

**United States
Department of Agriculture**

**Conference
Transparency,
Accountability and
Tracking (CTAT)
User Guide**

**July 2020
Version 3.1**

Office of the Chief Financial Officer
Transparency and Accountability Reporting Division

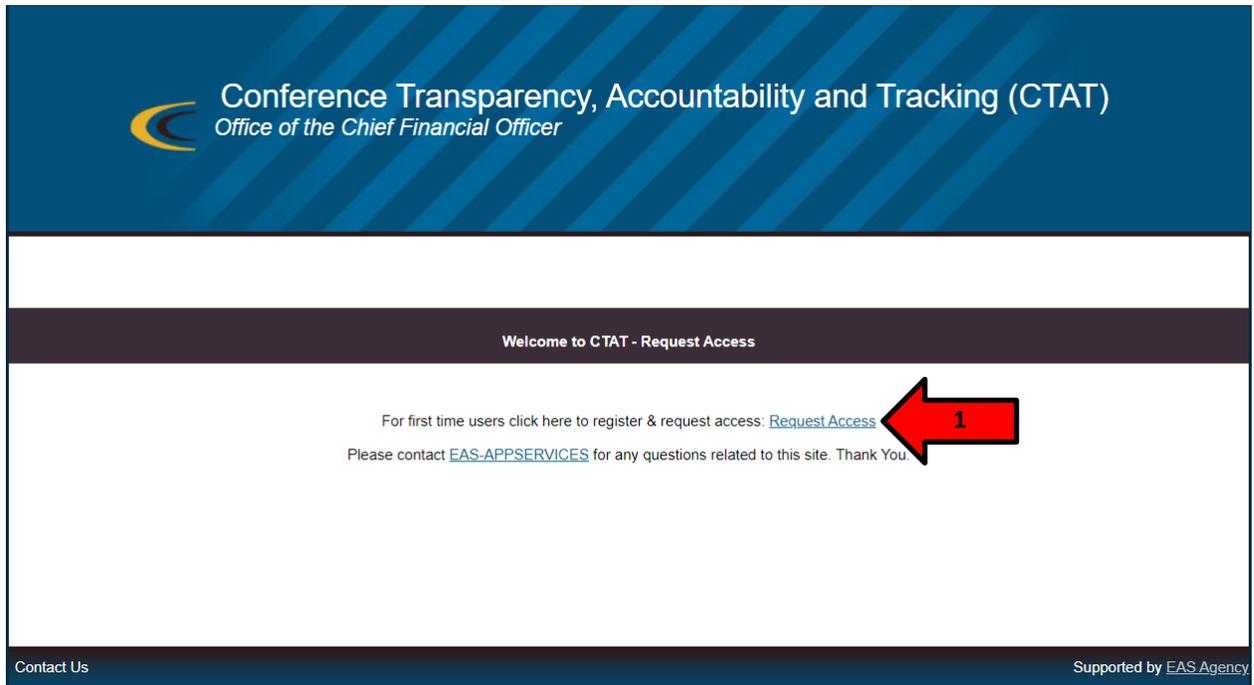
Table of Contents

	Page	Applies To
I. CTAT Registration		
A. Access Request.....	1	All
B. Roles/Functions.....	2	All
II. CTAT Account Profiles		
A. Submitters and Approvers		
1. Self-Registration.....	2	All
2. Agency POC-Initiated Registration.....	3	POCs
3. View and Update Profile.....	4	POCs
4. Access Levels.....	7	All
B. Agency POCs.....	9	POCs
III. Routing Lists		
A. Create a New Routing List.....	9	POCs
B. Update an Existing Routing List.....	16	POCs
C. Manage Sub Agencies.....	18	POCs
IV. Conference Requests		
A. Create a New Conference		
1. Entirely New.....	22	Submitters
2. Copy Conference.....	25	Submitters
B. Access Existing Conferences		
1. Draft Conferences.....	30	Submitters
2. All Entries.....	31	All
V. Conference Routing		
A. Decision Page.....	34	Approvers
B. Decision Workflow.....	38	Submitters, Approvers
C. Manual Retrieval.....	41	Approvers
D. Conference Override.....	42	POCs
VI. Reports		
A. Pending Requests.....	51	Submitters, POCs
B. Filterable Reports.....	52	Submitters, POCs
VII. Conference Transparency Reporting		
A. Post Conference Details.....	54	Submitters, POCs
B. Generate CTR Reports.....	56	POCs
VIII. Annual Plan		
A. Add New Plan.....	57	Submitters, POCs
B. View Plan.....	61	All
C. Edit/Update Plan.....	63	Submitters, POCs
Appendix A – Add New Conference.....	A-1	Submitters

I. CTAT Registration

A. Access Request

1. The CTAT homepage is at <https://www.eservices.usda.gov/ctat/>. Registered users log in using their eAuth credentials. First time users will be prompted to register. Click on (1) **Request Access**.



2. Enter information, select agency, and click on the (1) **submit request access** button. *Note: The Network username is pre-populated by the system.* A successful access request notification will appear on the screen, which indicates the request is now pending approval.

The screenshot shows the "REQUEST ACCESS FORM" on the CTAT website. The header is the same as in the previous image. Below the header, there is a red asterisk indicating required fields. The form contains the following fields: "First name:*" with a text input field containing "Enter first name"; "Last name:*" with a text input field containing "Enter last name"; "Email address*" with a text input field containing "Enter email address"; "Contact number:*" with a text input field containing "() - -"; "Network user name:*" with a text input field containing "JMcStay"; and "Agency:*" with a dropdown menu containing "Select One". At the bottom of the form is a "submit request access" button. A red arrow labeled "1" points to this button.

3. Initial registrations should consist of the agencies' points of contact (POC). The Office of the Chief Financial Officer (OCFO) will review the access requests and assign the agency POC role. Henceforth, POCs will manage registrations for their agencies (OCFO will assist as needed).

B. Roles/Functions

1. The three agency roles are submitter, approver, and POC. The submitter enters and submits conference requests while the approver reviews and approves or rejects them. In most cases the latter is part of agency management; certain thresholds require approval authorities (see [III.A.1](#)). The POC, on the other hand, manages CTAT for the agency, including, among others, overseeing user accounts, setting up routing lists, and submitting and approving conference requests on behalf of submitters and approvers, respectively. *Note: The term "user" will be used to denote any one of these three roles. A user's access and function are limited to the agency he or she is assigned to, but any user, regardless of role, can be assigned to multiple agencies.*
2. The system allows for a user account to have multiple roles – e.g., a submitter can be an approver, and vice versa; however, except for special cases (e.g., limited staff), it is recommended that users have distinct roles. POCs can fill in on most of the submitters' and approvers' functions to allow for a seamless conference approval process.
3. The table of contents shows each section in the user guide and which role(s) it is most applicable to.

II. CTAT Account Profiles

A. Submitters and Approvers

1. Self-Registration
 - a. Designated agency staff should register in CTAT (see [I.A](#)). Upon completion, the system sends a notification email to the agency POC and OCFO of the pending registration.
 - b. The agency POC logs in to review the access request. On the homepage, select (1) **Accounts**, click on (2) **Users** and select the (3) **User Access Requests** tab. *Note: The page lists all pending registrations.* Click on **Approve** or **Reject**, as appropriate. The user requesting access will receive a notification of the decision.

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer
Logged in as: James McStay

Home Conferences Routing Lists **Accounts** Reports Annual Plans

New User
Users
POCs

User Accounts

Manage Users Approver Access Requests **User Access Requests**

User Access Requests

A list of pending user accounts is displayed below. Please 'approve' or 'reject' the account requests. 'Approving' an account will grant the user access to the system and grant the ability to submit conference requests. 'Rejecting' an account will prevent the user from accessing the system.

Total no of requests: **44**

LAST NAME	FIRST NAME	USER NAME	EMAIL ADDRESS	AGENCY	CONTACT NUMBER	APPROVE USER	REJECT USER
McStay	James	JMcStay	james.mcstay@usda.gov	OCFO	2027200589	<input type="button" value="Approve"/>	<input type="button" value="Reject"/>

2. Agency POC-Initiated Registration

- a. The agency POC can register a user to the site by going to (1) **Accounts** → (2) **New User**, which opens the **User Profile Form** page. Enter the employee's information, including the network username, select the agency, and click on (3) **Submit User Profile**. A successful submit message appears, which indicates the employee can now access the system.

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Office of the Chief Financial Officer
Logged in as: James McStay

Home Conferences Routing Lists Accounts Reports Annual Plans

New User Users POCs **User Profile Form**

First Name

Last Name

Email Address

Contact Number

Network User Name

Agency

Submit User Profile

- b. Alternatively, the **User Profile Form** page can be reached by going to (1) **Accounts** → (2) **Users**, selecting the (3) **Manage Users** tab, and clicking on (4) **Add new user**.

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer
Logged in as: James McStay

Home Conferences Routing Lists Accounts Reports Annual Plans

New User Users POCs **User Accounts**

Manage Users Approver Access Requests User Access Requests

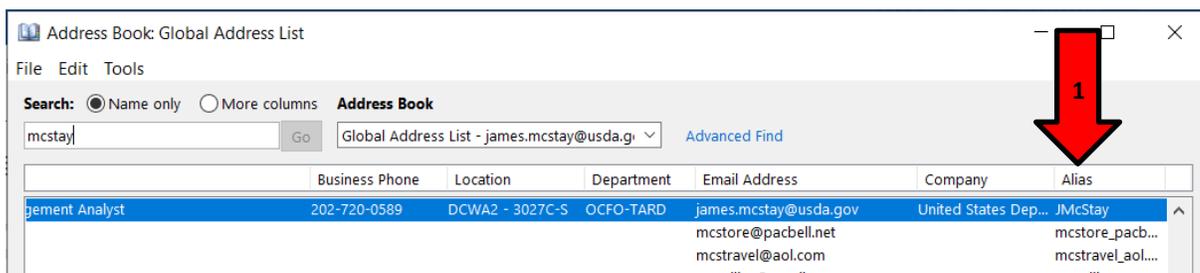
Manage User Accounts / Manage User Access
A list of active CTAT users is displayed below. You may manage a user's roles and access by visiting their account.

Users

Add new user Search Users Export User List Total no of active users: 1712

VIEW	LAST NAME	FIRST NAME	USER NAME	AGENCY	EMAIL ADDRESS	CONTACT NUMBER	DELETE
------	-----------	------------	-----------	--------	---------------	----------------	--------

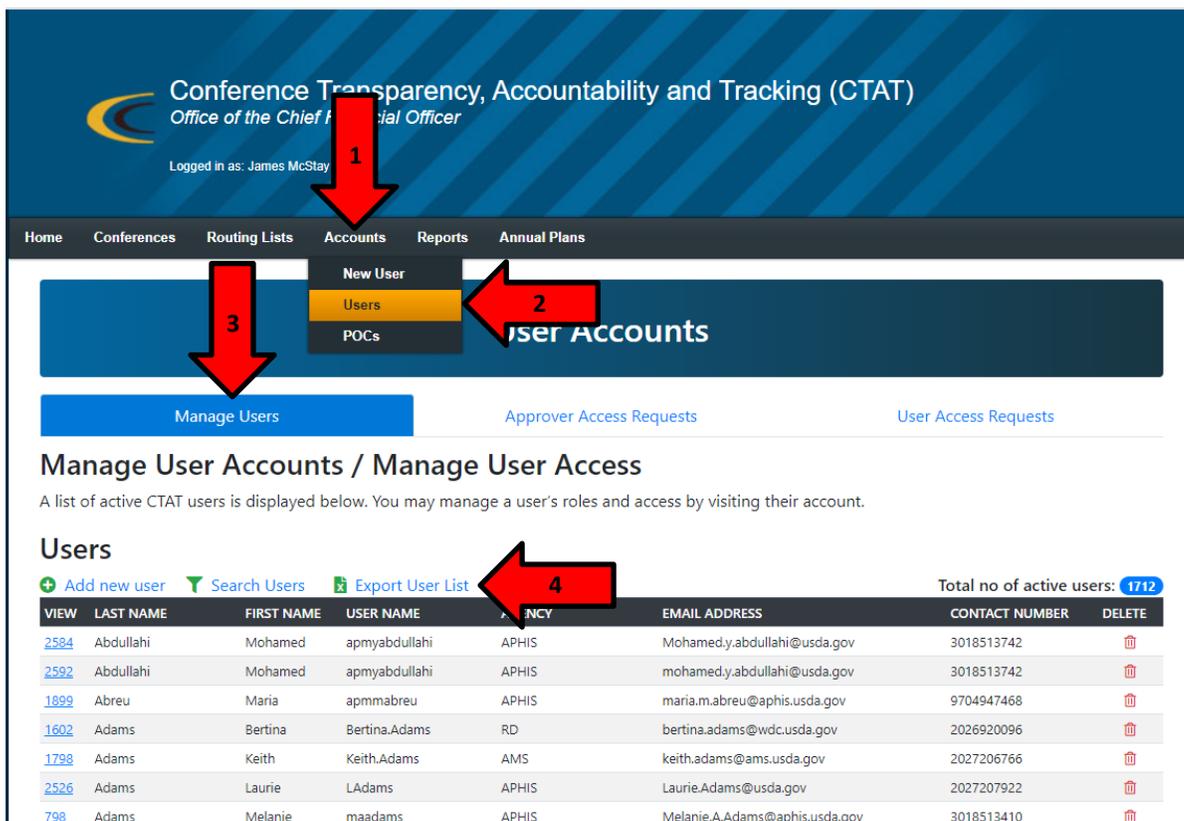
- c. As opposed to self-registrations where the network username is pre-populated, POC-initiated registrations require manual entry. In most instances the network username is the employee's (1) Alias in Outlook. However, in some cases the alias is different from the network username. When a POC registers agency staff and the latter are unable to log in or there are issues with accessing the website, it indicates a mismatch. (Network username typographical errors in [II.A.2.a](#) can also cause access issues; POCs should check for these errors when troubleshooting.) Have the employee go to the registration page as shown in [I.A.1](#) and note the network username, which is pre-populated, as shown in [I.A.2](#). The employee can complete the registration him/herself and the POC deletes the POC-created account (see [II.A.3.c](#)). Alternatively, the POC can modify the account (see [II.A.3.d](#)) using the correct network username.



- d. POCs who intend on manually registering most of the agency's users can request to have the Active Directory – a USDA user account software that lists employees' information, including network usernames – installed on their workstations. Contact OCFO for further information.

3. View and Update Profile

- a. Go to (1) **Accounts** → (2) **Users** → (3) **Manage Users**. The page lists all registered users, sorted alphabetically by last name, for all agencies the POC has access to. Scroll through the page(s) to find the user. *Note: Users' account information can be exported to a spreadsheet by clicking on (4) **Export User List** and following the prompt to open or save the file to a local folder.*



- b. Alternatively, click on (1) **Search Users**, filter by agency (as applicable), enter the last or first name, and click on (2) **Search**. The user account will be retrieved; otherwise, “No Records Found” will be displayed.

Manage Users Approver Access Requests User Access Requests

Manage User Accounts / Manage User Access

A list of active CTAT users is displayed below. You may manage a user's roles and access by visiting their account.

Users

[+ Add new user](#) [Search Users](#) [Export User List](#) Total no of active users: **1**

Agency: Last Name: First Name:

2

VIEW	LAST NAME	FIRST NAME	USER NAME	AGENCY	EMAIL ADDRESS	CONTACT NUMBER	DELETE
2846	McStay Admin	James	jmestay	OCFO	James.McStay@usda.gov	9999999999	

- c. To delete the account, click on the (1) delete icon.

Manage Users Approver Access Requests User Access Requests

Manage User Accounts / Manage User Access

A list of active CTAT users is displayed below. You may manage a user's roles and access by visiting their account.

Users

[+ Add new user](#) [Search Users](#) [Export User List](#) Total no of active users: **1**

Agency: Last Name: First Name:

VIEW	LAST NAME	FIRST NAME	USER NAME	AGENCY	EMAIL ADDRESS	CONTACT NUMBER	DELETE
2846	McStay Admin	James	jmestay	OCFO	James.McStay@usda.gov	9999999999	1

Then click (2) **Delete** on the dialog box that appears to confirm deletion.

Deleting User ×

You are about to permanently delete this item. This action cannot be undone.

Are you sure you want to proceed?

 2

- d. Click on the (1) account number to view or edit the profile.

Manage Users Approver Access Requests User Access Requests

Manage User Accounts / Manage User Access

A list of active CTAT users is displayed below. You may manage a user's roles and access by visiting their account.

Users

+ Add new user Search Users Export User List Total no of active users: 1

Agency: All Agencies Last Name: Mcstay First Name: []

Search Reset

VIEW	LAST NAME	FIRST NAME	USER NAME	AGENCY	EMAIL ADDRESS	CONTACT NUMBER	DELETE
2846	McStay Admin	James	jmestay	OCFO	James.McStay@usda.gov	9999999999	[]

- e. The **User Profile Form** page opens. Edit the applicable field(s) and save the changes by clicking on the (1) **Submit User Profile** button. If the account has an agency approver and/or Under Secretary approver role, it will show in the respective section. Existing agency approver roles can be deleted by clicking on the (2) delete icon and the **Delete** button on the confirmation box that appears. To add a new agency approver role, click on (3) **Add New Agency Approver Role**. *Note: To manage Under Secretary approvers, see [III.A.6.b](#).*

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer

Logged in as: James McStay Admin

Home Conferences Routing Lists Accounts Reports Annual Plans

User Profile Form

First Name: James
Last Name: McStay Admin
Email Address: James.McStay@usda.gov
Contact Number: 9999999999
Network User Name: jmestay
Agency: OCFO

Submit User Profile **1**

Agency Approver Roles

+ Add New Agency Approver Role **3**

AGENCY	SUBAGENCY	APPROVALORDER	APPROVER TYPE	DELETE
AMS	AMS Demo	2	Primary	[] 2

Under Secretary Approver Roles

No Records Found

- f. The **Agency Approver Roles** section expands. Select the (1) **Agency**; (2) **Sub-agency**; (3) **Approval Order**, i.e., the approver's order on the routing – "1" if the approver is first, "2" if second,

etc.; and (4) **Type of User**, i.e., primary, backup or other. *Note: the backup and other approver can approve/deny a conference request in the absence of the primary approver.* The approval order is limited to the number entered when creating the routing list (see [III.A.4](#)). Lastly, the (5) **Approval Order Name** is the designated name for that approver level, e.g., Approver 1, Office Reviewer 2, Agency Administrator Representative, etc. Click on the (6) **Submit Agency Approver** to save the changes.

Agency Approver Roles

[+ Add New Agency Approver Role](#)

AGENCY	SUBAGENCY	APPROVALORDER	APPROVER TYPE	DELETE
AMS	AMS Demo	2	Primary	

Add New Agency Approver Role

The form contains the following fields and buttons:

- 1** Agency: Select an Agency (dropdown)
- 2** Sub Agency: Select a Sub Agency (dropdown)
- 3** Select Approval Order: Select Approval Order (dropdown)
- 5** Enter Approval Order Name: Enter Approval Order Name (text input)
- 4** Pick Type of User: Select Type of User (dropdown)
- 6** Submit Agency Approver (button)
- Cancel (button)

4. Access Levels

- a. Submitters and approvers can view their access levels by going to (1) **Accounts** → (2) **My Account**. *Note: The submitters' and approvers' page/tab layout are slightly different from the agency POC's. In addition, submitters and approvers can only access read-only versions of certain pages, such as routing lists and other users' accounts.* The **User Profile Form** page opens. Except for the **Network User Name** and **Agency**, the submitter or approver can update the profile information and save the changes by clicking on (3) **Submit User Profile**. Approvers will have their approver assignments listed in the **Agency Approver Roles** and/or **Under Secretary Approver Roles** section. Submitters will have "No Records Found" displayed in both sections. Submitters and approvers may request new and additional agency approver roles, respectively, by clicking on (4) **Request New Agency Approver Role**. Complete the information and submit as described in [II.A.3.f](#). This action creates a pending approver role request for agency POC approval.

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer

Logged in as: James McStay

Home Conferences Routing Lists **Accounts** Reports Annual Plans

My Account Users POCs **User Profile Form**

First Name: James
Last Name: McStay User
Email Address: James.McStay@cfo.usda.gov
Contact Number: 999999999
Network User Name: jmcstay
Agency: FS

Submit User Profile

Agency Approver Roles
[Request New Agency Approver Role](#)
No Records Found

Under Secretary Approver Roles
No Records Found

- b. The POC goes to (1) **Accounts** → (2) **Users** → (3) **Approver Access Requests**. Note: The page lists all pending approver role requests. Click on **Approve** or **Reject**, as appropriate.

