

# Property Tracking and Management System

Review Information in the Property Tracking and Management System

September 27, 2017

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## Introduction

The GrantSolutions Property Tracking and Management System (PTMS) allows a government organization to track real property from the initial purchase to disposition. Additionally, grantor users can search for real property in the database; track multiple structures for each real property; view real property ownership, contacts, project activities, Federal interest and actions affecting Federal interest; and record the review and approval process of a real property disposition.

### PROPERTY, STRUCTURE, AND PROJECT DEFINED

The relationship between a Property, Structure, and Project is as follows:

**Property:** Any real property owned or leased in which there is Federal interest.

**Structure:** Building or facility that exists on a real property.

**Note:** The PTMS creates a Property and Structure based on the address information entered in the SF-429's Address of Real Property fields (Attachments A, B, and C).

**Project:** Purchase, construction, major renovations, disposition, or encumbrance of a building or facility that exists on a real property. Each structure may have multiple projects.

- All SF-429 Attachment A forms approved in the Online Data Collection (OLDC) system create a new project in PTMS, even if no changes are reported. The project is based on the line 13, Type of Federal Interest.
- All SF-429 Attachment B forms approved in OLDC create a new project in PTMS. The project is based on the line 14a, *Describe the intended use of the real property and how it will benefit the program.*
- A new project is only created when the SF-429 Attachment C is approved in OLDC if line 14a option C (*Use in other Federally sponsored project/program*) is selected.

## Property Example

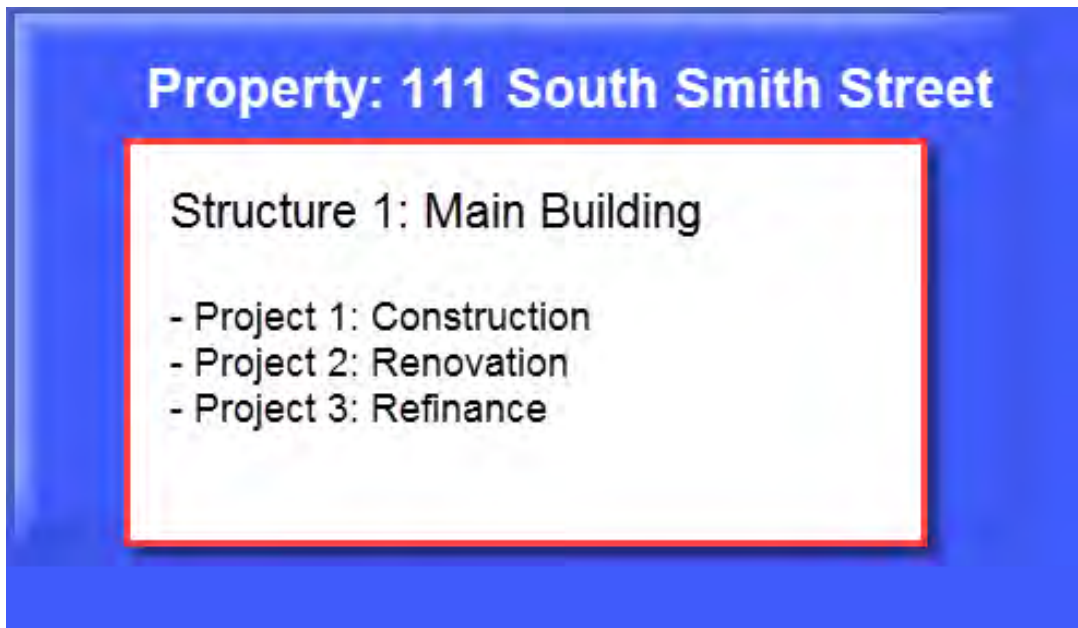


Figure 1: Property, Structure, Project example

A new property and structure is created in PTMS when the *Address of Real Property* (SF-429 A & C line 13b and SF-429 B line 14b) does not exist in the PTMS.

## ONLINE DATA COLLECTION TO THE PROPERTY TRACKING AND MANAGEMENT SYSTEM OVERVIEW

- Grantees complete and submit the SF-429 in the OLDC system.
- Grantors review, approve, or reject forms in OLDC.
- When approved, form information and supporting documents are transferred to PTMS.

## SF-429 Cover Page and Attachments

The SF-429 cover page and the three attachments (A, B, and C) information are transferred into their respective locations in PTMS. Please refer to Appendix A for the SF-429 Attachment A, B, and C Data Mapping of OLDC to PTMS.

### SF-429 COVER PAGE

- When the SF-429 forms are approved, the lines 2 and 2b *Federal Grant(s) or Other Identifying Number(s) Assigned by Federal Agency(ies)* is recorded or updated in PTMS.

### SF-429 ATTACHMENT A (GENERAL REPORTING)

- When the SF-429 Attachment A is approved, a new property and structure is created if the address does not yet exist in PTMS.
- If the address already exists, the property record is updated with the new information and supporting documents.
- A new project is created each time an Attachment A is approved.
- The following is transferred from OLDC to PTMS:
  - Property Contact
  - Project Cost Breakdown for the project
  - Project Source of Funds
  - Supporting Documents
  - A disposition record is created if line 16. *Real Property Disposition Status* is either A. *Sold*, B. *Transferred to different award*, C. *Used other Federally sponsored project/program*, D. *Transferred Title* or E. *Retained Title*.
  - A Federal Interest for the property is created if line 14g. *Has a deed, lien, covenant, or other related documentation be recorded to establish a Federal Interest in this property?* is marked 'Yes'.

#### SF-429 ATTACHMENT B (REQUEST TO ACQUIRE, IMPROVE OR FURNISH)

*Note: Furnish (also known as Government Furnished Property) is not an option for ACF grant programs.*

- When the SF-429 Attachment B is approved, a new property and structure is created if the address does not yet exist in PTMS.
- If the information already exists, the property record is updated with the new information and supporting documents.
- A new project is created each time an Attachment B is approved.
- The following is transferred from OLDC to PTMS:
  - Property Contact
  - Project Cost Breakdown for the project
  - Project Source of Funds
  - Supporting Documents

#### SF-429 ATTACHMENT C (DISPOSITION OR ENCUMBRANCE REQUEST)

*Note: Disposition involves requesting instructions or approval from the Federal government on retaining or disposing of the property.*

- When the SF-429 Attachment C is approved, a disposition is created in PTMS.
- If the property address does not exist in PTMS, a new property and structure is created.
- If the address already exists, the record is updated with the new information and supporting documents.
- A new project is created in PTMS if 14a. option C. *Use in other Federally sponsored project/program* is selected.
- The following is transferred from OLDC to PTMS:
  - Property Contact
  - Project Cost Breakdown for the project
  - Project Source of Funds
  - Supporting Documents

## PTMS – Review SF-429 Data

Once a SF-429 form is approved in OLDC, the information is transferred to PTMS.

### LOGIN

To access to PTMS:

1. Log into the GrantSolutions Grants Management Module (GMM) ([www.grantsolutions.gov](http://www.grantsolutions.gov)).
2. Either the GrantSolutions “Portal” or the “Grants List” screen appears.

