TPF Program contacts, Frequently Asked Questions (FAQ), Forms, and Glossary.

The home page was redesigned to be interactive and present several useful statistics. The interactive home page map shows: number of **Open Solicitations, Number of Active Studies**, and **Number of Studies Pending Closeout**.



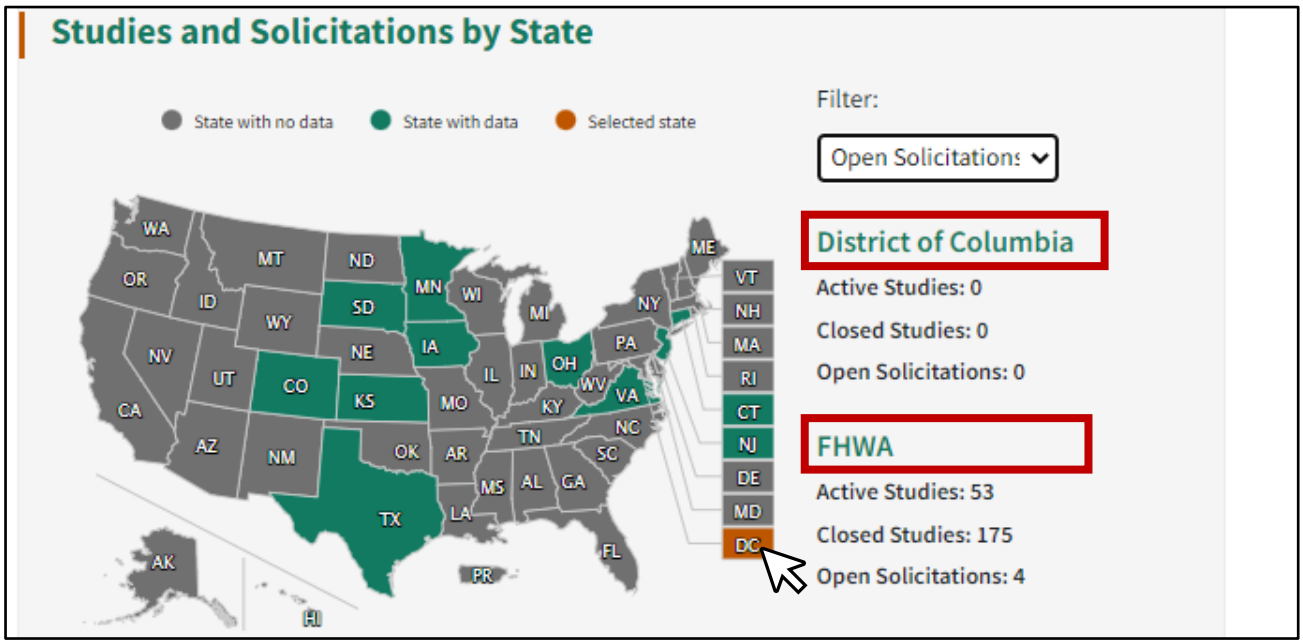
In addition, the interactive map displays the numbers of **Studies and Solicitations by location**.



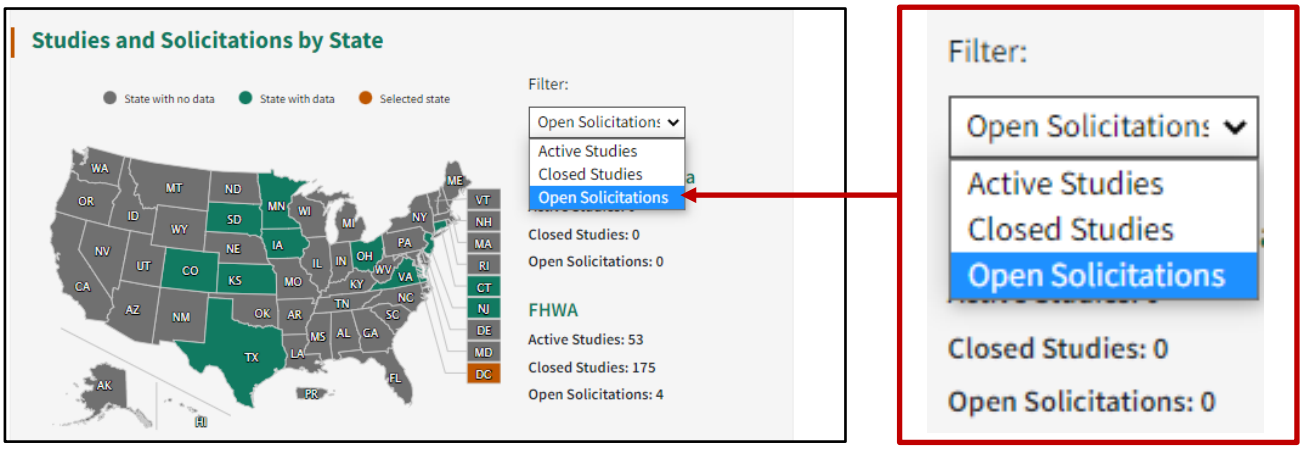
You can **mouseover** the map to view a popup of how many active studies a State has or **click** on a particular State to view all of its Active Studies, Closed Studies, and Open Solicitations.

NOTE

If you click on **Washington, DC**, you can view the statistics for both **District DOT** and **FHWA** at the same time because they are both headquartered in DC.

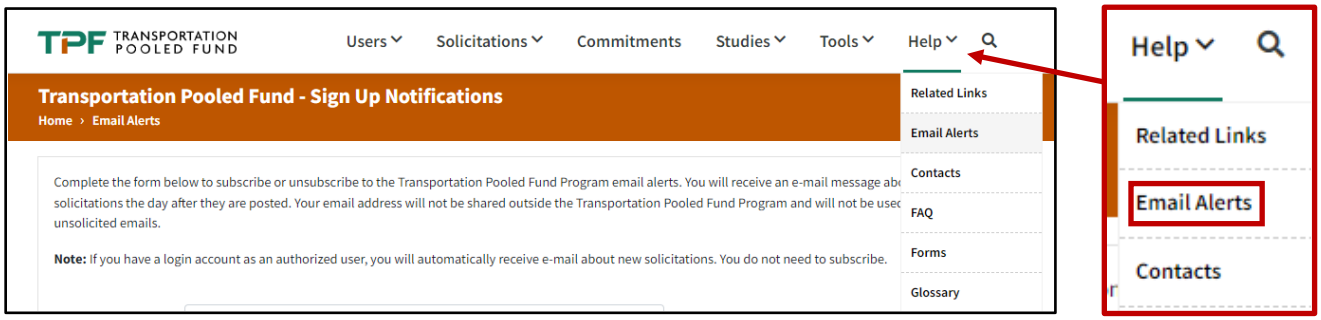


Click the **Filter** drop-down menu in the top right corner of the gray map area to change the view. Filter selection options are: Active Studies, Closed Studies, or Open Solicitations.



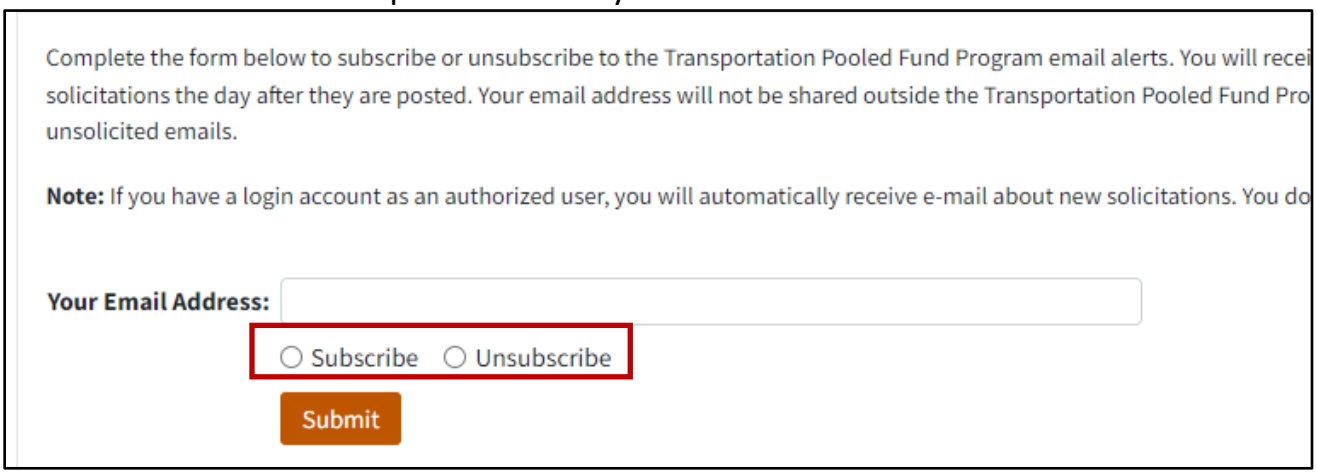
EMAIL NOTIFICATIONS

If you would like to manage the email notifications you receive from the TPF website, please go to **Help** and select **Email Alerts**.



Update Email Notification Preferences

To update preferences, enter your email address and select either **Subscribe** or **Unsubscribe**. This subscription option is primarily designed for persons who are not authorized users of the system. Most email notifications are preset based on their role or association with a particular study.



NOTE

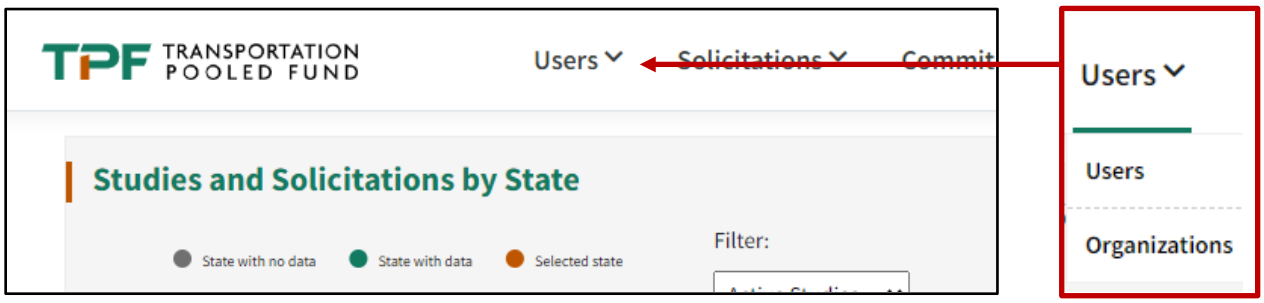
If you have an account as an authorized user, you will **automatically** receive email notifications about new solicitations.

USER MANAGEMENT

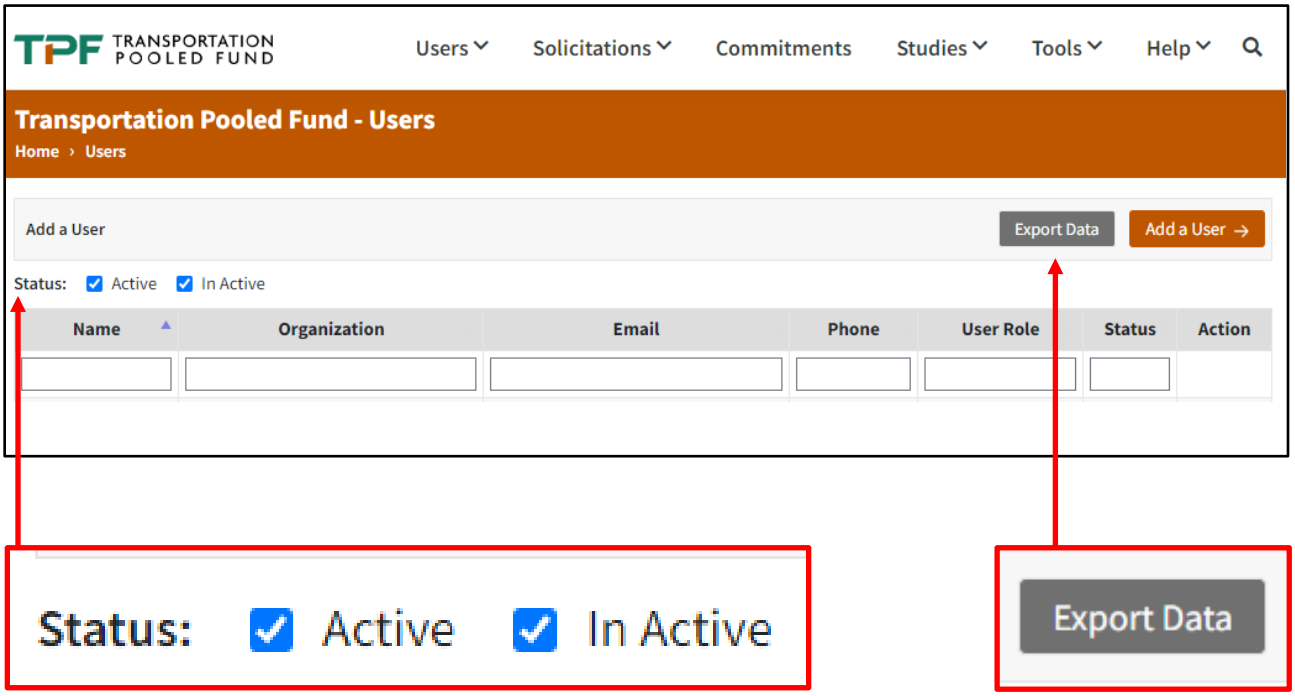
You can manage both individuals and organizations in the "Users" section of the website.

How to Add, Edit, and Manage Existing Users

In the top navigation menu, go to **Users,** hover over or click on the drop-down menu, then select either **Users** or **Organizations.**



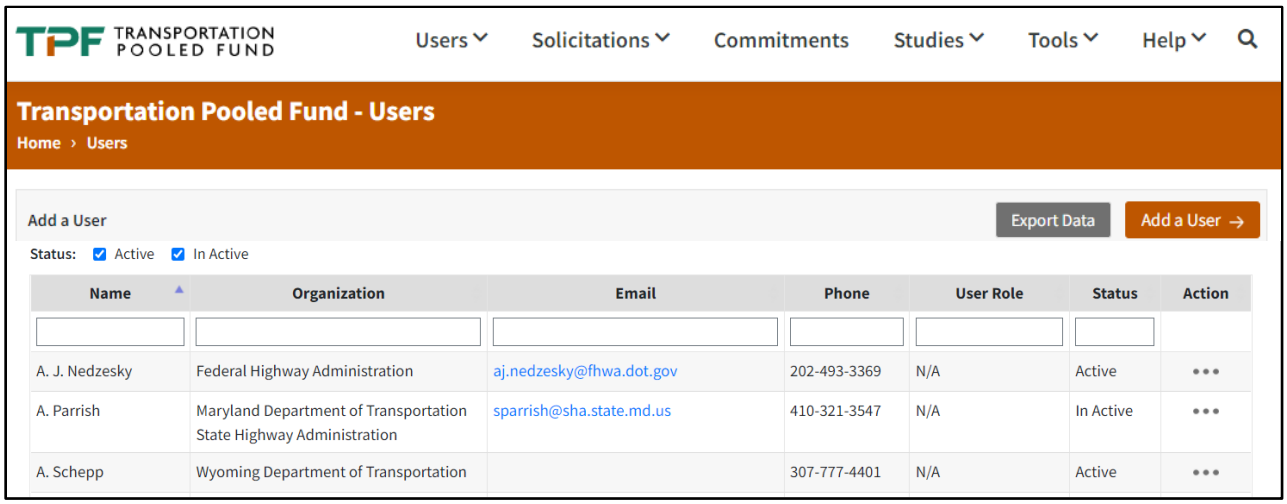
One of the new features on the TPF website is that users can review all users for their organization. You can change those who are no longer with your organization to an inactive status. You can also easily export the total users for your organization by pressing the **Export Data** button in the top right corner of the page.



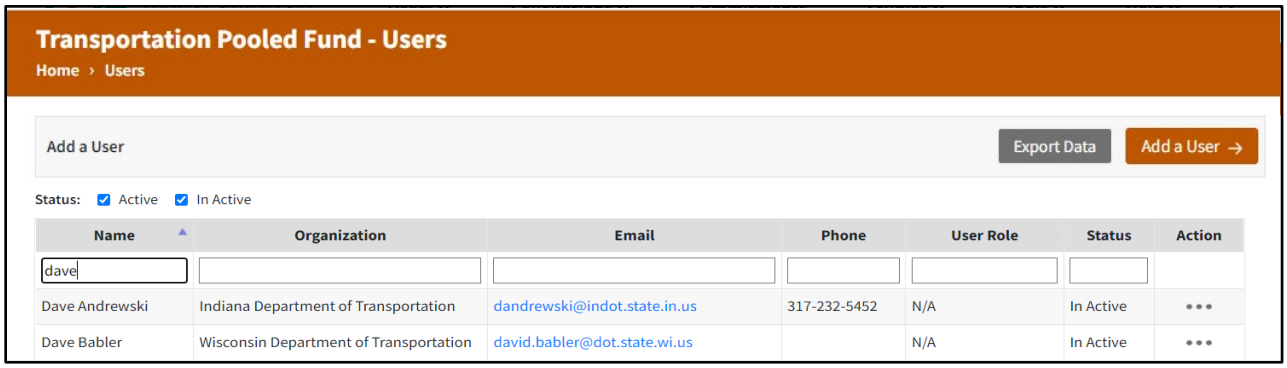
NOTE

One important feature of the new website is that all the tabulated lists of users, solicitations, and studies are presented in the smart grids. These smart grids are very user-friendly as they allow users to conveniently filter the information and navigate to the required information.

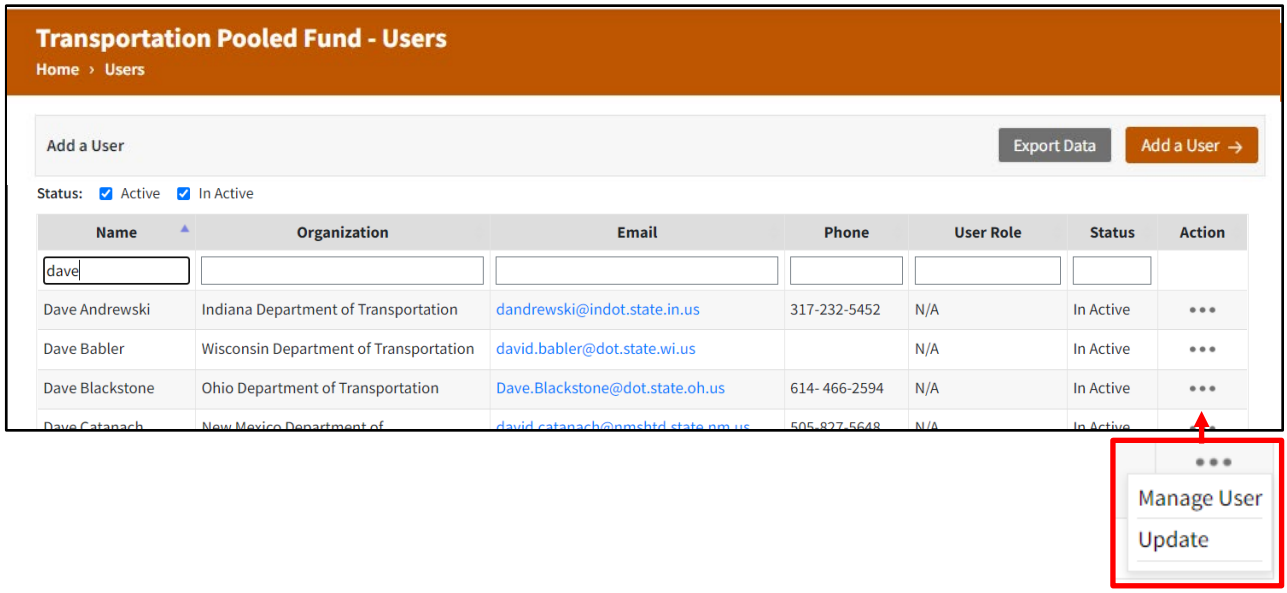
The smart grid from the Users page is provided in the following screenshot.



The first row of all these smart grids contains a text block in each column. A user can enter information into these boxes to narrow down the contents of each column. This filtering option is applied in realtime as soon as the user starts typing. For example, in the following screenshot, as soon as “Dave” is entered into the first column search bar, all the names that contain “Dave” appear. These results can further be drilled down by typing additional phrases in other columns. For example, the user could type Minnesota in the Organization column too, and all the Daves from Minnesota would then appear.

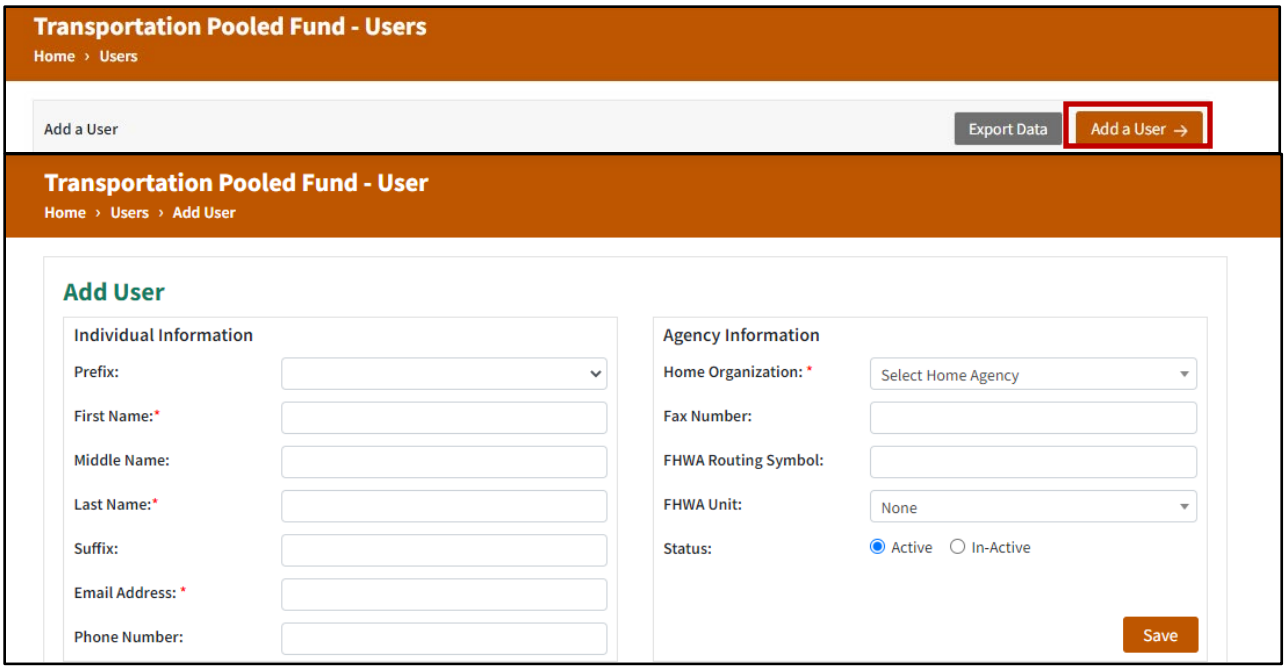


The last column in most of these smart grids is dedicated to **Actions.** These actions will be different for each page and for each user role. For the **Users** page, an administrative user can select the **Update** option from the **Actions** column if they need to update that individual's contact information. Administrators can also select the **Manage User** option from the **Actions** column if they need to change the user's role.

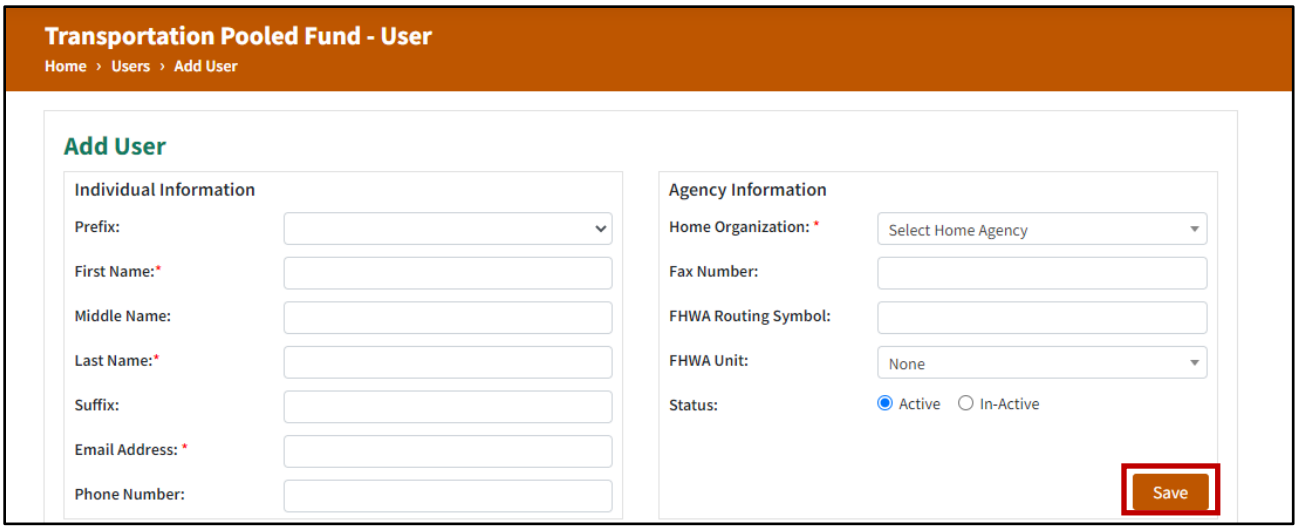


Adding a New User

A new user can be added to the system by clicking the **Add User** button in the top right corner of the Users page, which will open the following form.