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer

Logged in as: James McStay

Home Conferences Routing Lists **Accounts** Reports Annual Plans

New User Users POCs **User Accounts**

Manage Users Approver Access Requests User Access Requests

Approver Access Requests

A list of pending approver accounts is displayed below. Please 'approve' or 'reject' the account requests. 'Approving' an account will grant the user access to the system as an approver for the noted sub agency. 'Rejecting' an account will prevent the user from accessing the system.

Total no of requests: 20

AGENCY	SUB_AGENCY	REQUESTED_USERNAME	USER_TYPE	APPROVAL_ORDER	APP_ORDER_NAME	APPROVE	REJECT
AMS	Cotton and Tobacco	MONICA ALEXANDER	Primary	1	Requestor	<input type="button" value="Approve"/>	<input type="button" value="Reject"/>
AMS	Fair Trade Practices	Jennifer Hopes	Primary	1		<input type="button" value="Approve"/>	<input type="button" value="Reject"/>
AMS	Information Technology DA	Douglas Nash	BackUp	2	Summer Butler	<input type="button" value="Approve"/>	<input type="button" value="Reject"/>

B. Agency POCs

1. An agency can have more than one POC. The current POC(s) may view other POC accounts for agencies they have access to under (1) **Accounts** → (2) **POCs**. Any POC can delete another user's POC access by clicking on the (3) delete icon. Any registered user – either submitter or approver – may be added as a new POC by clicking on (4) **Add New Agency POC**.

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer
Logged in as: James McStay

Home Conferences Routing Lists **Accounts** Reports Annual Plans

New User
Users
POCs

Agency POC Listing

+ Add New Agency POC Total no of agency POCs: 129

AGENCY	POC NAME	DELETE
AMS	EMILY BRAMHALL	
APHIS	Candy Anderson	
APHIS	Cathy Timms	
APHIS	Deneen Lewis	

2. The **Add New Agency POC** section appears at the bottom of the page. Select the agency and user. The dropdown fields are limited to agencies the POC has access to and users that are registered for that agency. Click on **Submit New Agency POC** to complete.

Add New Agency POC

Select Agency

Select Agency User

III. Routing Lists

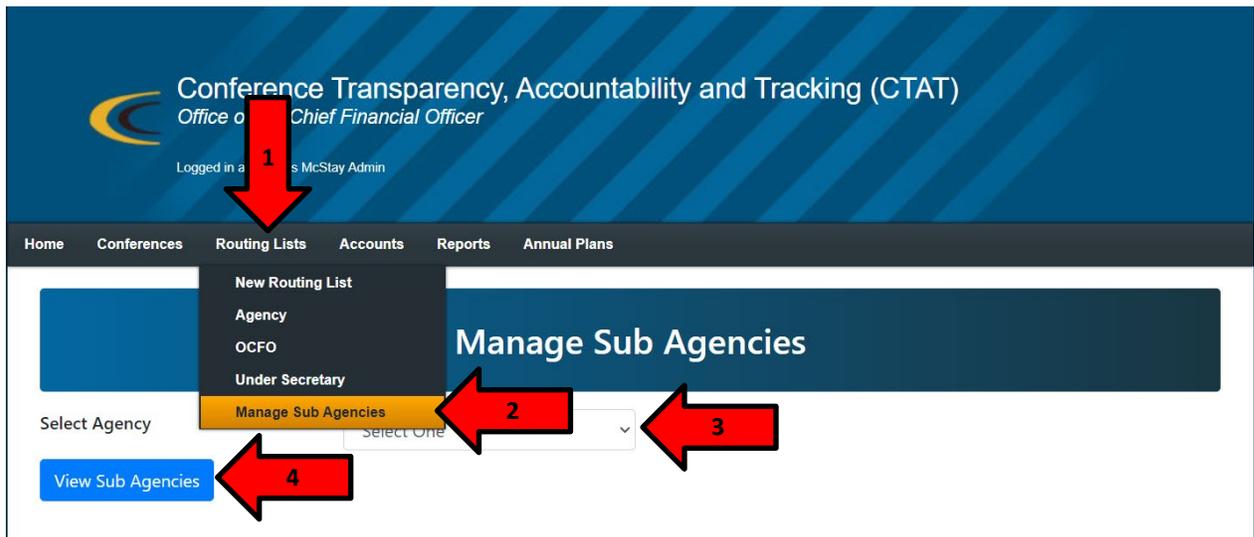
A. Create a New Routing List

1. The routing list is the order of approvers through which conference requests will route: A submitter enters and submits the request and approvers – from first to last – review and decide in succession. The June 2013 OCFO memo, “New Requirements for Conference Planning and Reporting,” outlines the conference approval thresholds and requirements:
 - a. USDA General Officers (i.e., Under Secretaries, Inspector General, Chief Economist, etc.) are authorized to approve events less than \$75,000. They may delegate the authority to approve events less than \$40,000 to Agency Heads or Staff Office Directors under their supervision. *Note: Agency Heads and Staff Office Directors may delegate the approval authority to the Senior Accountable Travel Official (SATO) per the December 2015 Agriculture Travel Regulation.*

- b. The Deputy Secretary must pre-approve events with net expenses at or over \$75,000. These requests will be routed through OCFO.
- c. Events with net expenses at or over \$450,000 require a Secretarial waiver. These requests will be routed through OCFO for approval.

All routing lists must include the Agency Administrator or Chief, Staff Office Director, or SATO and a General Officer – or their representatives – as the last two levels of approval. Depending on agencies’ requirements any number of approvers at varying responsibilities may be included below these two levels. CTAT will route conference requests to the General Officers only when the cost is at or over \$40,000. Additionally, requests will only route through OCFO when the cost is at or over \$75,000. All other requests (i.e., less than \$40,000) will complete at the Agency Administrator or SATO level.

- 2. To create a new routing list, the agency POC must first create a sub agency. A “sub agency” is an office, division or unit within an agency through which conferences will route for approval. An agency can have as many sub agencies as needed – each with its own set of approvers – based on the agency’s conference routing and approval requirements. Some agencies may have a sub agency for each state office, for example, while others may have a more consolidated approach that corresponds to fewer sub agencies. Go to (1) **Routing Lists** → (2) **Manage Sub Agencies**. Select (3) **Agency** and click on (4) **View Sub Agencies**.



- 3. All existing sub agencies will show under the **Sub Agencies** section. To create a new sub agency, click on (1) **Add New Sub Agency**. The **Add New Sub Agency** section appears at the bottom of the page. Enter the (2) **Sub Agency Name** and click on (3) **Create Sub Agency**.

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer
Logged in as: James McStay Admin

Home Conferences Routing Lists Accounts Reports Annual Plans

Manage Sub Agencies

Select Agency: Demo

View Sub Agencies

Sub Agencies

+ Add New Sub Agency **1**

SUB AGENCY NAME	EDIT	DEACTIVATE
DemoSubAgency1	Edit	Deactivate
DemoSubAgency2	Edit	Deactivate

Add New Sub Agency

Sub Agency Name: DemoSubAgency3.1 **2**

Create Sub Agency **3** Cancel

4. The page navigates to the **Agency Routing Form**, which prompts for the (1) **Number of Approval Order(s)**. Enter the number of approver levels (a minimum of one and a maximum of 11) that will be assigned for this sub agency's routing list. *Note: This number includes up to the Administrator/SATO. For example, entering "3" indicates the third level approver is the Administrator or SATO. Under Secretary approvers are managed separately (see [III.A.6.b](#)).* Click on (2) **Submit Agency Routing**.

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer
Logged in as: James McStay Admin

Home Conferences Routing Lists Accounts Reports Annual Plans

Agency Routing Form

Agency: Demo

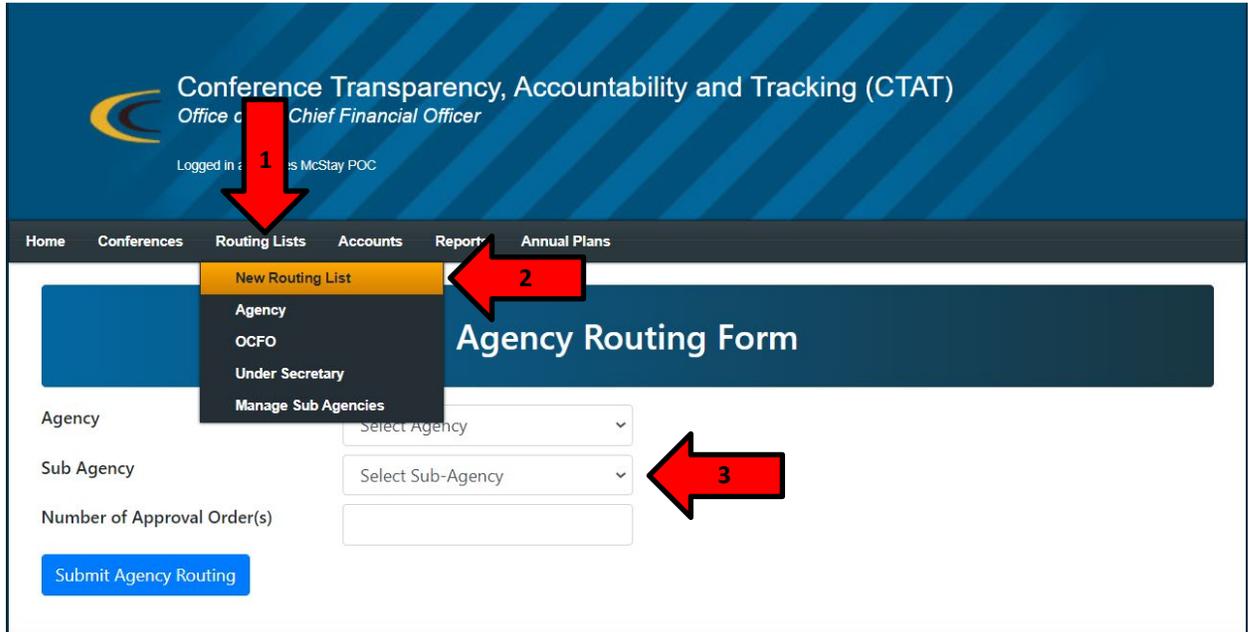
Sub Agency: DemoSubAgency3.1

Number of Approval Order(s): 3 **1**

Submit Agency Routing **2**

5. If a sub agency was previously created (as in steps 2-3), but the number of approval order(s) not assigned (as in step 4), the sub agency remains inactive. To activate, go to (1) **Routing Lists** → (2) **New Routing List**, which opens the **Agency Routing Form**. *Note: The (3) **Sub Agency** dropdown will be*

limited to inactive sub agencies. Complete as in the preceding step and proceed to add the approvers as outlined in the succeeding steps.



Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer
Logged in as: James McStay POC

Home Conferences Routing Lists Accounts Reports Annual Plans

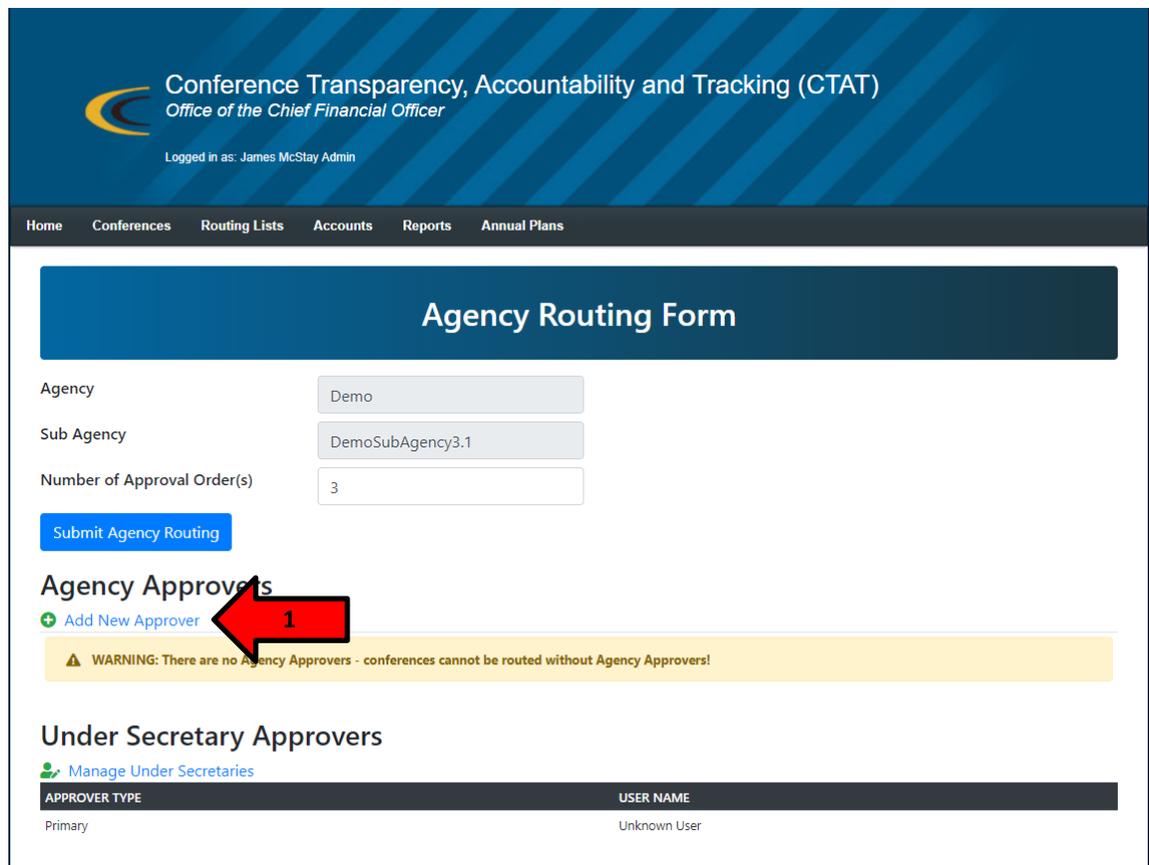
New Routing List
Agency
OCFO
Under Secretary
Manage Sub Agencies

Agency Routing Form

Agency Select Agency
Sub Agency Select Sub-Agency
Number of Approval Order(s)

Submit Agency Routing

6. The page expands to show the **Agency Approvers** and **Under Secretary Approvers** sections.
 - a. Agency Approvers
 - i. Click on (1) **Add New Approver** to add a new agency approver.



Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer
Logged in as: James McStay Admin

Home Conferences Routing Lists Accounts Reports Annual Plans

Agency Routing Form

Agency Demo
Sub Agency DemoSubAgency3.1
Number of Approval Order(s) 3

Submit Agency Routing

Agency Approvers
+ Add New Approver

WARNING: There are no Agency Approvers - conferences cannot be routed without Agency Approvers!

Under Secretary Approvers
+ Manage Under Secretaries

APPROVER TYPE	USER NAME
Primary	Unknown User

- ii. The **Add New Approver** subsection appears. Complete the fields and click on the (1) **Submit User** button.

Agency Approvers

[+ Add New Approver](#)

WARNING: There are no Agency Approvers - conferences cannot be routed without Agency Approvers!

Add New Approver

Select Approval Order (1)

Enter Approval Order name (2)

Pick type of user (3)

Select Agency User (4)

1

- (1) The (1) **Approval Order** dropdown consists of as many levels as the **Number of Approval Order(s)** entered in [III.A.4](#). Select the level being assigned to the approver, i.e., “1” if the approver is first on the routing list, “2” if second, etc. The highest number should correspond to the Administrator or SATO.

Add New Approver

Select Approval Order (1)

Enter Approval Order name

Pick type of user

Select Agency User

- (2) The **Approval Order Name** is the designated name to the approver at that level, e.g., Approver 1, Office Reviewer 2, Agency Administrator Representative, etc.
- (3) Select if this approver will be the primary, backup, or other approver at this level in the **Pick type of user** field. The backup and other approver can approve/deny conference requests in the absence of the primary.
- (4) Select the user that will be assigned at this level in the **Agency User** field. The dropdown consists of all registered users.

- iii. The page updates and shows the (1) recently added approver. Click on (2) **Add New Approver** and repeat step [III.A.6.a.ii](#) to add more agency approvers until each level has at least one approver. *Note: Any level with an unassigned approver will cause routing issues.* Also repeat this step when more than one agency approver needs to be added for a level (e.g., two primaries or a primary and a backup). To create more routing lists, repeat from [III.A.2](#).

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer

Logged in as: James McStay Admin

Home Conferences Routing Lists Accounts Reports Annual Plans

Agency Routing Form

Agency:

Sub Agency:

Number of Approval Order(s):

[Submit Agency Routing](#)

Agency Approvers

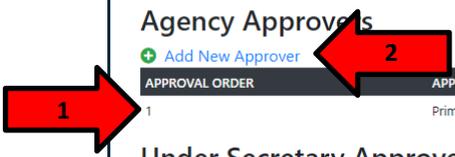
[+ Add New Approver](#)

APPROVAL ORDER	APPROVER TYPE	USER NAME	EDIT	DELETE
1	Primary	James McStay Admin	Edit	Delete

Under Secretary Approvers

[+ Manage Under Secretaries](#)

APPROVER TYPE	USER NAME
Primary	Unknown User



b. Under Secretary Approvers

- i. Under Secretary approvers can be added either through any sub agency's **Agency Routing Form** (see [III.B.1](#) on how to access) by clicking on (1) **Manage Under Secretaries**.

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer

Logged in as: James McStay Admin

Home Conferences Routing Lists Accounts Reports Annual Plans

Agency Routing Form

Agency:

Sub Agency:

Number of Approval Order(s):

[Submit Agency Routing](#)

Agency Approvers

[+ Add New Approver](#)

APPROVAL ORDER	APPROVER TYPE	USER NAME	EDIT	DELETE
1	Primary	James McStay Admin	Edit	Delete

Under Secretary Approvers

[+ Manage Under Secretaries](#)

APPROVER TYPE	USER NAME
Primary	Unknown User



- ii. Or (1) **Routing Lists** → (2) **Under Secretary**. Click on (3) **Add New Under Secretary Approver**.

The screenshot shows the CTAT system interface. At the top, it says "Conference Transparency, Accountability and Tracking (CTAT) Office of the Chief Financial Officer". Below that, it says "Logged in as McStay Admin". A red arrow labeled "1" points to the "Routing Lists" menu item in the top navigation bar. A dropdown menu is open under "Routing Lists", and a red arrow labeled "2" points to the "Under Secretary" option. Below the dropdown, a red arrow labeled "3" points to the "+ Add New Under Secretary Approver" link. The main content area shows a table titled "Under Secretary Approver Listing" with columns for AGENCY, REVIEWER NAME, USER TYPE, and DELETE. The table contains three rows of data. A "Total no of Under Secretary Approvers: 49" is shown at the top right of the table.

- iii. The **Add New Under Secretary Approver Role** section appears at the bottom of the page. Complete the dropdown fields and click on (1) **Submit Under Secretary Approver**.

Add New Under Secretary Approver Role

Select Agency

Select Agency User

Pick Type of User

- iv. The page refreshes showing the (1) newly added approver. Click on (2) **Add New Under Secretary Approver** and repeat the preceding step to add more Under Secretary approvers as needed. To delete an existing approver, click on the (3) delete icon and the **Delete** button on the confirmation box that appears. *Note: Under Secretary approvers need only be added (or updated) once – any addition (or update) is effective for all sub agency routing lists.*

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer
Logged in as: James McStay Admin

Home Conferences Routing Lists Accounts Reports Annual Plans

Manage Under Secretary Approver Listing

Under Secretary Approvers

[+ Add New Under Secretary Approver](#) Total no of Under Secretary Approvers: 50

AGENCY	REVIEWER NAME	USER TYPE	DELETE
AMS	Jameelah Taylor	Primary	
AMS	Marlene Mitchell	Primary	
AMS	James McStay Admin	BackUp	

Add New Under Secretary Approver Role

Successfully added the new Under Secretary.