**Grants List landing page:** From the menu bar, select **Grants Management → Property Management**.

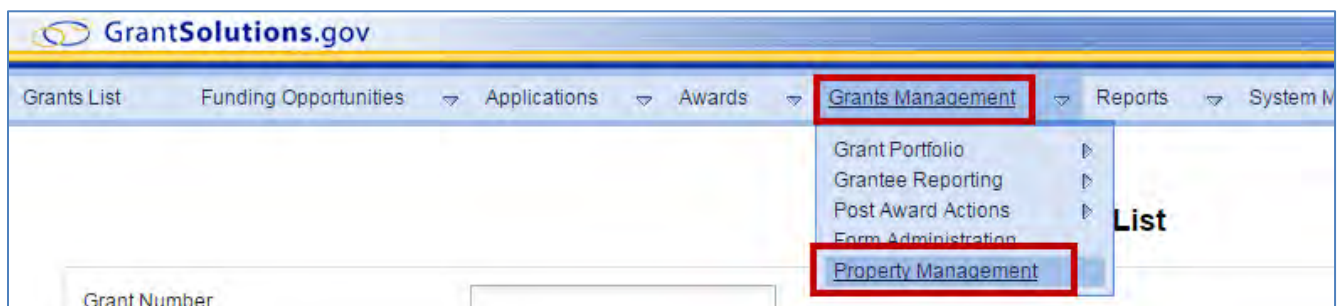


Figure 2: Grants List: Grants Management - Property Management menu

**Portal landing page:** From the menu bar, select **Reporting/Monitoring → Property**.

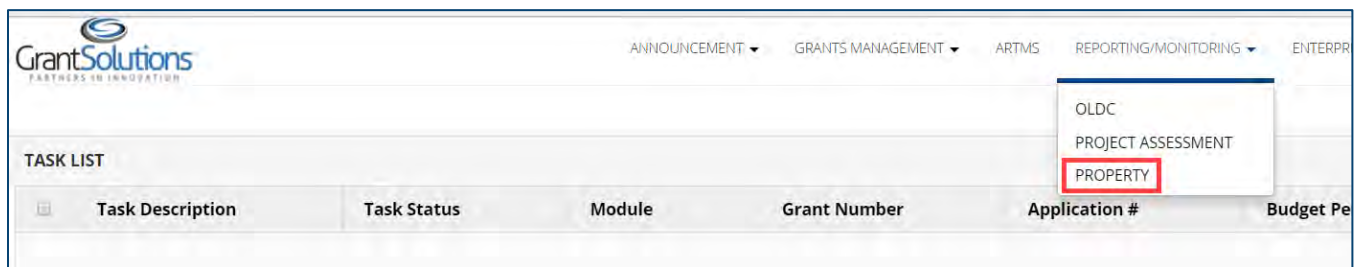


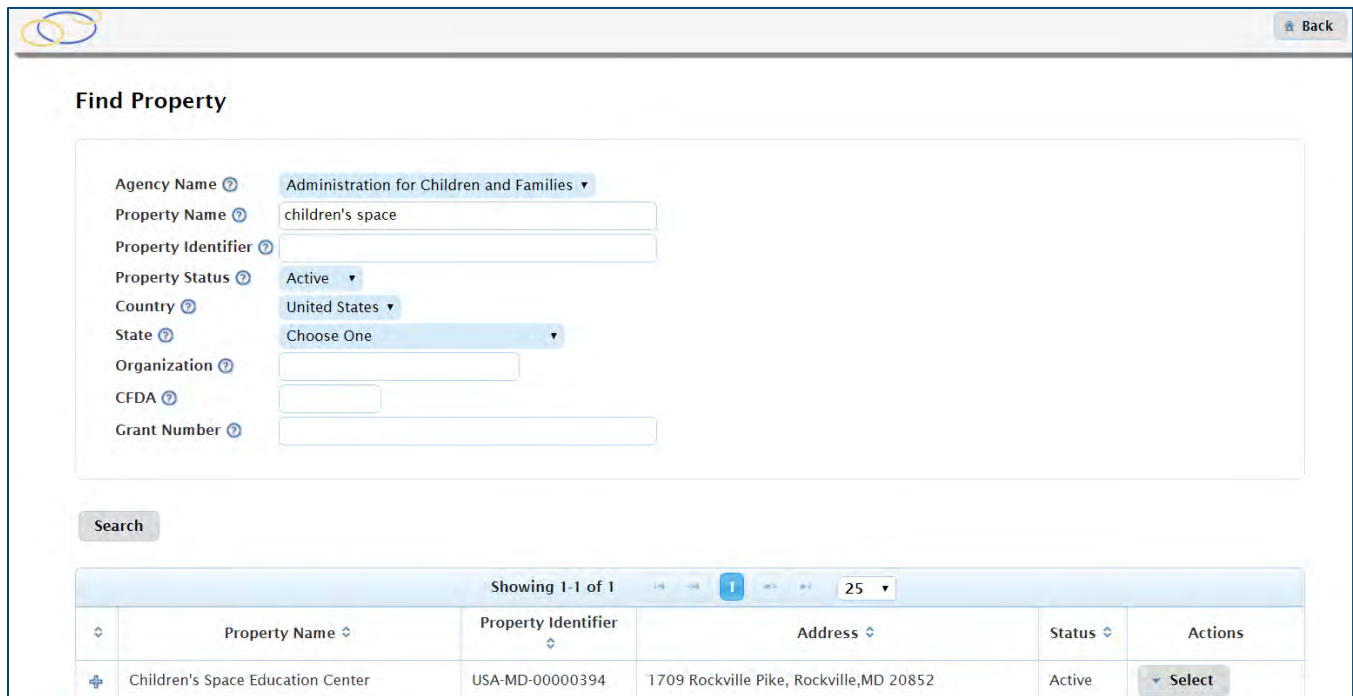
Figure 3: Grants List: Grants Management - Property Management menu

The “Find Property” screen appears.

## SEARCH FOR PROPERTY

From the “Find Property” screen, select one or more search criteria. When entering text, it is not necessary to type the complete information (i.e. It is not necessary to enter the entire organization name). However, the text that is entered must start at the beginning. For example, when searching for the Property Name “Children’s Space Education Center”, it is only necessary to enter “Children’s” or “Children’s Space”.

Select the search criteria, and click the **Search** button. A list of all the properties matching the search criteria appears.



The screenshot shows the "Find Property" interface. It includes a "Back" button in the top right corner. The search criteria section contains the following fields:

- Agency Name: Administration for Children and Families (dropdown)
- Property Name: children's space (text input)
- Property Identifier: (text input)
- Property Status: Active (dropdown)
- Country: United States (dropdown)
- State: Choose One (dropdown)
- Organization: (text input)
- CFDA: (text input)
- Grant Number: (text input)

A "Search" button is located below the search criteria. Below the search button is a table showing the search results:

Showing 1-1 of 1				
Property Name	Property Identifier	Address	Status	Actions
Children's Space Education Center	USA-MD-00000394	1709 Rockville Pike, Rockville,MD 20852	Active	Select

Figure 4: Find Property screen and search results



From the property *Actions* column, select **View Property** to open the property details.

Search

Showing 1-1 of 1

1

25

<div>◇</div>	Property Name ◇	Property Identifier ◇	Address ◇	Status ◇	Actions
<div>+</div>	Children's Space Education Center	USA-MD-00000394	1709 Rockville Pike, Rockville,MD 20852	Active	<div><div>▼ Select</div><div>View Property</div></div>

Showing 1-1 of 1

1

25

Figure 5: Property Actions column - View Property

The “View Property” screen appears. Click the **Cancel** button to return to the “Find Property” screen.

### View Property

Agency Name

Administration for Children and Families

Property Name

Children's Space Education Center

Physical Address

Address 1

1709 Rockville Pike

Address 2

Address 3

City

Rockville

County/Parish

Montgomery

Country

USA

States (US)/Territory/Province

Maryland

Zip/Postal Code

20852

Ext.

1621

GPS Location Longitude

-77.104789

GPS Location Latitude

39.022759

Zoning Information

Legal Description

Children's Space Education Center, Rockville, MD

Cancel

Figure 6: View Property screen

The property results reappear. Click the **blue plus sign** to the left of a property to expand the row.


Search					
Showing 1-1 of 1					
Property Name	Property Identifier	Address	Status	Actions	
 Children's Space Education Center	USA-MD-00000394	1709 Rockville Pike, Rockville,MD 20852	Active	<a href="#">Select</a>	
Showing 1-1 of 1					

Figure 7: Property row - Blue plus sign

All structures associated with the property appear. Select the **Open** link for a structure to view all structure and project information for the property.


Search					
Showing 1-1 of 1					
Property Name	Property Identifier	Address	Status	Actions	
 Children's Space Education Center	USA-MD-00000394	1709 Rockville Pike, Rockville,MD 20852	Active	<a href="#">Select</a>	
Structure Name		Status	Action		
Children's Space Education Center		Active	<a href="#">Open</a>		

Figure 8: Structure - Open link

Once Open is selected, the "Structure Overview" screen appears.