Fill in the details then click **Save**. The user profile will be saved in the system. However, the user will still not have authorized access to the TPF website.

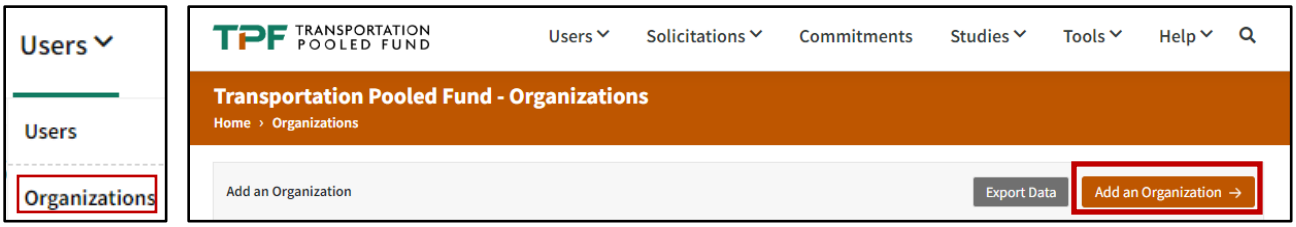


Contact the TPF program manager to obtain login access for the new user. The TPF program manager will update the user's system role and assign a password. Note an admin web user can add a new user to an organization.

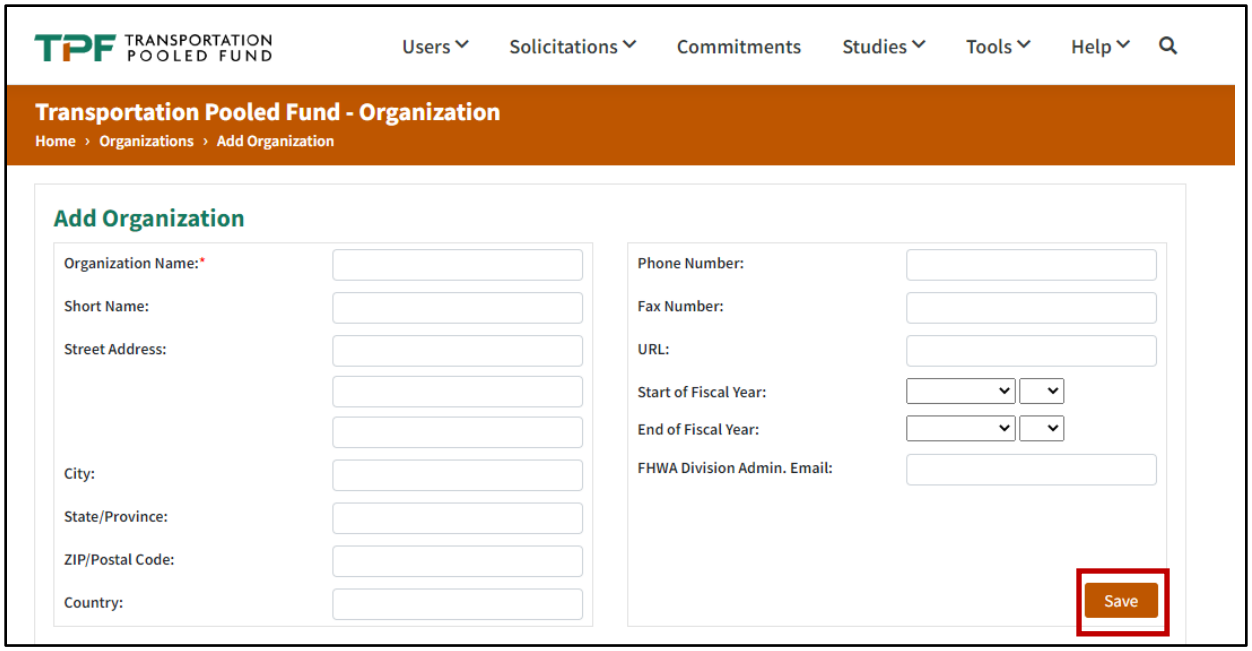
Adding/Updating an Organization

Adding a new organization is similar to adding a new user.

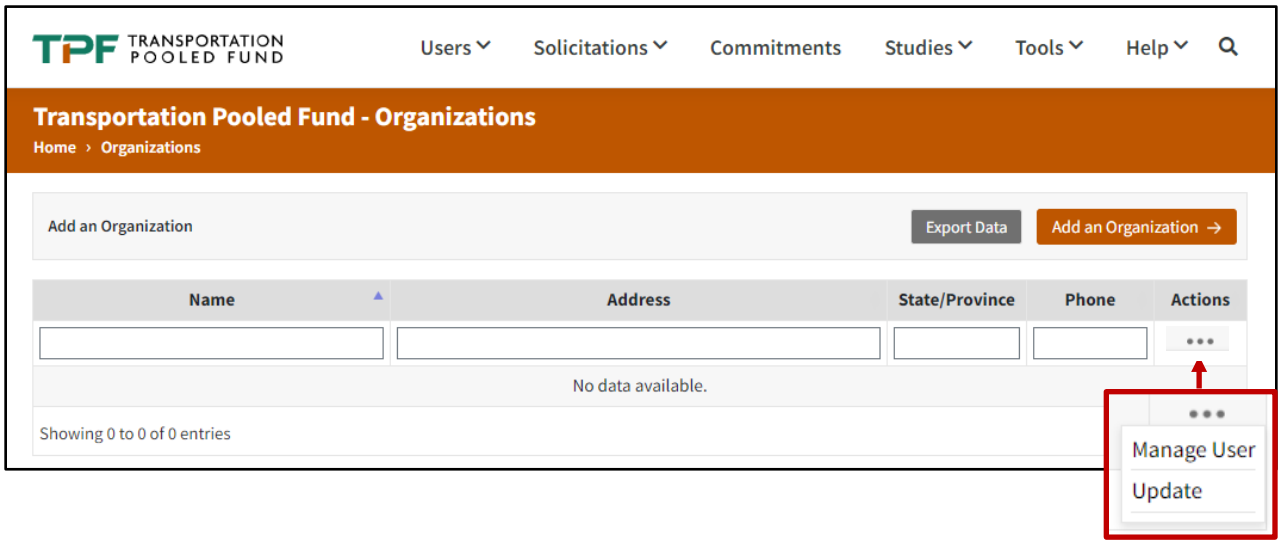
To add an organization, go to the **Organizations** page under the **Users** drop-down menu. Click the **Add Organization** button.



Fill in the form details and click **Save**.



To update the organization, simply navigate to the **Organizations** page and select **Update** from the **Actions** column.



SOLICITATIONS

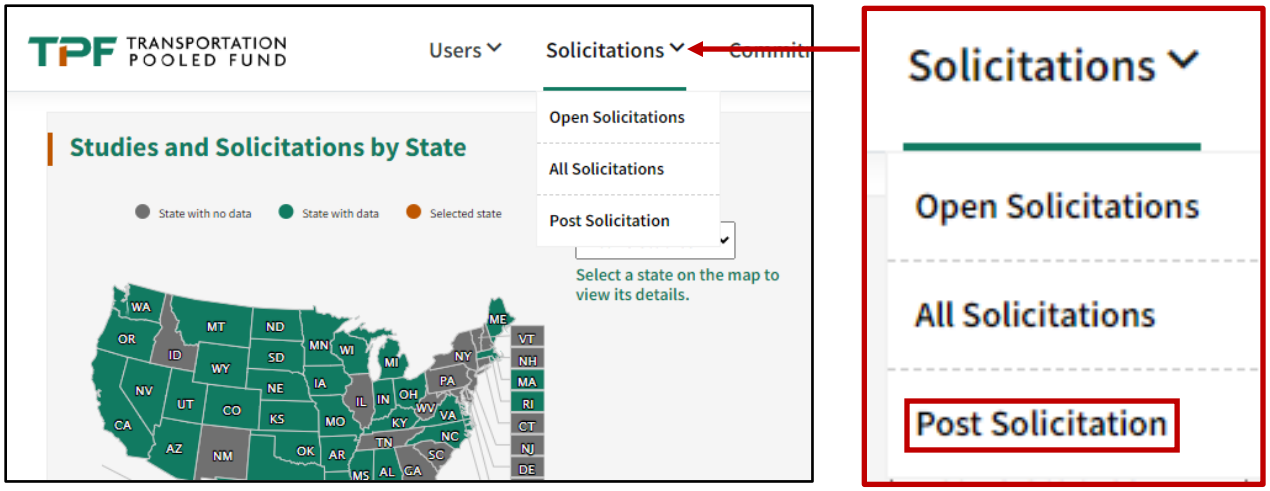
Users assigned a Lead Study Contact role have the ability to post new solicitations and update existing solicitations.

NOTE

For each section of the solicitation, the character limit is **4,000** characters.

Posting a New Solicitation

Click on the **Solicitations** tab, then **Post Solicitation**.



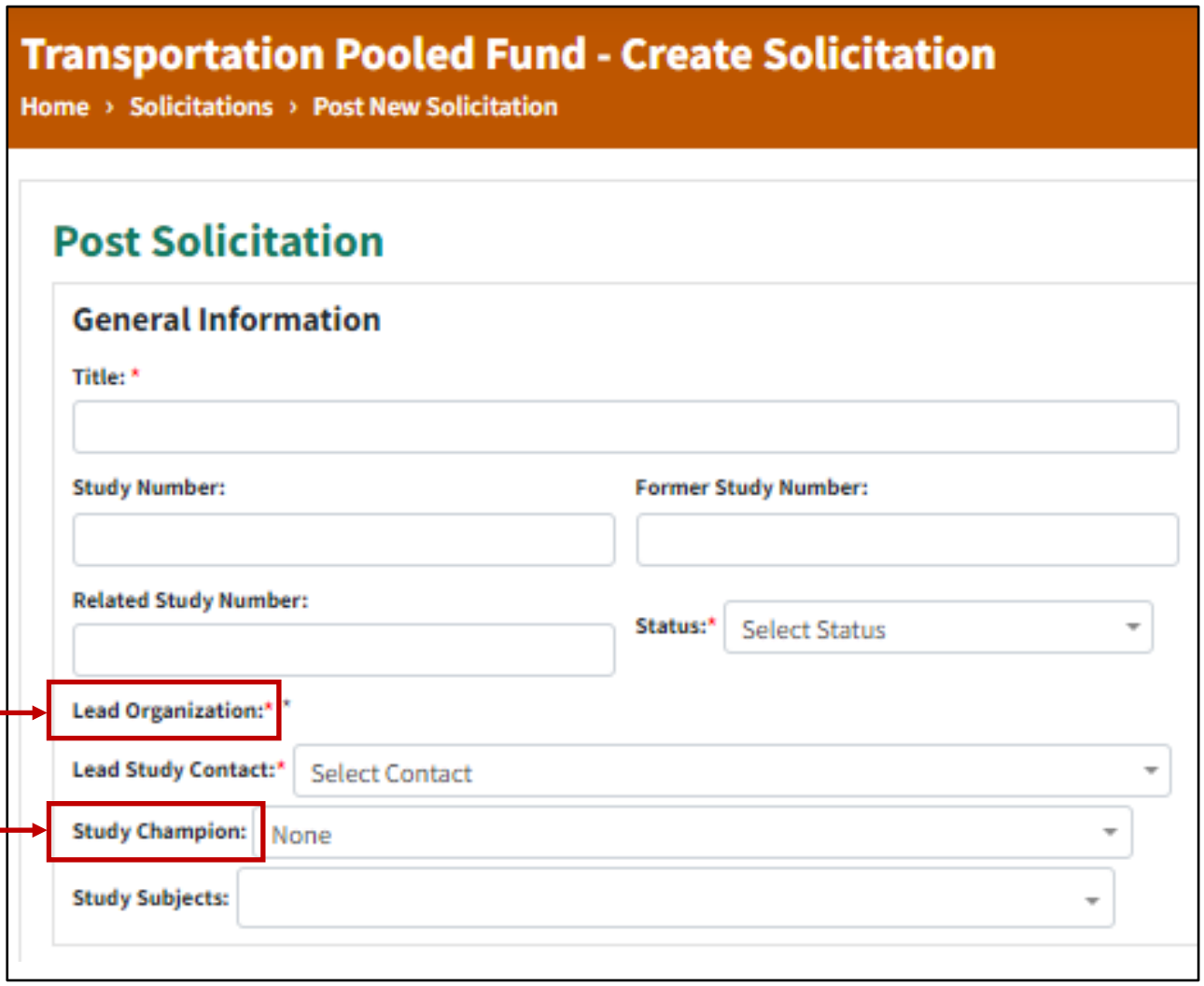
In the form that comes up (see corresponding screenshot with steps below):

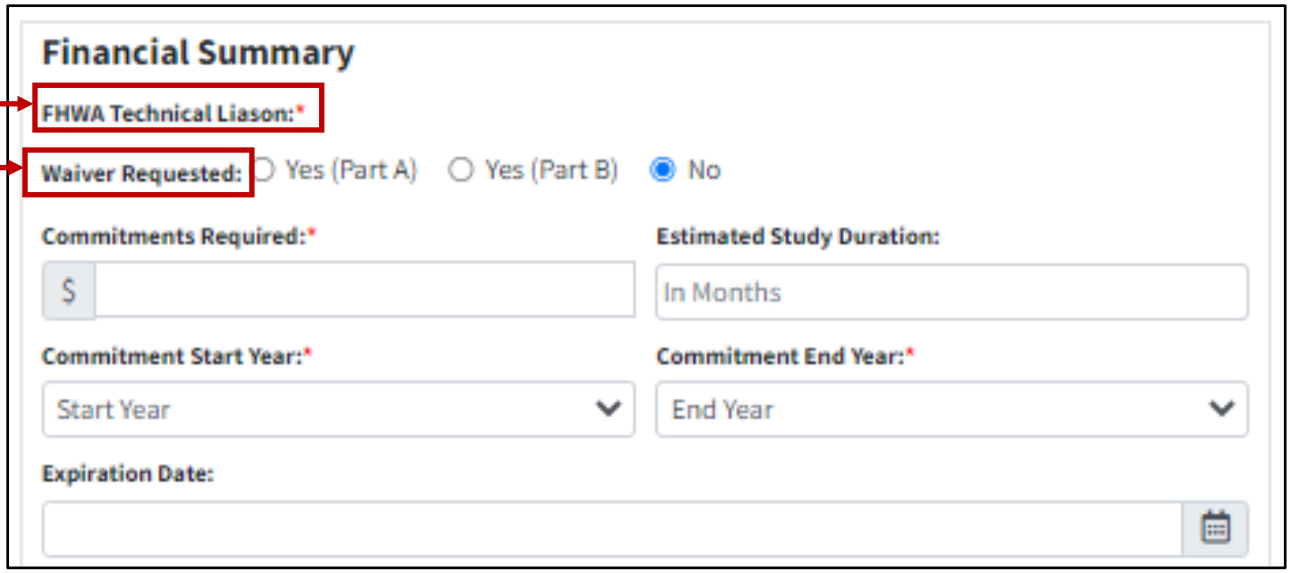
1. Your organization will automatically be listed as the **Lead Organization,** and your name will be listed as the **lead study contact** because you are logged into the system. You can change the lead study contact if necessary.
2. Select a **Study Champion** if needed. A Study Champion can be from any organization, including consultants. If the Study Champion's name is not already in the drop-down box, add the user by clicking on Users tap then Add a User in the menu bar at the top. Once they are added as a user, their name is available for selection in the drop-down.
3. Select if you are planning to apply for a state planning and research (**SPR) waiver request**.
4. Update Status to Solicitation Posted.
5. Fill out all required fields. Fill out the anticipated commitment start and end year. Please note TPF studies have a maximum duration of 5 years.
6. Click **Save**—the solicitation has now been saved, and a solicitation number created.
7. An email will be sent to all TPF website users notifying them that a new solicitation has been posted.

NOTE

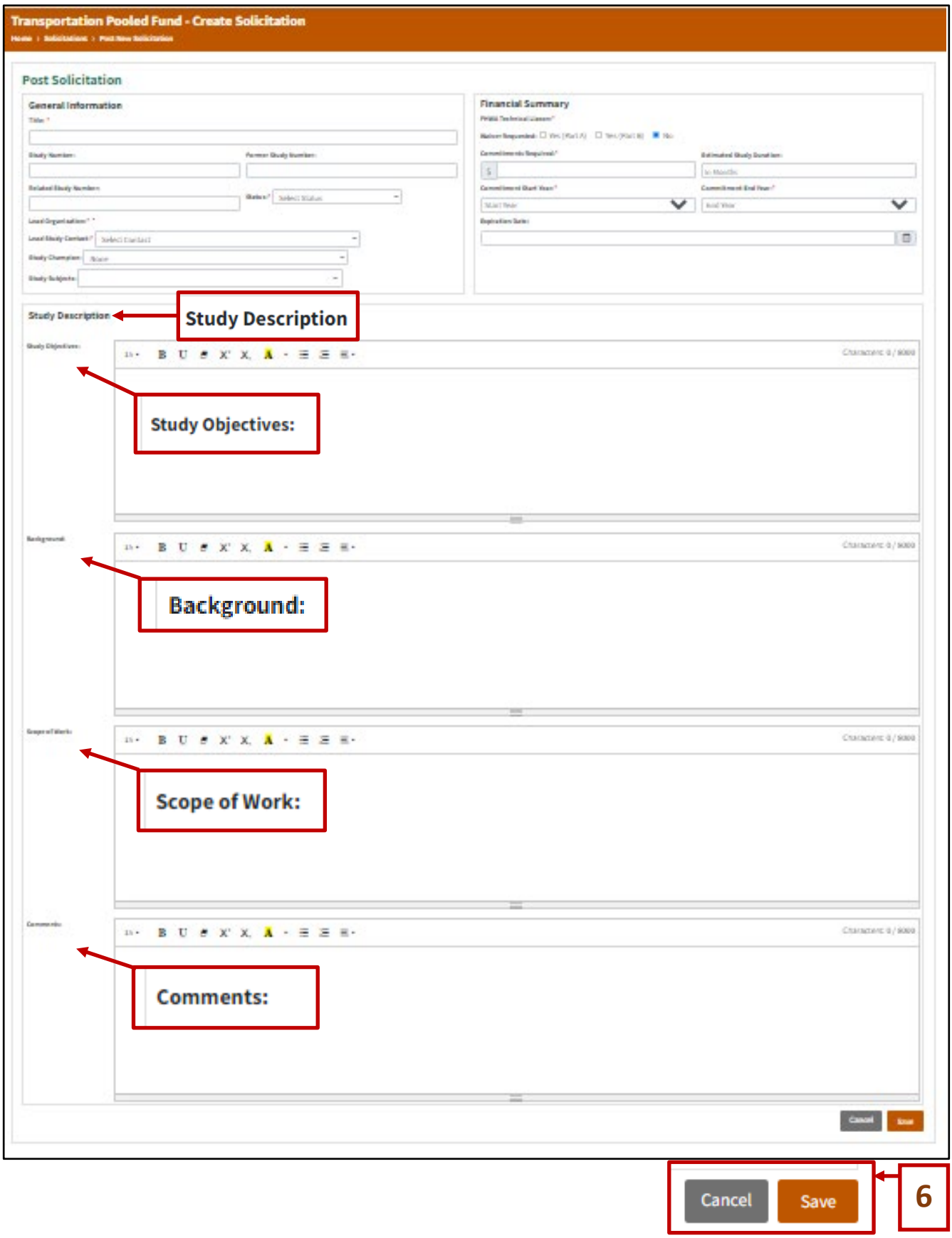
Fill out the solicitation expiration date (no longer than 12 months from posting).

Solicitation Form





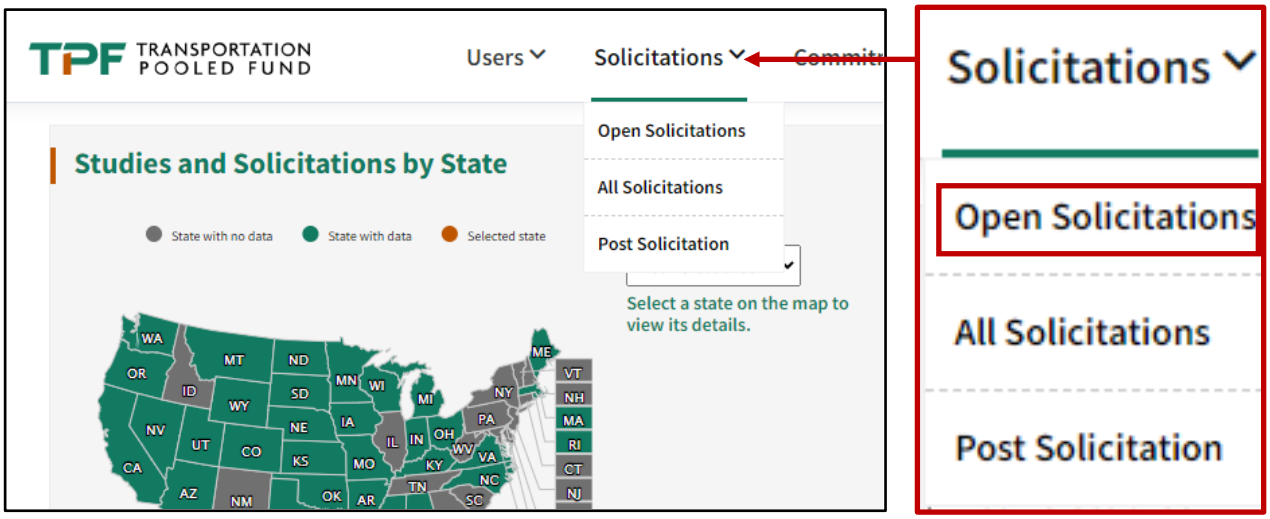
Solicitation Form (continued)



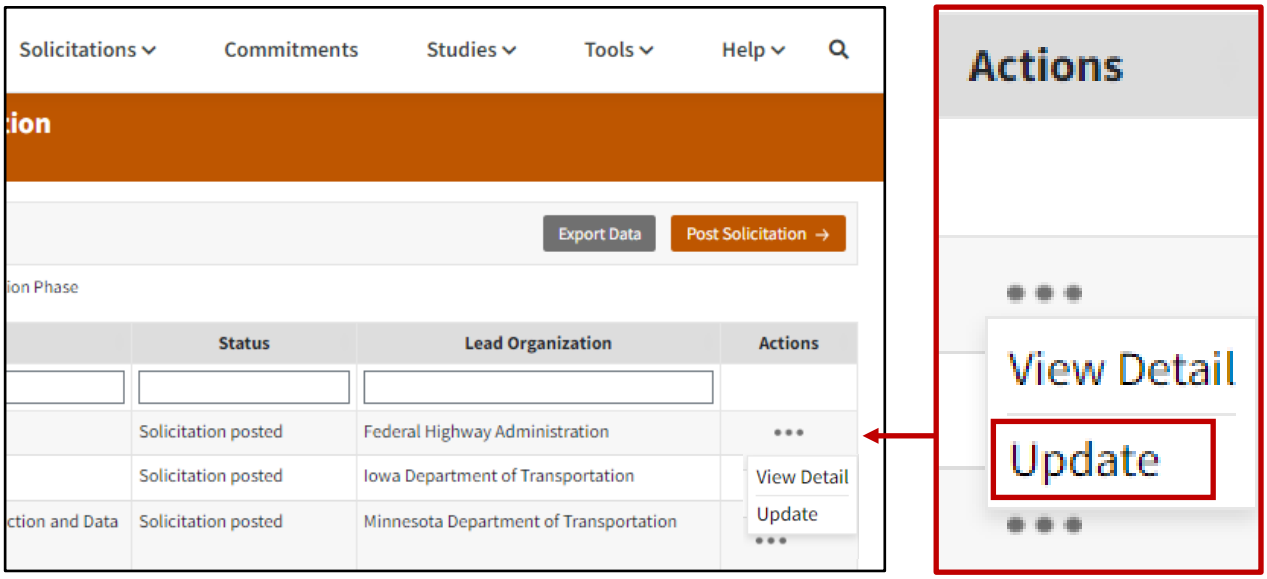
Link a URL/Upload Documents

After a solicitation is posted, there is frequently a need to link to or upload a document. Example documents include expanded Study Description information or previously published reports. The most common document is the approved Waiver Request. If you want to link a URL or upload documents to the solicitation:

Click on **Solicitations,** then **Open Solicitations**.