Select Agency:

Select Agency User:

Pick Type of User:

[Cancel](#) [Submit Under Secretary Approver](#)

B. Update an Existing Routing List

- Go to (1) **Routing Lists** → (2) **Agency**. To delete, click on the (3) delete icon and the **Delete** button on the confirmation box that appears. To view or update, click on the (4) routing list number. *Note: All routing lists can be exported to a spreadsheet by clicking on (5) **Export Routing List** and following the prompt to open or save the file to a local folder.*

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer
Logged in as: James McStay POC

Home Conferences Routing Lists Accounts Reports Annual Plans

- New Routing List
- Agency**
- OCFO
- Under Secretary
- Manage Sub Agencies

Agency Routing Listing

[+ Add New Agency Routing](#) [Export Routing List](#) Total no of records found: 81

VIEW	AGENCY	SUB AGENCY	NO. OF APPROVAL ORDER	CREATED BY	DELETE
1486	AMS	AMS Demo	3	Trevor Castillon Admin	
1490	AMS	AMS_Test	2	James McStay POC	
1485	AMS	Civil Rights	6	Neelima Semaldinne	

- The **Agency Routing Form** page opens. Update the (1) **Number of Approval Order(s)** as needed and click on (2) **Submit Agency Routing** to save. To add new agency approver(s) click on (3) **Add New Approver** and proceed as discussed in [III.A.6.a](#). *Note: As mentioned in [III.A.6.a.ii\(1\)](#), the number of approver levels added through (3) **Add New Approver** should match the number entered in (1) **Number of Approval Order(s)**.* To delete an existing agency approver, click on the (4) delete icon and the **Delete** button on the confirmation box that appears. To update an agency approver, click on (5) **Edit**.

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer
Logged in as: James McStay POC

Home Conferences Routing Lists Accounts Reports Annual Plans

Agency Routing Form

Agency: AMS
Sub Agency: AMS_Test
Number of Approval Order(s): 2

Submit Agency Routing

Agency Approvers

[+ Add New Approver](#)

APPROVAL ORDER	APPROVER TYPE	USER NAME	EDIT	DELETE
1	Primary	James McStay POC	Edit	Delete
2	Primary	James McStay POC	Edit	Delete

Under Secretary Approvers

[Manage Under Secretaries](#)

APPROVER TYPE	USER NAME
Primary	Jameelah Taylor
Primary	Marlene Mitchell

- The three fields convert to dropdowns. Make the appropriate selection(s) and click on (1) **Update**. The page refreshes with the updated information.

Agency Approvers

[+ Add New Approver](#)

APPROVAL ORDER	APPROVER TYPE	USER NAME	DELETED
1	Primary User	James McStay POC	Update Cancel Delete
2	Primary	James McStay POC	Edit Delete

- To update Under Secretary approvers, see [III.A.6.b](#).
- The OCFO routing list (for conferences over \$75,000) is managed by OCFO but can be viewed by all users by going to (1) **Routing Lists** → (2) **OCFO**.

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer

Logged in as [redacted] McStay POC

Home Conferences Routing Lists Accounts Reports Annual Plans

New Routing List
Agency
OCFO
Under Secretary
Manage Sub Agencies

Workflow (cost: >75K)

OCFO Reviewer Details

Total no of OCFO Reviewers: 17

AGENCY	REVIEWER NAME	APPROVAL ORDER	USER TYPE
OCFO	Huynh-Long Nguyen	OCFO Reviewer 1	Primary
OCFO	Kurt Bennett	OCFO Reviewer 1	BackUp
OCFO	Barbara Harris	OCFO Reviewer 1	BackUp
OCFO	Elvis Tull	OCFO Reviewer 1	BackUp

C. Manage Sub Agencies

1. Go to (1) **Routing Lists** → (2) **Manage Sub Agencies**. Select the (3) **Agency** and click on (4) **View Sub Agencies**.

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer

Logged in as [redacted] McStay POC

Home Conferences Routing Lists Accounts Reports Annual Plans

New Routing List
Agency
OCFO
Under Secretary
Manage Sub Agencies

Manage Sub Agencies

Select Agency
AWB

View Sub Agencies

2. The list of sub agencies appears. Sub agencies can either be renamed or deleted. *Note: Creating a new sub agency is discussed in [III.A.2 to 4](#).*
 - a. Rename
 - i. Click on (1) **Edit**.

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer

Logged in as: James McStay POC

Home Conferences Routing Lists Accounts Reports Annual Plans

Manage Sub Agencies

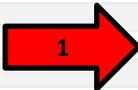
Select Agency

[View Sub Agencies](#)

Sub Agencies

[+ Add New Sub Agency](#)

SUB AGENCY NAME	EDIT	DEACTIVATE
AMS Demo	Edit	Deactivate
AMS_Test	Edit	Deactivate
AMS_test2	Edit	Deactivate
AMS-Test1.1	Edit	Deactivate

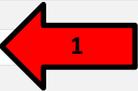
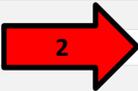


- ii. The field converts to a (1) textbox. Make the appropriate changes and click on (2) **Update** to save.

Sub Agencies

[+ Add New Sub Agency](#)

SUB AGENCY NAME	EDIT	DEACTIVATE
AMS Demo	Edit	Deactivate
AMS_Test	Edit	Deactivate
<input type="text" value="AMS_test2"/>	Update Cancel	Deactivate
AMS-Test1.1	Edit	Deactivate

b. Delete

- i. Deactivate allows for a sub agency to be deleted with the option to either archive its active conferences (i.e., in draft, pending, or additional information status – see [IV.B.1.a](#) and [2.a](#) for definitions) or reassign them to another sub agency. Once a sub agency is deleted it will no longer be available as a routing option for future conference requests. *Note: This action deletes the sub agency, not its conferences; for a discussion on managing conferences, including how to delete them, see [IV.B.2](#).* Click on (1) **Deactivate** for the corresponding sub agency.

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer

Logged in as: James McStay POC

Home Conferences Routing Lists Accounts Reports Annual Plans

Manage Sub Agencies

Select Agency: AMS

[View Sub Agencies](#)

Sub Agencies

[+ Add New Sub Agency](#)

SUB AGENCY NAME	EDIT	DEACTIVATE
AMS Demo	Edit	Deactivate
AMS_Test	Edit	Deactivate
AMS_test2	Edit	Deactivate
AMS-Test1.1	Edit	Deactivate

- ii. To archive active conferences, select the (1) first option on the **Deactivate Sub Agency** dialog box that appears, then click on (2) **Save Changes**.

Deactivate Sub Agency

Please select one of the options below to proceed with deactivation

Sub Agency: AMS Demo

Cancel & Archive all active conferences

Reassign all active conferences

[Close](#) [Save Changes](#)

The sub agency is deleted and all its conferences in draft, pending, and additional information status are converted to “Archived” in the (3) Status column. Approved and disapproved conferences are unaffected. *Note: To view/access conferences see [IV.B.2](#).*

List of Conference Requests

[+ Add New Conference](#) [🔍 Search Conferences](#)

Total No of Conference Requests: **3367**

S.NO (VIEW)	AGENCY	SUBAGENCY	CONFERENCE NAME	START DATE	STATUS	DELETE	POST CONF DETAILS
21737	AMS	AMS Demo	Farm Loan and FSFL training	11/5/2019	Pending		
19470	AMS	AMS Demo	Test Demo	7/28/2019	Approved		Post Conference Details

3

List of Conference Requests

[+ Add New Conference](#) [🔍 Search Conferences](#)

Total No of Conference Requests: **3367**

S.NO (VIEW)	AGENCY	SUBAGENCY	CONFERENCE NAME	START DATE	STATUS	DELETE	POST CONF DETAILS
21737	AMS	AMS Demo	Farm Loan and FSFL training	11/5/2019	Archived		
19470	AMS	AMS Demo	Test Demo	7/28/2019	Approved		Post Conference Details

- iii. To reassign active conferences, select the (1) second option and the (2) sub agency to reassign to, then click on (3) **Save Changes**.

Deactivate Sub Agency

Please select one of the options below to proceed with deactivation

Sub Agency : Civil Rights DA

Cancel & Archive all active conferences

Reassign all active conferences **1**

Select Sub Agency

Dairy **2**

3

The sub agency is deleted and all its draft, pending, and additional information conferences remain in the same status but are reassigned to the new (4) sub agency. Approved and disapproved conferences are unaffected.

List of Conference Requests

[+ Add New Conference](#) [Search Conferences](#) Total No of Conference Requests: **3367**

S.NO (VIEW)	AGENCY	SUBAGENCY	CONFERENCE NAME	START DATE	STATUS	DELETE	POST CONF DETAILS
18721	AMS	Civil Rights DA	Minorities in Agriculture, Natural Resources and Related Sciences (MANNRS)	4/3/2019	Draft		
18553	AMS	Civil Rights DA	Minorities in Agriculture, Natural Resources & Related Sciences (MANRRS)	4/3/2019	Approved		Post Conference Details

List of Conference Requests

[+ Add New Conference](#) [Search Conferences](#) Total No of Conference Requests: **3367**

S.NO (VIEW)	AGENCY	SUBAGENCY	CONFERENCE NAME	START DATE	STATUS	DELETE	POST CONF DETAILS
18721	AMS	Dairy	Minorities in Agriculture, Natural Resources and Related Sciences (MANNRS)	4/3/2019	Draft		
18553	AMS	Civil Rights DA	Minorities in Agriculture, Natural Resources & Related Sciences (MANRRS)	4/3/2019	Approved		Post Conference Details

IV. Conference Requests

Once all appropriate agency staff have registered and the routing lists created, conference requests can be entered and submitted for approval.

A. Create a New Conference

Conference requests can be created entirely new or copied from an existing conference.

1. Entirely New

- a. The submitter goes to (1) **Conferences** → (2) **New Conference**.

The screenshot shows the top navigation bar of the CTAT system. A red arrow labeled '1' points to the 'Conferences' menu item. A second red arrow labeled '2' points to the 'New Conference' option in the dropdown menu. Below the navigation bar, the 'GENERAL CONFERENCE INFORMATION' section is visible, including a text input field for the conference name and date selection fields for the start and end dates.

- b. Enter the conference details – from **General Conference Information** to **Miscellaneous Attachments** (see [Appendix A](#) for details on each section). Templates can be downloaded from the OCFO Travel Express website at <https://www.ocfo.usda.gov/travel-express/ConferenceTrainingTemplates> and uploaded on applicable sections. Certain fields will open new sections or fields depending on the response. At a minimum, the (1) **Conference Name**, (2) **Requesting Organization** and (3) **Requesting Suborganization** need to be entered before an initial draft can be saved. Submitters can return to the conference, fill out as much of the template as they wish, and save as often as necessary before final submission.



GENERAL CONFERENCE INFORMATION

Conference Name

Enter conference name

When adding a new conference, be sure to completely spell out the name. Do not use acronyms or abbreviations unless they are contained in the actual conference name.

Conference Dates

Enter the full date range of the conference, even if your agency is not attending all dates.

Estimated Start Date

Start Date

Estimated End Date

End Date

REQUESTOR INFORMATION

Requesting Organization

Select...

Requesting Sub Organization

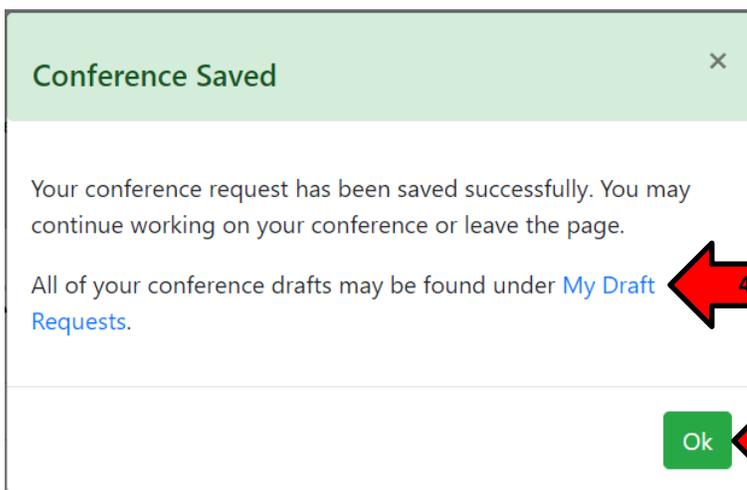
Select...

Requesting organization and sub organization are used to route your conference for approval. They should be your organization within an Agency or Staff Office.

Requestor Name

Requestor Title

A **Conference Saved** dialog box appears after a successful save (by clicking on the **Save as Draft** button at the bottom of the page). Click on (4) **My Draft Requests** to navigate to the submitter's list of conferences (see [IV.B.1](#) for further discussion) or (5) **Ok** to continue working on the conference template.



- c. The conference request cannot be submitted for review unless all fields are completed. When the submitter attempts to submit (by clicking on the **Continue to Review** button at the bottom of the page) with missing information, a (1) message appears at the top of the page indicating which fields are incomplete.

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer

Logged in as: James McStay User

Home Conferences Routing Lists Accounts Reports Annual Plans

GENERAL CONFERENCE INFORMATION

- Please enter Justification
- Please select Funding Type
- Please select Accounting Codes

Conference Name

CTAT Guide 3.0



- d. After completing the template and clicking on **Continue to Review**, the page navigates to **Submission Review**, which consists of the **Warnings and Alerts** and **Cost Calculations** sections. The **Warnings and Alerts** indicates potential issues that may prevent the conference request from being approved. The submitter should review the request and address the alerts with the goal of eliminating the red alerts (i.e., high risk) and/or limiting the orange ones (low/medium risk). A green alert indicates no issues.

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer

Logged in as: James McStay User

Home Conferences Routing Lists Accounts Reports Annual Plans

Submission Review

Warnings and Alerts

Warnings

- ❗ Check the Conference Justifications section as this conference request does not address all required justifications and does not meet the USDA approval requirements.
- ❗ Light refreshments or government provided meals are being served at this conference. USDA discourages the use of light refreshments or government provided meals.

Alerts

- ⚠️ USDA policy discourages distribution of promotional materials and conferences with this type of expense receive much greater scrutiny from oversight agencies.
- ⚠️ This conference has a paid speaker. This will increase the scrutiny from oversight agencies.
- ⚠️ This conference's cost exceed \$600 per USDA attendee per day exceeding the thresholds from Congressional inquiries and will receive additional scrutiny when reported.
- ⚠️ This conference's cost exceed \$3,000 per USDA attendee exceeding the thresholds from Congressional inquiries and will receive additional scrutiny when reported.

Cost Calculations

TOTAL COSTS		\$36,320.00
<small>Less salaries and benefits</small>		
TOTAL SALARY AND BENEFIT COST		\$50,000.00
TOTAL DAYS	5	
USDA ATTENDEES	10	
<small>USDA and non-USDA paid by Agency</small>		
COST PER ATTENDEE		\$3,632.00
<small>(w/o Salary and benefits)</small>		
COST PER ATTENDEE PER DAY		\$726.40
<small>(w/o Salary and benefits)</small>		

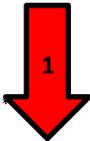
[Edit Conference Information](#)
[Submit for Review](#)
[Save as Draft](#)

- e. The **Cost Calculations** section shows a summary of costs based on information from the **Overall Attendee Information** (see Appendix A, section [E](#)) and the **Overall Cost Information** (see Appendix A, section [G](#)). The conference is considered a high cost event when the **Cost per Attendee** is over \$3,000 or the **Cost per Attendee per Day**, over \$600. A justification for high cost event should have been entered in the **Justification** field (see Appendix A, section [A.5](#)) under **General Conference Information**.
- f. The submitter can either make further edits by clicking on the **Edit Conference Information** button to navigate back to the template, initiate conference request routing and approver review by clicking on **Submit for Review**, or save the current progress and complete at a later time by clicking on **Save as Draft**. *Note: Red and orange alerts do not prevent a submitter from submitting the conference request. They serve to notify approvers of potential issues; an approver at any level may decide to reject or return the request for corrections based on these alerts.*
- g. A message appears on the screen after a successful submit. The submitter will also receive an email notification with a (1) link to the conference.

CTAT: Conference Request Successfully Submitted



EAS-AppServices@ocio.usda.gov
To ● McStay, James - OCFO, Washington, DC



**** Please do not respond to this mailbox. Thank you.

New conference request has been successfully submitted: [22743](#) Your request will be reviewed, and you will be notified when a decision has been made.

View all your conference requests at: <https://www.preprod.eservices.usda.gov/CTAT//ManageConferenceListing.aspx>

2. Copy Conference

To copy information from an existing conference to create a new conference request go to (1) **Conferences** → (2) **Copy Conference**. The **Copy Conference** page opens. There are four copy options, which are different ways to narrow down and retrieve specific results, but the objective is to enable agencies to copy information from a conference they created in the past or from their annual plans, or one that was created by another agency. However, not all information will be copied, and users will have to complete the rest of the template.

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer
Logged in as: James McStay User

Home Conferences Routing Lists Accounts Reports Annual Plans

New Conference
Copy Conference
All Entries
My Draft Requests

Copy Conference

This page will allow you to create a new draft conference based on information from other conferences already in the system.

Please select from the following options:

- Copy a conference I hosted or sponsored in the past
- Copy a conference I attended in the past
- Copy an upcoming conference that another agency created
- Copy conference from an Annual Plan

a. A conference the agency hosted or sponsored in the past

i. Select the (1) first option and click on (2) **Search**.

Copy Conference

This page will allow you to create a new draft conference based on information from other conferences already in the system.

Please select from the following options:

- Copy a conference I hosted or sponsored in the past
- Copy a conference I attended in the past
- Copy an upcoming conference that another agency created
- Copy conference from an Annual Plan

PAST CONFERENCE

Red arrows indicate: (1) pointing to the first radio button, and (2) pointing to the Search button.

ii. The page refreshes with the search fields. Fill out or select as many of the filters to narrow down results and click on (1) **Search**. Click on (2) **Reset** to clear the fields or (3) **Cancel & Start Over** to return to the options page. *Note: The conference name does not have to be exact; results can be retrieved on a keyword search. In addition, if using the date filters, conferences will be retrieved with start dates after the Date Range Start or end dates before the Date Range End.*

Copy Conference

This page will allow you to create a new draft conference based on information from other conferences already in the system.

Past Conference Search

Conference ID	Conference Name	
<input type="text"/>	<input type="text"/>	
Multiple Agency Event?	Recurring Event?	
<input type="text" value="Unknown"/>	<input type="text" value="Unknown"/>	
Requesting Agency	Requesting Sub Agency	
<input type="text" value="Select one"/>	<input type="text" value="Select an Agency"/>	
Sponsoring Agency	Sponsoring Sub Agency	
<input type="text" value="Select one"/>	<input type="text" value="Select an Agency"/>	
Country	State	City
<input type="text" value="Select one"/>	<input type="text" value="Select a Country"/>	<input type="text"/>
Date Range Start	Date Range End	
<input type="text" value="Start Date"/>	<input type="text" value="End Date"/>	

Red arrows indicate: (1) pointing to the Search button, (2) pointing to the Reset button, and (3) pointing to the Cancel & Start Over button.

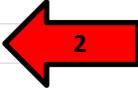
iii. As an example, conferences that were created by agency (1) DEMO in the past that have the word (2) “test” in its name with start dates after (3) 5/13/2018 or end dates before (4) 10/30/2018 will yield the results below. Click on the applicable (5) conference number to proceed.

Copy Conference

This page will allow you to create a new draft conference based on information from other conferences already in the system.

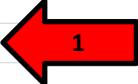
Past Conference Search

Conference ID

Conference Name 

Multiple Agency Event?

Recurring Event?

Requesting Agency 

Requesting Sub Agency

Sponsoring Agency

Sponsoring Sub Agency

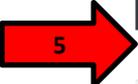
Country

State

City

Date Range Start 

Date Range End 



S.NO	CONFERENCE	START	END	COUNTRY	STATE	CITY	REQUESTING AGENCY	REQUESTING SUB AGENCY	SPONSORING AGENCY	SPONSORING SUB AGENCY	STATUS
15970	DEMO Test	5/14/2018	5/18/2018	United States	DC	Washington	Demo	DemoSubAgency2	Other(Non-USDA)	Other(Non-USDA)	Pending
17770	test	10/24/2018	10/29/2018	United States	CO	Fort Collins	Demo	DemoSubAgency1	Demo	DemoSubAgency1	Pending

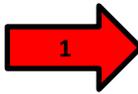
iv. Click on (1) **Create Draft** to continue.

Copy Conference

This page will allow you to create a new draft conference based on information from other conferences already in the system.

PAST CONFERENCE

You have selected:



v. A new draft conference is created and automatically saved, and the page navigates to the conference template. Some of the fields are prepopulated with information from the copied conference. Complete the template and save or submit as discussed in [IV.A.1.b](#) to [g](#).

b. A conference the agency attended in the past

i. Select the (1) second option, which prompts to select if another agency is hosting or sponsoring the conference.

Copy Conference

This page will allow you to create a new draft conference based on information from other conferences already in the system.