Structure Overview					
Property Identifier: USA-MD-00000394    Property Name: Children's Space Education Center    Structure Name: Children's Space Education Center					
<a href="#">Find Property</a> > <a href="#">Structure Overview</a>					
<a href="#">Structure Details</a> <a href="#">Legal Description</a> <a href="#">Ownership</a> <a href="#">Contacts</a> <a href="#">Projects</a> <a href="#">Cost Summary</a> <a href="#">Federal Interests</a> <a href="#">Support Documents</a> <a href="#">Dispositions</a>					
<div> <div>Structure Name</div> <div>Children's Space Education Center</div> </div> <div> <div>Mailing Address</div> <div> <div>Address 1</div> <div>1709 Rockville Pike</div> <div>Address 2</div> <div>Address 3</div> <div>City</div> <div>Rockville</div> <div>County/Parish</div> <div>Montgomery</div> <div>States (US)/Territory/Province</div> <div>MD</div> <div>Zip/Postal Code</div> <div>20852</div> <div>Ext.</div> <div>1621</div> <div>Country</div> <div>USA</div> </div> </div> <div> <div>Property Ownership Types</div> <div>Owned</div> </div> <div> <div>GPS Location Longitude</div> <div>-77.104789</div> </div> <div> <div>GPS Location Latitude</div> <div>39.022759</div> </div>					

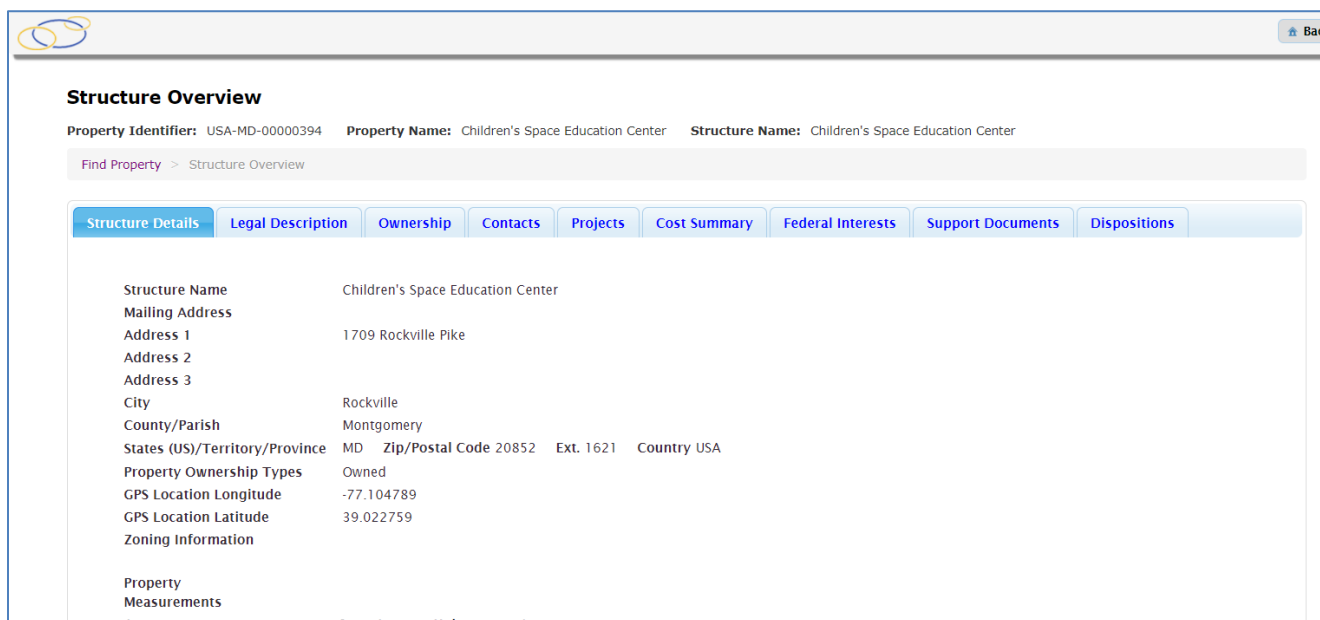
Figure 9: Structure Overview screen

## Structure Overview

The “Structure Overview” screen consists of nine (9) tabs. The following pages describe each tab.

### 1. STRUCTURE DETAILS

The *Structure Details* tab contains the Structure Name, Mailing Address, Address, City, County/Parish, State, Zip/Postal Code, Country, Property Ownership Type, and GPS longitude and latitude.



The screenshot shows the 'Structure Overview' screen with the 'Structure Details' tab selected. The screen displays the following information:

**Structure Overview**

Property Identifier: USA-MD-00000394    Property Name: Children's Space Education Center    Structure Name: Children's Space Education Center

[Find Property](#) > [Structure Overview](#)

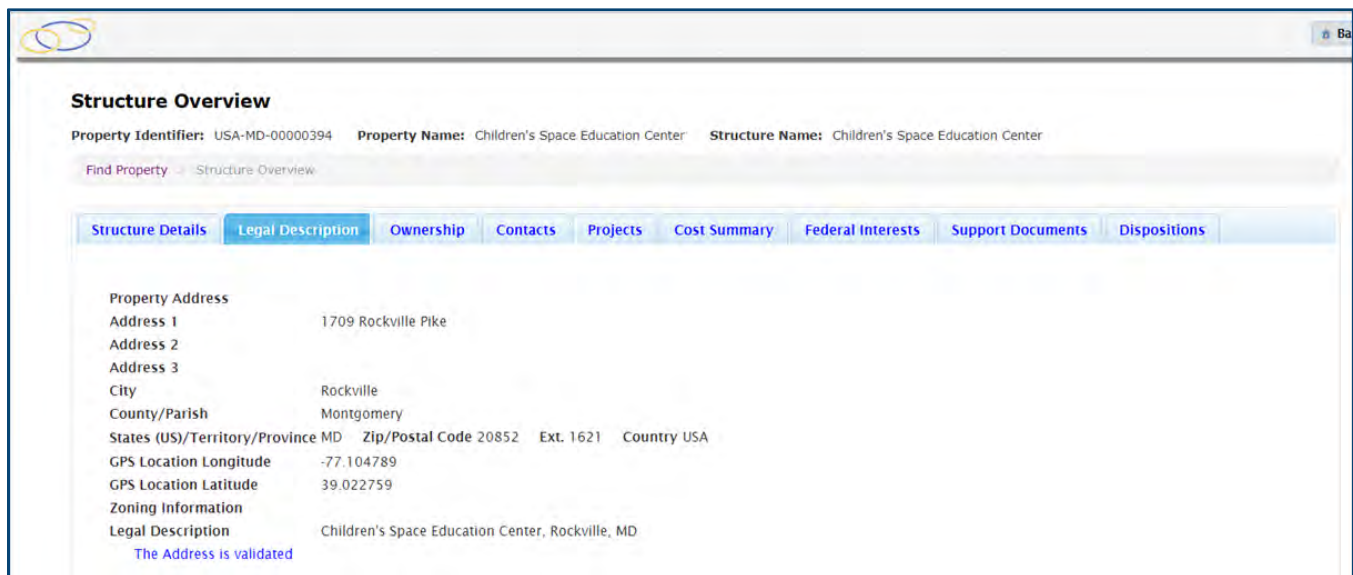
**Structure Details** | Legal Description | Ownership | Contacts | Projects | Cost Summary | Federal Interests | Support Documents | Dispositions

Structure Name	Children's Space Education Center		
Mailing Address			
Address 1	1709 Rockville Pike		
Address 2			
Address 3			
City	Rockville		
County/Parish	Montgomery		
States (US)/Territory/Province	MD	Zip/Postal Code 20852	Ext. 1621    Country USA
Property Ownership Types	Owned		
GPS Location Longitude	-77.104789		
GPS Location Latitude	39.022759		
Zoning Information			
Property Measurements			
Acres	2	Acres	Acres

Figure 10: Structure Details screen

## 2. LEGAL DESCRIPTION

The *Legal Description* tabs contains the Property Address, City, County/Parish, State, Zip/Postal Code, Country, GPS longitude and latitude, Zoning Information, and Legal Description.