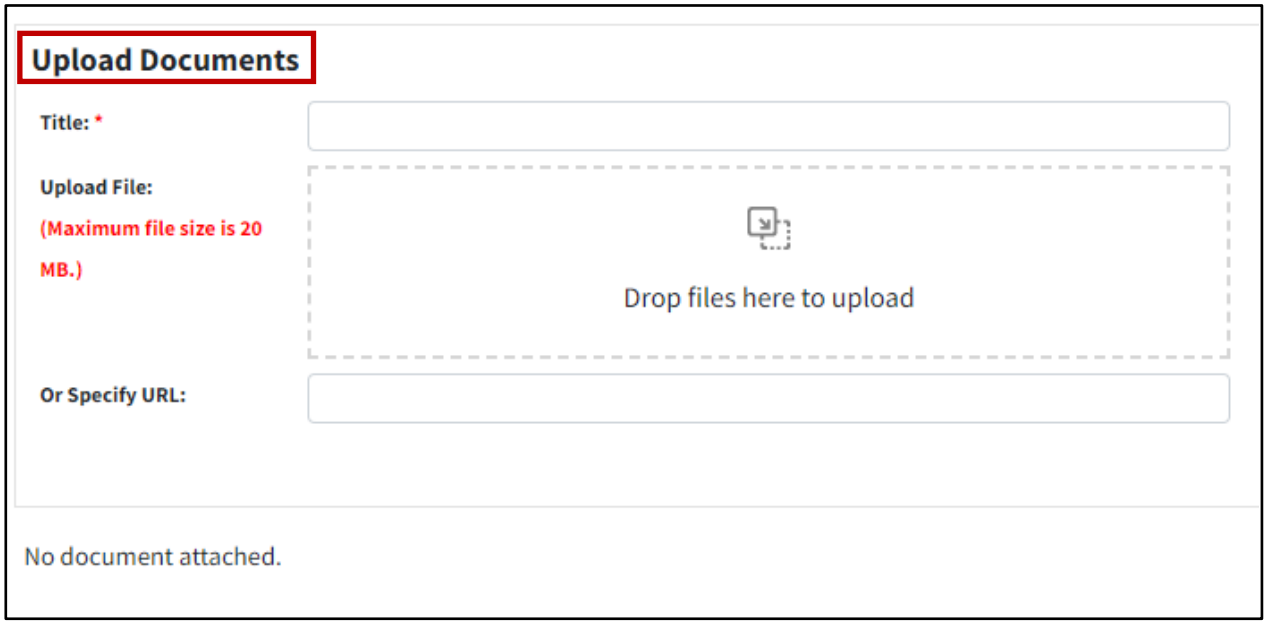


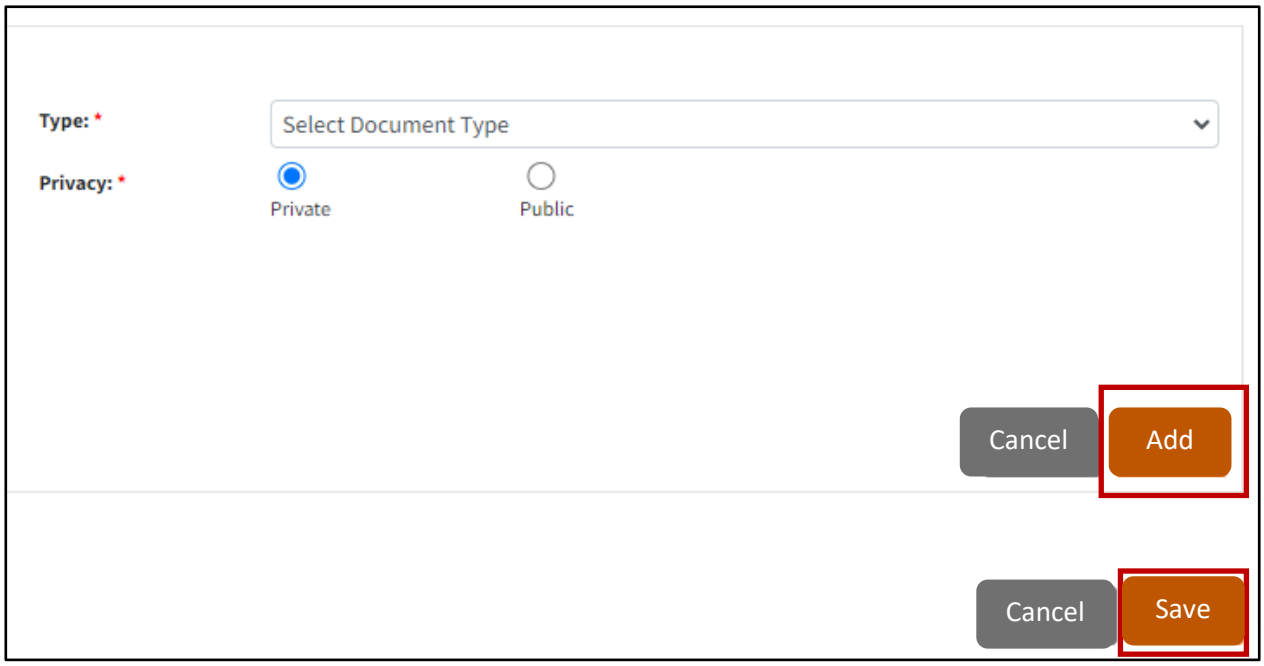
Click on the three dots under the **Actions** column and select **Update.**



Upload a document or specify a URL to include with the solicitation by completing the **Upload Documents** section.

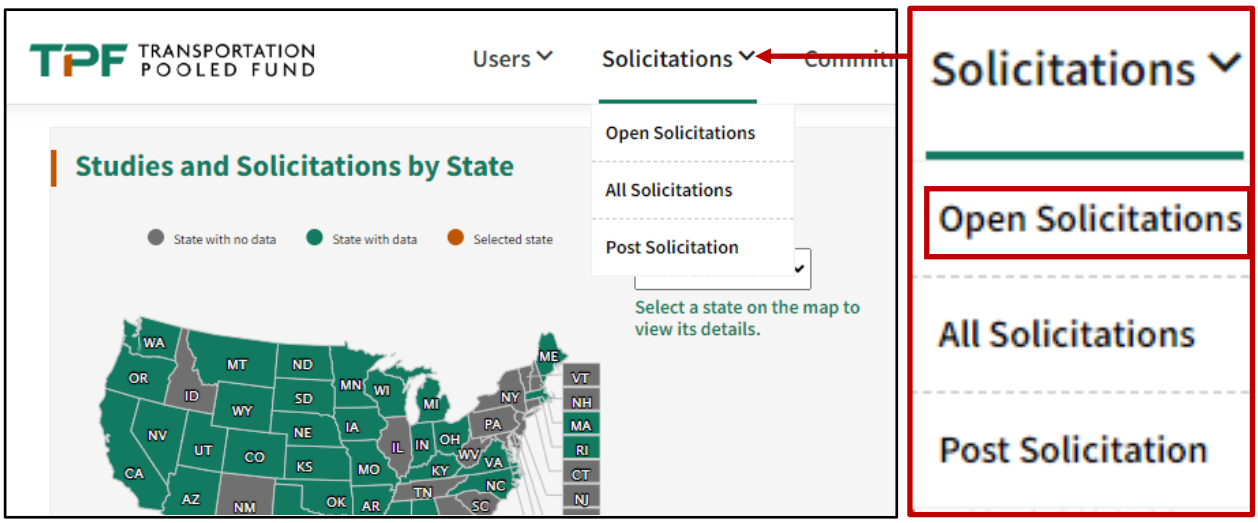
After selecting a file, click **Add**, then click **Save.**
Please note documents must be under **20 MB** in size.



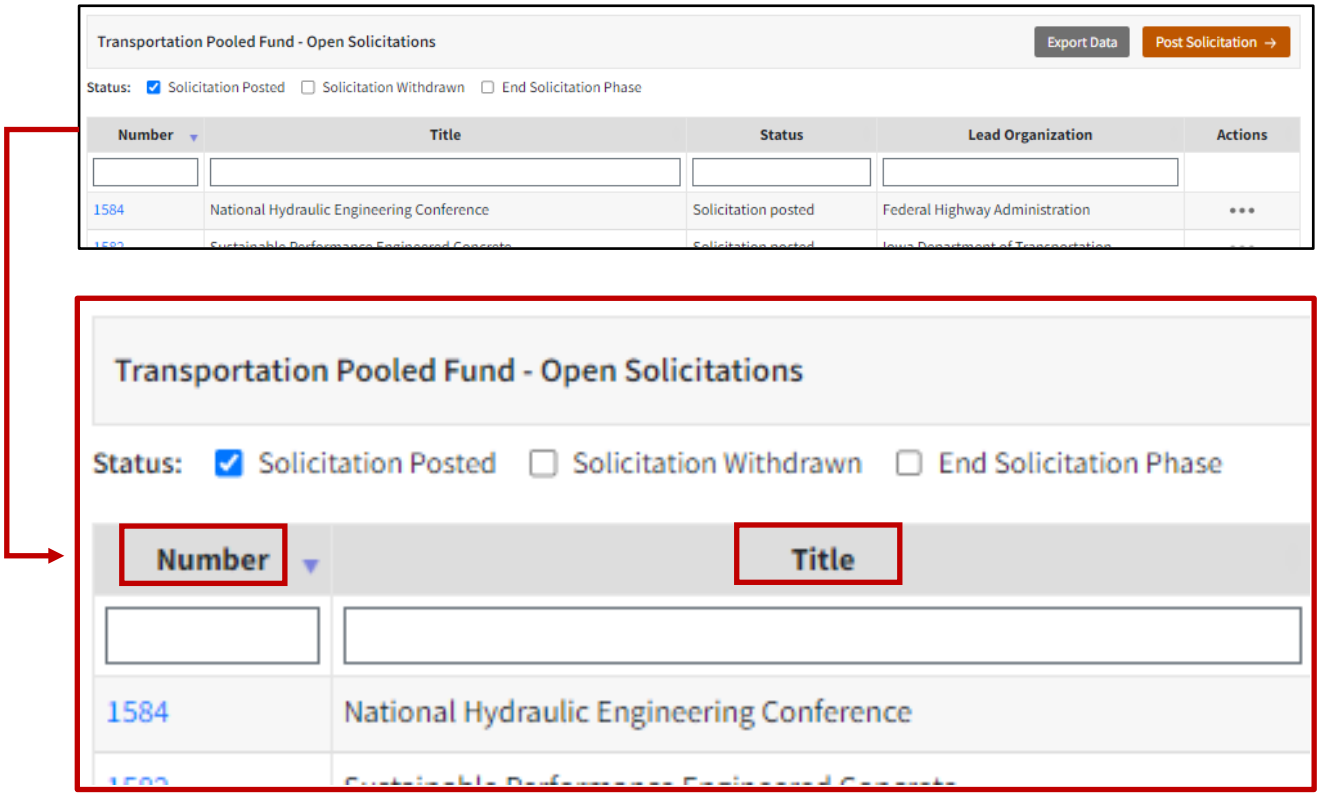


Updating an Existing Solicitation

Click the **Solicitations** tab, then **Open Solicitations**.

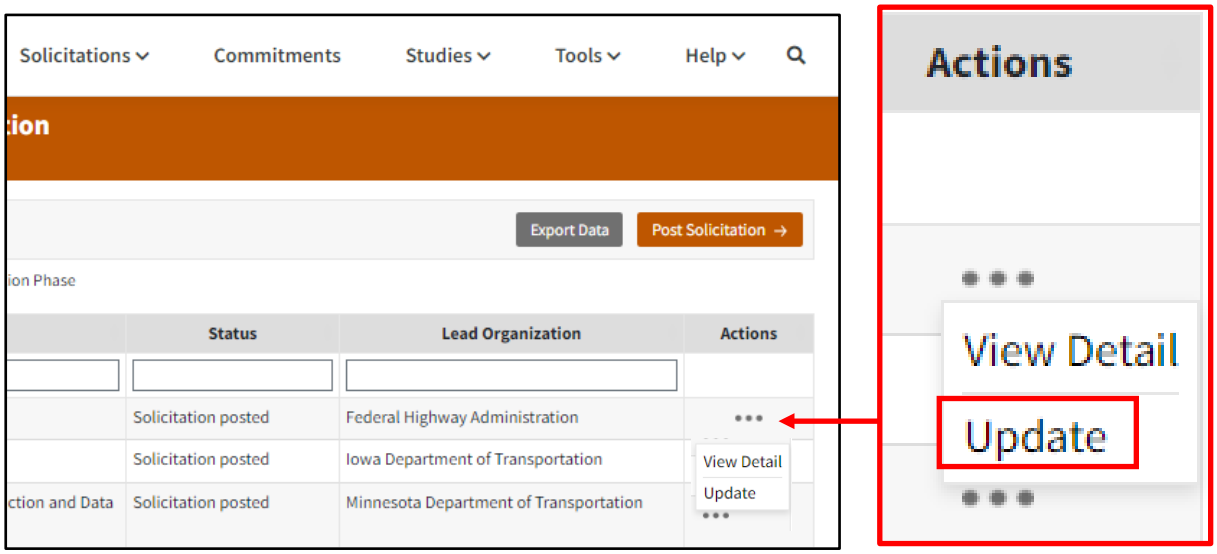


Filter and find the solicitation of interest by **Number** or **Title**.

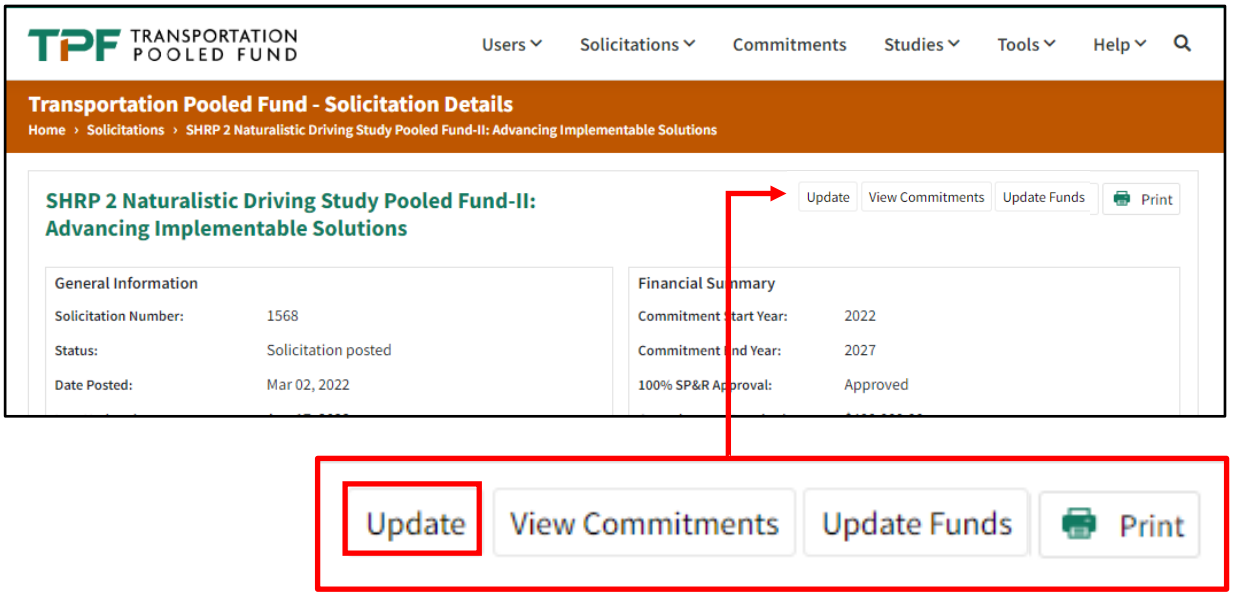


There are two ways to update the solicitation:

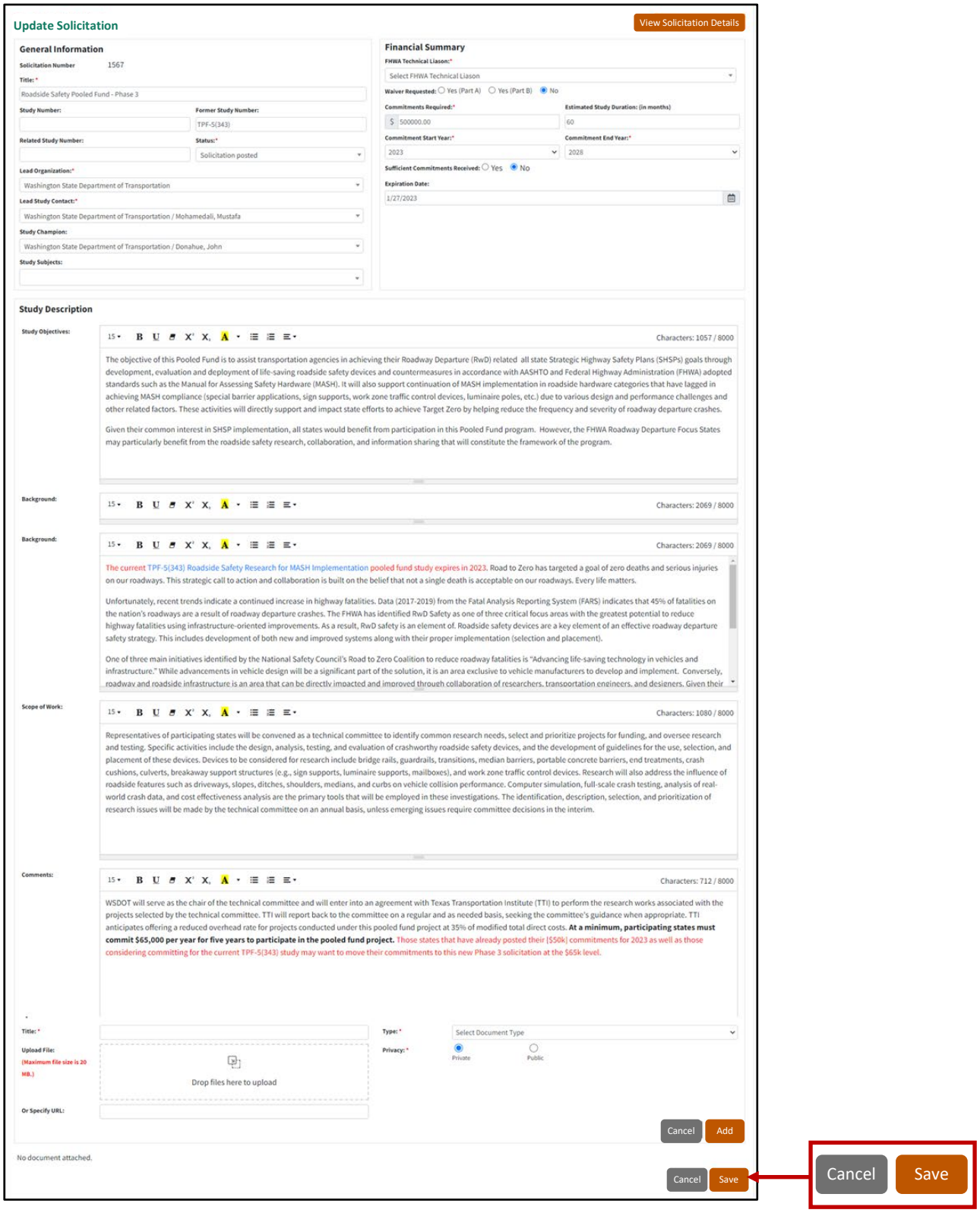
1. Click on the three dots under the **Actions** column next to the solicitation and then select **Update**.



2. Navigate to the Solicitations Details page and select the **Update** button at the top of the page.

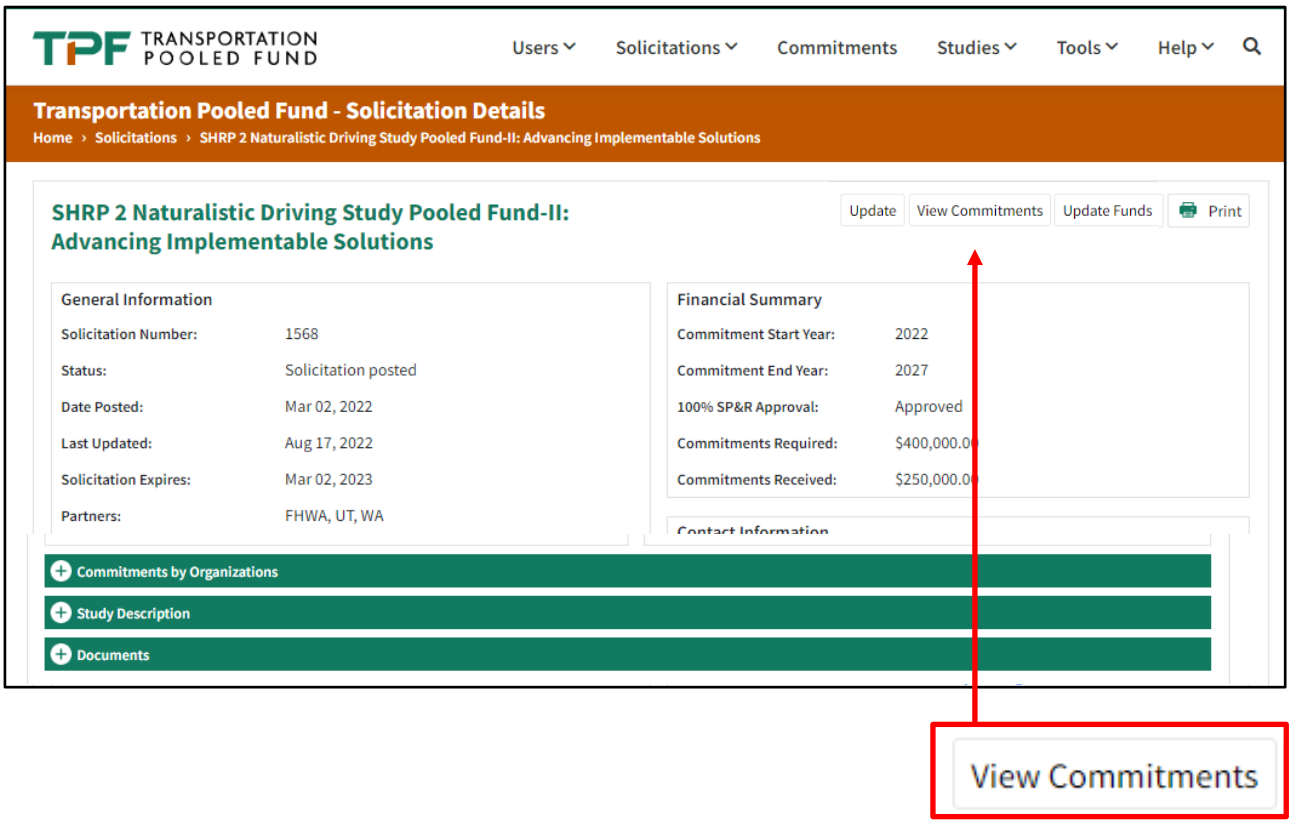


Edit the content of the solicitation and click **save**.

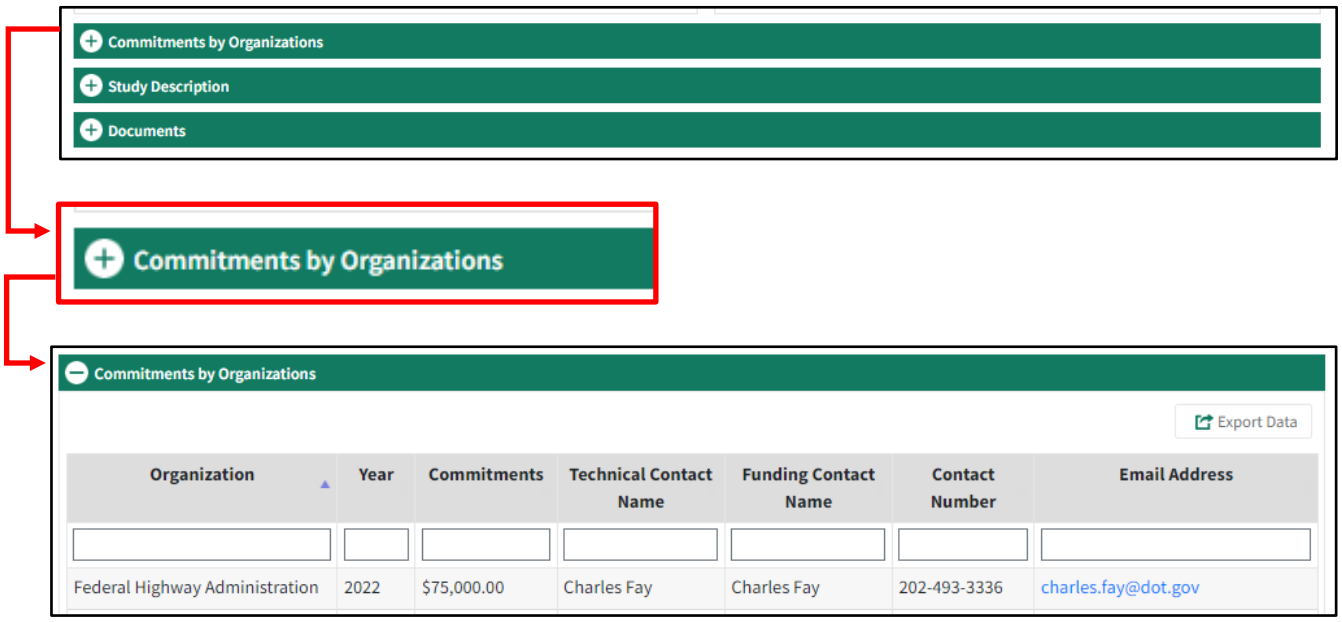


View Commitments for a Solicitation

Navigate to the Solicitation page.
Select **View Commitments**.



Or scroll down and expand the **Commitments by Organization** section.