Please select from the following options:

- Copy a conference I hosted or sponsored in the past
- Copy a conference I attended in the past
- Another agency is hosting or sponsoring this Conference:
 - Yes No
- Copy an upcoming conference that another agency created
- Copy conference from an Annual Plan

- ii. If (1) **Yes**, select between an (2) **Upcoming Conference** or a (3) **Past Conference** by clicking on its **Search** button. Regardless of selection, the same fields appear as in [IV.A.2.a.ii](#). Complete the applicable fields and create the draft as shown in [IV.A.2.a.iv](#).

Please select from the following options:

- Copy a conference I hosted or sponsored in the past
- Copy a conference I attended in the past
- Another agency is hosting or sponsoring this Conference:
 - Yes No
- Copy an upcoming conference that another agency created
- Copy conference from an Annual Plan

UPCOMING CONFERENCE

Q Search

PAST CONFERENCE

Q Search

- iii. Select (1) **No** if another agency is not hosting or sponsoring, or if unknown. Click on (2) **Search**. The same fields appear as in [IV.A.2.a.ii](#). Complete the applicable fields and create the draft as shown in [IV.A.2.a.iv](#).

Please select from the following options:

- Copy a conference I hosted or sponsored in the past
- Copy a conference I attended in the past
- Another agency is hosting or sponsoring this Conference:
 - Yes No
- Copy an upcoming conference that another agency created
- Copy conference from an Annual Plan

PAST CONFERENCE

Q Search

- c. An upcoming conference that another agency created

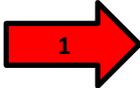
- i. Select the (1) third option, which prompts to select if the agency attended the conference in the past.

Copy Conference

This page will allow you to create a new draft conference based on information from other conferences already in the system.

Please select from the following options:

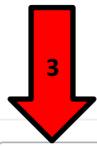
- Copy a conference I hosted or sponsored in the past
 - Copy a conference I attended in the past
 - Copy an upcoming conference that another agency created
- I attended this conference in the past:
- Yes No
- Copy conference from an Annual Plan



- ii. If (1) **Yes**, select between an (2) **Upcoming Conference** or a (3) **Past Conference** by clicking on its **Search** button. Regardless of selection, the same fields appear as in [IV.A.2.a.ii](#). Complete the applicable fields and create the draft as shown in [IV.A.2.a.iv](#). *Note: The **Upcoming Conference** option copies information from two conferences and combines them into one template – i.e., certain sections are copied from the conference created by the agency in the past, and other sections are copied from the upcoming conference created by another agency.*

Please select from the following options:

- Copy a conference I hosted or sponsored in the past
 - Copy a conference I attended in the past
 - Copy an upcoming conference that another agency created
- I attended this conference in the past:
- Yes No
- Copy conference from an Annual Plan



UPCOMING CONFERENCE

PAST CONFERENCE

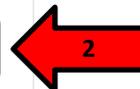
- iii. If (1) **No**, click on (2) **Search**. Complete the applicable fields and create the draft as shown in [IV.A.2.a.iv](#).

Please select from the following options:

- Copy a conference I hosted or sponsored in the past
 - Copy a conference I attended in the past
 - Copy an upcoming conference that another agency created
- I attended this conference in the past:
- Yes No
- Copy conference from an Annual Plan



UPCOMING CONFERENCE



- d. A conference from the agency's annual plan

Note: This option copies the least amount of information since the annual plan contains a limited number of data elements.

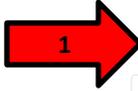
- i. Select the (1) fourth option and click on (2) **Search**.

Copy Conference

This page will allow you to create a new draft conference based on information from other conferences already in the system.

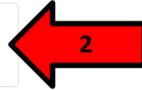
Please select from the following options:

- Copy a conference I hosted or sponsored in the past
- Copy a conference I attended in the past
- Copy an upcoming conference that another agency created
- Copy conference from an Annual Plan



ANNUAL PLAN CONFERENCE

Q Search



- ii. Select the (1) **Agency** and (2) **Fiscal Year** and click on (3) **Search**. The page refreshes with the results. Click on the applicable (4) conference number and create the draft as shown in [IV.A.2.a.iv.](#)

Copy Conference

This page will allow you to create a new draft conference based on information from other conferences already in the system.

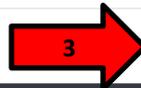
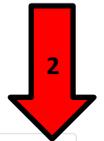
Annual Plan Conference Search

Agency

APHIS

Fiscal Year

2020



Q Search

Reset

Cancel & Start Over



S.NO(VIEW)	CONFERENCE	START DATE	END DATE	MODIFIED BY	MODIFIED ON
47906	Native American Fish & Wildlife National Conference	5/4/2020	5/6/2020	Trevor Castillon Admin	1/29/2020
42219	Oregon Interagency Noxious Weed Symposium	12/9/2019	12/11/2019	Candy Anderson	8/23/2019
40613	WS Carrillo Arizona District Meeting	8/5/2020	8/7/2020	Michelle Battle	8/22/2019
40712	Academy of Veterinary Consultants	8/7/2020	8/10/2020	Michelle Battle	8/22/2019
42593	Access and Functional Needs Preparedness Planning for Rural Communities	9/16/2020	9/17/2020	Michelle Battle	8/23/2019

B. Access Existing Conferences

1. Draft Conferences

- a. Go to (1) **Conferences** → (2) **My Draft Requests**. This option allows submitters to view and edit conferences they created that are in (3) draft and (4) “additional information” status. The former are conferences that were created but never submitted and the latter have been submitted but were returned by an approver for edits.
- b. Click on the (5) conference number to open the conference. Proceed to edit, save or submit as discussed in [IV.A.1.b](#) to [g.](#)
- c. This page also has the links to create a (6) new conference or (7) copy an existing conference, as discussed in [IV.A.1](#) and [2](#), respectively.

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer

Logged in as: James McStay User

Home Conferences Routing Lists Accounts Reports Annual Plans

New Conference
Copy Conference
All Entries
My Draft Requests

My Draft Requests

My Draft Conferences

+ Add New Conference Copy Conference

VIEW	AGENCY	SUB AGENCY	CONFERENCE	START DATE
22738	FS	Chief Financial Office (CFO)	CTAT Guide 3.0	6/8/2020
22739	FS	Business Operations (BusOps)	Test Conference 1.0	6/8/2020

My Conferences Needing Additional Information

VIEW	AGENCY	SUB AGENCY	CONFERENCE	START DATE
22741	FS	Business Operations (CIO)	Test Conf	7/2/2020

2. All Entries

- a. To navigate to the **All Conferences** page and view all conferences for agencies the user has access to, go to (1) **Conferences** → (2) **All Entries**. Saved requests will show “Draft” in the (3) **Status** column; currently routing requests will show “Pending”; returned requests, “Additional Info”; completed requests, “Approved”; and rejected requests, “Disapproved.” Lastly, conferences with deleted sub agencies (see [III.C.2.b](#)) will show “Archived.” Users may also search for a conference by clicking on (4) **Search Conference**.

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer

Logged in as: James McStay User

Home Conferences Routing Lists Accounts Reports Annual Plans

New Conference
Copy Conference
All Entries
My Draft Requests

All Conferences

List of Conference Requests

+ Add New Conference Search Conferences

Total Number of Conference Requests: 2585

S.NO (VIEW)	AGENCY	SUBAGENCY	CONFERENCE NAME	START DATE	STATUS	DELETE	POST CONF DETAILS
22741	FS	Business Operations (CIO)	Test Conf	7/2/2020	AdditionalInfo		
22739	FS	Business Operations (BusOps)	Test Conference 1.0	6/8/2020	Draft		
22738	FS	Chief Financial Office (CFO)	CTAT Guide 3.0	6/8/2020	Draft		
21727	FS	Business Operations (BusOps)	To Bridge A Gap	3/30/2020	Draft		
21735	FS	National Export System (NES)	International Association for Bear Research Conference	2/26/2020	Pending		

- b. Select the conference from the (1) dropdown that appears and click on (2) **Search**.

List of Conference Requests
 + Add New Conference Search Conferences
 Total No of Conference Requests: 2585
 Select Conference:
 22741 - (FS: Business Operations (CIO)) - Test Conf Search Reset

- c. Click on the (1) conference number to open. A submitter who clicks on a conference he/she created in Draft or Additional Info status will open the editable version of the conference and may proceed to edit, save or submit as discussed in [IV.A.1.b](#) to [g](#). All other conferences will open in read-only mode.

List of Conference Requests
 + Add New Conference Search Conferences
 Total No of Conference Requests: 2585

S.NO (VIEW)	AGENCY	SUBAGENCY	CONFERENCE NAME	START DATE	STATUS	DELETE	POST CONF DETAILS
19839	FS	National Forest System (R09)	Central States Forest Soils Workshop	10/8/2019	Approved		Post Conference Details

- d. The **Conference Request** page opens. All conferences have the (1) conference number and status prominently displayed. The (2) **Export PDF**, (3) **Print**, and (4) **Go Back** options are available. Export PDF creates a pdf file of the conference, which can be saved to the user’s local folder; the print option prints a hard copy to a local printer; and Go Back takes the user back to the **All Conferences** page ([IV.B.2.a](#)). Pending, approved, and disapproved conferences have the (5) **View Approval Details** and (6) **Override** (see [V.D](#)) options.

Conference Request
 Conference 22171 - Pending

Export PDF Print View Approval Details Override Go Back

GENERAL CONFERENCE INFORMATION

Conference Name
 Pre-Registration
 Conference Date
 Estimated Start Date: 07/22/2020
 Estimated End Date: 07/24/2020
 Conference Location
 Country: United States
 State: CO
 City: Denver

- e. The **View Approval Details** link opens the **Routing Workflow/Approval Details** page, which shows the (1) submission details, including when the conference request was created and last modified; the (2) **Review History**, which shows the approvers’ decision history, including a

timestamp on when the decision was made; and the (3) **Agency Routing List**, which shows the list of approvers the conference will route to. *Note: Under Secretary and OCFO approvers will only appear if the cost is over \$40,000 and \$75,000, respectively.* Click on (4) **View Conference Information** to return to the **Conference Request** page ([IV.B.2.d](#)).

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer
Logged in as: James McBay Admin

Home Conferences Routing Lists Accounts Reports Annual Plans

Routing Workflow / Approval Details

National Self-Help Housing Training Conference Submission Details

Last modified by: Bruce Lammers on 1/22/2020 12:14:30 PM

Estimated Start Date: 2/4/2020 Estimated End Date: 2/6/2020 Created by: Andrea Birmingham Created on: 1/14/2020 9:57:00 AM

Review History [View Conference Information](#)

REVIEWER NAME	STATUS	COMMENTS	REVIEW DATE
Roger Loesch	AdditionalInfo	Sub agency should be just RHS not RHS/SH - Please check that all of the Justifications are marked Yes - Please provide justification of the following - promotional materials - conference costs over \$600 per day - conference costs exceeding \$1000 per attendee - Paid speaker	1/14/2020 10:03:49 AM
Roger Loesch	AdditionalInfo	Justifications need to be all checked Yes - Accounting code needs to be added - Attendee Cost Detail Spreadsheet and Agenda need to be attached -	1/14/2020 10:18:39 AM
Roger Loesch	AdditionalInfo	Accounting Code and justification for excessive costs required	1/14/2020 10:27:25 AM
Roger Loesch	Approved	compressed time line for approval	1/14/2020 11:05:53 AM
Kelly Leary	Approved		1/14/2020 11:23:36 AM
Anthony Beinbridge	Approved		1/21/2020 3:45:02 PM
Bruce Lammers	Approved		1/22/2020 12:14:30 PM

Agency Routing List

AGENCY	SUB AGENCY	REVIEWER NAME	APPROVAL ORDER NAME	USER TYPE
RHS	RHS	Roger Loesch	Agency Reviewer 1	Primary
RHS	RHS	Kelly Leary	Agency Reviewer 2	Primary
RHS	RHS	Anthony Beinbridge	Agency Reviewer 3	Primary
RHS	RHS	Peggy Jewery	Agency Reviewer 3	BackUp
RHS	RHS	Bruce Lammers	Agency Reviewer 4	Primary
RHS	RHS	Roger Loesch	Undersecretary	Primary
RHS	RHS	Angilla Denton	Undersecretary	Primary
RHS	RHS	Misty Giles	Undersecretary	Primary
RHS	RHS	Donald Lavoy	Undersecretary	Primary
OCFO	OCFO	Huynh-Long Nguyen	OCFO Reviewer 1	Primary
OCFO	OCFO	Elin Tull	OCFO Reviewer 1	BackUp
OCFO	OCFO	Barbara Harris	OCFO Reviewer 1	BackUp
OCFO	OCFO	Kurt Bennett	OCFO Reviewer 1	BackUp
OCFO	OCFO	Marie Butler	OCFO Reviewer 2	Primary
OCFO	OCFO	Huynh-Long Nguyen	OCFO Reviewer 2	BackUp
OCFO	OCFO	Barbara Harris	OCFO Reviewer 2	BackUp
OCFO	OCFO	Huynh-Long Nguyen	OCFO Reviewer 3	BackUp
OCFO	OCFO	Marie Butler	OCFO Reviewer 3	BackUp
OCFO	OCFO	Barbara Harris	OCFO Reviewer 3	BackUp
OCFO	OCFO	Stanley McMichael	Associate CFO	Primary
OCFO	OCFO	Huynh-Long Nguyen	Associate CFO	BackUp
OCFO	OCFO	Marie Butler	Associate CFO	BackUp
OCFO	OCFO	Barbara Harris	Associate CFO	BackUp
OCFO	OCFO	Huynh-Long Nguyen	OCFO Closing Approval Routing	Primary
OCFO	OCFO	Elin Tull	OCFO Closing Approval Routing	BackUp
OCFO	OCFO	Barbara Harris	OCFO Closing Approval Routing	BackUp

- f. Only POCs and OCFO can delete conferences. To do so, click on the applicable (1) delete icon (which only appear for POCs and OCFO) and the **Delete** button on the confirmation box that appears.

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer
Logged in as: James McStay Admin

Home Conferences Routing Lists Accounts Reports Annual Plans

All Conferences

List of Conference Requests

+ Add New Conference Search Conferences Total No of Conference Requests: 6896

S.NO (VIEW)	AGENCY	SUBAGENCY	CONFERENCE NAME	START DATE	STATUS	DELETE	POST CONF DETAILS
22742	Demo	DemoSubAgency2	Test Conf 1.0	7/1/2020	Pending		
22741	FS	Business Operations (CIO)	Test Conf	7/2/2020	AdditionalInfo		
22739	FS	Business Operations (BusOps)	Test Conference 1.0	6/8/2020	Draft		
22738	FS	Chief Financial Office (CFO)	CTAT Guide 3.0	6/8/2020	Draft		

V. Conference Routing

A. Decision Page

1. Routing is triggered once the submitter clicks on **Submit for Review** (see IV.A.1.d). The first approver in the routing list for the sub agency entered in the conference request (see Appendix A, section D.2) receives an email notification, which contains the (1) linked conference number (a unique ID that identifies each request in the system); (2) the approval number, which is the approver's order in the routing list, i.e., 1 for the first approver, 2 for the second, etc.; and the (3) agency and (4) sub agency under which the request is being initiated. *Note: The system will send automated emails (with a link to the conference) to an approver every 48 hours until he/she enters a decision and the conference moves out of his/her queue.*

CTAT: Conference Request Ready for Review

EAS-AppServices@ocio.usda.gov
To McStay, James - OCFO, Washington, DC

**** Please do not respond to this mailbox. Thank you. ****

A conference request has been submitted for your review.

Please review conference request number: [22748](#)

Approval number: 1

Agency Name: Demo

Sub-Agency Name: DemoSubAgency2

View all requests pending your review at: <https://www.preprod.eservices.usda.gov/CTAT//ManageConferenceInfo.aspx>

2. Clicking on the conference number link takes the approver to the **Review Decision** page, which consists of seven sections: **Reviewer Submission, Warnings and Alerts, Conference Summary, Miscellaneous Attachments, Cost Calculations, Review History, and Agency Routing List**. On the **Reviewer Submission** section, the approver selects a (1) decision to approve, disapprove, or request additional information; enters (2) comments, if any; and clicks on the (3) **Submit** button. Selecting “Approve” elevates the request further up the routing list where subsequent approvers will review the conference. Selecting “Disapprove” will end the request, while “Additional Information” will send the request back to the submitter for revisions.

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer
Logged in as: James McStay Admin

Home Conferences Routing Lists Accounts Reports Annual Plans

Review Decision

Reviewer Submission

Decision
Approve

Comments

Submit

3. Further down the page are the other six sections, which can be reviewed by the approver prior to making a decision. The **Warnings and Alerts**, which is the same that appears to the submitter (as shown in [IV.A.1.d](#)), indicates potential issues that could flag the request for approval. Red and orange alerts can be causes for disapproval or delays, i.e., in instances where the approver returns the request for revision or additional information.

Warnings and Alerts

Warnings

- ❗ Check the Conference Justifications section as this conference request does not address all required justifications and does not meet the USDA approval requirements.
- ❗ Light refreshments or government provided meals are being served at this conference. USDA discourages the use of light refreshments or government provided meals.

Alerts

- ❗ USDA policy discourages distribution of promotional materials and conferences with this type of expense receive much greater scrutiny from oversight agencies.
- ❗ This conference has a paid speaker. This will increase the scrutiny from oversight agencies.
- ❗ This conference's cost exceed \$600 per USDA attendee per day exceeding the thresholds from Congressional inquiries and will receive additional scrutiny when reported.
- ❗ This conference's cost exceed \$3,000 per USDA attendee exceeding the thresholds from Congressional inquiries and will receive additional scrutiny when reported.

4. The **Conference Summary** provides the highlights of the conference such as the dates, location, purpose and justification. Clicking on (1) **View Conference Information** takes the approver to the **Conference Request** page.

Conference Summary: CTAT Guide 3.0

[View Conference Information](#) 

Conference Number 22748	Estimated Start Date 6/22/2020	Estimated End Date 6/26/2020
Country United States	State DC	City Washington
Purpose Mission critical		
Justification Mission critical		

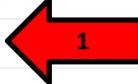
5. The **Conference Request** page consists of the read-only template that was completed by the submitter.

- a. Attachments can be viewed and/or saved by clicking on (1) **Download** on each applicable section.

Attendee List

List of attendees for the event whose travel costs will be paid by USDA.

Include their agency, name, travel authorization number and estimated TDY expense. This detailed listing should sum up to the "Total TDY Travel Expenses" amount listed above.

DOWNLOAD FILE	DOCUMENT	DELETE FILE
Download 	Attendees Cost Detail Spreadsheet V28007890655.xlsx	Delete

- b. To return to the **Review Decision** page, click on (1) **Approve and Move Forward**.

 **Conference Transparency, Accountability and Tracking (CTAT)**
Office of the Chief Financial Officer

Logged in as: James McStay Admin

Home Conferences Routing Lists Accounts Reports Annual Plans

Conference Request

Conference 22748 - Pending

[Export PDF](#)
[Print](#)
[View Approval Details](#)
[Approve and Move Forward](#)
[Go Back](#)

GENERAL CONFERENCE INFORMATION

Conference Name
CTAT Guide 3.0

6. The **Miscellaneous Attachments** section allows approvers to attach supporting documents. This is applicable in a situation, for example, where a designee is registered, logging into CTAT and moving the request on behalf of the approver, such as a secretary uploading a scanned conference approval request signed by the Administrator.

- a. To upload, click on the (1) **Select** button, which prompts to select the file from a local folder.

Miscellaneous Attachments

Additional Attachments

Documents attached to the conference request for reviewer consideration.

No additional documents have been attached.

UPLOAD ADDITIONAL ATTACHMENTS

You may attach any additional documents to share with reviewers.



- b. The (1) file appears below the **Select** box. Click on (2) **Upload Selected Files**.

Miscellaneous Attachments

Additional Attachments

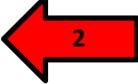
Documents attached to the conference request for reviewer consideration.

No additional documents have been attached.

UPLOAD ADDITIONAL ATTACHMENTS

You may attach any additional documents to share with reviewers.

● Agenda.docx ✕ Remove



- c. The (1) file then appears under **Additional Attachments**, which indicates a successful upload.

Miscellaneous Attachments

Additional Attachments

Documents attached to the conference request for reviewer consideration.

DOWNLOAD FILE	DOCUMENT	DELETE FILE
Download	Agenda72018.docx	Delete

UPLOAD ADDITIONAL ATTACHMENTS

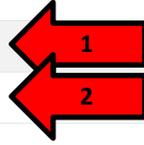
You may attach any additional documents to share with reviewers.