**Structure Overview**

Property Identifier: USA-MD-00000394    Property Name: Children's Space Education Center    Structure Name: Children's Space Education Center

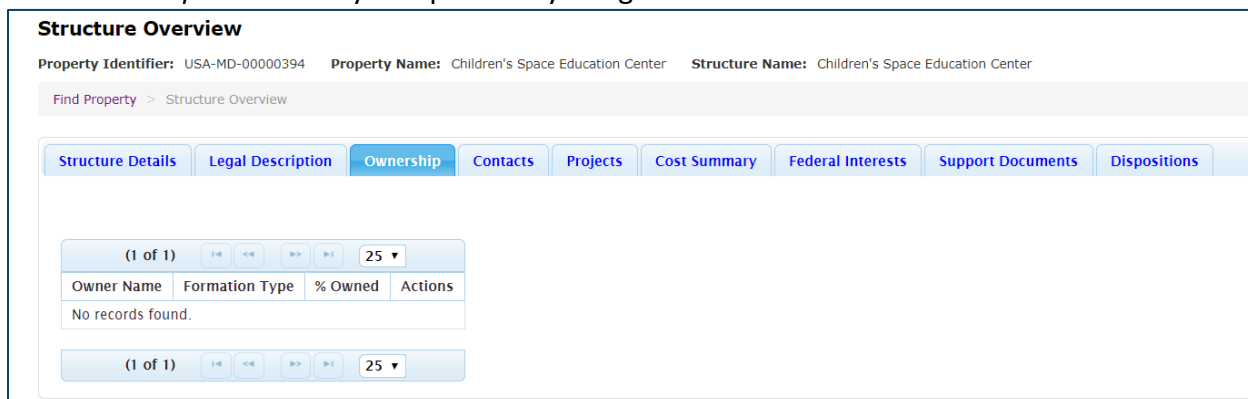
Find Property > Structure Overview

Structure Details	Legal Description	Ownership	Contacts	Projects	Cost Summary	Federal Interests	Support Documents	Dispositions
<p>Property Address</p> <p>Address 1                      1709 Rockville Pike</p> <p>Address 2</p> <p>Address 3</p> <p>City                              Rockville</p> <p>County/Parish                  Montgomery</p> <p>States (US)/Territory/Province MD    Zip/Postal Code 20852    Ext. 1621    Country USA</p> <p>GPS Location Longitude       -77.104789</p> <p>GPS Location Latitude        39.022759</p> <p>Zoning Information</p> <p>Legal Description               Children's Space Education Center, Rockville, MD</p> <p>The Address is validated</p>								

Figure 11: Legal Description screen

## 3. OWNERSHIP

The *Ownership* tab can only be updated by the grants office. Information does not transfer from OLDC.



**Structure Overview**

Property Identifier: USA-MD-00000394    Property Name: Children's Space Education Center    Structure Name: Children's Space Education Center

Find Property > Structure Overview

Structure Details	Legal Description	Ownership	Contacts	Projects	Cost Summary	Federal Interests	Support Documents	Dispositions								
<p>(1 of 1)    1 &lt;&lt; &gt;&gt; 25 ▾</p> <table border="1"> <thead> <tr> <th>Owner Name</th> <th>Formation Type</th> <th>% Owned</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td colspan="4">No records found.</td> </tr> </tbody> </table> <p>(1 of 1)    1 &lt;&lt; &gt;&gt; 25 ▾</p>									Owner Name	Formation Type	% Owned	Actions	No records found.			
Owner Name	Formation Type	% Owned	Actions													
No records found.																

Figure 12: Ownership page

#### 4. CONTACTS

The *Contacts* tab lists the contact information from the SF-429 cover page. More details can be viewed or edited by selecting the **Edit** action. Additionally, contacts may be added directly in PTMS by selecting the **New Contact** button.

**Structure Overview**

Property Identifier: USA-MD-00000394    Property Name: Children's Space Education Center    Structure Name: Children's Space Education Center

Find Property > Structure Overview

Structure Details   Legal Description   Ownership   **Contacts**   Projects   Cost Summary   Federal Interests   Support Documents   Dispositions

New Contact

First Name	MI	Last Name	Title	Phone	Ext	Email	Fax	Contact Type	Actions
Anna-Lisa		Walters	Trainer			demo1136399@gmail.com		Certifying Official	<a href="#">Edit</a>
Peter		Parker		(301) 555-1212		peterp@demo.xyz		Grantee Contact	<a href="#">Edit</a>

Figure 13: Contacts page

#### 5. PROJECTS

All projects associated with a structure can be viewed under the *Projects* tab. Different project types have different fields within the project screen. A new project is created for each Attachment A and B. Attachment C creates a project if number 14a option C. *Use in other Federally sponsored project/program* is selected in OLDC.

**Structure Overview**

Property Identifier: USA-MD-00000394    Property Name: Children's Space Education Center    Structure Name: Children's Space Education Center

Find Property > Structure Overview

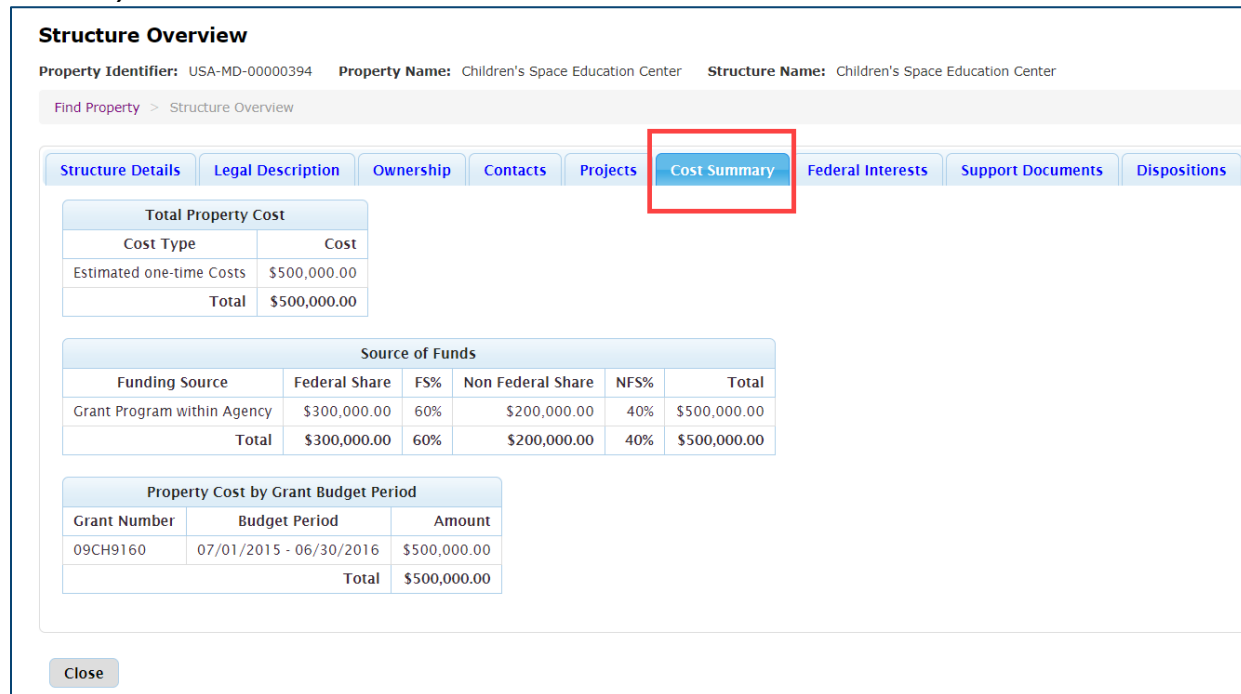
Structure Details   Legal Description   Ownership   Contacts   **Projects**   Cost Summary   Federal Interests   Support Documents   Dispositions

Project Identifier	Type	Start Date	End Date	Funded by Grant(s)	Actions
09CH9160	Purchase	06/01/2016	uncertain	09CH9160	<a href="#">Select</a>

Figure 14: Projects page

## 6. COST SUMMARY

A total of all cost summary information for all projects linked to the structure can be viewed in the *Cost Summary* tab.