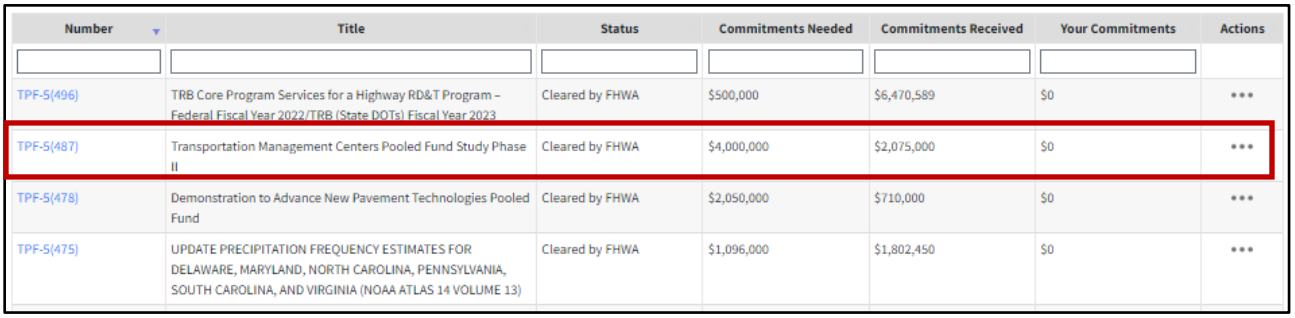
COMMITMENTS

How to post a commitment, update an existing commitment, or view Organization's commitments.

Posting a New Commitment

Click on the **Commitments** tab.

Navigate to the selected TPF study or solicitation.



Number	Title	Status	Commitments Needed	Commitments Received	Your Commitments	Actions
TPF-5(496)	TRB Core Program Services for a Highway RD&T Program – Federal Fiscal Year 2022/TRB (State DOTs) Fiscal Year 2023	Cleared by FHWA	$500,000	$6,470,589	$0	•••
TPF-5(487)	Transportation Management Centers Pooled Fund Study Phase II	Cleared by FHWA	$4,000,000	$2,075,000	$0	•••
TPF-5(478)	Demonstration to Advance New Pavement Technologies Pooled Fund	Cleared by FHWA	$2,050,000	$710,000	$0	•••
TPF-5(475)	UPDATE PRECIPITATION FREQUENCY ESTIMATES FOR DELAWARE, MARYLAND, NORTH CAROLINA, PENNSYLVANIA, SOUTH CAROLINA, AND VIRGINIA (NOAA ATLAS 14 VOLUME 13)	Cleared by FHWA	$1,096,000	$1,802,450	$0	•••

Select the three dots under **Actions** and click on **Commit**.

	Status	Commitments Needed	Commitments Received	Your Commitments	Actions
RD&T Program – Fiscal Year 2023	Cleared by FHWA	$500,000	$6,470,589	$0	•••
ed Fund Study Phase	Cleared by FHWA	$4,000,000	$2,075,000	$0	••• Commit
Technologies Pooled	Cleared by FHWA	$2,050,000	$710,000	$0	•••

The following screen appears after you click on Commit.

TPF TRANSPORTATION POOLED FUND

Users | Solicitations | Commitments | Studies | Tools | Help

Transportation Pooled Fund - Commit Funds

Home › Commitments › Commit Funds

Commit Funds

Study Number: TPF-5(487)

Title: Transportation Management Centers Pooled Fund Study Phase II

Objectives: The objectives of the Traffic Management Centers (TMC) Pooled Fund Study (PFS) is to assemble regional, state, and local transportation management agencies and FHWA to: (1) identify key issues and challenges agencies are facing with their traffic management systems (TMSs) or centers (TMCs); (2) suggest approaches to addressing identified issues; (3) initiate and monitor projects intended to address identified issues; (4) develop technical resources and disseminate results; (5) provide leadership and coordinate with others on TMC interests; and (6) promote and facilitate sharing information on TMC issues nationally.

The TMC Pooled PFS involves a group of public agencies and organizations who voluntarily pool funds each year to address the key challenges and issues they are facing in support of improving performance, capabilities, and how they manage and operate their TMSs. TMC PFS members collaborate by using funds they contribute for the pursuit of projects they agree to pursue and develop technical resources and advance activities to address the key challenges and issues they are collectively facing. This project is being created to establish a new number (Phase II of TPF-5(319)) and allow for 5 additional years (April 17, 2022 to April 16, 2027) beyond the existing study (TPF-5(319)). Agencies can join and add their commitments to the TMC PFS at any time during each year the TMC PFS, which is approved through April 16, 2027.

Lead Agency: Federal Highway Administration

Considering Agency *

Contact Details

Funding Contact:* Hunter , Shanise

Technical Contact:* -- Select --

Manage TAC Members

Commitments

Commitments Required: $4,000,000

Commitments Received: $2,075,000

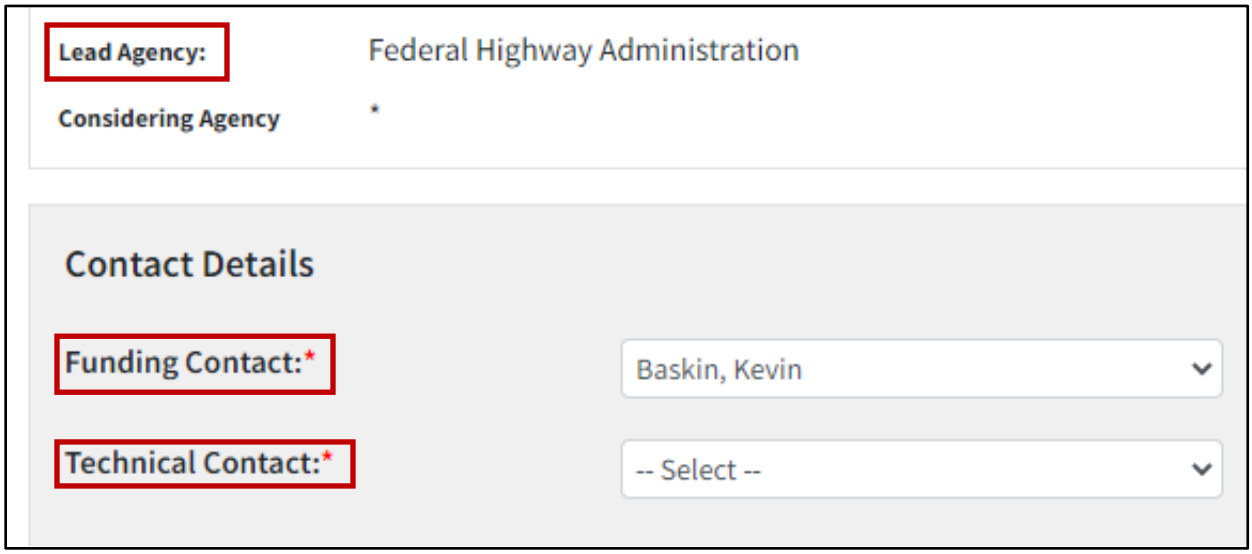
Commitments: * Enter a commitment amount for at least one federal fiscal year.

Year (Federal FY)	Amount	Source (if other than SP&R funds)
2022	$	
2023	$	
2024	$	
2025	$	
2026	$	
2027	$	

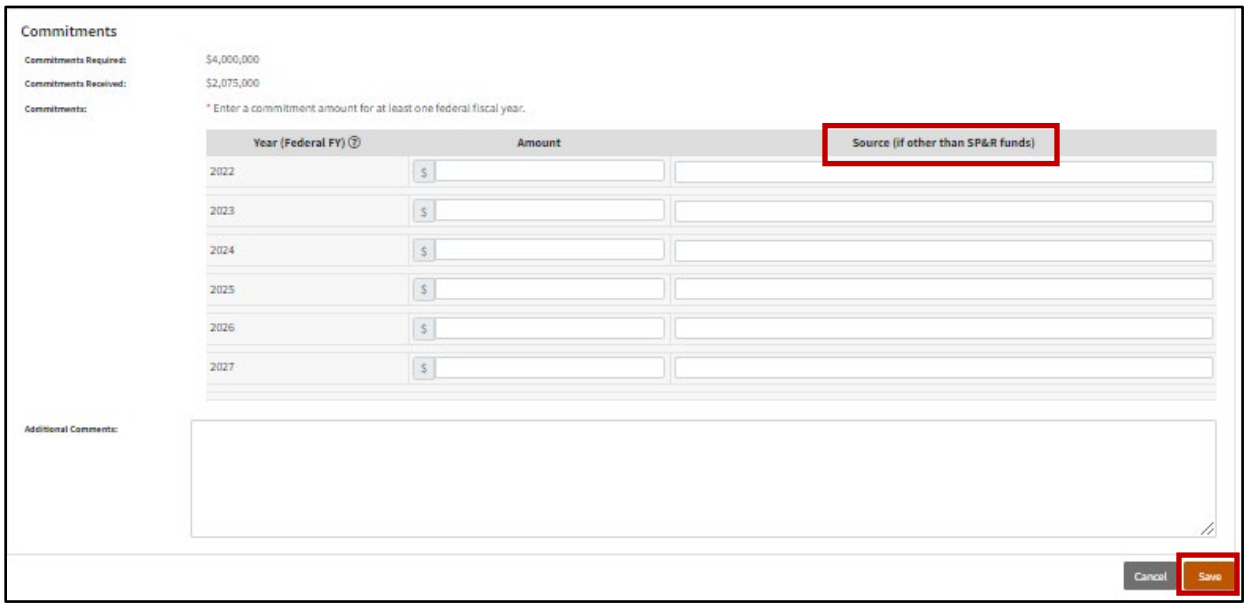
Additional Comments:

Cancel | Save

On this page, the organization will be automatically filled in for the **Considering Agency,** and the name will be selected for the **Funding Contact**. Select a **Technical Contact**, which will be the person responsible for interfacing with the study. This contact could be the same person as the Funding Contact.



Indicate the organization's commitments for each fiscal year (FY) accepting commitments.
For **Source** indicate what types of funds (e.g.., State, SPR-B, non-Federal).
Click **Save**.



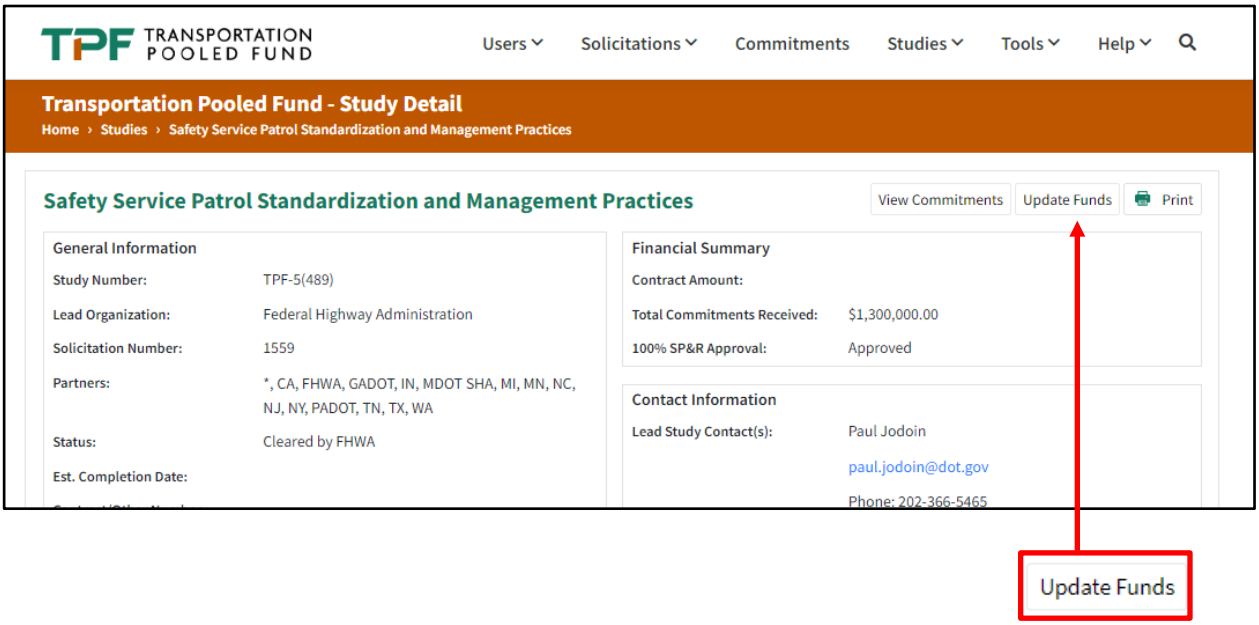
You can also navigate to the TPF Solicitation page and select **Commit Funds.** Please note that the option to commit funds will only appear if you are an authorized user and are logged into the system.

The lead study contact will receive an email notification that a commitment has been made to the solicitation.

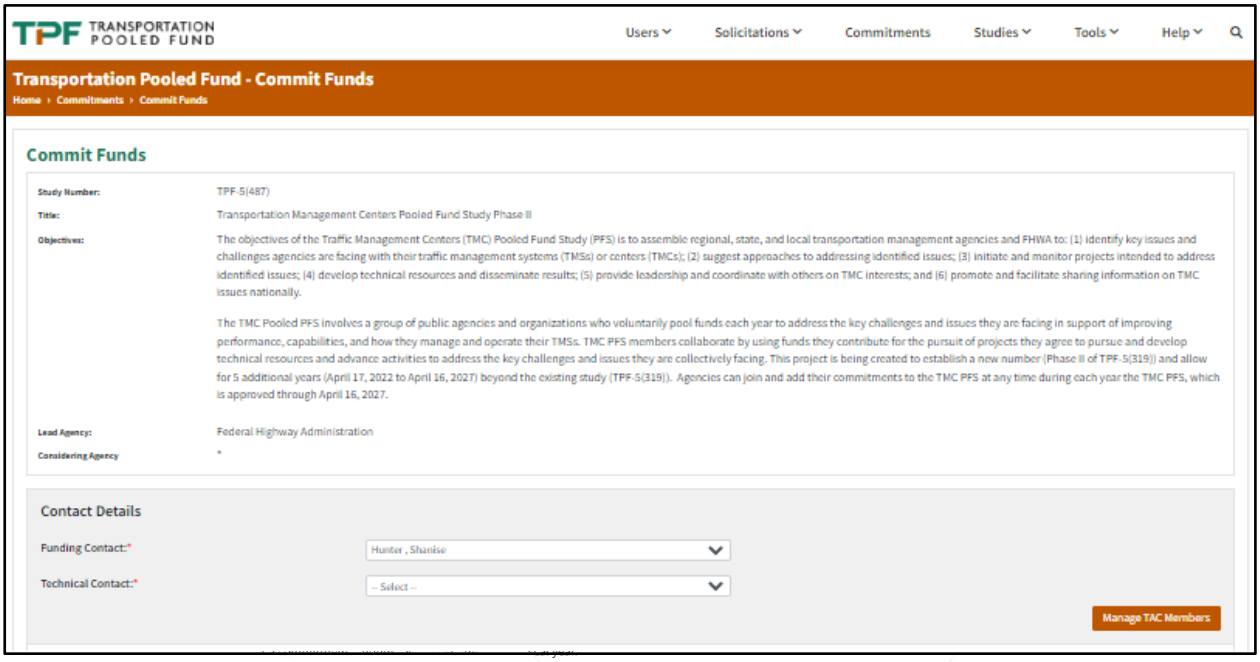
NOTE: A new commitment can be posted to a solicitation at any time while the solicitation remains active. However, if the new commitment is intended to be added to TPF study, the user's organization must be added as a partner for the Commit option to appear. If the user's organization is not already a partner, email the Lead Study Contact and request to be added as a partner. Once added as a partner, a new commitment can be posted.

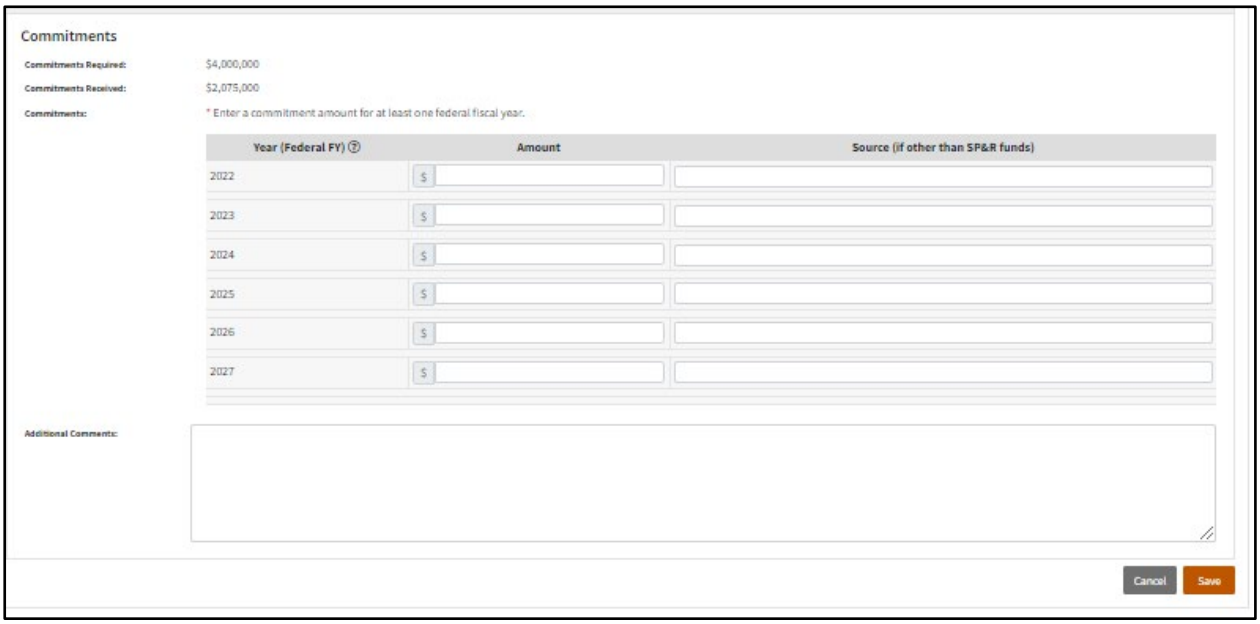
Update Commitments

To update commitments and/or modify the technical contact, click on the **Update** button in the following screenshot.

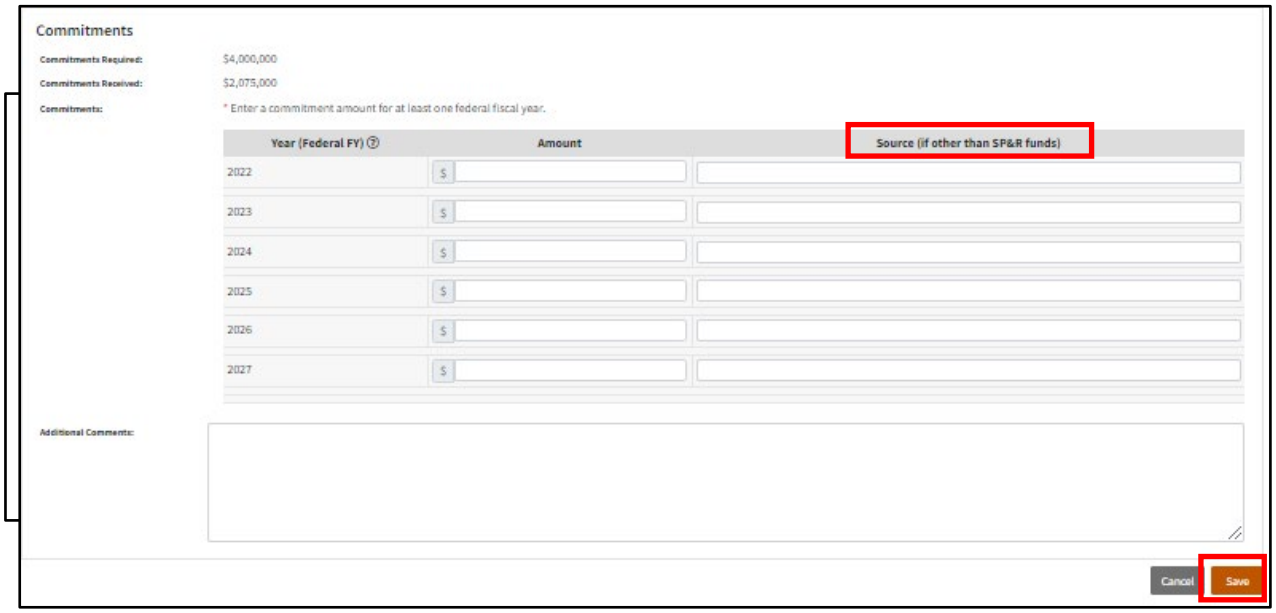


This screenshot shows the first view for entering or updating commitments and/or the technical contacts, such as members of the Technical Advisory Committee (TAC). The Manage TAC Members button is viewable to those in the lead study role.





Update the organization's commitments for each FY accepting commitments. For **Source** indicate what types of funds (e.g. State, SPR-B, non-Federal).
Click **Save**.

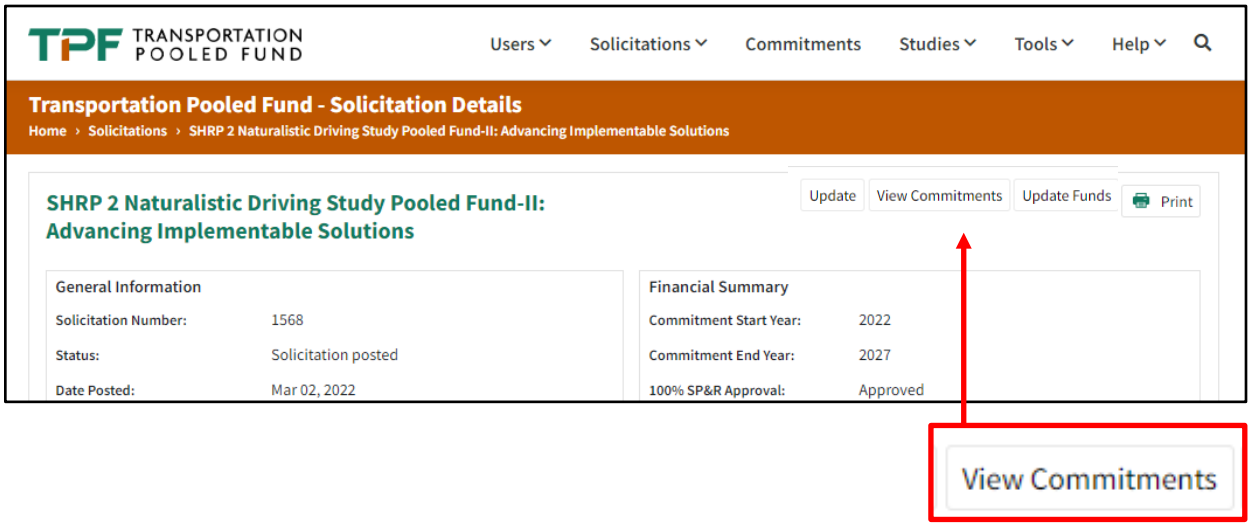


The lead study contact will receive an email notification that the commitment has been updated.

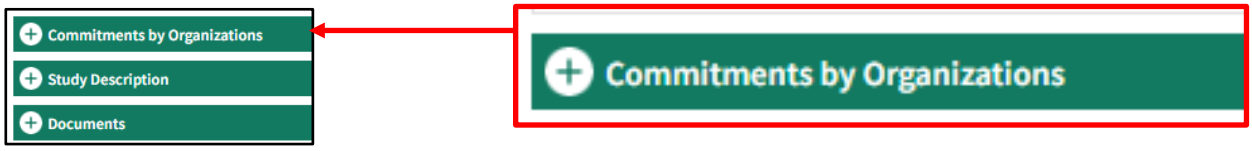
Viewing Commitments

To view an organization's commitments for a particular solicitation or study, select the option **View Commitments** in the **Actions** column on the Commitments page.

Alternatively, navigate to a study detail page and click the **View Commitments** button in the top right corner. Both of these options will show the commitments of all the organizations against a specific study or solicitation.