7. The **Cost Calculations** provides a high-level summary of the costs, including the number of conference days and attendees paid for by the agency. The conference is a high cost event if the (1) **Cost per Attendee** is over \$3,000 or the (2) **Cost per Attendee per Day** is over \$600. *Note: The justification for a high cost event should have been entered in the **Justification** field (see Appendix A, section [A.5](#)) under the **General Conference Information** section.*

Cost Calculations

TOTAL COSTS			
Less salaries and benefits			\$41,500.00
TOTAL SALARY AND BENEFIT COST			\$25,000.00
TOTAL DAYS		5	
USDA ATTENDEES		10	
USDA and non-USDA paid by Agency			
COST PER ATTENDEE			\$4150.00
w/o Salary and benefits			
COST PER ATTENDEE PER DAY			\$830.00
w/o Salary and benefits			



8. The **Review History** shows the conference request’s decision history. It includes preceding approvers’ names, decisions, comments and review dates.

Review History

REVIEWER NAME	STATUS	COMMENTS	REVIEW DATE
James McStay Admin	AdditionalInfo	Missing attachment	6/8/2020 4:53:11 PM
James McStay Admin	Approved		6/8/2020 4:54:02 PM

9. Lastly, the **Agency Routing List** shows the list of approvers the conference request will route to within the agency, which includes the Under Secretary for conferences over \$40,000. The OCFO approvers list appears for conferences over \$75,000.

Agency Routing List

AGENCY	SUB AGENCY	REVIEWER NAME	APPROVAL ORDER NAME	USER TYPE
Demo	DemoSubAgency2	James McStay Admin	Agency Reviewer 1	Primary
Demo	DemoSubAgency2	James McStay Admin	Agency Reviewer 2	Primary
Demo	DemoSubAgency2	James McStay Admin	Undersecretary	Primary

B. Decision Workflow

1. When the first approver approves the conference request, it routes to the second approver for review, and so on. The process is repeated starting at [V.A.1](#) for the second and subsequent approvers until the request reaches completion when approved by the final approver. The request’s status changes from “Pending” to “Approved” in the **Status** column in the **All Conferences** page (see [IV.B.2.a](#)) and certain reports in the **Reports** tab (see [VI](#) for further discussion).
2. When an approver at any level disapproves the request, the routing ends and the conference request’s status changes from “Pending” to “Disapproved.” The conference is disabled and can only be reactivated by contacting OCFO.
3. When an approver decides the conference needs corrections, he/she selects “Additional Information.” The request is routed back to the submitter, who receives an email notification containing the (1) linked conference number.

CTAT: Conference Request Returned for Additional Information



EAS-AppServices@ocio.usda.gov
To McStay, James - OCFO, Washington, DC

**** Please do not respond to this mailbox. Thank you. ****

An approver has returned your request pending additional information.

Please provide additional information for conference request number: [22748](#)



View all your conference requests at: <https://www.preprod.eservices.usda.gov/CTAT//ManageConferenceListing.aspx>

4. Clicking on the link takes the submitter directly to the **Conference Request** page where edits can be made. Alternatively, the submitter can search for and access the (1) conference by going to:
 - a. My Conferences Needing Additional Information (Conferences → My Draft Requests)

VIEW	AGENCY	SUB AGENCY	CONFERENCE	START DATE
22748	Demo	DemoSubAgency2	CTAT Guide 3.0	6/22/2020

- b. List of Conference Requests (Conferences → All Entries)

S.NO (VIEW)	AGENCY	SUBAGENCY	CONFERENCE NAME	START DATE	STATUS	DELETE	POST CONF DETAILS
22748	Demo	DemoSubAgency2	CTAT Guide 3.0	6/22/2020	AdditionalInfo		
22747	FS	N/A	Test123		Draft		

5. In addition to the original sections – i.e., **General Conference Information** to **Miscellaneous Attachments** – two new sections are added to returned conference requests:
 - a. The (1) **Reviewer Comments**, which appears before the **General Conference Information**, shows the approver who returned the request; comments, if any; and return date.

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer
Logged in as: James McStay Admin

Home Conferences Routing Lists Accounts Reports Annual Plans

REVIEWER COMMENTS

A reviewer has requested more information regarding your conference submission. Please make corrections or additions as necessary and enter any comments to the reviewer in the box at the bottom of the form.

The details of the request are as follows:

COMMENTS	SUBMITTED BY	SUBMITTED ON
Missing attachment	James McStay Admin	6/8/2020 4:53:11 PM
Verify costs	James McStay Admin	6/9/2020 9:22:04 AM

GENERAL CONFERENCE INFORMATION

Conference Name

CTAT Guide 3.0

- b. The (1) **Comments to Reviewer**, which appears at the bottom of the page after **Miscellaneous Attachments**, allows the submitter to enter comments in response to the approver's.

MISCELLANEOUS ATTACHMENTS

Additional Attachments

No additional documents have been attached to this conference request.

Please attach any additional documents to share with reviewers.

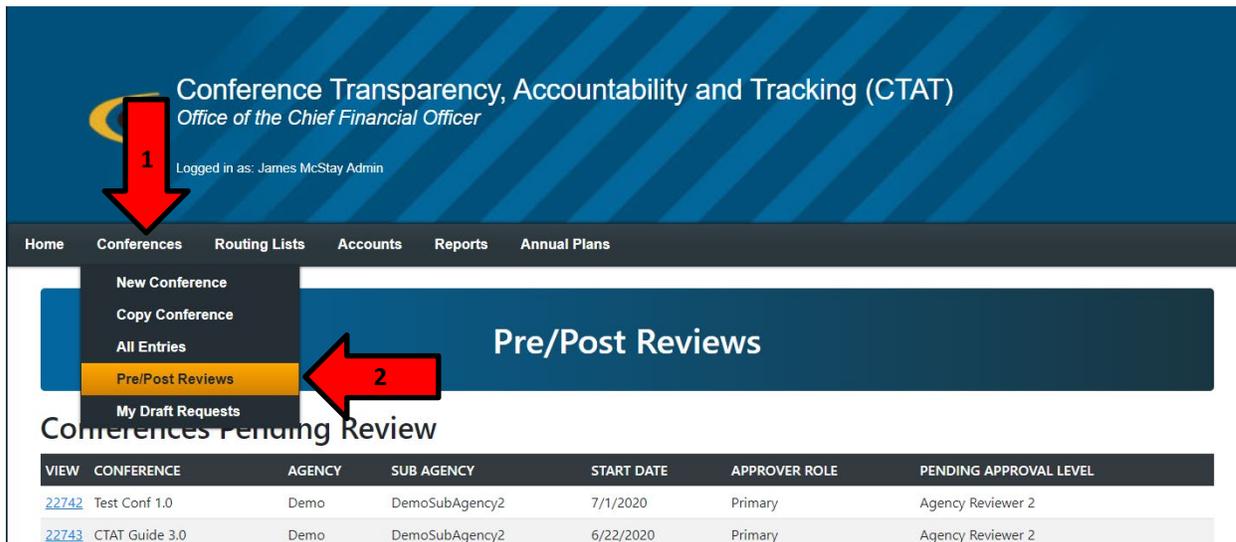
COMMENTS TO REVIEWER

Please add your comments to the conference reviewers.

6. The submitter makes the necessary edits and proceeds to save or submit as discussed in [IV.A.1.b](#) to [g](#). The routing and approval process restart from the beginning (i.e., first approver).

C. Manual Retrieval

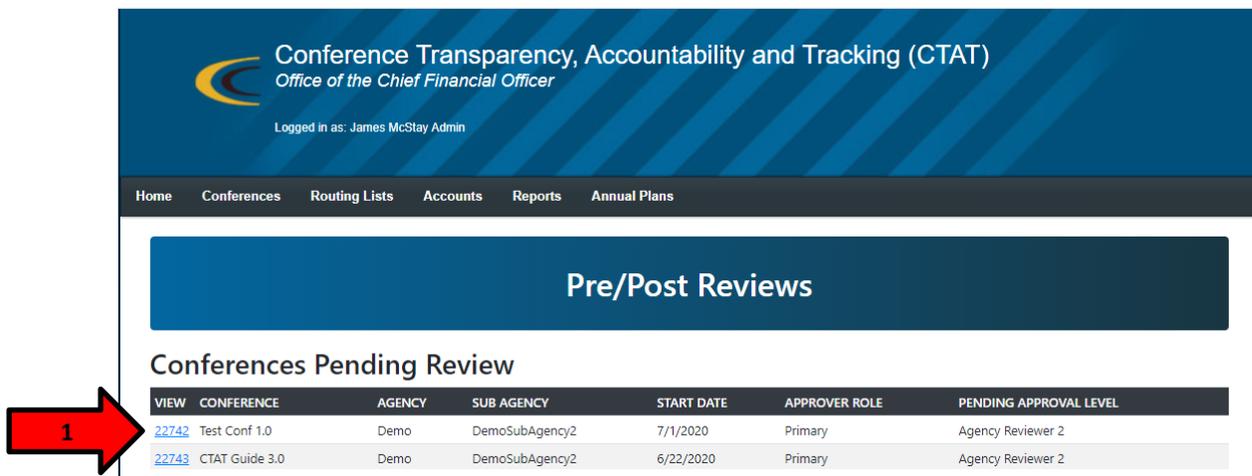
1. The auto-generated email notifies an approver of a conference request pending his/her immediate review. Approvers can also view and access all their pending and completed requests by going to (1) **Conferences** → (2) **Pre/Post Reviews**.



The screenshot shows the CTAT web application interface. At the top, the header reads "Conference Transparency, Accountability and Tracking (CTAT) Office of the Chief Financial Officer" and "Logged in as: James McStay Admin". A navigation menu includes "Home", "Conferences", "Routing Lists", "Accounts", "Reports", and "Annual Plans". A dropdown menu is open under "Conferences", with "Pre/Post Reviews" highlighted. A red arrow labeled "1" points to the "Conferences" menu item, and another red arrow labeled "2" points to the "Pre/Post Reviews" option in the dropdown. Below the navigation, a large blue banner reads "Pre/Post Reviews". Underneath, a section titled "Conferences Pending Review" contains a table with the following data:

VIEW	CONFERENCE	AGENCY	SUB AGENCY	START DATE	APPROVER ROLE	PENDING APPROVAL LEVEL
22742	Test Conf 1.0	Demo	DemoSubAgency2	7/1/2020	Primary	Agency Reviewer 2
22743	CTAT Guide 3.0	Demo	DemoSubAgency2	6/22/2020	Primary	Agency Reviewer 2

2. The **Pre/Post Reviews** consists of three sections.
 - a. **Conferences Pending Review** – These conferences are in the approver’s immediate queue.
 - i. Click on the (1) conference number to navigate to the **Conference Request** page.



The screenshot shows the "Pre/Post Reviews" section of the CTAT web application. It features a large blue banner with the text "Pre/Post Reviews". Below this, a section titled "Conferences Pending Review" contains a table with the following data:

VIEW	CONFERENCE	AGENCY	SUB AGENCY	START DATE	APPROVER ROLE	PENDING APPROVAL LEVEL
22742	Test Conf 1.0	Demo	DemoSubAgency2	7/1/2020	Primary	Agency Reviewer 2
22743	CTAT Guide 3.0	Demo	DemoSubAgency2	6/22/2020	Primary	Agency Reviewer 2

A red arrow labeled "1" points to the "VIEW" column of the first row, specifically to the conference number [22742](#).

- ii. Scroll through the page to review the conference details and click on (1) **Approve and Move Forward** to navigate to the **Review Decision** page. Proceed as discussed in [V.A.2](#).

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer

Logged in as: James McSlay Admin

Home Conferences Routing Lists Accounts Reports Annual Plans

Conference Request

1

Conference 22742 - Pending

[Export PDF](#)
[Print](#)
[View Approval Details](#)
[Approve and Move Forward](#)
[Go Back](#)

GENERAL CONFERENCE INFORMATION

Conference Name
Test Conf 1.0

Conference Dates
Enter the full date range of the conference, even if your agency is not attending all dates.

Estimated Start Date 07/01/2020	Estimated End Date 07/03/2020
---	---

- b. Upcoming Reviews – These conferences are pending a preceding approver’s review and will not have the **Approve and Move Forward** option when opened to prevent the higher level approver from entering a decision before a lower level approver (i.e., the one who has it in his/her immediate queue).

Upcoming Reviews

VIEW	CONFERENCE	AGENCY	SUB AGENCY	START DATE	PENDING APPROVAL LEVEL
18005	CTAT Demo ACFO	Demo	DemoSubAgency2	12/3/2020	Agency Reviewer 1
17742	dEMOO	Demo	DemoSubAgency2	10/1/2020	Agency Reviewer 1

- c. Review Decisions – Shows a summary of the approver’s past conference decisions.

Review Decisions

REVIEW NUM	CONFERENCE	AGENCY	SUB AGENCY	REVIEWED ON	APPROVAL LEVEL	DECISION
22748	CTAT Guide 3.0	Demo	DemoSubAgency2	6/8/2020	Agency Reviewer 1	Approved
22748	CTAT Guide 3.0	Demo	DemoSubAgency2	6/9/2020	Agency Reviewer 2	AdditionalInfo
22743	CTAT Guide 3.0	Demo	DemoSubAgency2	6/8/2020	Agency Reviewer 1	Approved
22742	Test Conf 1.0	Demo	DemoSubAgency2	6/6/2020	Agency Reviewer 1	Approved

D. Conference Override

POCs can override pending, approved, and disapproved conferences. This action entails changing the status of a conference from one state to another. Open the conference and click on (1) **Override** (see [IV.B.2](#) for a discussion on how to access conferences).



Conference Request



Conference 22171 - Pending

[Export PDF](#) [Print](#) [View Approval Details](#) [Approve and Move Forward](#) [Override](#) [Go Back](#)

GENERAL CONFERENCE INFORMATION

Conference Name
Preprod-Smoke Test1

1. Pending Conferences

Three options are available – (a) Transfer Ownership, (b) Approve, and (c) Change Status.



Conference Override

Conference 22171 - Pending

[View Approval Details](#) [Go Back](#)

GENERAL CONFERENCE INFORMATION

Conference Name
Preprod-Smoke Test1

Conference Owner
Teresa Perry Admin

Conference Dates

Estimated Start Date
07/22/2020

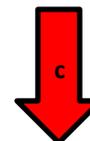
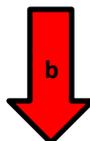
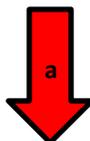
Estimated End Date
07/24/2020

Conference Location

Country
United States

State
CO

City
Denver



OVERRIDE ACTIONS

TRANSFER OWNERSHIP

APPROVE

CHANGE STATUS

- a. Transfer Ownership – Only the submitter can edit and submit a conference he/she created. Transferring ownership, which can be done multiple times to the same conference, reassigns the conference from one submitter to another to allow the new user to edit and submit the conference. *Note: This action can be utilized in situations where the original submitter left the agency either permanently or temporarily, which necessitates having another user take over. In the case of the latter, the conference can be reassigned back to the original submitter when he/she returns.*
- i. Click on (1) **Transfer Ownership**, which expands the section. Select the (2) user the conference will be reassigned to, enter the (3) justification and click on the (4) **Transfer Ownership** button.

OVERRIDE ACTIONS

The screenshot shows a form titled "TRANSFER OWNERSHIP" with the following elements:

- TRANSFER OWNERSHIP**: A blue header button with a red arrow labeled "1" pointing to it.
- New owner**: A dropdown menu with "Select One" and a downward arrow, with a red arrow labeled "2" pointing to it.
- Justification for transfer**: A text input field with the placeholder "Enter Justification for transfer", with a red arrow labeled "3" pointing to it.
- Transfer Ownership**: A blue button with a red arrow labeled "4" pointing to it.
- Cancel**: A grey button located below the "Transfer Ownership" button.

- ii. The page updates with the new (1) conference owner.

The screenshot shows the "Conference Override" page with the following information:

- Conference Override**: A dark blue header.
- Conference 22171 - Pending**: A yellow status bar.
- [View Approval Details](#) and [Go Back](#): Navigation links.
- GENERAL CONFERENCE INFORMATION**: A section header.
- Conference Name**: Preprod-Smoke Test1
- Conference Owner**: James McStay, with a red arrow labeled "1" pointing to it.
- Conference Dates**:

Estimated Start Date	Estimated End Date
07/22/2020	07/24/2020
- Conference Location**:

Country	State	City
United States	CO	Denver

The **Review History** section in the **Routing Workflow/Approval Details** page (see [IV.B.2.e](#) for discussion) and the **Review Decision** page (see [V.A.8](#)) reflects the (1) transaction. Furthermore, all sections or pages with a "Created By" field will reflect the new conference owner.

Review History

REVIEWER NAME	STATUS	COMMENTS	REVIEW DATE
James McStay	Approved	Conference ownership administratively transferred from 'Teresa Perry Admin' to 'James McStay' on 7/8/2020 by James McStay with the following justification: Complete in submitter's absence	7/8/2020 5:39:19 PM

- b. Approve – The POC can administratively approve the conference at the current approver level or for the whole agency. *Note: OCFO can administratively approve for the Under Secretary.*
- i. Click on (1) **Approve**, which expands the section, and enter the (2) justification. Click on (3) **Approve for Level x**, where x is the approver level the conference is currently pending review, if approving only for that level. Click on (4) **Approve through Agency** if approving for all remaining approvers within the agency. For example, if the sub agency below had five approver levels, this action will approve for levels 3, 4 and 5, since levels 1 and 2 had already approved and the conference is pending at level 3.

- ii. The **Review History** will show the administrative approval. In the case of an approval though the agency, each approver level will reflect the same transaction. In the example above, the administrative approval occurred for levels 3 through 5, which corresponds to the same transaction shown for each of approver level (1) 3, (2) 4 and (3) 5 below. In addition, the conference's status will change from "Pending" to "Approved" in all applicable sections and pages.

Review History

[View Conference Information](#)

REVIEWER NAME	STATUS	COMMENTS	REVIEW DATE
Clinton Evans	Approved		5/7/2020 3:27:18 PM
Astor Boozer	Approved		5/7/2020 7:01:34 PM
James McStay Admin	Approved	Conference administratively approved by James McStay Admin on 7/9/2020 with the following justification: Time sensitive - needs to be approved ASAP.	7/9/2020 6:55:35 PM
James McStay Admin	Approved	Conference administratively approved by James McStay Admin on 7/9/2020 with the following justification: Time sensitive - needs to be approved ASAP.	7/9/2020 6:55:35 PM
James McStay Admin	Approved	Conference administratively approved by James McStay Admin on 7/9/2020 with the following justification: Time sensitive - needs to be approved ASAP.	7/9/2020 6:55:35 PM

- c. Change Status – This action is the same as an approver returning the conference for additional information (see [V.A.2](#) and [V.B.3](#)).

- i. Click on (1) **Change Status**, which expands the section. Enter the (2) justification and (3) comments and click on (4) **Return for Additional Information**.

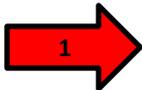
The screenshot shows a form titled "CHANGE STATUS". At the top is a blue button labeled "CHANGE STATUS" with a red arrow and the number "1" pointing to it. Below this is a section titled "Justification for status change" containing a text input field with the placeholder "Enter Justification for status change" and a red arrow with the number "2" pointing to it. Underneath is another section titled "Approver Comments" with a text input field containing "Enter Approver Comments" and a red arrow with the number "3" pointing to it. At the bottom of the form are two buttons: a blue button labeled "Return for Additional Information" with a red arrow and the number "4" pointing to it, and a grey button labeled "Cancel".

- ii. The **Review History** reflects the (1) transaction, and the conference's status changes from "Pending" to "Additional Info" in all applicable sections and pages. The submitter will have to make the necessary edits and resubmit (see [V.B.4](#) to [6](#) for discussion).

Review History

[View Conference Information](#)

REVIEWER NAME	STATUS	COMMENTS	REVIEW DATE
Alexandra Wilkerson	Approved		6/23/2020 12:45:42 PM
Melissa Bailey	Approved		6/24/2020 10:48:38 AM
James McStay Admin	AdditionalInfo	Conference administratively overridden by James McStay Admin on 7/10/2020. Conference changed from 'Pending' to 'Additional Information' with the following justification: Need to return to submitter.	7/10/2020 2:30:09 PM



2. Approved Conferences

One option is available with further options to either reopen the conference or disapprove. Click on (1) **Change Status**.