**Structure Overview**

Property Identifier: USA-MD-00000394    Property Name: Children's Space Education Center    Structure Name: Children's Space Education Center

Find Property > Structure Overview

Structure Details   Legal Description   Ownership   Contacts   Projects   **Cost Summary**   Federal Interests   Support Documents   Dispositions

Total Property Cost	
Cost Type	Cost
Estimated one-time Costs	\$500,000.00
<b>Total</b>	<b>\$500,000.00</b>

Source of Funds					
Funding Source	Federal Share	FS%	Non Federal Share	NFS%	Total
Grant Program within Agency	\$300,000.00	60%	\$200,000.00	40%	\$500,000.00
<b>Total</b>	<b>\$300,000.00</b>	<b>60%</b>	<b>\$200,000.00</b>	<b>40%</b>	<b>\$500,000.00</b>

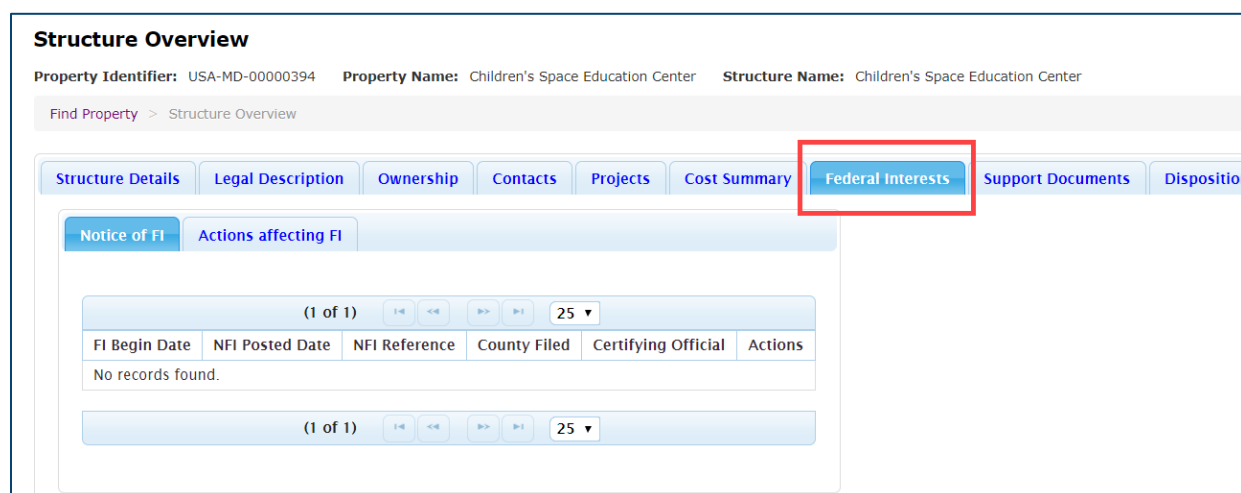
Property Cost by Grant Budget Period		
Grant Number	Budget Period	Amount
09CH9160	07/01/2015 - 06/30/2016	\$500,000.00
<b>Total</b>		<b>\$500,000.00</b>

Close

Figure 15: Cost Summary page

## 7. FEDERAL INTEREST

Any Federal interest information created by Attachment A can be viewed in the *Federal Interests* tab. This page also contains the sub-tabs *Notice of FI* (Federal Interest) and *Actions affecting FI*.



**Structure Overview**

Property Identifier: USA-MD-00000394    Property Name: Children's Space Education Center    Structure Name: Children's Space Education Center

Find Property > Structure Overview

Structure Details   Legal Description   Ownership   Contacts   Projects   Cost Summary   **Federal Interests**   Support Documents   Dispositions

Notice of FI   Actions affecting FI

(1 of 1)   1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25

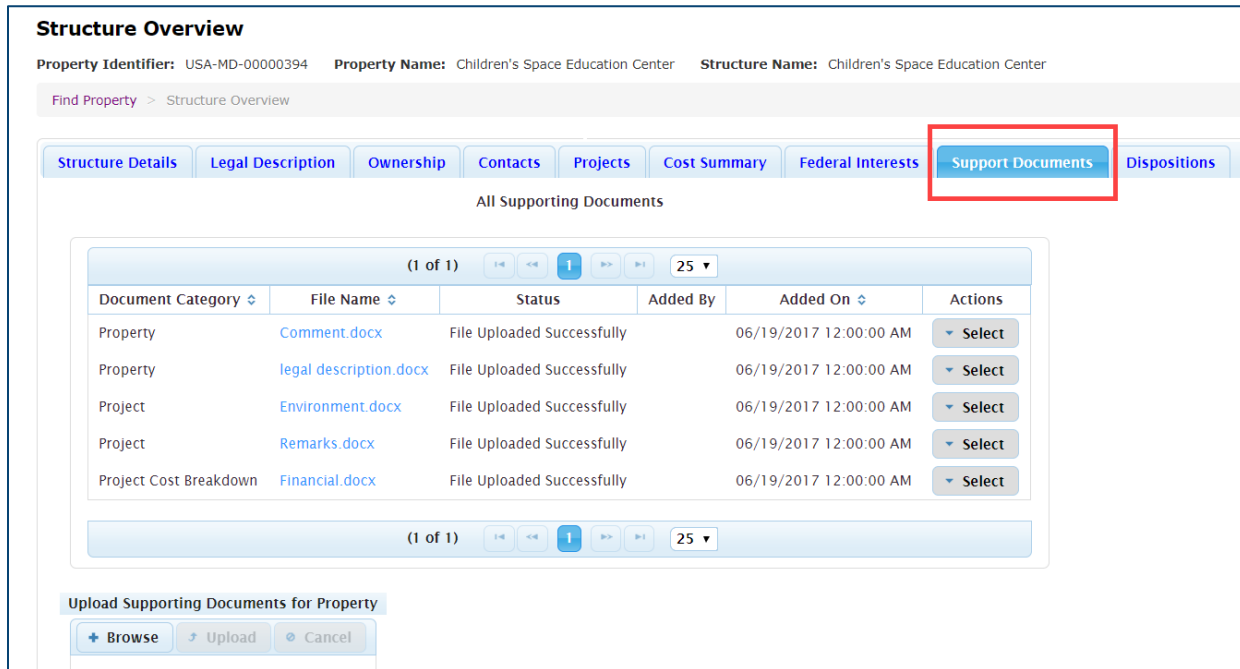
FI Begin Date	NFI Posted Date	NFI Reference	County Filed	Certifying Official	Actions
No records found.					

(1 of 1)   1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25

Figure 16: Federal Interests page

## 8. SUPPORT DOCUMENTS

All documents uploaded through OLDC for this structure can be viewed in the *Support Documents* tab. Additionally, documents can be attached directly to this structure in PTMS from this page.



**Structure Overview**

Property Identifier: USA-MD-00000394 Property Name: Children's Space Education Center Structure Name: Children's Space Education Center

Find Property > Structure Overview

Structure Details Legal Description Ownership Contacts Projects Cost Summary Federal Interests **Support Documents** Dispositions

All Supporting Documents

(1 of 1) 1 25

Document Category	File Name	Status	Added By	Added On	Actions
Property	<a href="#">Comment.docx</a>	File Uploaded Successfully		06/19/2017 12:00:00 AM	Select
Property	<a href="#">legal description.docx</a>	File Uploaded Successfully		06/19/2017 12:00:00 AM	Select
Project	<a href="#">Environment.docx</a>	File Uploaded Successfully		06/19/2017 12:00:00 AM	Select
Project	<a href="#">Remarks.docx</a>	File Uploaded Successfully		06/19/2017 12:00:00 AM	Select
Project Cost Breakdown	<a href="#">Financial.docx</a>	File Uploaded Successfully		06/19/2017 12:00:00 AM	Select