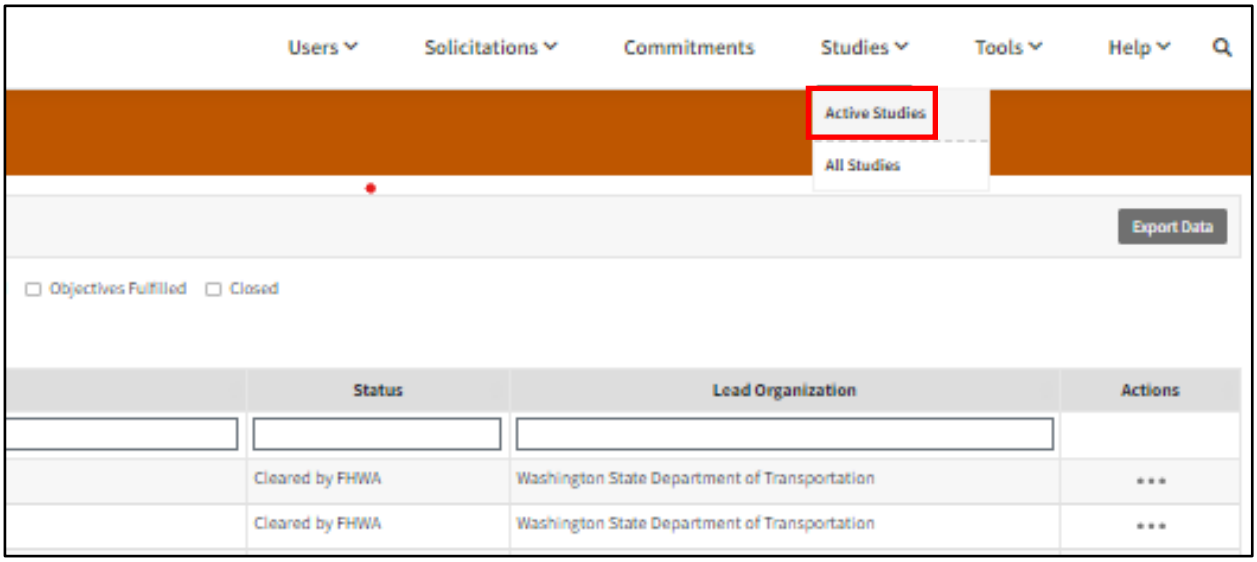
These commitments are also available in the solicitation or study detail page in the green expandable menu titled "**Commitments by Organization.**"



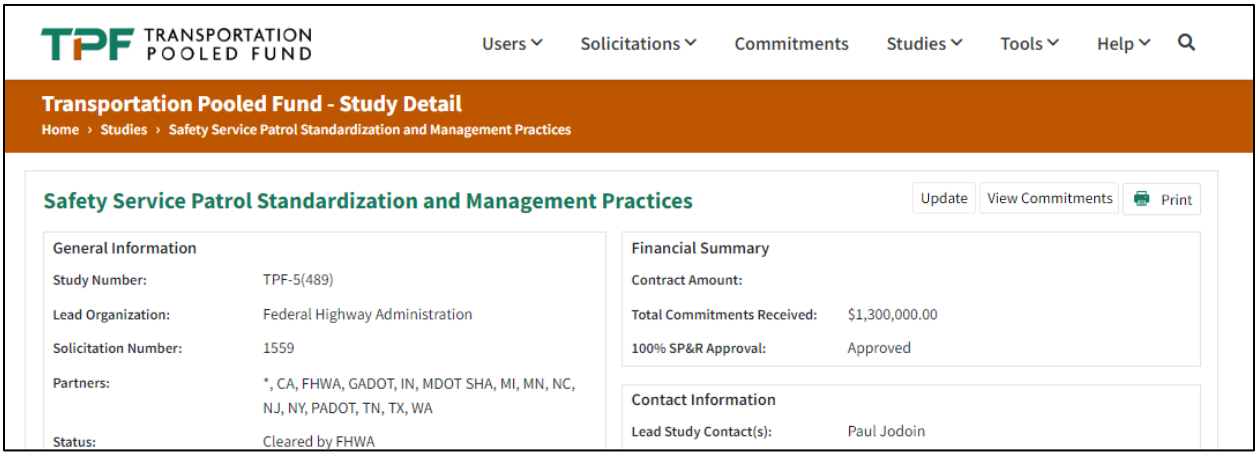
HOW TO MANAGE A STUDY

Updating a Study

Click on **Studies**, then on **Active Studies,** or select the search icon on the right.

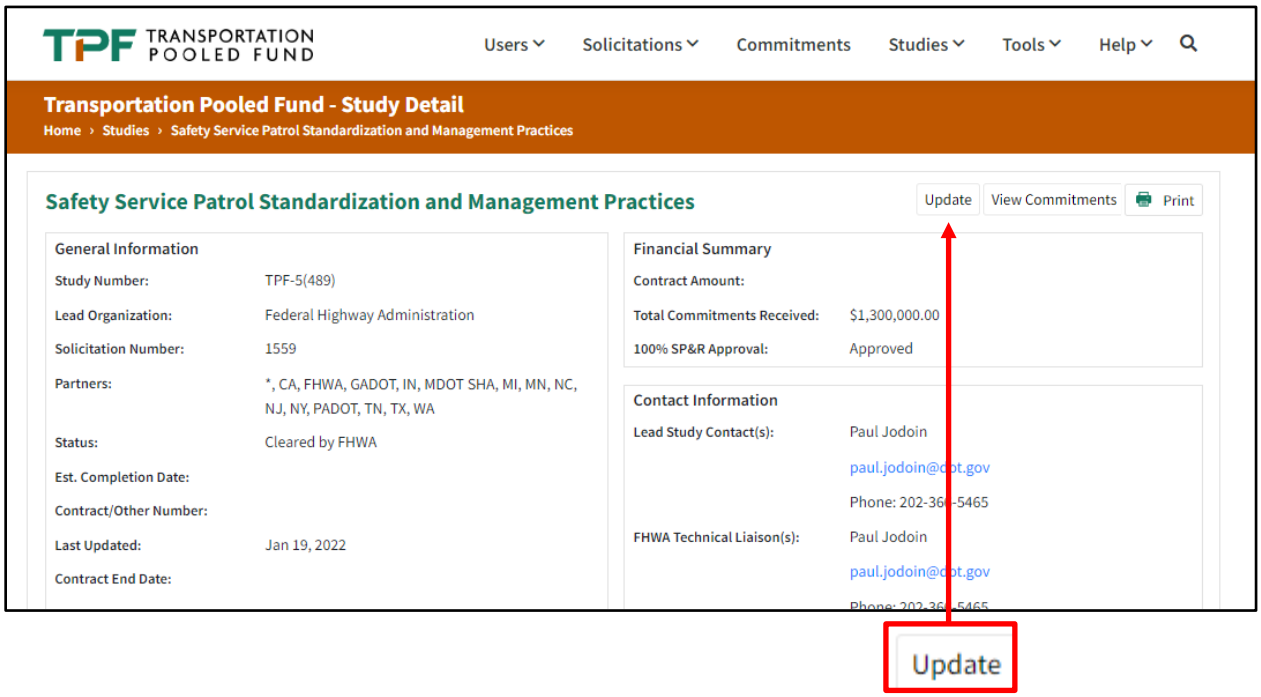


Navigate to the study you want to update.
Click on **Update**.
From here, you can update existing details, , Manage TAC members or Manage contractors or investigators.



Uploading Documents to a Study

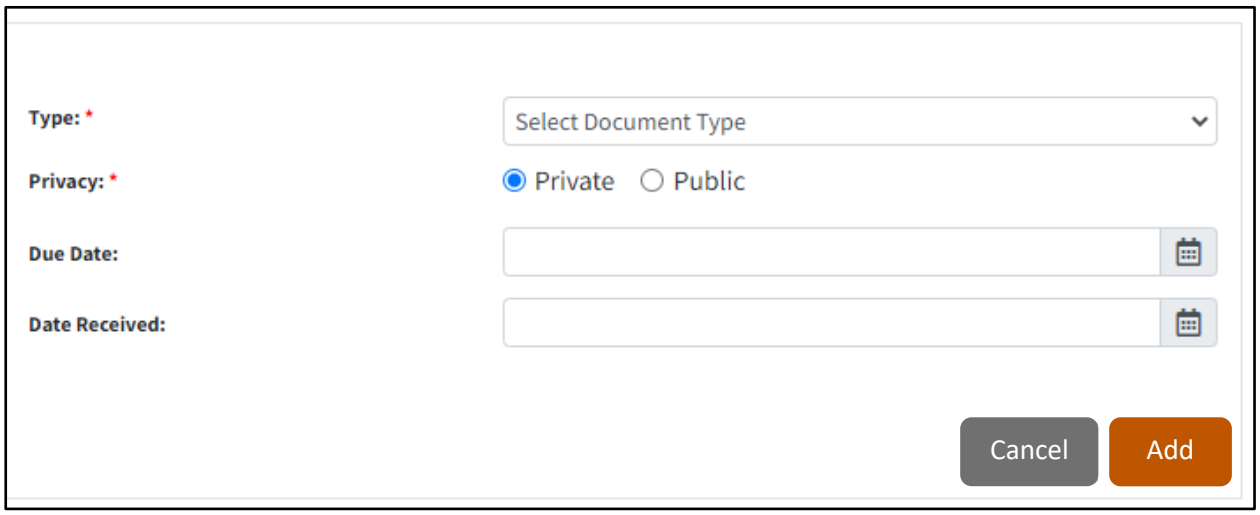
Navigate to the Study Detail page.
Select the **Update** Button.



Scroll to the bottom of the page. In the **Upload Documents** section, enter the document title.
Click on **Drop a file to upload** to search for document to upload.

Select type of document. Select if the document is **Public** or **Private**.

- Public documents can be seen by everyone, even if they are not an authorized user.
- Private documents can only be seen by people associated with the study (i.e., partners, TAC members, research team members).

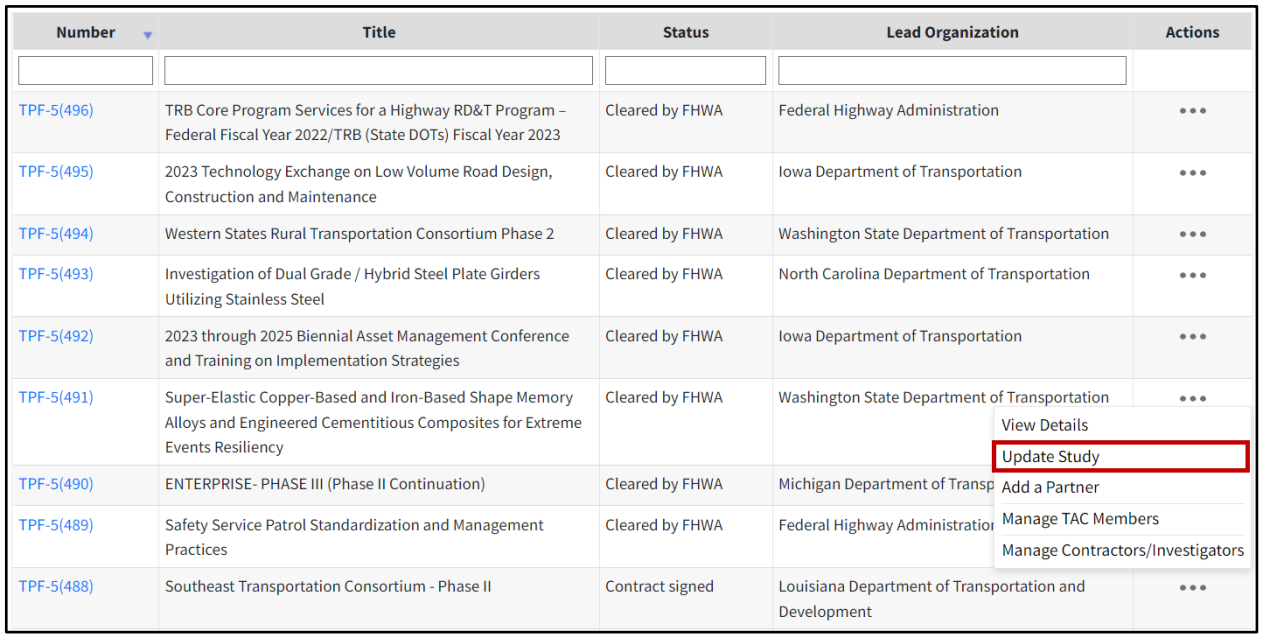


Documents with funding information should be marked as private. The **Date Due** and **Date Received** fields do not need to be completed. After finalizing, be sure to click **Add** then **Save** at the bottom of the page.

Study partners and TAC members will receive an email notifying them that the document was posted. After uploading, the document should be visible under **Study Documents**.

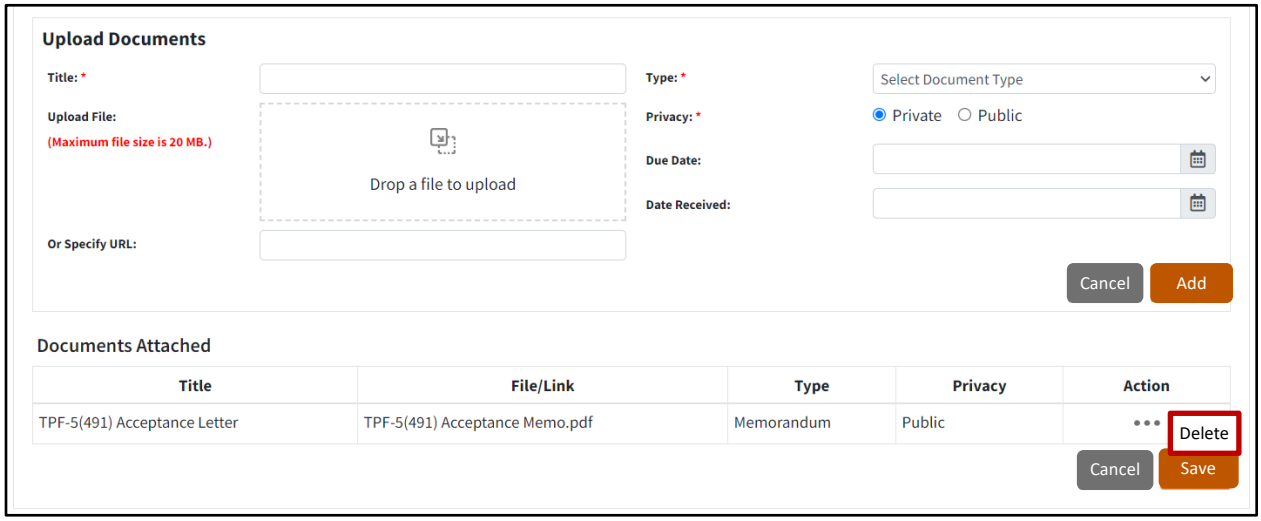
How to Delete a Document from a Study

Go to the **All Studies** page. Navigate to the **Actions** column and click on the three dots next to the study for which you wish to delete a document. Select **Update Study** from the list.



Number	Title	Status	Lead Organization	Actions
TPF-5(496)	TRB Core Program Services for a Highway RD&T Program – Federal Fiscal Year 2022/TRB (State DOTs) Fiscal Year 2023	Cleared by FHWA	Federal Highway Administration	•••
TPF-5(495)	2023 Technology Exchange on Low Volume Road Design, Construction and Maintenance	Cleared by FHWA	Iowa Department of Transportation	•••
TPF-5(494)	Western States Rural Transportation Consortium Phase 2	Cleared by FHWA	Washington State Department of Transportation	•••
TPF-5(493)	Investigation of Dual Grade / Hybrid Steel Plate Girders Utilizing Stainless Steel	Cleared by FHWA	North Carolina Department of Transportation	•••
TPF-5(492)	2023 through 2025 Biennial Asset Management Conference and Training on Implementation Strategies	Cleared by FHWA	Iowa Department of Transportation	•••
TPF-5(491)	Super-Elastic Copper-Based and Iron-Based Shape Memory Alloys and Engineered Cementitious Composites for Extreme Events Resiliency	Cleared by FHWA	Washington State Department of Transportation	•••
TPF-5(490)	ENTERPRISE- PHASE III (Phase II Continuation)	Cleared by FHWA	Michigan Department of Transp	
TPF-5(489)	Safety Service Patrol Standardization and Management Practices	Cleared by FHWA	Federal Highway Administratio	
TPF-5(488)	Southeast Transportation Consortium - Phase II	Contract signed	Louisiana Department of Transportation and Development	•••

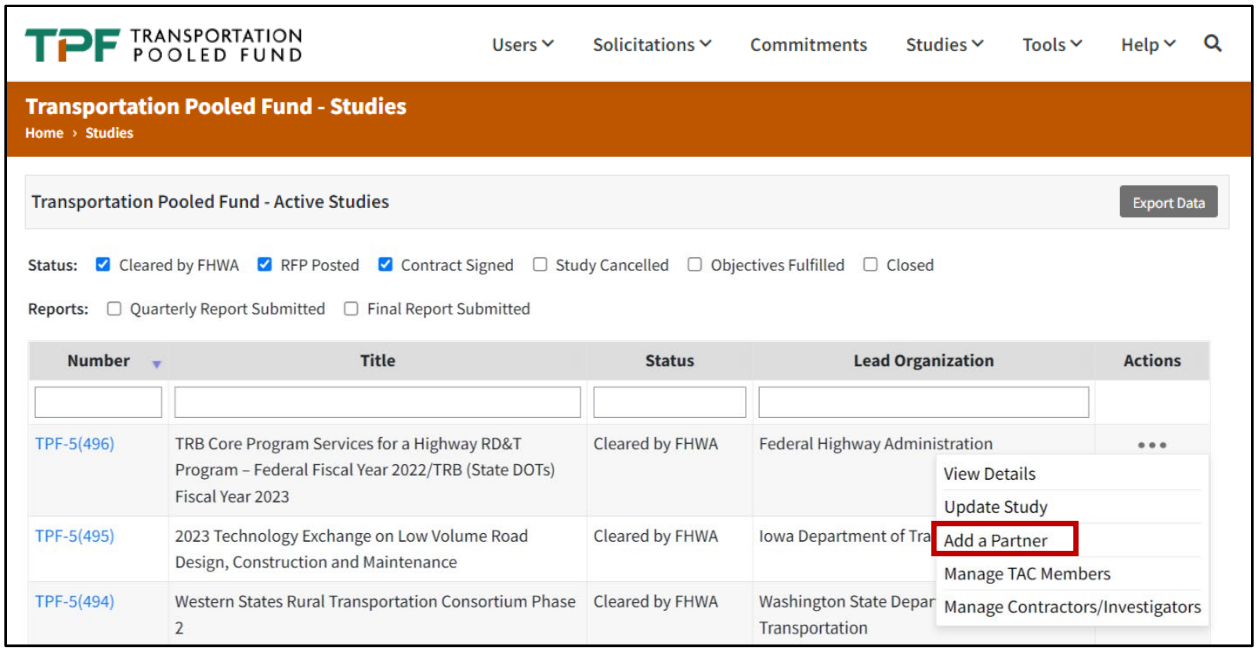
Scroll down to the **Documents Attached** section and navigate to the **Actions** column. Click on the three dots associated with the attachment you wish to delete. A **Delete** button will appear on the screen. Click on the button to delete the attachment.



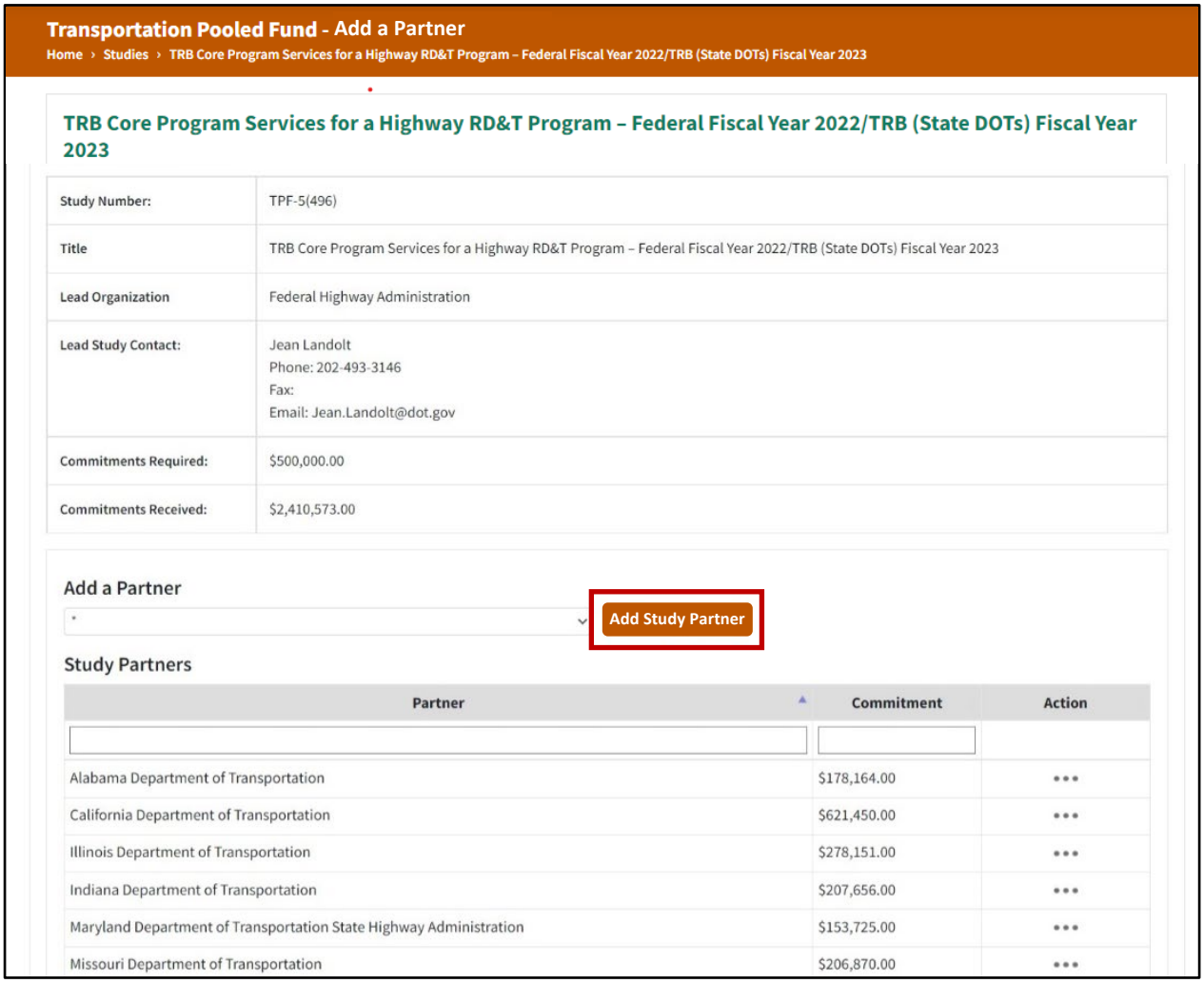
Adding a Partner to a Study

To commit funds to a study that has indicated that sufficient commitments have been received but is still accepting commitments from current partners, an organization must be added as a study partner.

Go to the **Studies** page. Find the study for which you want to add a partner.
In the **Actions** column, click on **Add a Partner**.



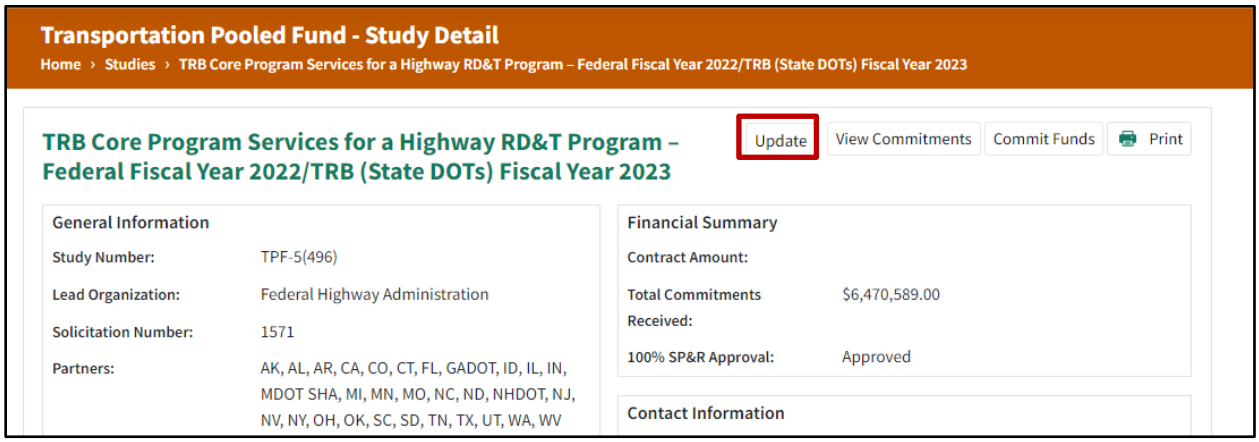
Scroll down to the **Add Study Partner** field and select the partner organization from the drop-down box. If the partner you want to add is not in the box, then you will need to go to **Users/Organizations/Add an organization** in the top menu bar and add the new organization. Once you add the organization, it will appear in the drop-down box.
Click on **Add Study Partner.**



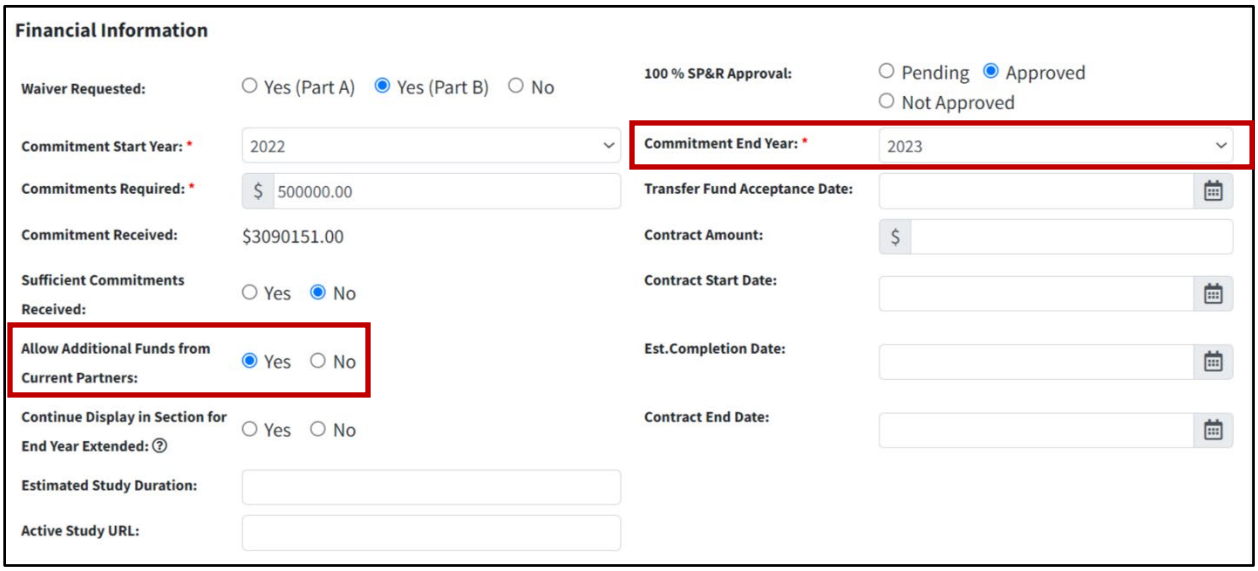
Continue Allowing Commitments to a Study

If sufficient commitments have been received but you would like to still allow current partners to commit to the study, perform the following actions:

Click on **Studies**. Find the study you want to allow current partners to continue to commit to.