Conference Override

Conference 22159 - Approved

[View Approval Details](#) [Go Back](#)

GENERAL CONFERENCE INFORMATION

Conference Name

The 2020 Central Grasslands Roadmap Summit

Conference Owner

Becky Ross

Conference Dates

Estimated Start Date

08/04/2020

Estimated End Date

08/06/2020

Conference Location

Country

United States

State

CO

City

Fort Collins

OVERRIDE ACTIONS

CHANGE STATUS

1

- a. Reopen Conference – This action reverts the conference from “Approved” to “Pending” (at the last approver level). This would be utilized to allow the POC to further process the conference since it will have the same options as a pending conference (see [V.D.1](#)) – i.e., transfer ownership or return to submitter.
 - i. Enter the (1) justification and click on (2) **Reopen Conference**.

OVERRIDE ACTIONS

CHANGE STATUS

Justification for status change

Enter Justification for status change

1

Reopen Conference

2

Change to Disapproved

Cancel

- ii. The conference's status changes to (1) "Pending" with the same (2) override options as in [V.D.1](#).

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer
Logged in as: James McStay Admin

Home Conferences Routing Lists Accounts Reports Annual Plans

Conference Override

Conference 22159 - Pending 

[View Approval Details](#) [Go Back](#)

GENERAL CONFERENCE INFORMATION

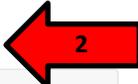
Conference Name
The 2020 Central Grasslands Roadmap Summit

Conference Owner
Becky Ross

Conference Dates
Estimated Start Date: 08/04/2020
Estimated End Date: 08/06/2020

Conference Location
Country: United States
State: CO
City: Fort Collins

OVERVERRIDE ACTIONS



[TRANSFER OWNERSHIP](#) [APPROVE](#) [CHANGE STATUS](#)

- iii. The **Review History** reflects the transaction, and the conference's status changes from "Approved" to "Pending" in all applicable sections and pages.

- b. Change to Disapproved – Convert the conference from "Approved" to "Disapproved."

- i. Enter the (1) justification and click on (2) **Change to Disapproved**.

CHANGE STATUS

Justification for status change

Enter Justification for status change 

[Reopen Conference](#)

[Change to Disapproved](#) 

[Cancel](#)

- ii. The conference's status changes to (1) "Disapproved" on the page and in all applicable sections and pages. The **Review History** will reflect the transaction.

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer
Logged in as: James McStay Admin

Home Conferences Routing Lists Accounts Reports Annual Plans

Conference Override

Conference 22159 - Disapproved 

[View Approval Details](#) [Go Back](#)

GENERAL CONFERENCE INFORMATION

Conference Name
The 2020 Central Grasslands Roadmap Summit

Conference Owner
Becky Ross

Conference Dates
Estimated Start Date: 08/04/2020
Estimated End Date: 08/06/2020

Conference Location

Country	State	City
United States	CO	Fort Collins

OVERRIDE ACTIONS

[CHANGE STATUS](#)

3. Disapproved Conferences

One option is available with further options to either reopen the conference or approve. *Note: One reason a disapproved conference is reopened or approved is due to inadvertent disapproval.* Click on (1) **Change Status**.



Conference Override

Conference 22168 - Disapproved

[View Approval Details](#) [Go Back](#)

GENERAL CONFERENCE INFORMATION

Conference Name

Texas Deer Farmers Association Annual Convention

Conference Owner

Connie Maynard

Conference Dates

Estimated Start Date
08/13/2020

Estimated End Date
08/16/2020

Conference Location

Country	State	City
United States	TX	San Antonio

OVERRIDE ACTIONS

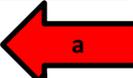
CHANGE STATUS

Justification for status change

Reopen Conference **a**

Change to Approved **b**

Cancel



- a. Reopen Conference – The same action and result as in [V.D.2.a](#), except it reverts the conference from “Disapproved” to “Pending.” Proceed as discussed.
- b. Change to Approved – The opposite action of [V.D.2.b](#).

VI. Reports

The POC can run the agency's conference reports, which can be filtered by status, date range, agency/sub-agency, and cost. Click on one of the options that appear in the (1) **Reports** tab. *Note: Submitters and approvers can also run reports but with limited results.*



A. Pending Requests

1. The **Pending Requests** option retrieves conference requests that are pending an approver's review and shows where the requests are on the routing. The (1) **Reviewers Listing** column shows the agency approvers. The (2) **Under Secretary** and (3) **OCFO Reviewers** columns show the corresponding approvers at these levels – the former will only show an approver icon for conferences between \$40,000 and \$75,000, while the latter for those over \$75,000.
2. The red approver icon indicates which approver the request is currently awaiting a decision on. For example, (4) conference no. 1949, a less than \$40,000 conference, is awaiting approver 2's decision; (5) conference no. 1915 for less than \$75,000 is with approver 1; and (6) conference no. 1909, which is over \$75,000 and has gone through the agency and Under Secretary levels, is nearing completion with the Associate CFO at OCFO.
3. The agency POC can send an email to remind the current approver to complete the review by clicking on the (7) checklist icon in the **Send Email Reminder** column. The system will create and send an email to the approver, which is similar to that in [V.A.1](#) and will allow the approver to access the conference request directly.


Conference Transparency, Accountability and Tracking (CTAT)
 Office of the Chief Financial Officer
 Logged in as: James McStay

Home Conference Requests Agency Routing Manage Users Reports Annual Plan





S.No	Agency	Sub Agency	Conference Name	Reviewers Listing	Under Secretary	OCFO Reviewers	Send Email Reminder
1949	NRCS	Regional Conservation Office	Leadership Institute 2016	Approver1 Approver2 Approver3 Approver4 Approver5 Approver6 			  
1915	DEMO	DemoSubAgency	Test Conf 3	Approver1 Approver2 Approver3 	Under Secretary 		
1909	APHIS	Office of Civil Rights Diversity and Inclusion	Federal Dispute Resolution Conference (FDR)	Approver1 Approver2 Approver3 Approver4 Approver5 Approver6 	Under Secretary 	OCFO Rev 1 OCFO Rev 2 OCFO Rev 3 Associate.CFO 	

B. Filterable Reports

1. Reports can be filtered by any of the following options: status, date range, agency/sub-agency, and cost. The **View By Status** filters for conferences whether in draft, additional info, pending, approved, disapproved, or archived status. The **View By Date Range** includes options for the conferences' start and end dates. Conferences on or after the start date filter will be retrieved. Entering an end date limits the results to those that end on or before the said date. The **View By Agency** filters by agency and sub agency (i.e., the office under which the conference request was initiated). Lastly, the **View By Cost** retrieves requests greater/less than or equal to the entered values based on the conferences' total costs (without salaries and benefits).
2. Select or enter the appropriate filters and click on the (1) **Get Reports** button to retrieve the conferences. *Note: The **View by Status** option provides the most detailed results. In addition to columns/fields that are available in the other options, it also includes the location, date created, event amount (i.e., conference cost), number of attendees, routing status, and final approver.*

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer

Logged in as: James McStay

Home Conference Requests Agency Routing Manage Users Reports Annual Plan

REPORTS BY STATUS

Select Status:

S.No	Agency	SubAgency	Conference Name	Requestor Name	Location	Start Date	End Date	Status	Date Created	Event Amount	No.of Attendees	Rou. Status	Final Approvers
3059	DEMO	DemoSubAgency2	Test DEMO Conference II	Joe Smith	Washington ,DC	7/11/2016	7/15/2016	AdditionalInfo	6/20/2016	80000	7		OCFO Reviewers

- The results can be exported to an (1) Excel spreadsheet or opened as a (2) pdf file by clicking on the appropriate button.

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer

Logged in as: James McStay

Home Conference Requests Agency Routing Manage Users Reports Annual Plan

REPORTS BY DATE RANGE

Select Start Date:

Select End Date:

S.No	Start Date	End Date	Agency	Sub Agency	Conference Name	RequestorName	Status
3059	7/11/2016	7/15/2016	DEMO	DemoSubAgency2	Test DEMO Conference II	Joe Smith	AdditionalInfo

VII. Conference Transparency Reporting

A. Post Conference Details

1. Select fields from approved conference requests are mapped onto the **Post Conference Details**, which can be accessed through the **All Conferences** page (**Conferences** → **All Entries**). This information can be used to satisfy the quarterly conference transparency reporting (CTR) requirements to OCFO¹. The submitter or POC must update the post conference data after event completion and as soon as the information becomes available. Click on the (1) **Post Conference Details** link under the **Post Conf Details** column.

S.NO (VIEW)	AGENCY	SUBAGENCY	CONFERENCE NAME	START DATE	STATUS	DELETE	POST CONF DETAILS
22748	Demo	DemoSubAgency2	CTAT Guide 3.0	6/22/2020	Attended		Post Conference Details
22747	FS	N/A	Test123		Draft		
22746	Demo	DemoSubAgency1	Trevor Test	6/8/2020	Draft		

2. The **Post Conference Request Details** page appears with pre-populated information.
 - a. Three text fields in the summary section require the user to input information: (1) **Attended, Hosted or Sponsored** - enter either attended, hosted or sponsored. (2) **Contracting** - enter sole source; competitively awarded; sponsored the event via grant or cooperative agreement; or expenses are for travel, fees or below micro purchase limit. (3) **Basis for City Selected** - enter location is near more than 50% of attendees; location selected by host; or cost comparison performed to select locations.
 - b. In the **Participants and Cost Details** section, there is an (4) **Actual** and a (5) **Conference Request** column. The fields in the latter are read-only and reflect the estimates that were entered when the conference request was submitted. The fields in the **Actual** column - from (6) **Agency Participants** to (7) **Salary Costs** - are editable and should reflect the actual numbers and costs; the rest of the fields are auto-calculated.
 - c. If the cost per person is over \$3,000 or the cost per person per day over \$600, a (8) justification for high cost event field appears. Similarly, a justification field for mission impact appears for a sponsored conference over \$100,000. An explanation must be entered for the high cost event and/or the conference's impact on the agency's mission.

¹ The June 2013 OCFO memo, "New Requirements for Conference Planning and Reporting," requires agencies to submit certified reports each quarter on conferences that were attended, hosted, or sponsored where net expenses exceeded \$7,000.

d. Click on the (9) **Submit Conference Details** button to save any changes.

Post Conference Request Details

CTAT Guide 3.0 Conference Details

Conference Dates
Estimated Start Date: 6/22/2020 Estimated End Date: 6/26/2020

Conference Location
Country: _____ State: DC City: Washington

Attended, Sponsored or Hosted: _____ Contracting: _____ Facility Type: USDA Facility

Basis for City Selected: _____

Participants and Costs Details

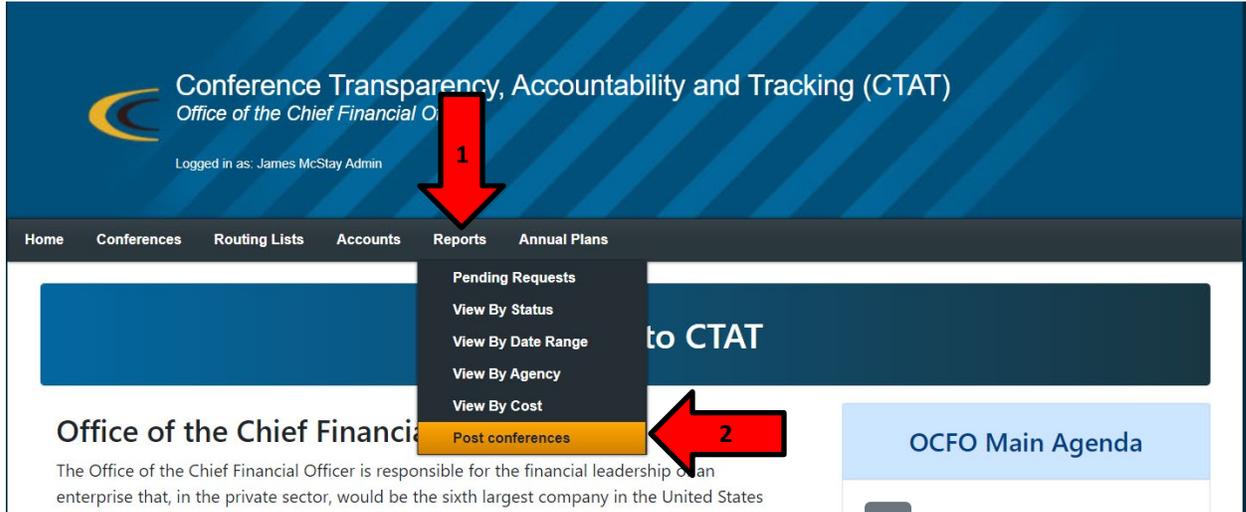
	ACTUAL	CONFERENCE REQUEST
AGENCY PARTICIPANTS	10	10
NON-USDA PARTICIPANTS PAID BY AGENCY	0	0
TRAVEL EXPENSES	\$19,000.00	\$19,000.00
A/V COSTS	\$0.00	\$0.00
FOOD OR BEVERAGE COSTS	\$2,500.00	\$2,500.00
OTHER COSTS	\$20,000.00	\$20,000.00
SALARY COSTS	\$25,000.00	\$25,000.00
TOTAL DIRECT COST (WITHOUT SALARIES)	\$41,500.00	\$41,500.00
NUMBER OF PEOPLE	10	10
NUMBER OF DAYS	5	5
COST PER PERSON	\$4,150.00	\$4,150.00
COST PER PERSON PER DAY	\$830.00	\$830.00

Explanation of High Cost Event: _____

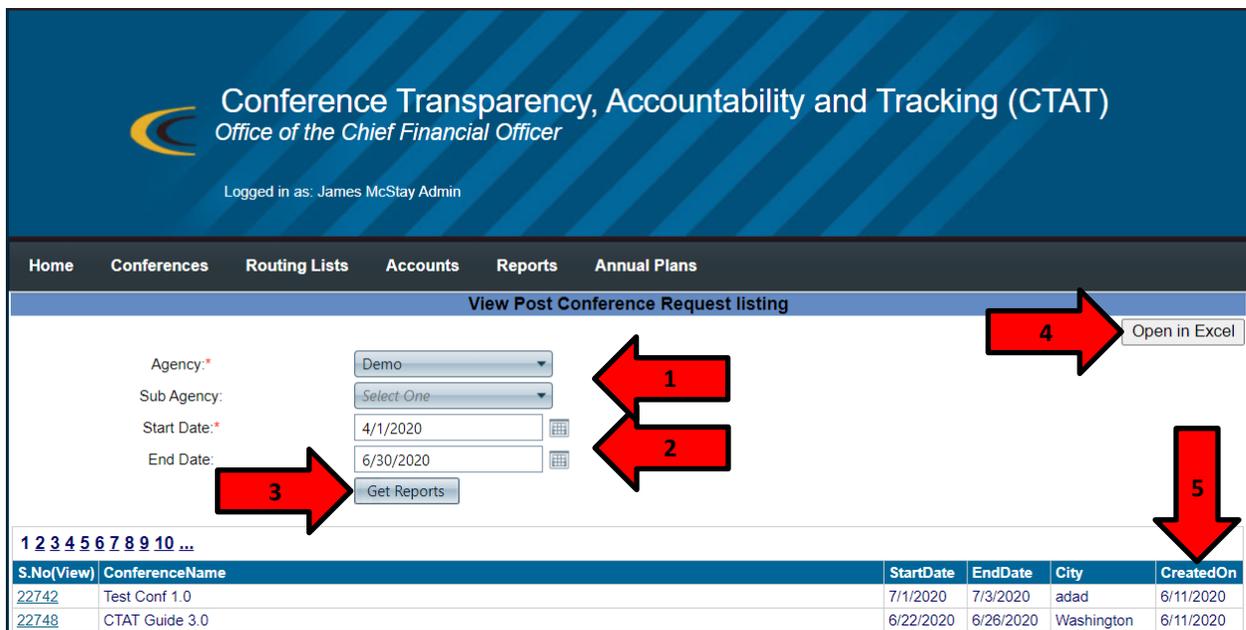
Submit Conference Details

B. Generate CTR Reports

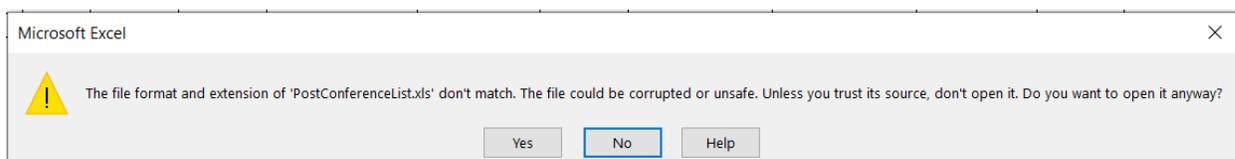
1. Approved conferences that have been updated through the **Post Conference Details** will appear in the post conferences report under (1) **Reports** → (2) **Post Conferences**.



2. The report can be filtered by (1) agency and sub agency. Use the (2) date filters and click on the (3) **Get Reports** button to generate a report for a particular period. For example, enter 4/1/2020 and 6/30/2020 for the start and end dates, respectively, to retrieve all conferences for the 3rd quarter of Fiscal Year 2020. The list of conferences that appear can be exported to a spreadsheet by clicking on the (4) **Open in Excel** button. *Note: The (5) **CreatedOn** column reflects the date the conference was updated in the **Post Conference Details** and consequently added to the post conference report.*



3. Open or save the Excel file to a local folder once download completes. Click on Yes on the Excel dialog box that appears when opening the file.



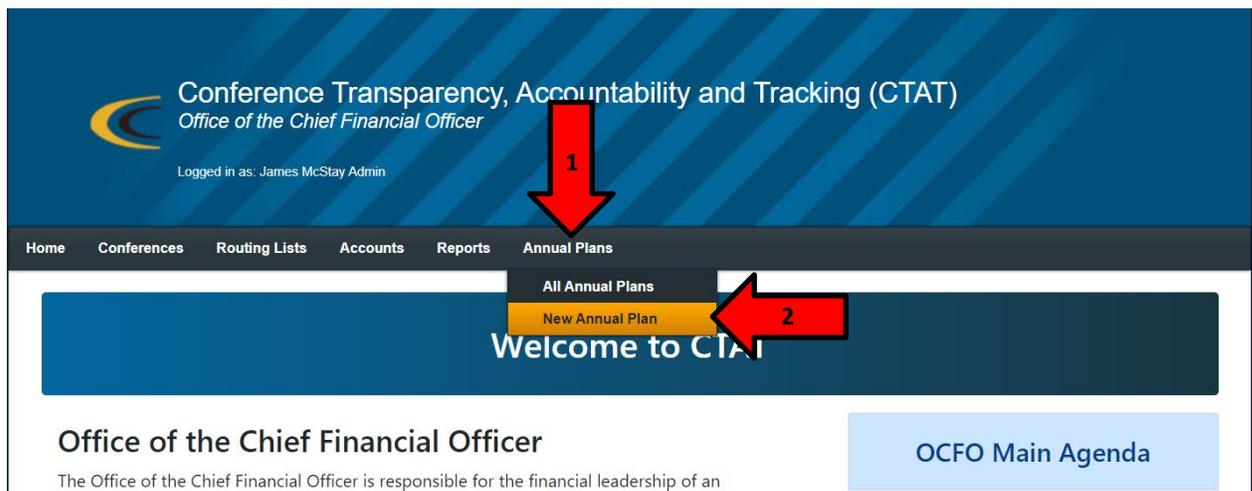
- The spreadsheet contains all the data elements required for post conference reporting to OCFO, such as conference name, dates, location, number of attendees, and costs, among others. Further edits to the data can be made as needed prior to submission.
- The annual OCFO CTR memoranda establish the guidelines for CTR. The POC should coordinate with agency staff responsible for CTR to ensure quarterly reports are generated from CTAT, updated as needed, and submitted to OCFO in a timely manner.