(1 of 1) 1 25

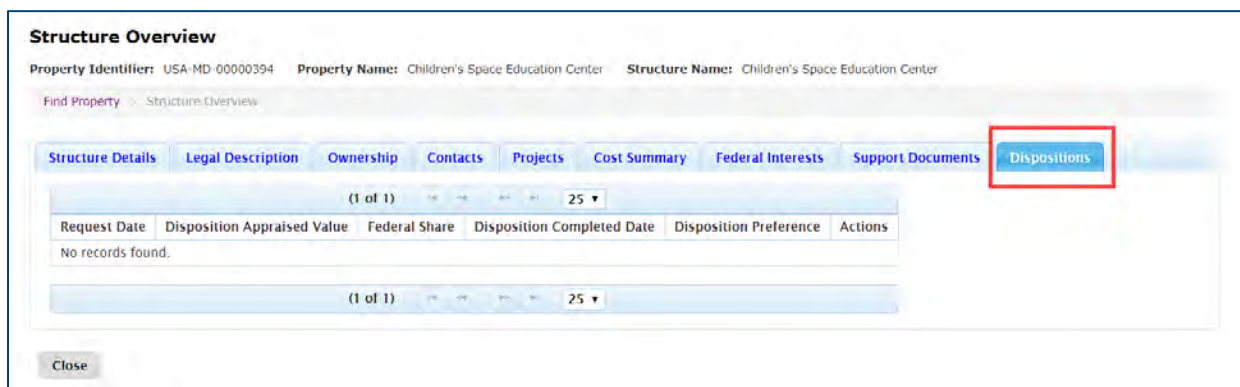
Upload Supporting Documents for Property

+ Browse Upload Cancel

Figure 17: Support Documents page

## 9. DISPOSITION

Any dispositions created by Attachment A or C can be viewed in the *Dispositions* tab.



**Structure Overview**

Property Identifier: USA-MD-00000394 Property Name: Children's Space Education Center Structure Name: Children's Space Education Center

Find Property > Structure Overview

Structure Details Legal Description Ownership Contacts Projects Cost Summary Federal Interests Support Documents **Dispositions**

(1 of 1) 1 25

Request Date	Disposition Appraised Value	Federal Share	Disposition Completed Date	Disposition Preference	Actions
No records found.					

(1 of 1) 1 25

Close

Figure 18: Dispositions page

## Actions Menu OVERVIEW

The PTMS “Actions” menu consists of several options. Each tab has different screens that can be viewed from the *Actions* menu.

### PROJECT ACTIONS

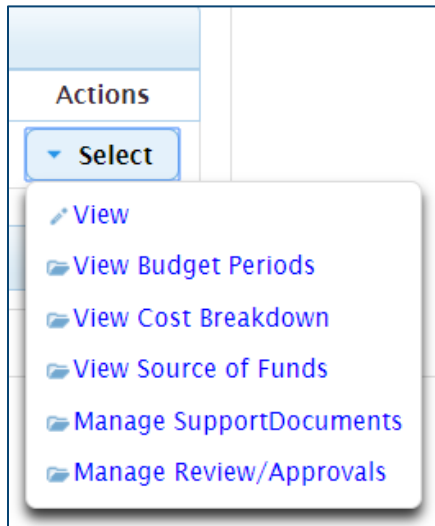


Figure 19: - Actions menu expanded

#### 1. View

To view project information, select the **View** link from the *Actions* menu. This is the **View** action under the “Projects” tab.





### View Project

**Property Identifier:** USA-MD-00000394   
**Property Name:** Children's Space Education Center   
**Structure Name:** Children's Space Education Center

Project Identifier ⓘ  
Project Type ⓘ  
Project Dates ⓘ  
Start ⓘ 06/01/2016    End ⓘ  
End Date Comment ⓘ  
Approved ⓘ  
Location ⓘ  
Description ⓘ  
Ex: Solar Panels,  
Rooftop Garden  
Proposed Use ⓘ  
Comments ⓘ    See attachment

Real Property Cost ⓘ    \$500,000.00  
Funding Nature ⓘ  
Proposed/Existing  
Loans ⓘ  
Loan Amount ⓘ  
Lender Name ⓘ  
Type of Facility ⓘ  
Lease Exp. Date ⓘ

☐ Loan and documents attached ⓘ   
☐ Plan and spec attached ⓘ  
☐ Eligibility established ⓘ   
☐ Davis-Bacon Act proof of compliance ⓘ  
☐ Insurance Secured ⓘ   
☐ Uniform Relocation Act (URA) applicable ⓘ  
☒ Environmental compliance requirements ⓘ   
☐ National Historic Preservation Act (NHPA) applicable ⓘ

**Compliance Comments** ⓘ    ENV comments: See attachment

**Environmental Impact** ⓘ  
☐ Integrates design principles ⓘ  
☐ Reduces environmental impact of materials ⓘ   
☐ Enhances indoor environment quality ⓘ  
☐ Optimizes energy performance ⓘ   
☐ Protects and conserves water ⓘ

**Cumulative Energy Consumed In** ⓘ  
Electric KWH ⓘ    500    Electric BTU ⓘ  
Petroleum Gallons ⓘ    500    Natural Gas Cubic Feet ⓘ  
Other ⓘ

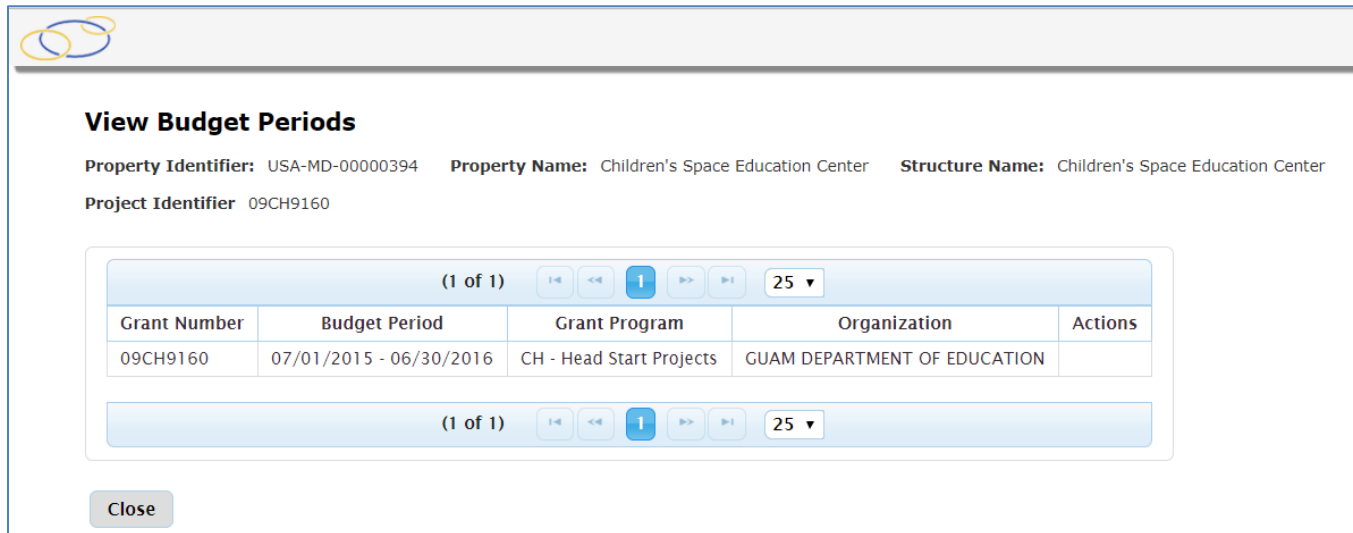
**Other Description** ⓘ

**Anticipated Energy Consumption In** ⓘ  
Electric KWH ⓘ    Electric BTU ⓘ  
Petroleum Gallons ⓘ    Natural Gas Cubic Feet ⓘ

Figure 20: View Project page

## 2. View Budget Periods

A project's Budget Periods can be viewed by selecting **View Budget Periods** from the *Actions* menu. This is the **View Budget Periods** action under the "Projects" tab.