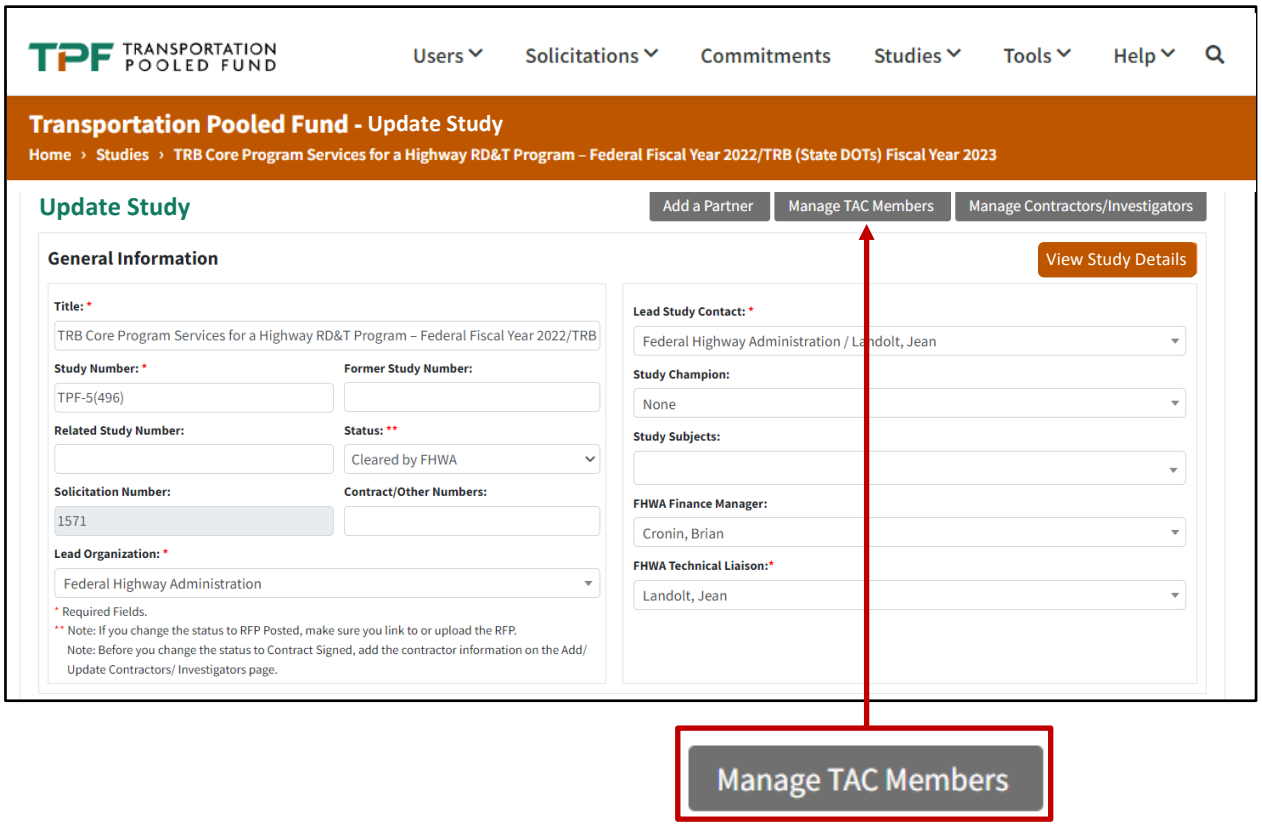
Click on **Update**. Scroll down to the bottom of the page to the **Financial** section. Set **Allow Additional Funds from Current Partners** to Yes. Ensure that the **Commitment End Year** is at least the current year or the contract end year. Note this is not a teime extnsion. Commitment End Year is not identical to contract expiration.



Adding a New TAC Member to a Study

Study partners who've committed funds are automatically listed as Study TAC members. The technical contact added while committing funds to a study is a voting TAC member.

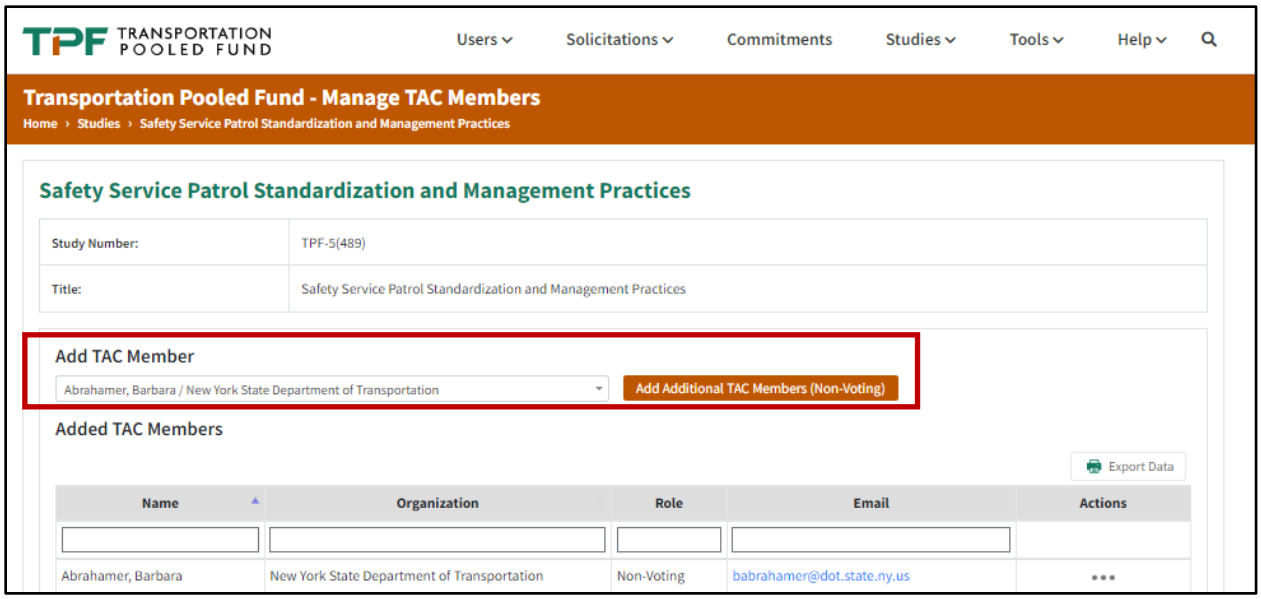
Once an organization is added as a partner, the persons associated with that study may be added as a nonvoting TAC member. This designation can be done by selecting the **Manage TAC Members** option from the Actions column of the Studies page, or clicking the button titled **Manage TAC Members** on the **Update** Study Page.



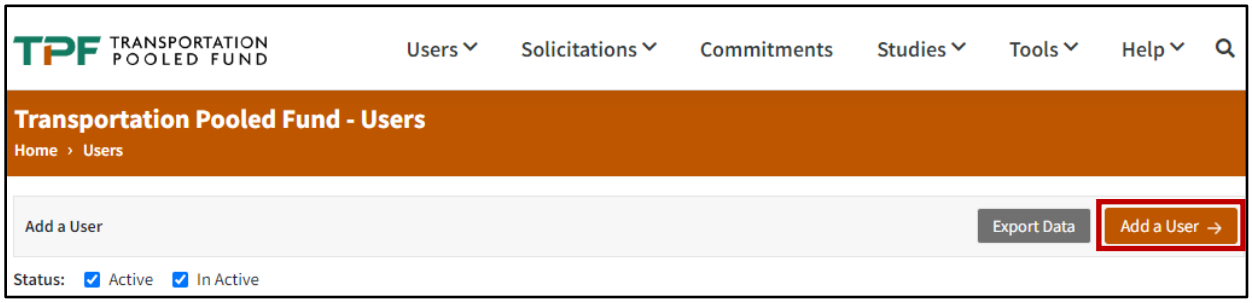
To add a non-voting TAC Member to a study from an organization that has been added as a Study Partner:

Navigate to the Study page. Select **Update**. Select **Manage TAC Members**. On the page that comes up, the current TAC members are listed.

Select from the drop-down **Add TAC Member** menu to Add Additional TAC members (Non-Voting).



If the TAC member's name is not already in the drop-down box, you will need to add the user's organization as a patner. Then click **Users** in the top menu bar. Then you will need to click **Add a User** at the top and fill out the required fields on the Add User page. Once added, the TAC member's name will automatically appear in the drop-down box.

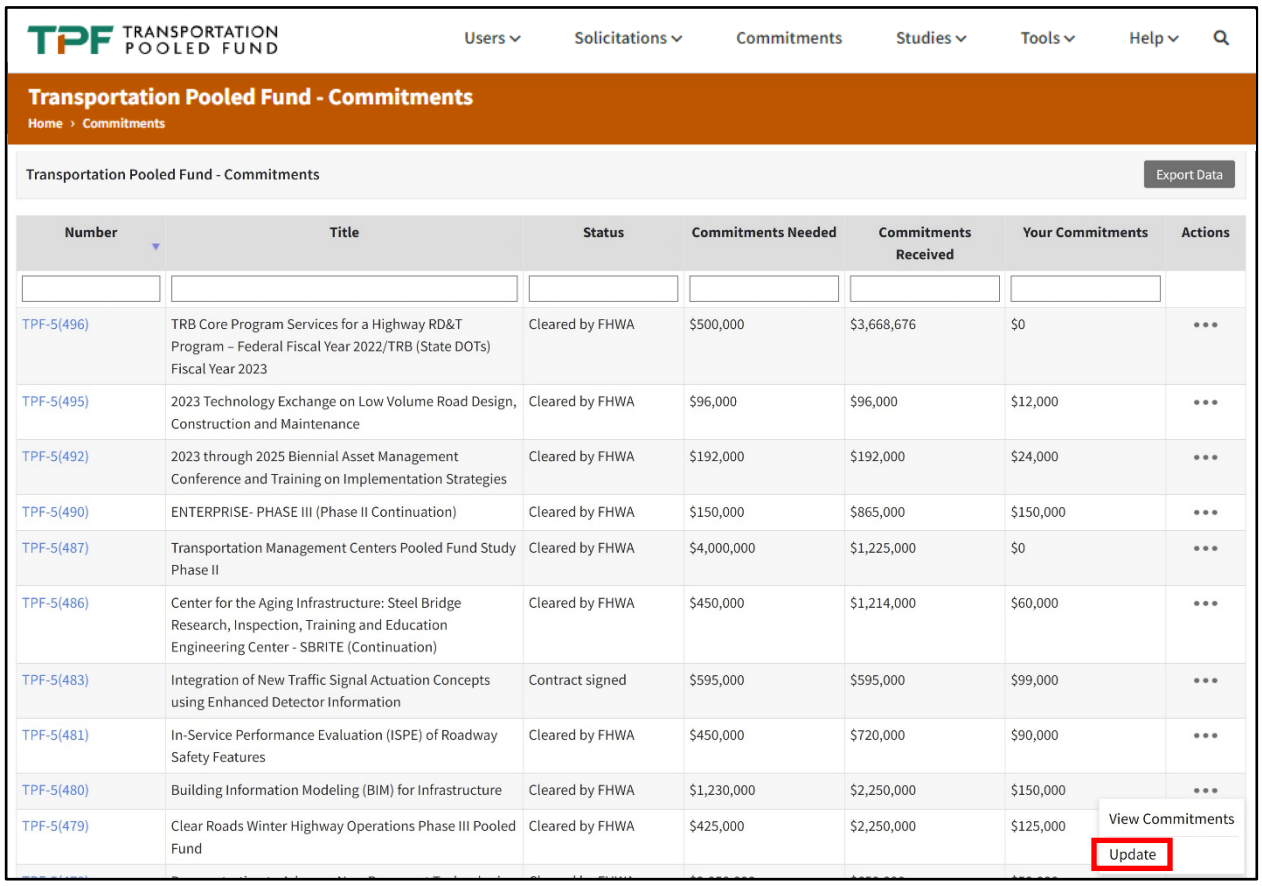


If the new TAC Member does not already have a TPF login account, then the webmaster will automatically receive an email notification that a new account needs to be created.

How to Update the Funding and/or Technical Contact

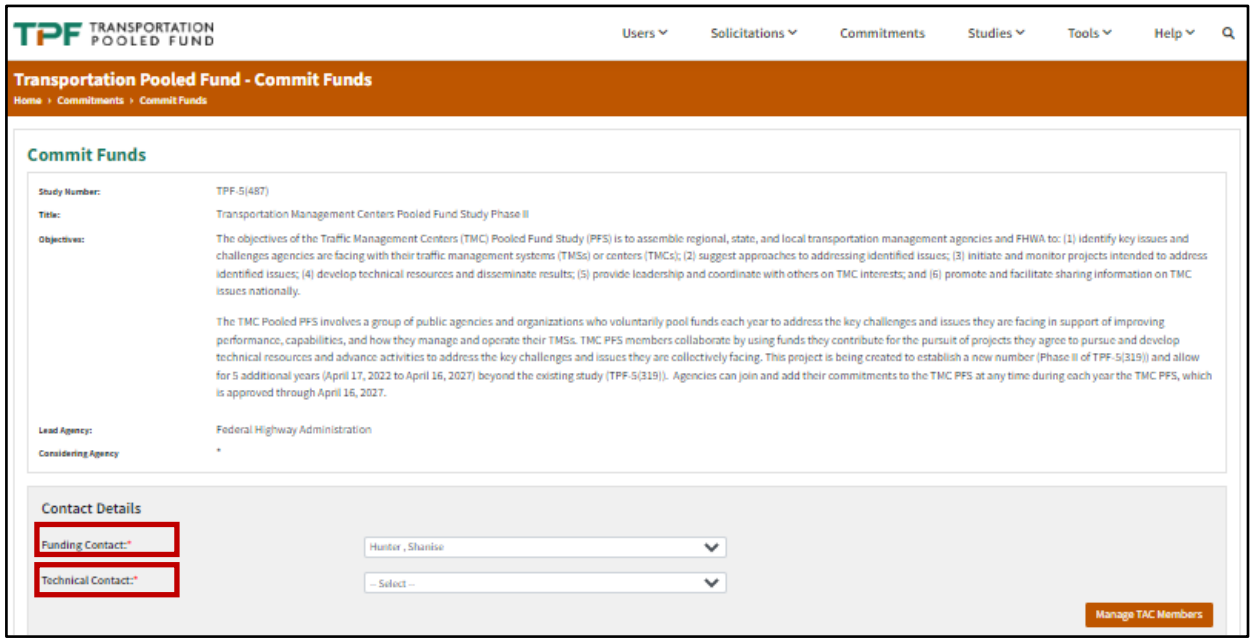
Click **Commitments** (in the top main menu bar).

The Commitments page will show all solicitations and studies where the organization is listed as a partner. Under the **Actions** column for the study, select the **Update** option inside the ellipsis.



Number	Title	Status	Commitments Needed	Commitments Received	Your Commitments	Actions
TPF-5(496)	TRB Core Program Services for a Highway RD&T Program – Federal Fiscal Year 2022/TRB (State DOTs) Fiscal Year 2023	Cleared by FHWA	$500,000	$3,668,676	$0	•••
TPF-5(495)	2023 Technology Exchange on Low Volume Road Design, Construction and Maintenance	Cleared by FHWA	$96,000	$96,000	$12,000	•••
TPF-5(492)	2023 through 2025 Biennial Asset Management Conference and Training on Implementation Strategies	Cleared by FHWA	$192,000	$192,000	$24,000	•••
TPF-5(490)	ENTERPRISE- PHASE III (Phase II Continuation)	Cleared by FHWA	$150,000	$865,000	$150,000	•••
TPF-5(487)	Transportation Management Centers Pooled Fund Study Phase II	Cleared by FHWA	$4,000,000	$1,225,000	$0	•••
TPF-5(486)	Center for the Aging Infrastructure: Steel Bridge Research, Inspection, Training and Education Engineering Center - SBRITE (Continuation)	Cleared by FHWA	$450,000	$1,214,000	$60,000	•••
TPF-5(483)	Integration of New Traffic Signal Actuation Concepts using Enhanced Detector Information	Contract signed	$595,000	$595,000	$99,000	•••
TPF-5(481)	In-Service Performance Evaluation (ISPE) of Roadway Safety Features	Cleared by FHWA	$450,000	$720,000	$90,000	•••
TPF-5(480)	Building Information Modeling (BIM) for Infrastructure	Cleared by FHWA	$1,230,000	$2,250,000	$150,000	•••
TPF-5(479)	Clear Roads Winter Highway Operations Phase III Pooled Fund	Cleared by FHWA	$425,000	$2,250,000	$125,000	

Select the correct person from the drop-down boxes for **Funding Contact** and **Technical Contact**. If the person is not already in the drop-down box, you will need to add them to the TPF database by clicking on **Users/Users/Add a User** in the menu bar at the top and adding a new person. Once they are added, they will automatically appear in the drop-down box. The TPF webmaster will automatically receive an email notification that a new authorized user account is needed for that person. Click on **Save** at the bottom of the screen.



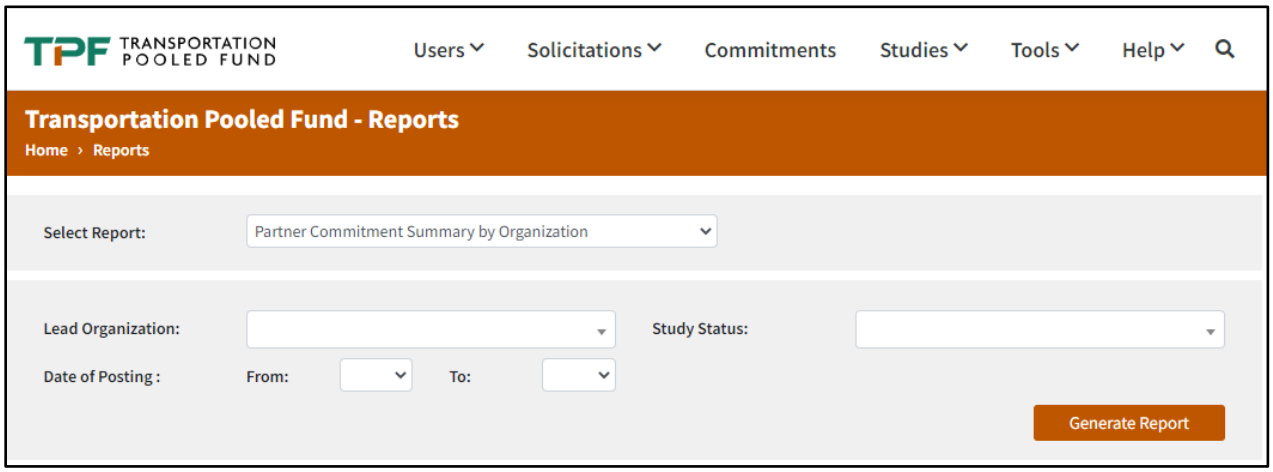
REPORTS

The current TPF website allows users to generate five different types of reports. To view the reports section on the TPF website, navigate to Tools in the top menu and select the Reports option from the drop-down list. Each type of report is explained separately in the following section:

Partner Commitment Summary by Organization Report

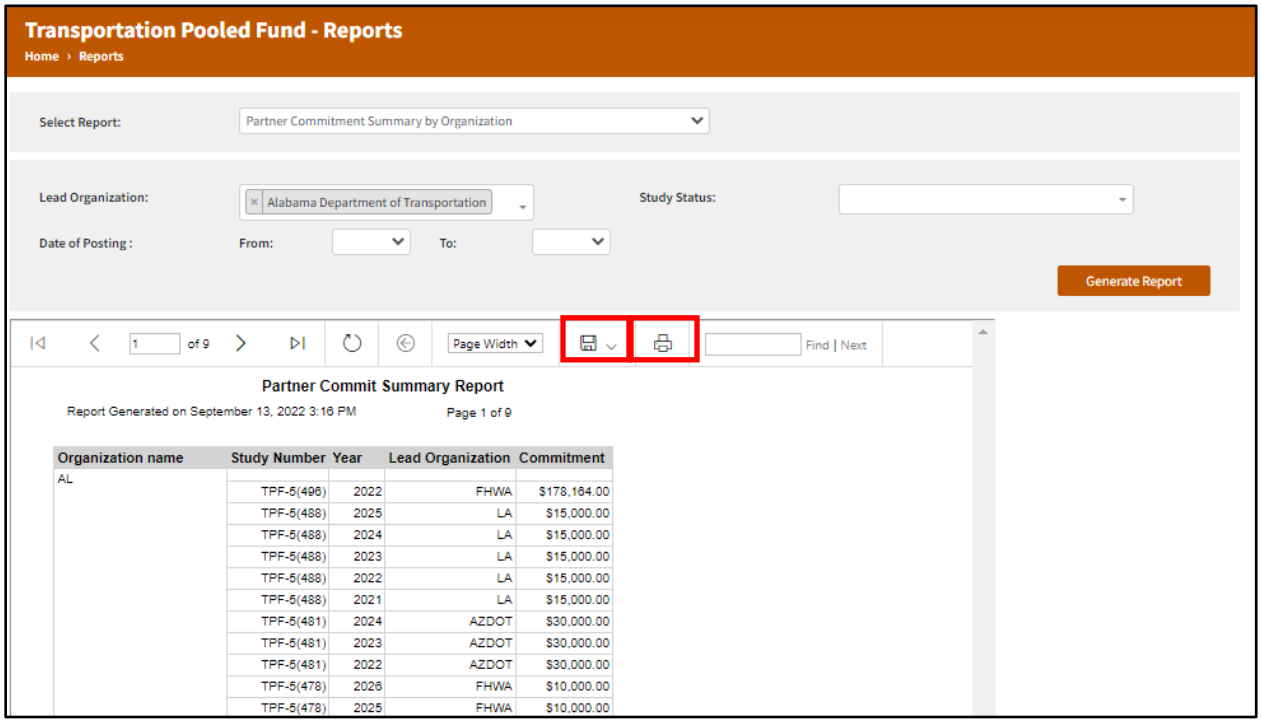
Take the following steps to generate a Partner Commitment Summary by Organization Report:

1. On the TPF Reports page, go to the **Select Report** drop-down and select the **Partner Commitment Summary by Organization** report.
2. Select the organization from the **Lead Organization** drop-down. (Note: Multiple lead organizations can be selected based on the user's requirements. Leaving the "Lead Organization" drop-down unselected will select all organizations by default).
3. Select the study status from the **Study Status** drop-down. (Note: Multiple study statuses can be selected based on the user's requirements.)
4. Select the posting year by selecting the years using the **From** and **To** drop-down lists provided to the right of the **Date of Posting** option.
5. Click on the **Generate Report** button to generate the Partner Commitment Summary by Organization Report.



This report provides the information for the partner commitment summary. This report includes the Study Number, Year, Lead Organization, and Commitment against all organizations or specific organizations based on the applied filters.

The report is generated and can be viewed inside the browser. The user also can download this report in an Excel® spreadsheet, PDF™, or Word® document. To download in any of these formats, click on the **floppy disk icon** in the header of the report, and it will show you all the available format options. You can also click on the **printer icon** next to the floppy disk to print the report from the browser. These icons are shown with a thick red border in the following screenshot.



Organization name	Study Number	Year	Lead Organization	Commitment
AL				
	TPF-5(496)	2022	FHWA	$178,164.00
	TPF-5(488)	2025	LA	$15,000.00
	TPF-5(488)	2024	LA	$15,000.00
	TPF-5(488)	2023	LA	$15,000.00
	TPF-5(488)	2022	LA	$15,000.00
	TPF-5(488)	2021	LA	$15,000.00
	TPF-5(481)	2024	AZDOT	$30,000.00
	TPF-5(481)	2023	AZDOT	$30,000.00
	TPF-5(481)	2022	AZDOT	$30,000.00
	TPF-5(478)	2026	FHWA	$10,000.00
	TPF-5(478)	2025	FHWA	$10,000.00

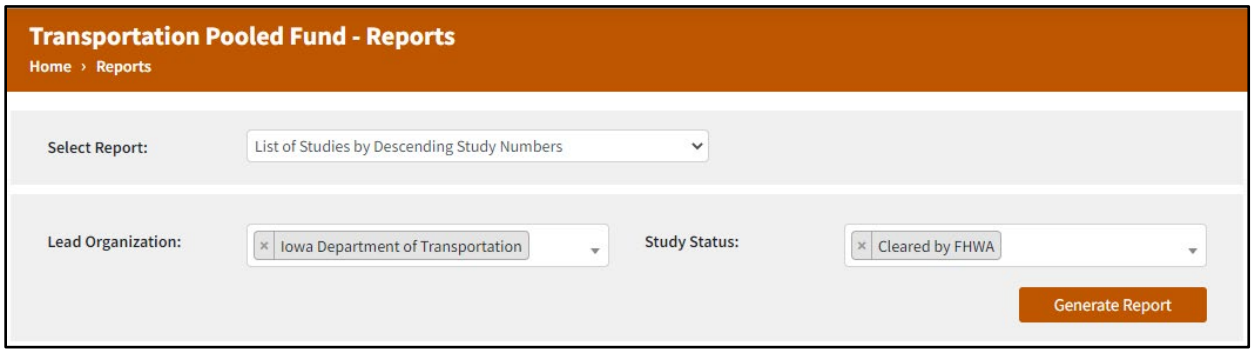
NOTE

Because reports take some time to retrieve data from the database, it might take longer to load or download a report, especially when the data for various years or projects are selected.