VIII. Annual Plan

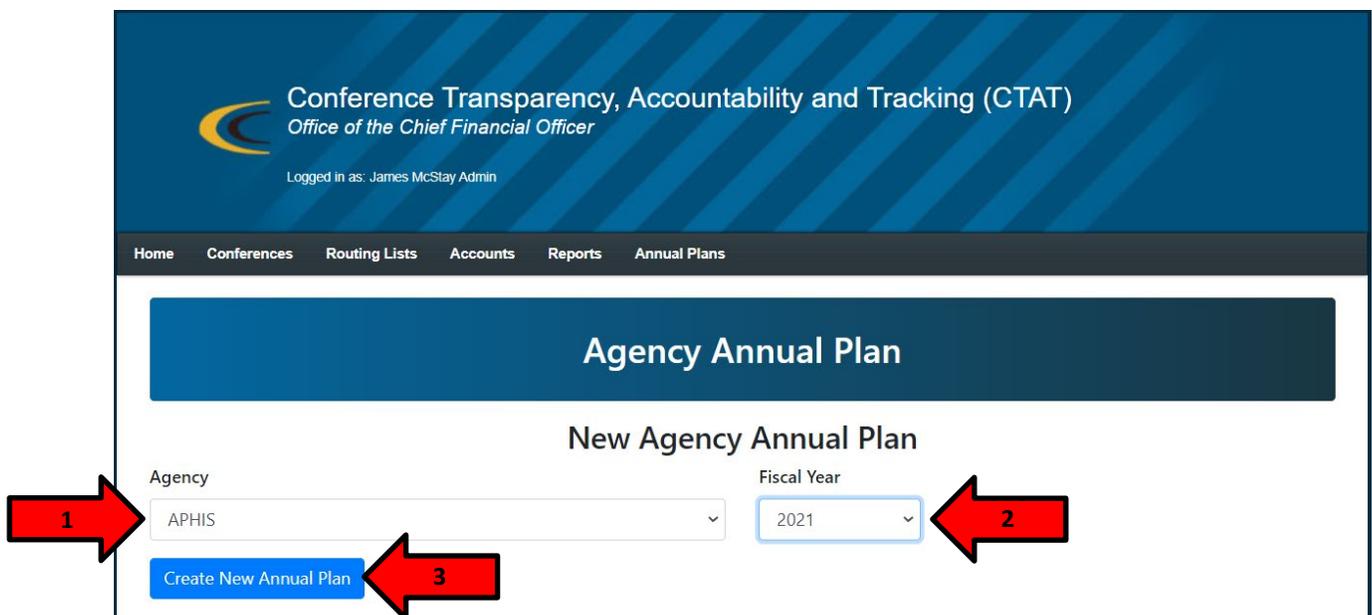
Annual conference plans are due to OCFO by August 31.

A. Add New Plan

- To add a new plan, go to (1) **Annual Plans** → (2) **New Annual Plan**.



- Select the (1) **Agency** and (2) **Fiscal Year** and click on the (3) **Create New Annual Plan** button.



- The **Agency Annual Plan** page refreshes. Two options for adding the annual plan are available: (1) **Import Conferences** and (2) **Create a New Conference**. The Import Conferences option allows users to complete an Excel spreadsheet offline for uploading onto the website. The Create a New Conference

option allows users to enter each conference online. Agencies may use whichever option is more suitable; alternatively, both may be combined, i.e., a file is uploaded through the import option and individual conferences added through the manual entry option.

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer

Logged in as: James McStay Admin

Home Conferences Routing Lists Accounts Reports Annual Plans

Agency Annual Plan

APHIS Agency Annual Plan for FY 2021

Last modified by James McStay Admin on 7/17/2020

IMPORT CONFERENCES

You may import conferences to this agency annual plan uploading a completed [FY21 Conference Template planning spreadsheet](#).

CREATE A NEW CONFERENCE

You may add a conference to this agency annual plan by filling out a form online.

Imported Conferences

No conferences have been imported into this annual plan.

Manually Entered Conferences

No conference plans have manually entered to this agency annual plan.

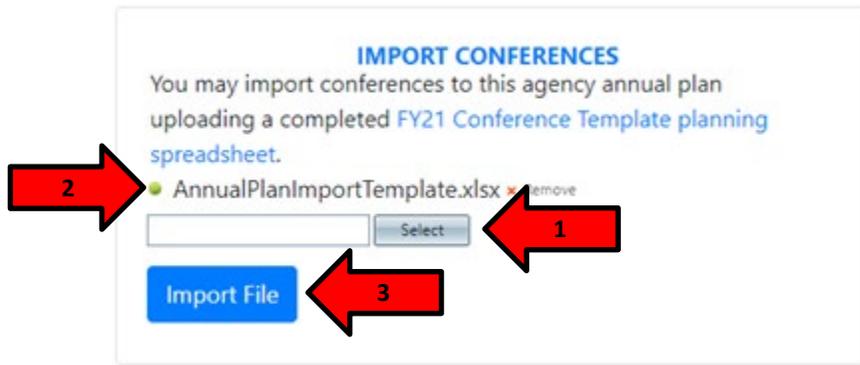
a. Import Conferences

- i. Click on (1) **FY21 Conference Template planning spreadsheet**, which prompts the annual plan Excel template to be opened or saved in a local folder. *Note: The template can also be downloaded from the OCFO website – see link in [IV.A.1.b](#).*

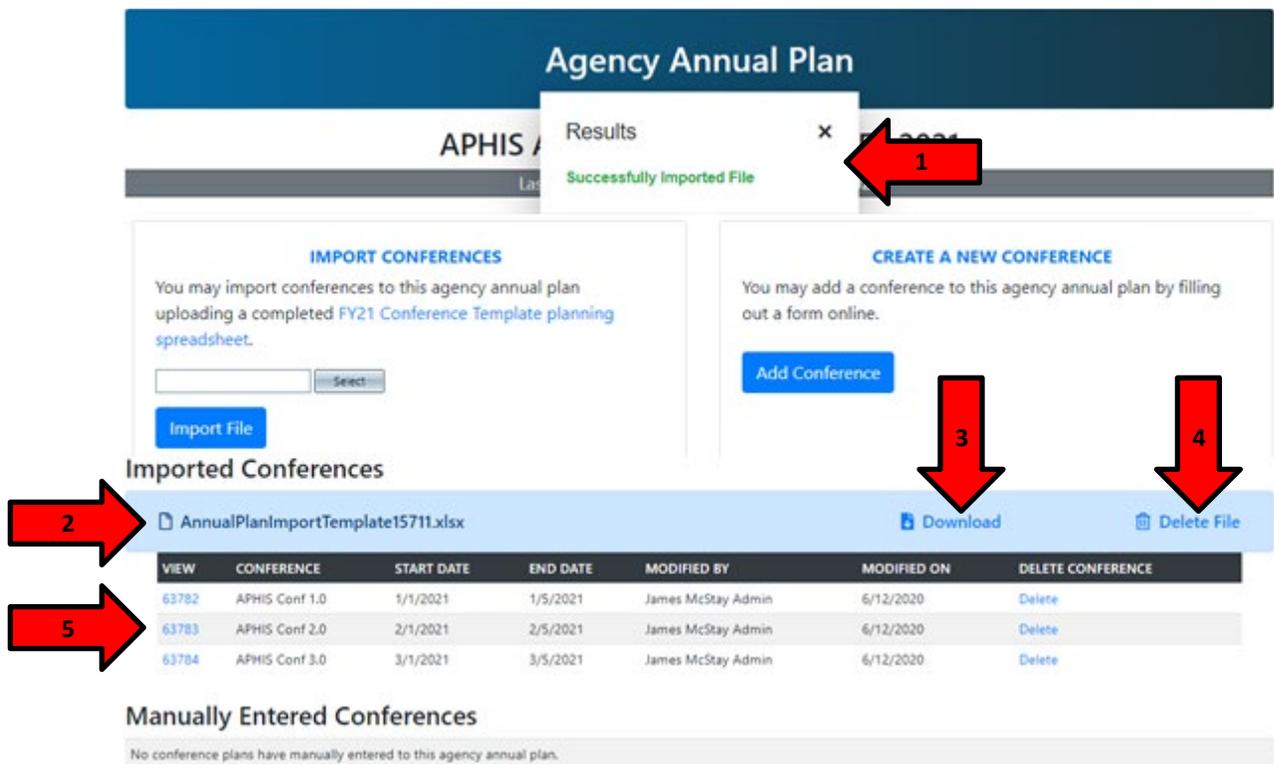
IMPORT CONFERENCES

You may import conferences to this agency annual plan uploading a completed [FY21 Conference Template planning spreadsheet](#).

- ii. Complete the template and upload by clicking on the (1) **Select** button. The (2) file appears above the Select box after a successful upload. Click on (3) **Import File**.

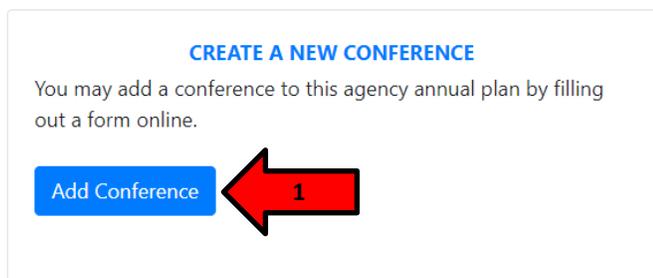


- iii. A (1) successful import message appears (click on the “x” to close). *Note: If there are issues with the file, e.g., missing or incorrect entries, it will not be imported, and a message appears indicating what caused the errors.* The (2) file appears in the **Imported Conferences** section with an option to (3) **Download** or (4) **Delete**. All the (5) entries in the Excel file are shown. *Note: Agencies may upload more than one template, and each will show as a separate file; however, to prevent potential duplicate records, agencies should consolidate all records and upload one template.*



b. Create a New Conference

- i. Click on (1) **Add Conference**.



- ii. The **Annual Plan Conference** page opens. All the fields are required, except the (1) **Cost per Attendee** and **Cost per Attendee per Day**, which are auto-calculated, (2) **Additional Expense Justification**, and (3) **Miscellaneous Attachments**. The Additional Expense Justification is only required when the Cost per Attendee is over \$3,000 or the Cost per Attendee per Day over \$600. One or more documents pertaining to the conference may be uploaded in the Miscellaneous Attachments. Click on (4) **Add to Annual Plan** when complete.

Annual Plan Conference

APHIS Agency Annual Plan Conference for FY 2021

Last modified by James McStay Admin on 7/27/2020

Event Type	<input checked="" type="checkbox"/> Conference <input type="checkbox"/> Training <input type="checkbox"/> Operational
Name of Conference or Training	APHIS Conf 4.0
Participation Type	<input type="checkbox"/> Sponsor <input type="checkbox"/> Host <input checked="" type="checkbox"/> Attend
City	Paris
State	Select... ▼
Country	FRANCE ▼
Number of Attendees	5
Start Date	05/01/2021
End Date	05/05/2021
Total Cost	\$25,000.00
Cost Per Attendee	\$5,000.00
Cost Per Attendee Per Day	\$1,000.00

Justification / Reason for Conference or Training

Attendance at this conference is extremely important to further the agency's mission and the Department's Strategic Plan because it will allow staff to strengthen working relationships between partner agencies with similar missions and learn from partners and board members about numerous subjects pertaining to the mission.

Conference Point of Contact: John Doe

Additional Expense Justification

The high cost is due to international airfare and lodging. Teleconferencing is not an option; in person attendance will be required to participate in the event.

Miscellaneous Attachments

Please attach any documents related to the annual plan conference.

Select

Add to Annual Plan

- iii. The (1) conference is added to the **Manually Entered Conferences** section. Repeat the two preceding steps for each conference.

Agency Annual Plan

APHIS Agency Annual Plan for FY 2021

Last modified by James McStay Admin on 6/12/2020

IMPORT CONFERENCES

You may import conferences to this agency annual plan uploading a completed FY21 Conference Template planning spreadsheet.

CREATE A NEW CONFERENCE

You may add a conference to this agency annual plan by filling out a form online.

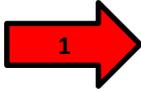
Imported Conferences

AnnualPlanImportTemplate15711.xlsx

VIEW	CONFERENCE	START DATE	END DATE	MODIFIED BY	MODIFIED ON	DELETE CONFERENCE
63782	APHIS Conf 1.0	1/1/2021	1/5/2021	James McStay Admin	6/12/2020	Delete
63783	APHIS Conf 2.0	2/1/2021	2/5/2021	James McStay Admin	6/12/2020	Delete
63784	APHIS Conf 3.0	3/1/2021	3/5/2021	James McStay Admin	6/12/2020	Delete

Manually Entered Conferences

VIEW	CONFERENCE	START DATE	END DATE	MODIFIED BY	MODIFIED ON	DELETE CONFERENCE
63785	APHIS Conf 4.0	5/1/2021	5/5/2021	James McStay Admin	6/12/2020	Delete



B. View Plan

- To view the annual plan, go to (1) **Annual Plans** → (2) **All Annual Plans**.

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer

Logged in as: James McStay Admin

Home Conferences Routing Lists Accounts Reports **Annual Plans**

All Annual Plans

New Annual Plan

Welcome to CTAT

Office of the Chief Financial Officer

The Office of the Chief Financial Officer is responsible for the financial leadership of an

OCFO Main Agenda

- Select the (1) **Agency** and (2) **Fiscal Year** and click on (3) **Search**. The corresponding annual plan is retrieved. Click on the (4) plan number to open. Alternatively, all the conferences in the annual plan, regardless if added via the file upload or manual entry option, can be exported and viewed in a single Excel file by clicking on the (5) **Export Plan Details** button.

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer

Logged in as: James McStay Admin

Home Conferences Routing Lists Accounts Reports Annual Plans

All Annual Plans

Agency: APHIS Fiscal Year: 2021

3 →
← 1
← 2
← 5

← 4
Search
Reset
Export Plan Details

Annual Plan Search Results

VIEW	YEAR	AGENCY	MODIFIED BY	MODIFIED ON
21	2021	APHIS	James McStay Admin	6/12/2020

3. Clicking on the plan number opens the **Agency Annual Plan** page.

Conference Transparency, Accountability and Tracking (CTAT)
Office of the Chief Financial Officer

Logged in as: James McStay Admin

Home Conferences Routing Lists Accounts Reports Annual Plans

Agency Annual Plan

APHIS Agency Annual Plan for FY 2021

Last modified by James McStay Admin on 6/12/2020

IMPORT CONFERENCES

You may import conferences to this agency annual plan uploading a completed FY21 Conference Template planning spreadsheet.

Select...

Import File

CREATE A NEW CONFERENCE

You may add a conference to this agency annual plan by filling out a form online.

Add Conference

Imported Conferences

AnnualPlanImportTemplate15711.xlsx Download Delete File

VIEW	CONFERENCE	START DATE	END DATE	MODIFIED BY	MODIFIED ON	DELETE CONFERENCE
63782	APHIS Conf 1.0	1/1/2021	1/5/2021	James McStay Admin	6/12/2020	Delete
63783	APHIS Conf 2.0	2/1/2021	2/5/2021	James McStay Admin	6/12/2020	Delete
63784	APHIS Conf 3.0	3/1/2021	3/5/2021	James McStay Admin	6/12/2020	Delete

Manually Entered Conferences

VIEW	CONFERENCE	START DATE	END DATE	MODIFIED BY	MODIFIED ON	DELETE CONFERENCE
63785	APHIS Conf 4.0	5/1/2021	5/5/2021	James McStay Admin	6/12/2020	Delete

4. The Export Plan Details option prompts the user to open or save the Excel file in a local folder. The spreadsheet will contain all the data elements from the annual plan template. In addition, it includes a summary of the total number of events and estimated expenses, the user who created and/or modified each conference, and the dates these occurred.

PLEASE DO NOT ALTER THE INFORMATION ON THIS SPREADSHEET. THIS INFORMATION WILL BE EXPORTED TO THE EXCEL FILE.

USDA Planned Conferences										
Total # of Planned Events 4										
Total Amount of Estimated Expenses \$85,000										
Year	Agency	Conference Name (and acronym)	Conference Type (ONLY Attend, Host, Sponsor)	City	State / Country	Start Date	End Date	Event Type (ONLY Conference or Training)	Number of Attendees	T
2021	APHIS	APHIS Conf 1.0	Attend	Washington	DC	1/1/2021	1/5/2021	Conference	10	
2021	APHIS	APHIS Conf 2.0	Attend	Phoenix	AZ	2/1/2021	2/5/2021	Training	5	
2021	APHIS	APHIS Conf 3.0	Attend	Arlington	VA	3/1/2021	3/5/2021	Training	10	
2021	APHIS	APHIS Conf 4.0	Attend	Houston	TX	5/1/2021	5/5/2021	Conference	5	

C. Edit/Update Plan

1. Imported Conferences – There are several options for updating the records that were added via the file upload.
 - a. Delete the current file and replace with a new file.
 - i. Click on (1) **Delete File** and the **Delete** button on the confirmation box that appears.

Agency Annual Plan

APHIS Agency Annual Plan for FY 2021

Last modified by James McStay Admin on 6/12/2020

IMPORT CONFERENCES

You may import conferences to this agency annual plan uploading a completed FY21 Conference Template planning spreadsheet.

Select

Import File

CREATE A NEW CONFERENCE

You may add a conference to this agency annual plan by filling out a form online.

Add Conference

Imported Conferences

AnnualPlanImportTemplate15711.xlsx
Download
Delete File

VIEW	CONFERENCE	START DATE	END DATE	MODIFIED BY	MODIFIED ON	DELETE CONFERENCE
63782	APHIS Conf 1.0	1/1/2021	1/5/2021	James McStay Admin	6/12/2020	Delete
63783	APHIS Conf 2.0	2/1/2021	2/5/2021	James McStay Admin	6/12/2020	Delete
63784	APHIS Conf 3.0	3/1/2021	3/5/2021	James McStay Admin	6/12/2020	Delete

Manually Entered Conferences

VIEW	CONFERENCE	START DATE	END DATE	MODIFIED BY	MODIFIED ON	DELETE CONFERENCE
63785	APHIS Conf 4.0	5/1/2021	5/5/2021	James McStay Admin	6/12/2020	Delete

- ii. The file and its corresponding records in the **Imported Conferences** section are removed.

Agency Annual Plan

APHIS Agency Annual Plan for FY 2021

Last modified by James McStay Admin on 6/15/2020

IMPORT CONFERENCES

You may import conferences to this agency annual plan uploading a completed [FY21 Conference Template planning spreadsheet](#).

Select

Import File

CREATE A NEW CONFERENCE

You may add a conference to this agency annual plan by filling out a form online.

Add Conference

Imported Conferences
No conferences have been imported into this annual plan.

Manually Entered Conferences

VIEW	CONFERENCE	START DATE	END DATE	MODIFIED BY	MODIFIED ON	DELETE CONFERENCE
63785	APHIS Conf 4.0	5/1/2021	5/5/2021	James McStay Admin	6/12/2020	Delete

- iii. Upload the new file (as described in [VIII.A.3.a.ii](#) and [iii](#)). The new file and all its records will show in the **Imported Conferences** section.
- b. Download the current file, update, and reupload.

Note: This option would be utilized if the user prefers to work on the file that is already in the system as opposed to a completely new file.

- i. Click on (1) **Download**, which will prompt to open or save the file to a local folder.

Agency Annual Plan

APHIS Agency Annual Plan for FY 2021

Last modified by James McStay Admin on 6/12/2020

IMPORT CONFERENCES

You may import conferences to this agency annual plan uploading a completed [FY21 Conference Template planning spreadsheet](#).

Select

Import File

CREATE A NEW CONFERENCE

You may add a conference to this agency annual plan by filling out a form online.