**View Budget Periods**

**Property Identifier:** USA-MD-00000394    **Property Name:** Children's Space Education Center    **Structure Name:** Children's Space Education Center  
**Project Identifier:** 09CH9160

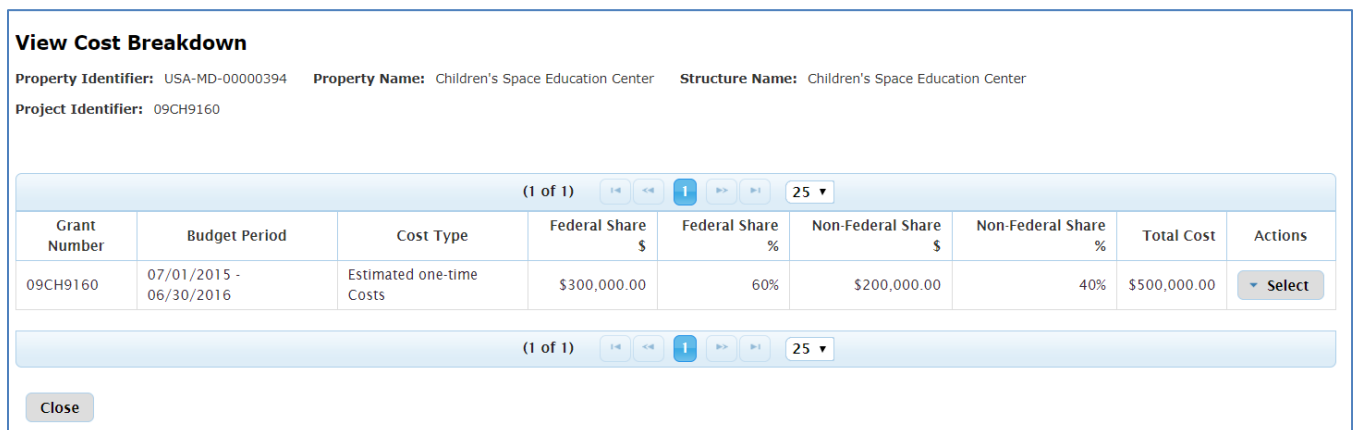
Grant Number	Budget Period	Grant Program	Organization	Actions
09CH9160	07/01/2015 - 06/30/2016	CH - Head Start Projects	GUAM DEPARTMENT OF EDUCATION	

Close

Figure 21: View Budget Periods page

## 3. View Cost Breakdown

View a project's cost breakdown information by selecting **View Cost Breakdown** from the *Actions* menu. This is the **View Cost Breakdown** action under the "Projects" tab.



**View Cost Breakdown**

**Property Identifier:** USA-MD-00000394    **Property Name:** Children's Space Education Center    **Structure Name:** Children's Space Education Center  
**Project Identifier:** 09CH9160

Grant Number	Budget Period	Cost Type	Federal Share \$	Federal Share %	Non-Federal Share \$	Non-Federal Share %	Total Cost	Actions
09CH9160	07/01/2015 - 06/30/2016	Estimated one-time Costs	\$300,000.00	60%	\$200,000.00	40%	\$500,000.00	Select

Close

Figure 22: View Cost Breakdown page

#### 4. View Source of Funds

To view a project's source of funds information, select **View Source of Funds** from the *Actions* menu. This is the **View Source of Funds** action under the "Projects" tab.

View Source of Funds

Property Identifier: USA-MD-00000394

Property Name: Children's Space Education Center

Structure Name: Children's Space Education Center

Project Identifier: 09CH9160

(1 of 1)

25

Grant Number	Budget Period	Source Of Funds	Federal Share \$	Federal Share %	Non-Federal Share \$	Non-Federal Share %	Total Amount	Actions
09CH9160	07/01/2015 - 06/30/2016	Grant Program within Agency	\$300,000.00	60%	\$200,000.00	40%	\$500,000.00	<div>Select</div>

(1 of 1)

25

Close

Figure 23: View Source of Funds page

#### 5. Manage Support Documents

To view files attached to a project from OLDC, or to add additional documentation, select **Manage Support Documents** from the *Actions* column. This is the **Manage Support Documents** action under the "Projects" tab.

**Structure Overview**

Property Identifier: USA-MD-00000394    Property Name: Children's Space Education Center    Structure Name: Children's Space Education Center

Find Property > Structure Overview

Structure Details    Legal Description    Ownership    Contacts    **Projects**    Cost Summary    Federal Interests    Support Documents

Dispositions

(1 of 1) 1 25					
Project Identifier	Type	Start Date	End Date	Funded by Grant(s)	Actions
09CH9160	Purchase	06/01/2016	uncertain	09CH9160	Select

(1 of 1) 1 25

Close

View  
View Budget Periods  
View Cost Breakdown  
View Source of Funds  
**Manage Support Documents**  
Manage Review/Approvals

Figure 24: Projects tab – Manage Support/Documents menu

The “Manage Project Support Documents” screen appears. Support documents may be viewed or uploaded directly to PTMS from this page.

### Manage Project Support Documents

**Property Identifier:** USA-MD-00000394   
**Property Name:** Children's Space Education Center   
**Structure Name:** Children's Space Education Ce

**Project Identifier:** 09CH9160

File Name	Status	Added By	Added On	Actions
Remarks.docx	File Uploaded Successfully		06/19/2017 12:00:00 AM	Select
Environment.docx	File Uploaded Successfully		06/19/2017 12:00:00 AM	Select

+ Browse   
Upload   
Cancel

Figure 25: Manage Project Support Documents

## 6. Manage Review/Approvals

The SF-429 is reviewed and approved in OLDC. Therefore, the Project Review/Approvals is not used in PTMS.

## Manage Disposition Review Approvals

Any comments about approving the disposition can be entered in the “Manage Disposition Review Approvals” screen found under the Disposition *Actions* menu. To enter a new review:

1. Select the **Dispositions** tab.
2. In the dispositions table, locate the disposition for which to create a review and select the **Manage Review/Approvals** link from the *Actions* menu.

The screenshot shows the 'Dispositions' tab selected. Below the tabs is a 'Disposition Preference' dropdown set to 'Sell-Full' and a 'Create New Disposition' button. A table displays disposition data with columns: Request Date, Disposition Appraised Value, Federal Share, Disposition Completed Date, and Disposition Preference. The 'Actions' column is expanded, showing options: Select, Edit, Manage Support Documents, and Manage Reviews/Approvals. The 'Manage Reviews/Approvals' option is highlighted.

Request Date	Disposition Appraised Value	Federal Share	Disposition Completed Date	Disposition Preference	Actions
10/21/2015	\$50,000.00	\$30,000.00		Use in other Federal sponsored Project/Program	Select Edit Manage Support Documents Manage Reviews/Approvals
10/21/2015	\$50,000.00	\$30,000.00		Transfer to Different Award	
10/21/2015	\$50,000.00	\$30,000.00		Transfer to Different Award	
10/21/2015	\$50,000.00	\$30,000.00		Use in other Federal sponsored Project/Program	

Figure 26: Dispositions tab - Actions drop-down list - Manage Reviews/Approvals menu

3. The “Manage Disposition Review Approvals” screen appears. Select the **Activity Type** from the drop-down list.
4. Click the **New Disposition Review** button.

The screenshot shows the 'Manage Disposition Review Approvals' screen. It includes fields for Property Identifier (USA-MA-00000002), Property Name (Head Start Center), and Structure Name (Head Start Center). Below these is an 'Activity Type' dropdown menu set to 'Grantee Request' and a 'New Disposition Review' button. A table with columns: Type of Activity, Review Decision, Review Date, Reviewed By, Final Decision, and Decision Date is shown with the message 'No records found.'.

Figure 27: Manage Disposition Review Approvals screen - Activity Request drop-down list and New Disposition button

5. The “Create Disposition Review” screen appears. The top portion of the screen contains the review information and the bottom part the decision information. Complete the necessary fields.
- **Activity Type:** System generated specific to the disposition type
  - **Review Decision:** Select *Approved* or *Disapproved* from the drop-down list
  - **Review Date:** Date the review is created
  - **Reviewed By:** Pre-populated with user’s name
  - **Review Comments:** Enter up to 2000 characters
  - **Final Decision:** Grants Management Officer (GMO) only. Select Approved or Disapproved from the drop-down list
  - **Decision Date:** Date the decision was made
  - **Decision By:** Approver - pre-populated with user’s name
  - **Decision Comments:** Enter up to 2000 characters

**Create Disposition Review**

Property Identifier: USA-MA-00000002    Property Name: Head Start Center    Structure Name: Head Start Center

Activity Type: Grantee Request ▼

Review Decision: Choose One ▼

Review Date: 1/19/16

Reviewed By: Walters, Anna-Lisa

Review Comments: 2000 characters remaining.