List of Studies by Descending Study Numbers Report

Take the following steps to generate a List of Studies by Descending Study Numbers report:

1. On the TPF Reports page, go to the **Select Report** drop-down and select the **List of Studies by Descending Study Numbers.**
2. Select the required organization from the **Lead Organization** drop-down. (Note: Multiple lead organizations can be selected based on the user's requirements. Leaving the Lead Organization drop-down unselected will select all organizations by default.)
3. Select the status option from the **Study Status** drop-down list. (Note: Multiple Study Statuses can be selected based on the user's requirements.)
4. Click on the **Generate Report** button to generate the List of Studies by Descending Study Numbers report.



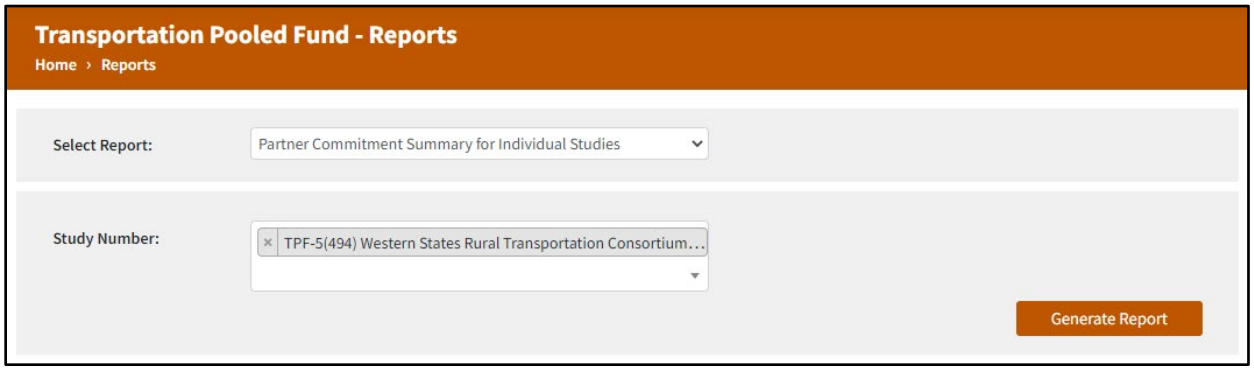
This report provides TPF study information in descending order of the study numbers. The report includes the Solicitation ID, Title, Lead Organization Contact Name, Lead Study Contact Email, FHWA Tech liaison Name, Total Commitments and FHWA Contribution.

This report can also be downloaded and printed using the two icons on top of the report viewer. However, due to the extended number of columns, this report is only downloadable in Excel format.

Partner Commitment Summary for Individual Studies Report

Take the following steps to generate a Partner Commitment Summary for Individual Studies report:

1. On the TPF Reports page, go to the **Select Report** drop-down and select the **Partner Commitment Summary for Individual.**
2. Select the specific required study number from the **Study Number** drop-down list. (Note: Multiple study numbers can be selected based on the user's requirements.)
3. Click on the **Generate Report** button to generate the Partner Commitment Summary for Individual.



This report provides commitment information for a specified study. This report includes the Study Title, Study Number, Study Status, Lead Organization, Total Commitments by your organization, and Commitment Ratio.

This report can also be downloaded or printed using the options in the report viewer, as explained in previous sections. The report can be downloaded in Excel, PDF, or Word formats.

TPF Projects – Summary Statics Report

Take the following steps to generate TPF Projects—Summary Statics Report:

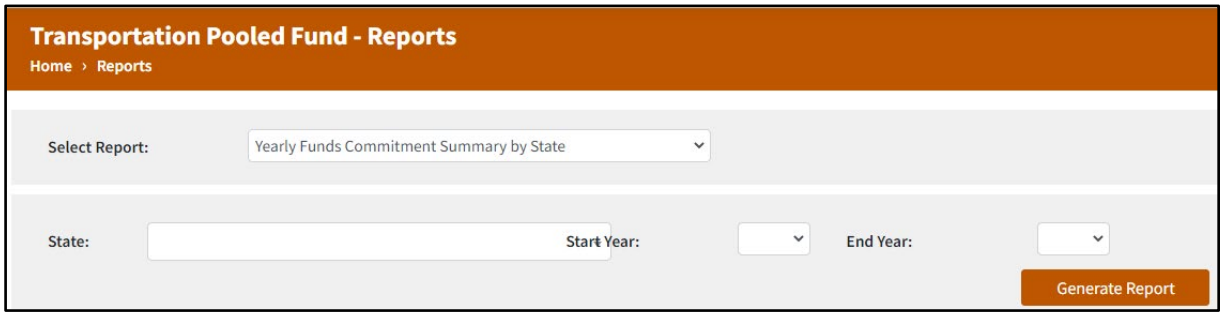
1. On the TPF Reports page, go to the **Select Report** drop-down and select the TPF Projects—Summary Statics report.
2. Click on the **Generate Report** button to generate the TPF Projects—Summary Statics Report.

This report provides the TPF projects statistics summary information against all active studies and completed studies. Active Studies represent the studies that have the status of “Cleared by FHWA”, “Request for Proposals Posted, or “Contract Signed.” Completed studies constitute studies whose status is either “Objectives Fulfilled” or “Closed.” The first page of the report contains tabulated statistics, while the second and third pages visualize the overall statistics as bar charts.

Yearly Funds Commitment Summary by State Report

Take the following steps to generate Yearly Funds Commitment Summary by State Report:

1. On the TPF Reports page, go to the **Select Report** drop-down and select the **Yearly Funds Commitment Summary by State** report.
2. Select the State from **State** drop-down. (Note: Multiple States can be selected based on the user's requirements, leaving the "State" drop-down unselected will select all States by default.)
3. Select the start year and end year from the **Start Year** and **End Year** drop-down list options.
4. Click on the **Generate Report** button to generate the Yearly Funds Commitment Summary by State Report.



This report provides the information for a commitment summary against yearly funds and all States based on the applied filters.

TOOLS TAB

This tab includes the What's New, Frequently Used Resources, Funding Transfer Requests, Search Records, and Reports pages. These pages can be viewed on the TPF website by navigating to **Tools** on the top menu and then selecting a page from the drop-down list. Each page available under the Tools tab is explained separately in the following subheadings.

Note: The pages for Funding Transfer Requests and Reports are only visible to an authorized user. A public user will not be able to access these pages without logging in.

What's New

The What's New page will feature updates to the TPF Program, including updated resources, success stories, and more!

Frequently Used Resources

This page allows users to download frequently used resources when participating in the TPF Program. The instructions to download documents are provided on page 55. This page has three subsections (Frequently Used Resources, TPF Quarterly Webinar Archives, and Tutorials/Help) where different links are provided for the users.

The Frequently Used Resources subsection contains documents that include various forms, checklists, process flowcharts, and user manuals. The Quarterly Webinar Archives contain links to the past webinar recordings and presentations. The Tutorials/Help section enlists guidebooks and user manuals for the website and the TPF Program.

Frequently Used Resources

- TPF Web User Manual (May, 2022)
- TPF Financial Procedural Manual (July, 2022)

TPF Quarterly Webinar Archives

The TPF Program holds quarterly webinars to provide program status updates. These webinars are free and open to all interested participants. Check the Current News section on the homepage of this web site for information about registering for the next quarterly webinar.

April 2021

- Webinar Recording

May 2019

- Webinar Training Presentation and Recording

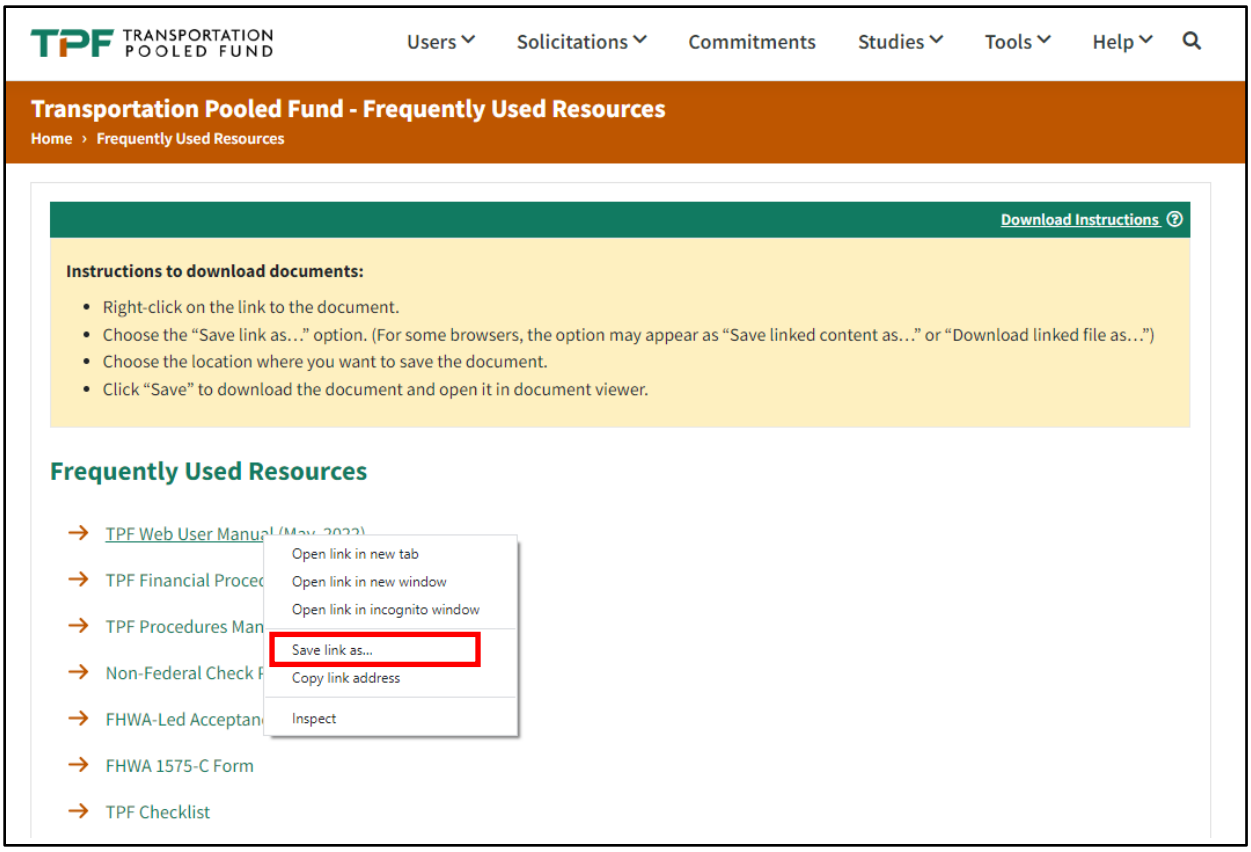
March 2017

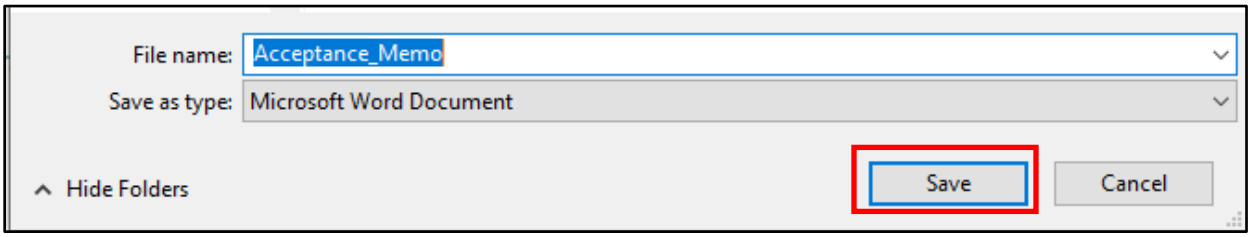
- Webinar Presentation

Tutorials/Help

- TPF Procedures Manual (July, 2022)

Instructions to download documents:
Right-click on the link to the document.
Choose the **Save link as** option. (For some browsers, the option may appear as Save linked content as… or “Download linked file as…”)
Choose the location where you want to save the document.
Click **Save** to download the document then open it in the document viewer.





FUNDING TRANSFER TRACKING TOOL

Tracking Funding Transfers in Process

All funding transfers are tracked in a spreadsheet that is maintained by the FHWA Office of Budget and Finance (OCFO). The Transfer Tracking Tool will show the following information:

- The project number (TPF number).
- The name of the transferee.
- The program code.
- The name of the recipient.
- The FY of the funds that are being transferred.
- The amount of funds that are being transferred.
- The date the transfer request was received and logged by FHWA.
- The date that the request was processed in FMIS.
- The date an advice of funds was submitted for approval for FHWA-led projects.
- The date the transfer is complete.

Funding Transfer Stages

Stage 1—The date the request was logged by the OCFO.

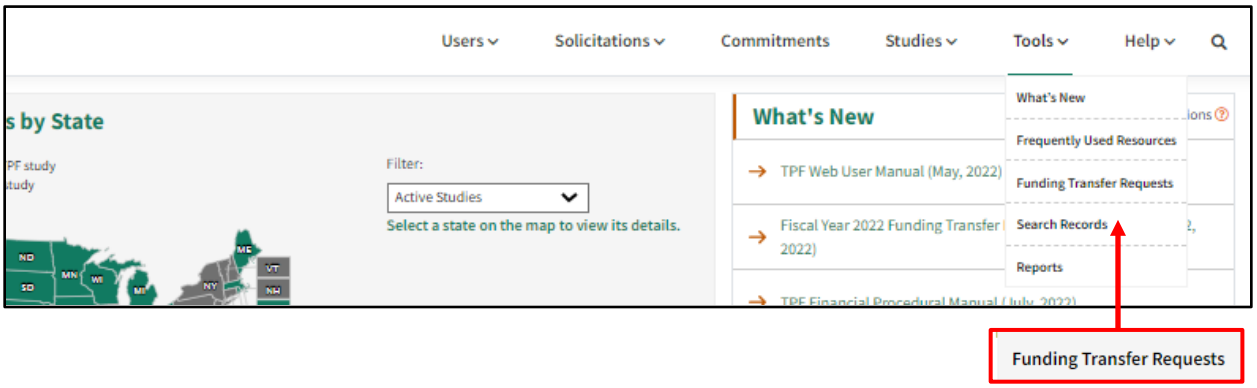
Stage 2—The date the request was processed in FMIS. Note: If the transfer is not processed, then it will be indicated as “Not/Applicable (N/A)” with a supporting statement underneath the comment column of the spreadsheet.

Stage 3—This stage is only applicable to FHWA-led projects and signifies the date that OCFO submits the advice of funds for signature. State-to-State transfers and unprocessed transfers will be indicated as “N/A.”

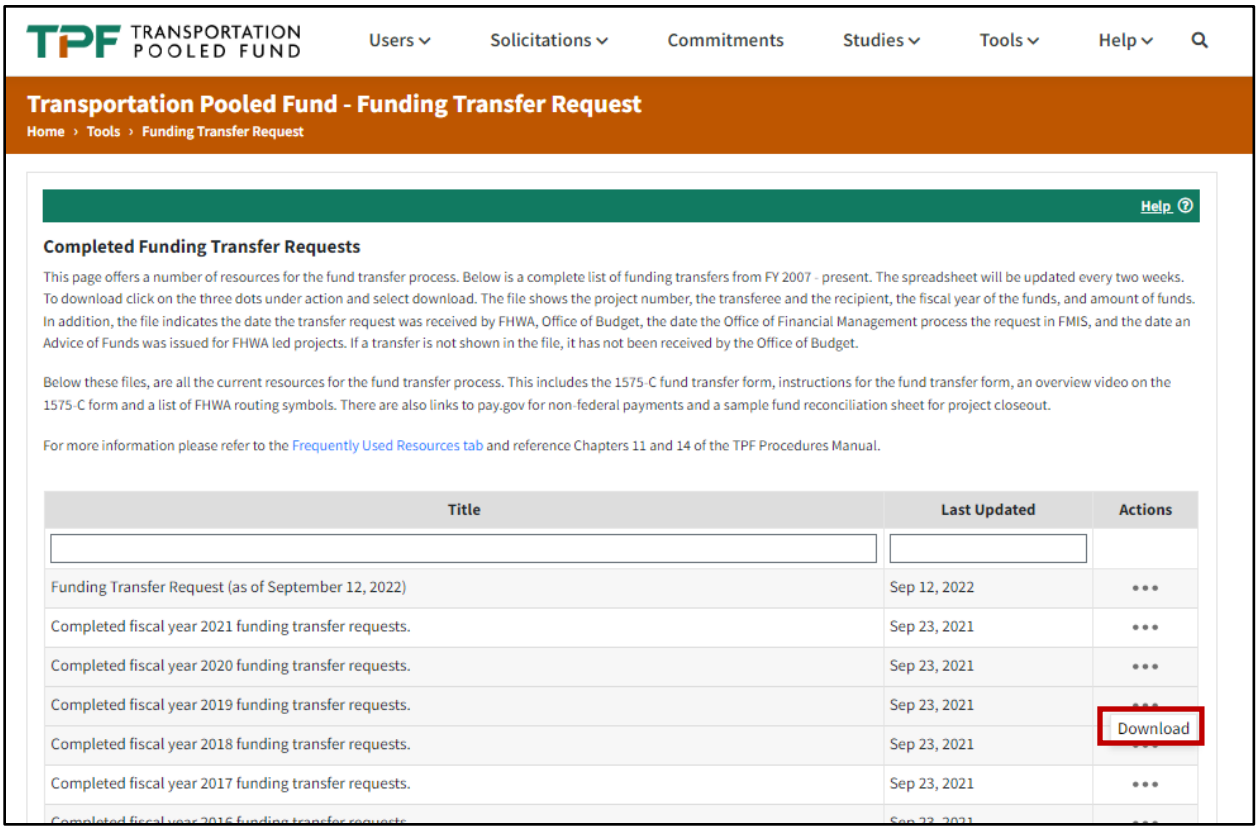
Stage 4—This stage is only applicable to FHWA-led projects where funding was transferred to FHWA. The transfer is complete once the advice of funds is provided to the Headquarters (HQ) office.

How to Access the Funding Transfer Tracking Tool

Ensure you are logged in to the TPF website. Under the **Tools** tab, click on the "**Funding Transfer Requests**."

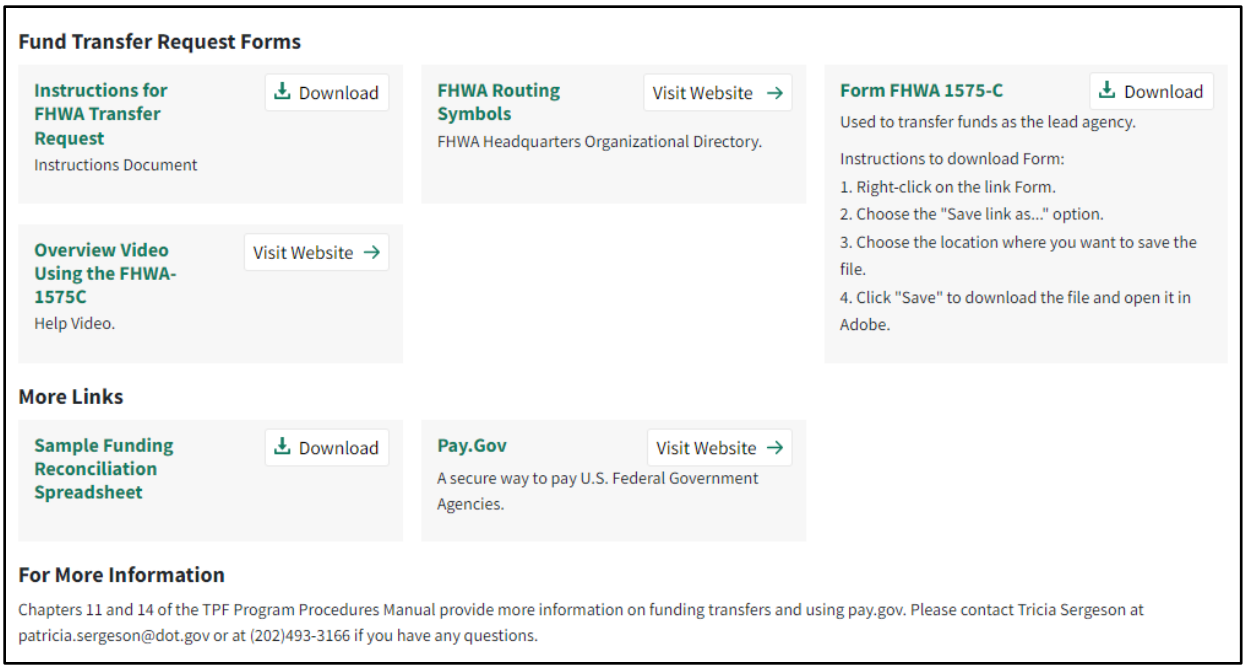


This link will take you to the Funding Transfer Request page. This page offers a number of resources for the funds transfer process. The following screenshot is a complete list of funding transfers from FY 2007–present. The spreadsheet will be updated every 2 w. To download the spreadsheet, click on the three dots under **Action** then select **Download**.

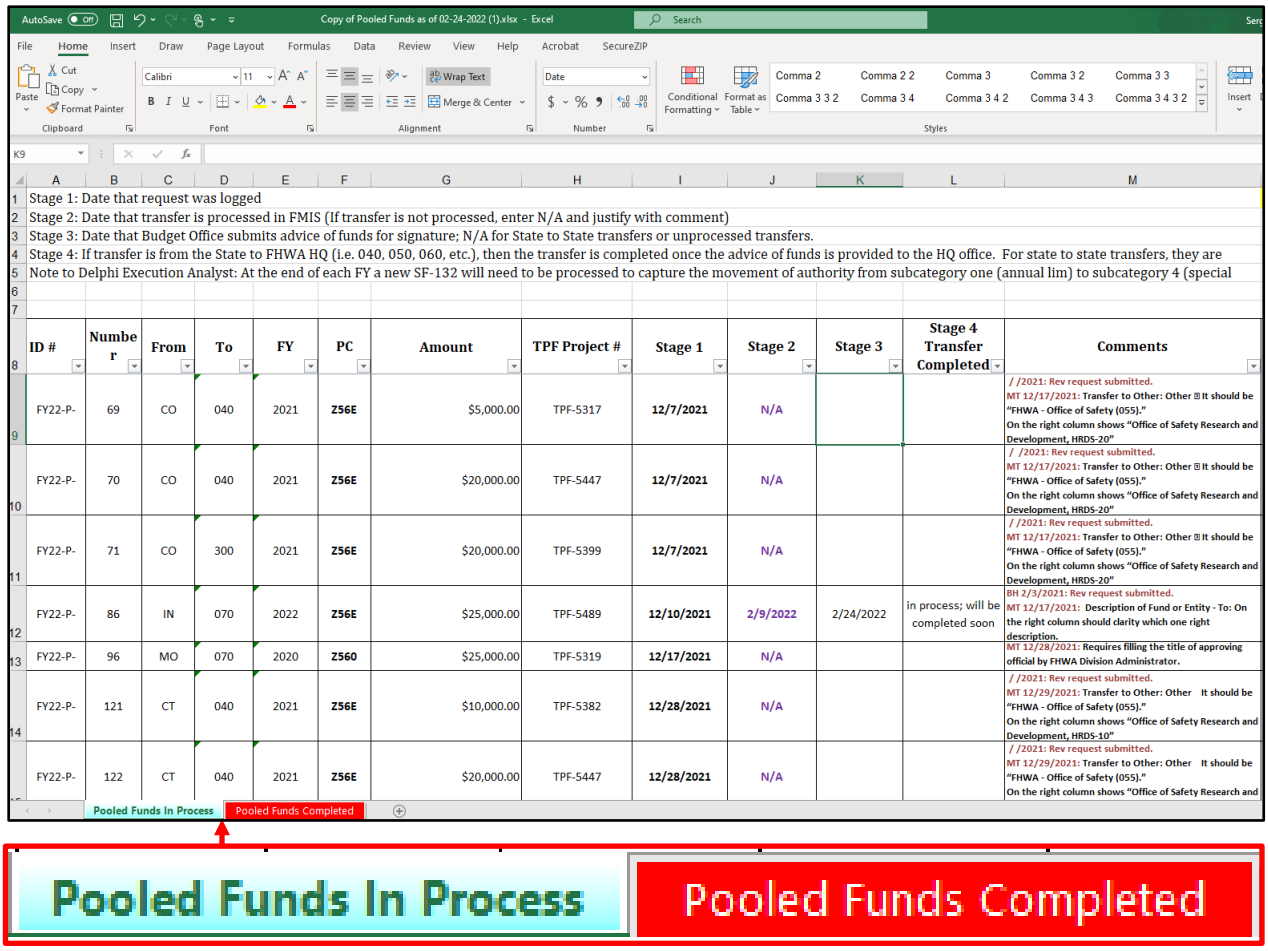


The file shows the project number, the transferee, and the recipient, the FY of the funds, and the amount of funds. In addition, the file indicates the date that the transfer request was received by FHWA, and the date the OCFO processed the request in FMIS, and the date an Advice of Funds was issued for FHWA-led projects. If a transfer is not shown in the file, it was not received by the OCFO.