Add Conference

Imported Conferences

📄 AnnualPlanImportTemplate15711.xlsx [Download](#) [Delete File](#)

VIEW	CONFERENCE	START DATE	END DATE	MODIFIED BY	MODIFIED ON	DELETE CONFERENCE
63782	APHIS Conf 1.0	1/1/2021	1/5/2021	James McStay Admin	6/12/2020	Delete
63783	APHIS Conf 2.0	2/1/2021	2/5/2021	James McStay Admin	6/12/2020	Delete
63784	APHIS Conf 3.0	3/1/2021	3/5/2021	James McStay Admin	6/12/2020	Delete

Manually Entered Conferences

VIEW	CONFERENCE	START DATE	END DATE	MODIFIED BY	MODIFIED ON	DELETE CONFERENCE
63785	APHIS Conf 4.0	5/1/2021	5/5/2021	James McStay Admin	6/12/2020	Delete

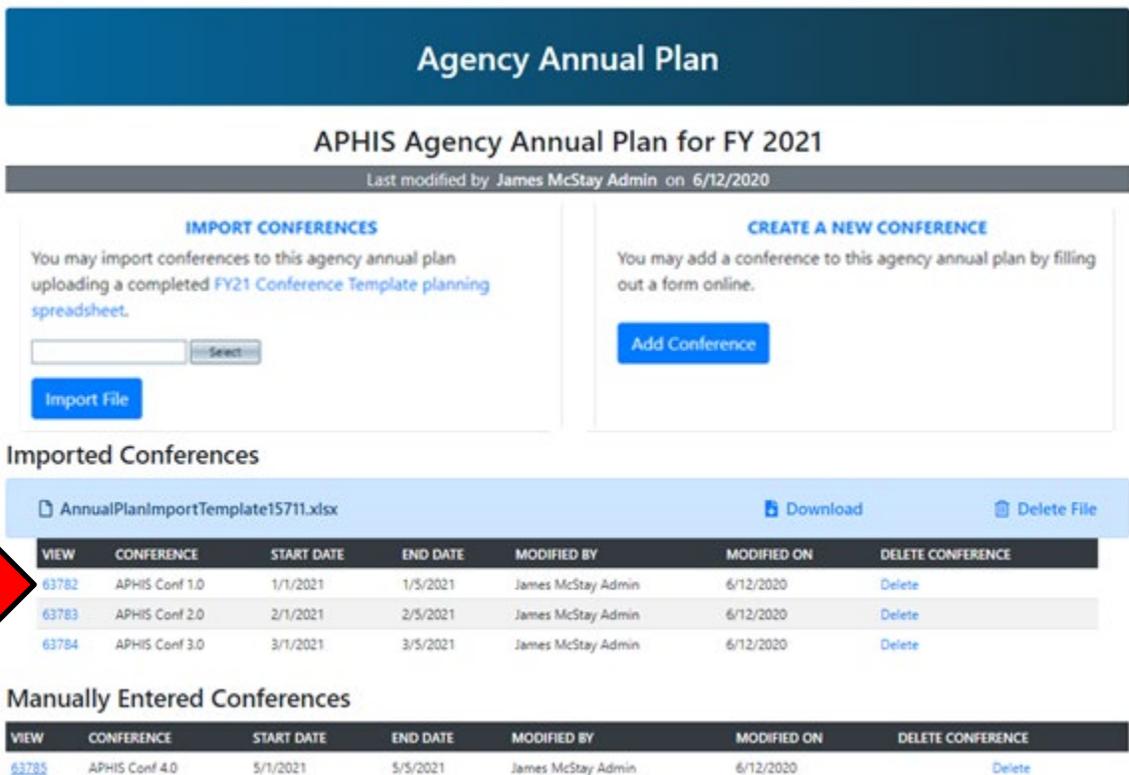
- ii. Update the downloaded file and delete the existing file. Reupload the updated file.

Important: Files are not overwritten; therefore, it is necessary to first delete the existing file before reuploading the updated file, otherwise, a new instance of the file, and consequently, potential duplicate records, will be created.

- c. Update a record.

Note: This option would be utilized if there are only a few edits to be made or if the user prefers to update records online, as opposed to making a bulk update on the file offline and having to upload it.

- i. Click on the (1) conference number.



Agency Annual Plan

APHIS Agency Annual Plan for FY 2021

Last modified by James McStay Admin on 6/12/2020

IMPORT CONFERENCES
You may import conferences to this agency annual plan uploading a completed FY21 Conference Template planning spreadsheet.

CREATE A NEW CONFERENCE
You may add a conference to this agency annual plan by filling out a form online.

Imported Conferences

AnnualPlanImportTemplate15711.xlsx

VIEW	CONFERENCE	START DATE	END DATE	MODIFIED BY	MODIFIED ON	DELETE CONFERENCE
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63784	APHIS Conf 3.0	3/1/2021	3/5/2021	James McStay Admin	6/12/2020	Delete

Manually Entered Conferences

VIEW	CONFERENCE	START DATE	END DATE	MODIFIED BY	MODIFIED ON	DELETE CONFERENCE
63785	APHIS Conf 4.0	5/1/2021	5/5/2021	James McStay Admin	6/12/2020	Delete

- ii. The **Annual Plan Conference** page opens (see [VIII.A.3.b.ii](#)). Make the appropriate edits and click on the **Add to Annual Plan** button to save the changes.

Important: Changes made to a record via this option do not carry over to the source file, i.e., the data in the file remains unchanged. However, the data for updated records will reflect in the annual plan spreadsheet when exported as described in [VIII.B.2](#) and [4](#).

APPENDIX A

Add New Conference

A. General Conference Information

GENERAL CONFERENCE INFORMATION

Conference Name

Enter conference name

1

When adding a new conference, be sure to completely spell out the name. Do not use acronyms or abbreviations unless they are contained in the actual conference name.

Conference Dates

Enter the full date range of the conference, even if your agency is not attending all dates.

Estimated Start Date

Start Date

2



Estimated End Date

End Date

2



Conference Location

Country

United States

3



State

Select...

3



City

City

3

Purpose

Enter the reason your agency will be attending the conference.

4

Justification

Explain why your agency must attend this conference. How will your attendance benefit your agency? This will also be the draft text used in reporting sponsored events with costs over \$100 thousand dollars.

5

1. Enter the conference name.
2. Enter the start and end dates (mm/dd/yyyy) or use the date picker.
3. Select the country, the state if U.S., and type in the city.
4. Enter the purpose for attending, hosting, or sponsoring the conference.
5. Enter the justification for participating in the conference. Also include an explanation when the conference is high cost, i.e., cost per person over \$3,000 or cost per person per day over \$600.

Event Type **6**

Conference Training Operational

This is a recurring event **7**

Continuing Professional Education

Select... **8**

Will your agency be hosting a booth (USDA or otherwise) at the event?

Select... **8**

Does this event meet the definition of a "conference" in Appendix C to Chapter 301 of the Federal Travel Regulations and 5 USC 4101 (4)?

Select... **8**

Will multiple USDA agencies be sending attendees to this event?

Select... **9**

What is/are the role(s) of your agency in the conference? **10**

Attendee(s) Exhibitor(s) Host(s) Presenter(s) Speaker(s) Sponsor(s)

Conference Agendas **11**

Please attach the conference agenda, or if training, the official list of courses

6. Select one (or more) event type.
7. If the event is recurring move the slide button to the right and enter the frequency.

This is a recurring event

Recurring Event Frequency

8. Select yes or no.
9. Select yes, no, or unknown.
10. Select one (or more) role(s). Selecting Sponsor(s) will open the Sponsoring Agency Information section.

What is/are the role(s) of your agency in the conference?

Attendee(s) Exhibitor(s) Host(s) Presenter(s) Speaker(s) Sponsor(s)

Conference Agendas

Please attach the conference agenda, or if training, the official list of courses

SPONSORING AGENCY INFORMATION

What steps will be taken to minimize lodging costs (such as negotiating a rate below per diem)?

a

Upgraded rooms are part of the arrangements **b**

Additional meeting rooms are being provided that are not listed on the agenda **b**

Outside conference planning services will be used **b**

Scouting trips will be used when arranging this conference **b**

After hours events, networking sessions, or parties will be officially organized or included on the agenda **c**

Alcohol will be officially provided or procured with government funds for this event **d**

a. Enter explanation.

b. If the item applies, move the slide button to the right and enter justification.

Upgraded rooms are part of the arrangements

Please explain why they are needed, their intended use and how they will be distributed.

c. If applicable, this item will cause an orange flag in the Warning and Alerts (see [IV.A.1.d](#) and [V.A.3](#)). Enter justification.

After hours events, networking sessions, or parties will be officially organized or included on the agenda

USDA strongly discourages these type of events and a yes answer will likely result in your conference request being denied.
Please provide a justification on why this is a proper use of government resources.

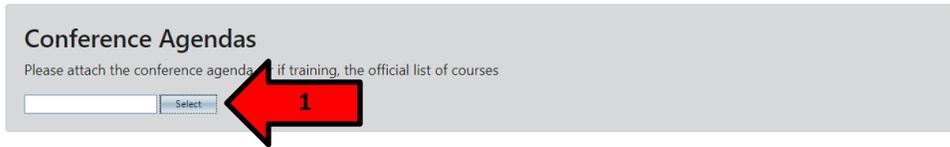
d. If applicable, this item will cause a red flag in the Warnings and Alerts (see [IV.A.1.d](#) and [V.A.3](#)).

Alcohol will be officially provided or procured with government funds for this event

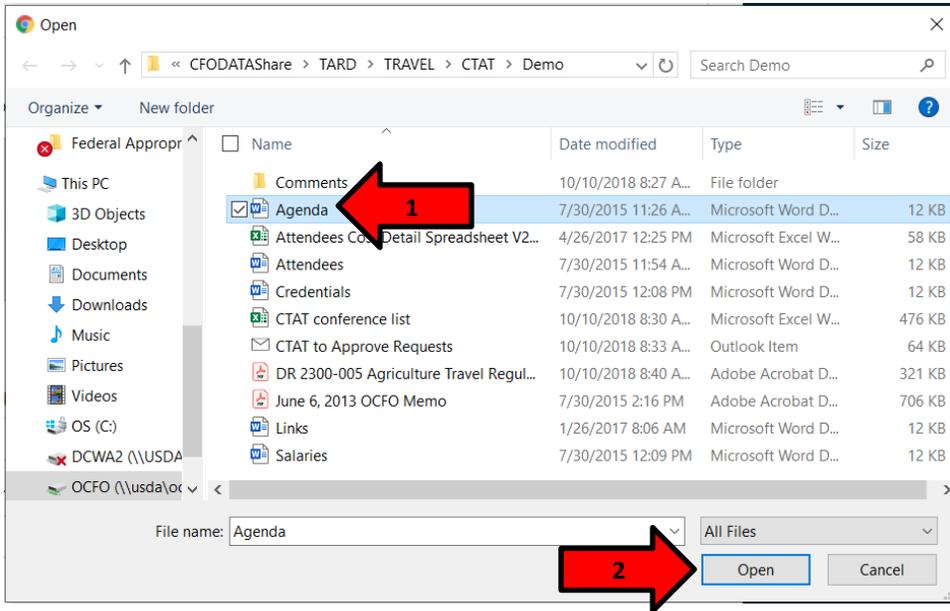
USDA strongly discourages providing or procuring alcohol and a yes answer will likely result in your conference request being denied. If alcohol will be provided, please explain why this is necessary in the Purpose and Justification fields above.

11. To upload:

- a. Click on the (1) Select button.



- b. The folder dialog box appears. Select the (1) file and click on (2) Open. *Note: One or more files may be uploaded.*



- c. The (1) file appears above the Select box, indicating a successful upload. To delete the file, click on (2) Remove.



B. Conference Justifications

Selecting No in any one of these questions will trigger a red flag in the Warnings and Alerts.

CONFERENCE JUSTIFICATIONS

Will this conference help further the agency's mission or the Department's strategic plan? *

Select...

1

Can the information NOT be effectively shared through another means such as a teleconference or the Internet? *

Select...

1

Is the number of employees attending justified? *

Select...

1

Is the conference or training event a "must-do" considering the limited budgets of the agency? *

Select...

1

1. Select yes or no.

C. Conference Sponsorship Information

CONFERENCE SPONSORSHIP INFORMATION

Sponsoring USDA Agency/Organization

Select...

1

Co-Sponsor USDA Agency/Organization

Select...

2

Non-USDA Co-Sponsoring Organization

3

Executive Sponsor

Name

4

Title

4

Point of Contact

Name

5

Title

5

1. Select the sponsoring organization – either a USDA agency, Other (non-USDA), or N/A if not applicable or unknown.
2. Select the co-sponsoring agency or N/A if unknown or not applicable.
3. Type in the non-USDA co-sponsoring organization if known; otherwise, enter N/A or unknown.
4. Enter the executive sponsor's name and title.
5. Enter the sponsoring organization's POC's name and title.

D. Requestor Information

REQUESTOR INFORMATION

Requesting Organization

 ①

Requesting Sub Organization

 ②

Requesting organization and sub organization are used to route your conference for approval. They should be your organization within an Agency or Staff Office.

Requestor Name

 ③

Requestor Title

 ③

Requestor Email

 ③

Requestor Phone

 ③

1. Select the agency, which is limited to those the user has access to.
2. Select the sub agency. This field determines the approval workflow, i.e., the conference will route through the approvers listed for the sub agency.
3. Enter the requestor's information.

E. Overall Attendee Information

OVERALL ATTENDEE INFORMATION

Total number of USDA employees attending the event

 ①

Total number of non-USDA employees attending the event whose costs are paid by USDA

 ②

Total number of non-USDA federal participants attending the event

Do not include people reported above

 ③

Total number of non-federal participants attending the event

Do not include people reported above

 ④

Total Attendees

1. Enter the number of USDA employees (both in and outside the agency) attending the event that are paid for by the agency.
2. Enter the number of non-USDA attendees whose expenses (partial or full) are paid for by the agency.
3. Enter the number of non-USDA federal participants not covered by #1 or #2, if known.
4. Enter the number of non-federal participants not covered by #1 or #2, if known.

F. Facility Information and Justifications

FACILITY INFORMATION AND JUSTIFICATIONS

In what type of facility will the event be held?

Select...

1

Justification of Why a Tele/Video Conference is not a Viable Alternative to Meeting in Person

2

What was the basis for selecting this location?

Select...

3

1. Select the facility type. "Commercial Facility" prompts for a justification.

In what type of facility will the event be held?

Commercial Facility

Commercial Facility Use Justification

2. Enter justification for in person attendance.

3. Select location basis. If the agency is hosting the conference (i.e., selected "Hosts(s)" in Appendix A, section [A.10](#)), the first and third options will be available; otherwise, the choice will be limited to the second option.

What was the basis for selecting this location?

Select...

Select...

Location is near more than 50% of attendees

Location selected by host

Cost comparison performed to select locations

G. Overall Cost Information

If “Host(s)” is selected in section [A.10](#) and “Cost comparison performed to select location” in section [F.3](#), this section will expand to show three columns, one for each location; otherwise, the default consists of only the first column (Preferred Location).

OVERALL COST INFORMATION

	PREFERRED LOCATION	2ND ALTERNATIVE	3RD ALTERNATIVE
CITY & STATE OF EVENT	<input type="text" value="Enter Location Above"/> ①	<input type="text"/>	<input type="text"/>
PER DIEM RATES - LODGING	<input type="text"/> ②	<input type="text"/>	<input type="text"/>
PER DIEM RATES - M & IE	<input type="text"/> ②	<input type="text"/>	<input type="text"/>
LOCATION OF EVENT <small>Hotel, conference center, etc.</small>	<input type="text"/> ③	<input type="text"/>	<input type="text"/>
TYPE OF FACILITY <small>USDA, Federal, University or Commercial</small>	<input type="text" value="Select Facility Above"/> ④	<input type="text" value="Select..."/> ▾	<input type="text" value="Select..."/> ▾
1 - AIR FARE	<input type="text"/> ⑤	<input type="text"/>	<input type="text"/>
2 - LOCAL/TDY TRANSPORTATION EXPENSES <small>POV Mileage, Subway, TNC, IMTC, Shuttle, Taxi, Tolls, Rental Car/Fuel</small>	<input type="text"/> ⑤	<input type="text"/>	<input type="text"/>
3 - MISCELLANEOUS TRAVEL EXPENSES <small>TMC and Voucher fee, baggage fees, parking, hotel taxes/fees</small>	<input type="text"/> ⑤	<input type="text"/>	<input type="text"/>
4 - TOTAL LODGING	<input type="text"/> ⑤	<input type="text"/>	<input type="text"/>
5 - TOTAL M&IE <small>Must be reduced if any meals (breakfast, lunch or dinner) are provided by contractor and/or vendors</small>	<input type="text"/> ⑤	<input type="text"/>	<input type="text"/>
TOTAL TRAVEL EXPENSE	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>

1. Prepopulated from section [A.3](#).
2. Enter the lodging and M&IE per diem rates. Refer to the General Services Administration’s Per Diem Rates at <https://www.gsa.gov/travel/plan-book/per-diem-rates>.
3. Enter the specific type of facility, e.g., hotel, conference center, etc., as opposed to a “general” type of facility in section [F.1](#),
4. Prepopulated from section [F.1](#).

6 - FACILITY / ROOM RENTAL Provide details or any contracting documentation related to this cost	<input type="text" value="5"/>	<input type="text"/>	<input type="text"/>
7 - LIGHT REFRESHMENTS Less than 20% of total M&IE/per day/per location	<input type="text" value="6"/>	<input type="text"/>	<input type="text"/>
8 - PROMOTIONAL MATERIAL	<input type="text" value="6"/>	<input type="text"/>	<input type="text"/>
9 - SPEAKER / TRAINER FEES	<input type="text" value="6"/>	<input type="text"/>	<input type="text"/>
10 - OTHER COSTS - ITEMIZED If any, list each item and cost	<input type="text" value="6"/>	<input type="text"/>	<input type="text"/>
11 - REGISTRATION FEES	<input type="text" value="5"/>	<input type="text"/>	<input type="text"/>
12 - EXTERNAL FUNDS Soft, Grant, or Trust Funds	<input type="text" value="5"/>	<input type="text"/>	<input type="text"/>
13 - AV COSTS	<input type="text" value="5"/>	<input type="text"/>	<input type="text"/>
TOTAL NON-TRAVEL EXPENSE	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>
TOTAL EVENT COST WITHOUT SALARY	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>
TOTAL SALARY AND BENEFITS	<input type="text" value="5"/>	<input type="text"/>	<input type="text"/>
NON-FEDERAL CONTRIBUTION	<input type="text" value="5"/>	<input type="text"/>	<input type="text"/>

- Enter the applicable dollar amounts.
- Enter the applicable dollar amounts. A non-zero entry prompts for the justification, description and/or explanation. Light refreshments will trigger an orange flag in Warnings and Alerts.

7 - LIGHT REFRESHMENTS

Less than 20% of total M&IE/per day/per location

\$500.00

Providing light refreshments at conferences is discouraged at USDA and should only be provided when absolutely necessary.

7A - JUSTIFICATION

a

7B - DESCRIPTION

b

8 - PROMOTIONAL MATERIAL

\$500.00

8A - JUSTIFICATION

a

8B - DESCRIPTION

b

9 - SPEAKER / TRAINER FEES

\$500.00

9A - JUSTIFICATION

a

10 - OTHER COSTS - ITEMIZED

If any, list each item and cost

\$500.00

10A - EXPLANATION

c

- a. Enter justification.
- b. Enter description.
- c. Enter explanation.

Deputy Secretary Memo ⁷

Conferences with an overall cost of \$75,000 or greater require a completed [Deputy Secretary Memo](#) ^a

 ^b

Cost Comparison Methodology and Justification ⁸

Preferred location methodology for including it in cost comparison

 ^a

Justification for Preferred Location

 ^b

2nd alternative location methodology for including it in cost comparison

 ^a

Explanation for not selecting 2nd alternative location

 ^c

3rd alternative location methodology for including it in cost comparison

 ^a

Explanation for not selecting 3rd alternative location

 ^c

Attendee List ⁹

Please attach the attendee list for the event

Speaker Credentials ¹⁰

Please attach the speaker credentials for the event

7. The Deputy Secretary Memo only appears when the total cost (without salaries) is over \$75,000.
 - a. Clicking on the Deputy Secretary Memo link opens a new webpage of the OCFO Travel Express site (see link in [IV.A.1.b](#)) where templates, including the memo, can be downloaded.
 - b. Complete the memo and upload (see upload instructions in section [A.11](#)).
8. This only appears for a hosted conference utilizing a cost comparison to select location.
 - a. Select the location methodology.

- b. Enter the justification.
 - c. Enter explanation.
9. The Attendee List template can be downloaded from the OCFO website (see link in [IV.A.1.b](#)). See upload instructions in section [A.11](#).
 10. The Speaker Credentials only appears when the Speaker/Trainer Fees in section [G.6](#) is non-zero. See upload instructions in section [A.11](#).

H. Accounting Information

ACCOUNTING INFORMATION

Accounting information for Preferred Location.

Funding Type

Select...

1

Accounting Codes

2

Contracting

Select...

3

Non-Federal Contribution 4

A non-federal contribution was indicated for the preferred location in the Overall Cost Information section. Please provide the following information:

Non-Federal Funding Organization(s)

a

b

An Office of General Counsel (OGC) opinion, or other applicable form, on receiving funds from a non-Federal source has been filed

1. Select the funding type.
2. Enter the accounting code(s).
3. Select the contracting methodology.
4. This only appears when the Non-Federal Contribution in section [G.5](#) is non-zero.
 - a. Enter the non-federal funding organization(s).
 - b. If applicable, move the slide button to the right, which prompts for an Office of General Counsel form upload. See upload instructions in section [A.11](#).

An Office of General Counsel (OGC) opinion, or other applicable form, on receiving funds from a non-Federal source has been filed

Filed Form

Attach the Office of General Counsel (OGC) opinion, or other applicable form.

I. Miscellaneous Attachments

Upload other pertinent documents as needed. See upload instructions in section [A.11](#).

MISCELLANEOUS ATTACHMENTS

Additional Attachments

Please attach any additional documents to share with reviewers.

J. Save or Submit

The Save as Draft and Continue to Review buttons are at the bottom of the page. Save progress or proceed to submit – see [IV.A.1.b](#) to [d](#) for discussion.

Contact Us

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