After the list of files are the current resources for the fund transfer process. These resources include the 1575-C fund transfer form, instructions for the fund transfer form, an overview video on the 1575-C form, and a list of FHWA routing symbols. There are also links to pay.gov for non-Federal payments and a sample fund reconciliation sheet for project closeout.



When selecting a sample funding transfer spreadsheet to review, please remember that there are two tabs at the bottom of the spreadsheet: **Pooled Fund in Process** and **Pooled Fund Completed.**



Stage 1: Date that request was logged
Stage 2: Date that transfer is processed in FMIS (If transfer is not processed, enter N/A and justify with comment)
Stage 3: Date that Budget Office submits advice of funds for signature; N/A for State to State transfers or unprocessed transfers.
Stage 4: If transfer is from the State to FHWA HQ (i.e. 040, 050, 060, etc.), then the transfer is completed once the advice of funds is provided to the HQ office. For state to state transfers, they are
Note to Delphi Execution Analyst: At the end of each FY a new SF-132 will need to be processed to capture the movement of authority from subcategory one (annual lim) to subcategory 4 (special

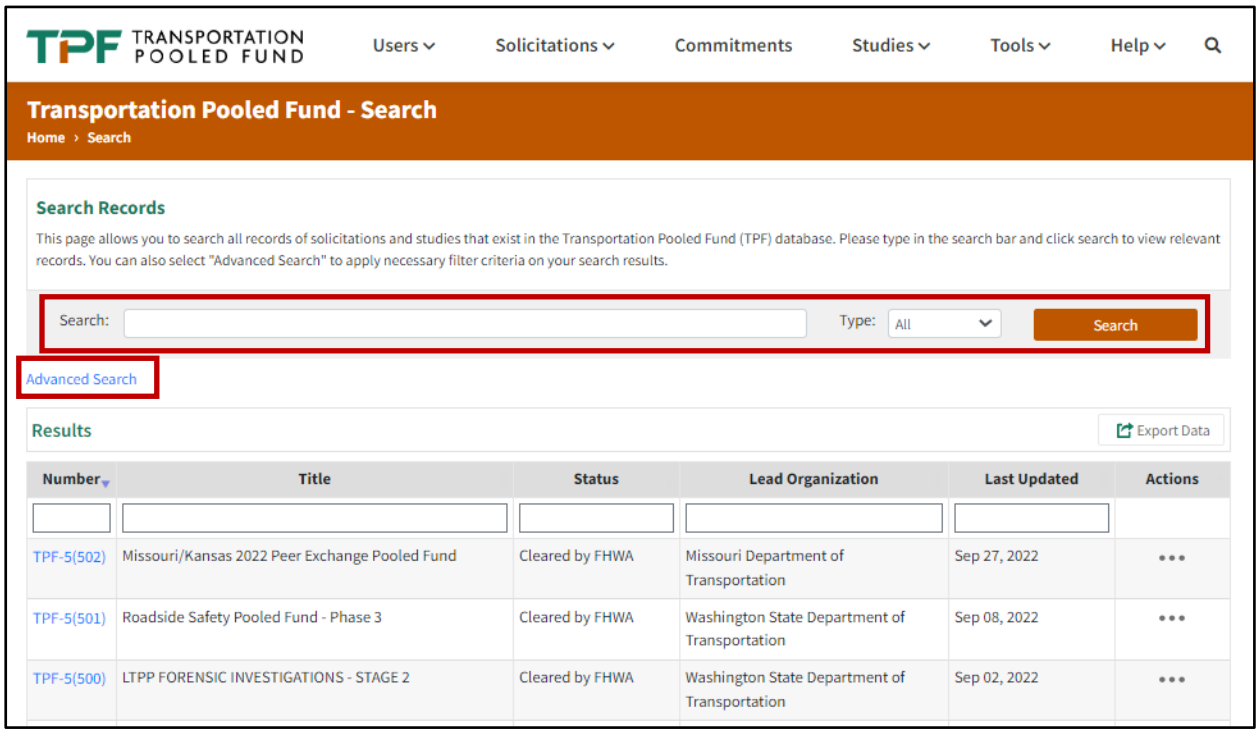
ID #	Number	From	To	FY	PC	Amount	TPF Project #	Stage 1	Stage 2	Stage 3	Stage 4 Transfer Completed	Comments
FY22-P-	69	CO	040	2021	Z56E	$5,000.00	TPF-5317	12/7/2021	N/A			/ /2021: Rev request submitted. MT 12/17/2021: Transfer to Other: Other It should be "FHWA - Office of Safety (055)." On the right column shows "Office of Safety Research and Development, HRDS-20"
FY22-P-	70	CO	040	2021	Z56E	$20,000.00	TPF-5447	12/7/2021	N/A			/ /2021: Rev request submitted. MT 12/17/2021: Transfer to Other: Other It should be "FHWA - Office of Safety (055)." On the right column shows "Office of Safety Research and Development, HRDS-20"
FY22-P-	71	CO	300	2021	Z56E	$20,000.00	TPF-5399	12/7/2021	N/A			/ /2021: Rev request submitted. MT 12/17/2021: Transfer to Other: Other It should be "FHWA - Office of Safety (055)." On the right column shows "Office of Safety Research and Development, HRDS-20"
FY22-P-	86	IN	070	2022	Z56E	$25,000.00	TPF-5489	12/10/2021	2/9/2022	2/24/2022	in process; will be completed soon	BH 2/3/2021: Rev request submitted. MT 12/17/2021: Description of Fund or Entity - To: On the right column should clarity which one right description.
FY22-P-	96	MO	070	2020	Z560	$25,000.00	TPF-5319	12/17/2021	N/A			MT 12/28/2021: Requires filling the title of approving official by FHWA Division Administrator.
FY22-P-	121	CT	040	2021	Z56E	$10,000.00	TPF-5382	12/28/2021	N/A			/ /2021: Rev request submitted. MT 12/29/2021: Transfer to Other: Other It should be "FHWA - Office of Safety (055)." On the right column shows "Office of Safety Research and Development, HRDS-10"
FY22-P-	122	CT	040	2021	Z56E	$20,000.00	TPF-5447	12/28/2021	N/A			/ /2021: Rev request submitted. MT 12/29/2021: Transfer to Other: Other It should be "FHWA - Office of Safety (055)." On the right column shows "Office of Safety Research and

Please note: If a specific transfer is not evident on the tracking tool, it should be assumed that the request was not received by the Office of Budget.
The current FY's funding transfer tracking tool is updated on a bi-weekly basis.

Upon completion of the State-to-State funding transfer, confirmation of funds received can be obtained via FMIS Business Objects.

Search Records

This page allows you to search all records of solicitations and studies that exist in the TPF database. The user can type keywords into the search bar and click **Search** to view relevant records. An **Advanced Search** feature lets you apply necessary filter criteria to the search results. The user can also download the record in the form of a spreadsheet in comma-separated values (CSV) file format.

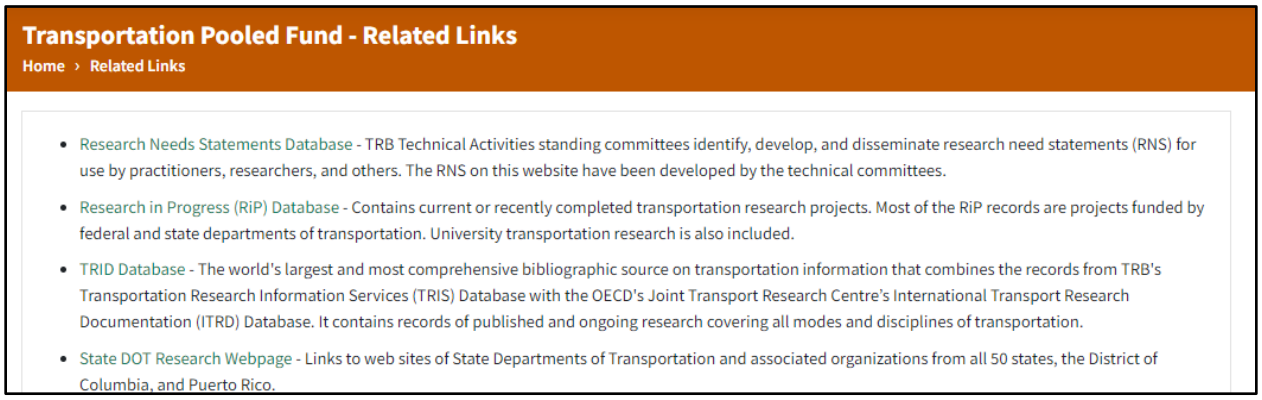


HELP TAB

This tab includes the Related Links, Email Alerts, Contacts, FAQ, Forms, and Glossary pages. These pages can be viewed on the TPF website by navigating to "Help" in the top menu and selecting a page from the drop-down list. Each page available under the Help tab is explained separately in the following section.

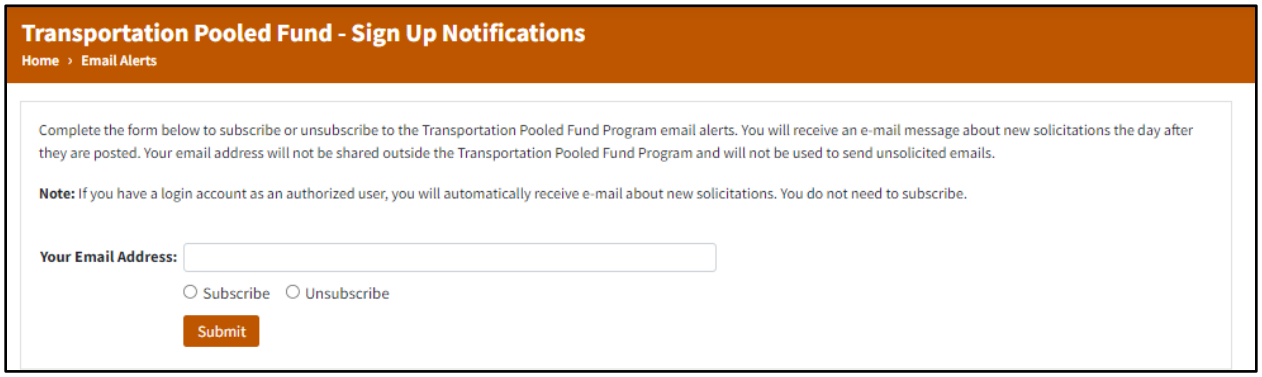
Related Links

The related links provides links to different websites that are associated with the Pooled Fund Program. A description of these websites is also provided with their names.



Email Alerts

This page allows the user to subscribe or unsubscribe to the TPF Program email alerts. You will receive an email message about new solicitations the day after they are posted. The email address will not be shared outside the TPF Program and will not be used to send unsolicited emails. If you have a login account as an authorized user, you will automatically receive emails about new solicitations. You do not need to subscribe.

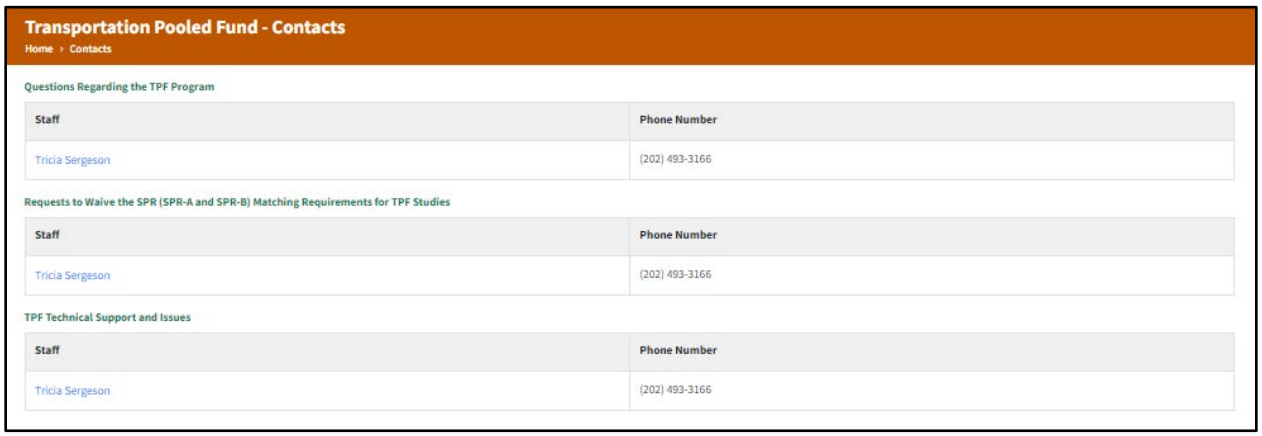


Take the following steps to subscribe or unsubscribe to the TPF Program email alerts:

1. Enter the email address in the “Your Email Address” field.
2. Click on the “Subscribe” or “Unsubscribe” option in the email alerts form.
3. Click on the “Submit” button to subscribe or unsubscribe to the email alerts on the TPF website.

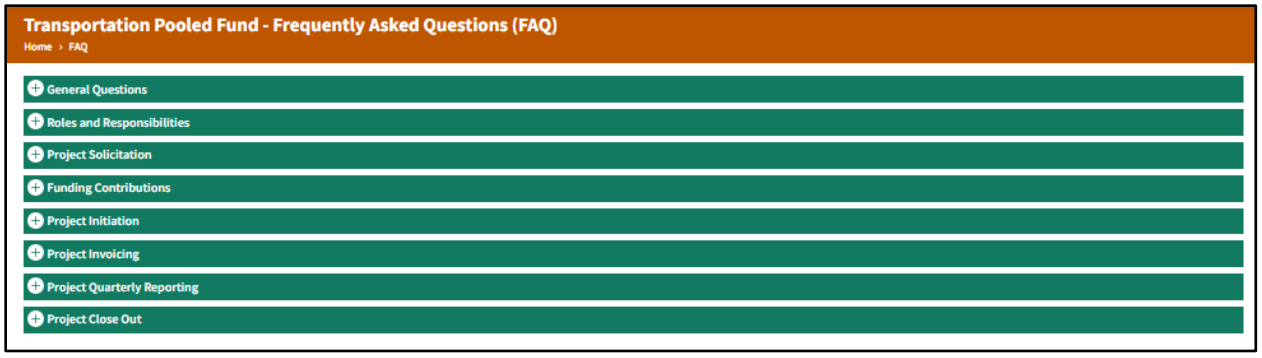
Contacts

This page allows the user to view the contacts information for the TPF website.



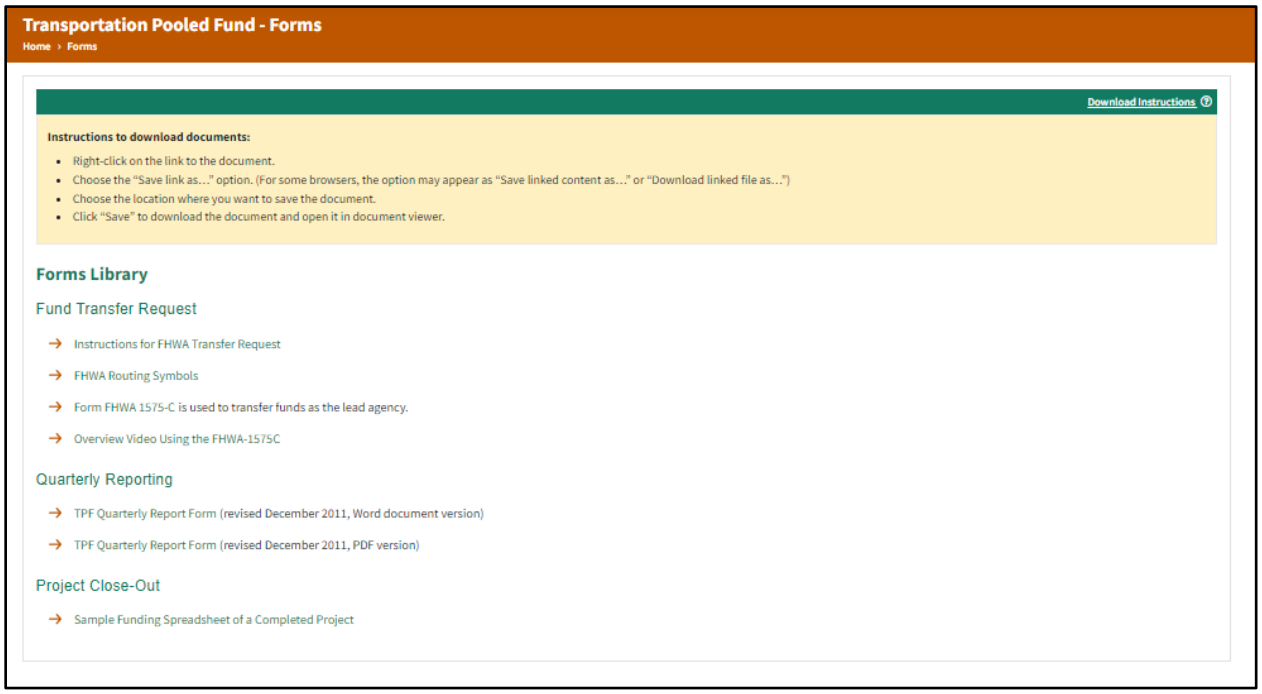
FAQ

This page allows users to view the FAQs. The FAQ page includes the General Question, Roles and Responsibilities, Project Solicitation, Funding Contributions, Project Initiation, Project Invoicing, Project Quarterly Reporting, and Project Close Out sections.



Forms

This page allows the user to download the fund transfer request, quarterly reporting, and project closeout forms from the TPF website. The instructions to download documents are provided at the top of the Forms page.



USER ROLES

The current website has two layers of user roles in the system. Both of these layers are explained in the following sections.

System-Level Roles

The first layer is the system-level role, which is a universal-level role for an authorized user of the website. This role remains the same for all projects and determines the access level of an individual inside the website. The read/write access on different sections of the website will be different for each system-level user role.

A matrix of permissions for all user roles is provided in table 1.

Table 1: Matrix of permissions for system-level user roles.

User Permission	FHWA Financial Manager, HQ	FHWA Financial Manager, State	TAC or Research Team Member	Funding Contact	Lead Agency Facilitator	Lead Agency Contact	FHWA Facilitator/Web master
View a list of the records on which the user is assigned a project role.	✓			✓	✓		
View a list of the records for the State the user is monitoring.		✓					
View a list of the records associated with the user's agency.				✓		✓	✓
View a summary of all commitments for projects with which the user is associated.	✓	✓	✓	✓	✓	✓	
View a summary of all commitments by the user's agency that is recorded in the TPF system.				✓		✓	✓
Update the record for the user's login account.					✓	✓	✓
View studies where the user is a member, including privileged study documents that are posted on the web.	✓	✓	✓	✓	✓	✓	✓

Table 1: Matrix of permissions for system-level user roles (continued).

User Permission	FHWA Financial Manager, HQ	FHWA Financial Manager, State	TAC or Research Team Member	Funding Contact	Lead Agency Facilitator	Lead Agency Contact	FHWA Facilitator/ Webmaster
Add or update the record of a person or agency.					✓	✓	✓
Commit funds to a study in the posted status solicitation.				✓		✓	✓
Commit funds to a study cleared by FHWA.				✓		✓	✓
Identify or change the agency's technical contact for a study.				✓		✓	✓
Post a solicitation for a new study.						✓	✓
Update solicitation or study record for those records where the user is assigned as the Lead Agency Facilitator.					✓		
Update the solicitation or study record for those records where the user's agency is the Lead Agency.						✓	✓

Table 1: Matrix of permissions for system-level user roles (cont.).

User Permission	FHWA Financial Manager, HQ	FHWA Financial Manager, State	TAC or Research Team Member	Funding Contact	Lead Agency Facilitator	Lead Agency Contact	FHWA Facilitator/Web master
Update any solicitation or study record.					✓	✓	✓
Extend the commitment or the end year of a study.					✓	✓	✓
Add a partner to the study.					✓	✓	✓
Indicate that sufficient commitments have been received.						✓	✓
Change the status of the study to solicitation withdrawn, request for proposal posted, contract signed, or objectives fulfilled.					✓	✓	✓
Post study documents and indicate whether they are public or for the TAC and Research Team only.					✓	✓	✓
Identify members of the TAC.					✓	✓	✓

Table 1: Matrix of permissions for system-level user roles (cont.).

User Permission	FHWA Financial Manager, HQ	FHWA Financial Manager, State	TAC or Research Team Member	Funding Contact	Lead Agency Facilitator	Lead Agency Contact	FHWA Facilitator/Web master
Identify research team members.					✓	✓	✓
Identify the contractor and investigator.					✓	✓	✓
Change the status of a study to Cleared by FHWA, Study Cancelled, or Study Closed.							✓
Assign a study number.							✓
Indicate that a study is eligible for 100 percent State Planning and Research funds.							✓
Identify any person from the user's agency as the lead agency contact.						✓	✓
Identify any person as the lead agency contact and the FHWA technical liaison.							✓

Table 1: Matrix of permissions for system-level user roles (cont.).

User Permission	FHWA Financial Manager, HQ	FHWA Financial Manager, State	TAC or Research Team Member	Funding Contact	Lead Agency Facilitator	Lead Agency Contact	FHWA Facilitator/Web master
Add a former study number or related study number to a record.					✓		✓
Enter information into the Legacy Update system.							✓
Commit funds on behalf of an agency.					✓		✓
Add subject terms to the study record or update them.							✓

Project-Level Roles

People can be connected to a TPF project (solicitation or study) in one or more roles. In some cases, these roles have no other function than to provide points of contact. In other cases, they modify or limit the user's User Role assignment. With the exception of the FHWA Finance Manager, project roles are assigned by the Webmaster, FHWA Facilitator, lead agency contact, or Lead Agency Facilitator via drop-down boxes in the Post/Update Solicitation and Update Study sections of the authorized user side of the website. The FHWA Finance Manager for FHWA Headquarters-led projects can only be assigned by the FHWA Facilitator or Webmaster. The project roles and their descriptions are provided in table 2.

Table 2: Project-level roles and their descriptions.

Project Role	Description
FHWA Finance Manager	• For projects where FHWA is the Lead Agency, an FHWA finance manager can be assigned. This option enables the assignment of a Headquarters (HQ) finance manager to a HQ-lead project. • Only an FHWA facilitator/webmaster user can assign a project's FHWA finance manager. • Only users with an FHWA financial manager, HQ user role can be assigned as a FHWA Headquarters-led project's FHWA financial manager. • This project role is not to be confused with the user role of finance manager. FHWA finance managers are also assigned to each State, but State finance managers can be set up via the webmaster and do not have to be assigned to individual projects.
FHWA Liaison	• This person is designated by the FHWA facilitator user as the FHWA liaison to the project.

Table 2: Project-level roles and their descriptions (continued).

Project Role	Description
Lead Study Contact	• The person who is designated as the Lead Study Contact is the main point of contact for the study/solicitation. This person must be from the Lead Agency or a "co-agency" of the Lead Agency. • The project's Lead Study Contact does not necessarily need to be a lead agency contact user, but he/she will need a lead agency contact user account to edit the project's record.
Partner Funding Contact	• This person is designated by the Partner Agency as the contact person for that agency's commitments to the project. The Funding Contact must be from the Partner Organization.
Partner Technical Contact	• This person is designated by the Partner Organization as the Partner's representative on the TAC for the project. • The Partner Technical Contact can access documents attached to the project that are marked "private" but only if the Technical Contact has a user account. • The Technical Contact's user account can be any User Role.

Table 2: Project-level roles and their descriptions (cont.).

Project Role	Description
Principle Investigator	• This person is designated by the lead organization contact to be the leader of the research team. • The Principle Investigator can access documents attached to the project that are marked "private" but only if the Principle Investigator has a user account. • The Principle Investigator's user account can be any User Role.
Research Team Member	• These people are designated by the lead agency contact to be a member of the research team. • The Research Team Member can access documents attached to the project that are marked "private" but only if the Research Team Member has a user account. • The Research Team Member's user account can be any User Role.
Study Champion	• A person who is assigned as the Study Champion can perform any TPF function that a Lead Study Contact can do, but only for projects where he/she is assigned the role. • Any person in the TPF database can be assigned as the Study Champion, and that person can have any User Role, not just the Lead Agency Facilitator User Role.

Table 2: Project-level roles and their descriptions (continued).

Project Role	Description
TAC Member	• These people are designated by the lead agency contact to be additional members of the TAC, aside from the Partner Technical Contacts. • The TAC Member can access documents attached to the project that are marked "private" but only if the TAC member has a user account. • The TAC member's user account can be any User Role.

NOTE

The project role **Lead Study Contact** was previously known as **Lead Agency Contact**. The project role **Study Champion** was previously known as **Lead Agency Facilitator**. These names were changed on the recommendation of National Cooperative Highway Research Program because having identical names on system-level as well as on project-level created confusion.

For any questions, please contact the **Pooled Fund Program manager at (202) 493–3166**.