Final Decision: Choose One ▼

Decision Date: 1/19/16

Decision By: Walters, Anna-Lisa

Decision Comments: 2000 characters remaining.

Save & Close    Save    Cancel

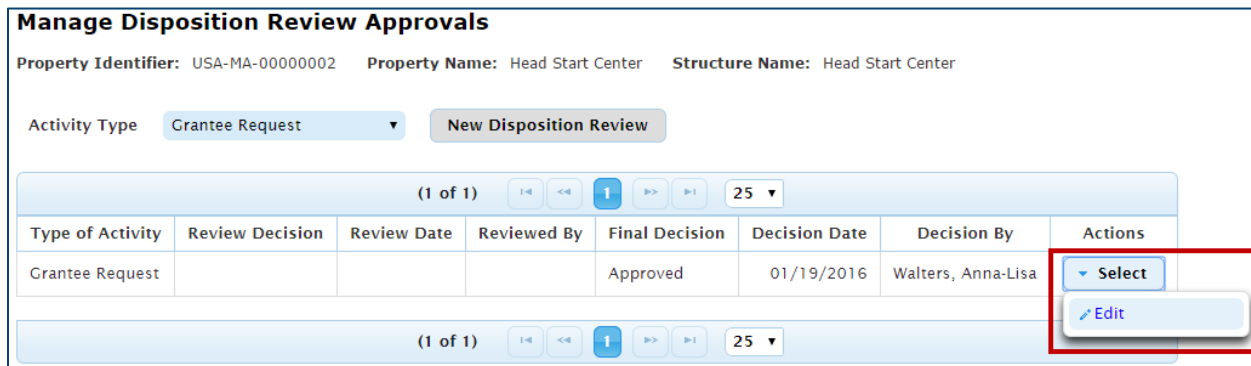
Figure 28: Create Disposition Review screen

- When complete, click the **Save & Close** button.

Save & Close    Save    Cancel

Figure 29: Save & Close button

- The “Manage Dispositions Review Approvals” screen appears. To modify an existing review, from the *Actions* column, select **Edit** from the drop-down menu.



**Manage Disposition Review Approvals**

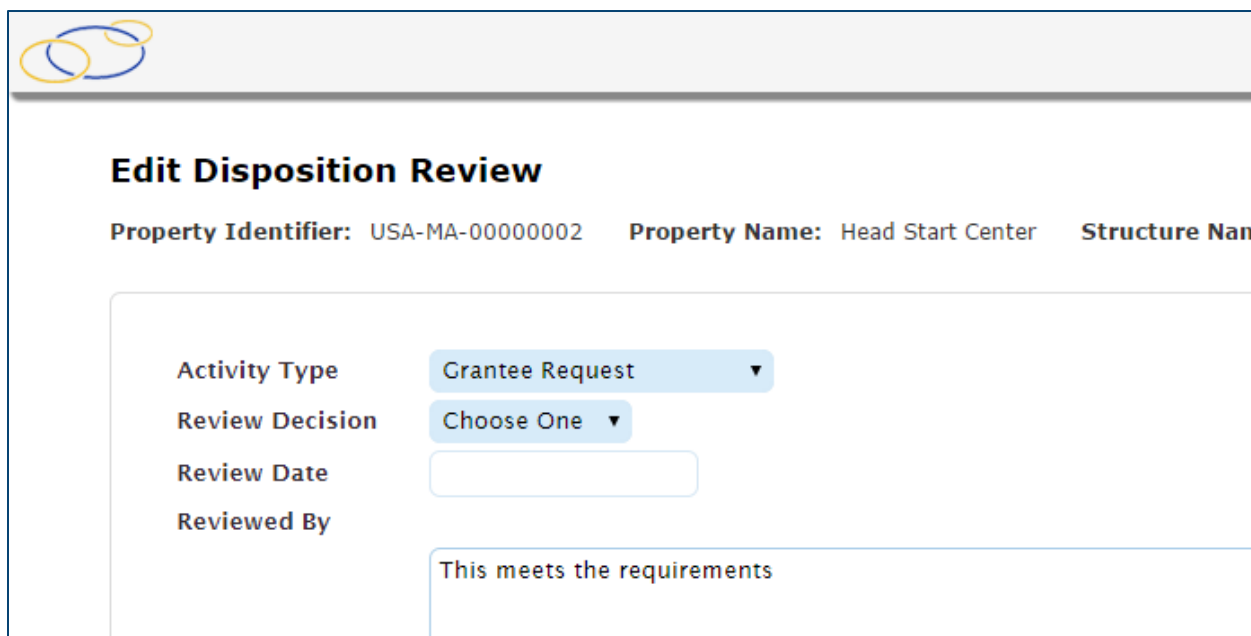
Property Identifier: USA-MA-00000002    Property Name: Head Start Center    Structure Name: Head Start Center

Activity Type: Grantee Request    New Disposition Review

Type of Activity	Review Decision	Review Date	Reviewed By	Final Decision	Decision Date	Decision By	Actions
Grantee Request				Approved	01/19/2016	Walters, Anna-Lisa	Select Edit

Figure 30: Manage Disposition Review Approvals screen - Actions drop-down list - Edit menu

- The “Edit Disposition Review” screen appears. Make changes and then click the **Save & Close** button.



**Edit Disposition Review**

Property Identifier: USA-MA-00000002    Property Name: Head Start Center    Structure Name: Head Start Center

Activity Type: Grantee Request

Review Decision: Choose One

Review Date:

Reviewed By: This meets the requirements

Figure 31: Edit Disposition Review screen



## RESPONSIBILITIES IN PTMS

### A. Office of Grants Management

Administration for Children and Families (ACF) grants management staff are responsible for ensuring the integrity of grant programs from a business, financial, and administrative perspective. This includes oversight of real property assets.

Since the Federal interest in real property purchased, constructed, or improved with grant funds does not expire, the Department and Health and Human Services has long required responsible grants staff to maintain facilities files during and beyond the period of funding and until formal disposition.

With the creation of its Property Management and Tracking System, ACF will move from paper facilities files to electronic record keeping.

### B. Program Offices

The Program Offices only have view only access to the SF-429s in OLDC and data within PTMS.

## APPENDIX

### SF-429 ATTACHMENT A, B, AND C DATA MAPPING OLDC TO PTMS GUIDE

#### SF-429 Cover Page

OLDC/Form Section Label	PTMS Screen	PTMS Field
1. Federal Agency and Organizational Element to Which Report is submitted.	View Property	Agency Name
2. Federal Grant(s) or Other Identifying Number(s) Assigned by Federal Agency(ies)	Projects	Project Identifier
	Projects	Funded by Grant(s)
	Projects>Action>Select>View	Project Identifier
	Cost Summary	Grant Number
3a. Recipient Organization		
3b. Address Line 1		
3c. Address Line 2		
3d. Address Line 3		
3e. City		
3f. State		
3g. Zip Code		
3h. Zip Ext.		
4a. DUNS Number		
4b. EIN		
5. Recipient Account or Identifying Number		
6.Contact Person for this Report:	Contacts	Grantee Contact
6a. First Name	Contacts	First Name
6b. Middle	Contacts	MI

OLDC/Form Section Label	PTMS Screen	PTMS Field
6c. Last Name	Contacts	Last Name
6d. Phone	Contacts	Phone
6e. Extension	Contacts	Ext
6f. Email	Contacts	Email
6g. Fax	Contacts	Fax
N/A		
7. Report End Date:		
8. Real Property Status Report - Attachments: [check the applicable block(s)]:		
8a. Attachment A (General Reporting) attached		
8b. Attachment B (Request to Acquire, Improve or Furnish) attached		
8c. Attachment C (Disposition Request) attached		
9. Comments (attach additional sheets if necessary):	Structure Details	Comments
10. Certification: I certify to the best of my knowledge and belief that all information presented in this report is true, correct, and complete and constitutes a material representation of fact upon which the Federal government may rely.	Contacts	Contact Type
11a. (First Name) Typed or Printed Name and Title of Authorized Certifying Official.	Contacts	First Name
11a. (Middle Initial) Typed or Printed Name and Title of Authorized Certifying Official.	Contacts	MI
11a. (Last Name) Typed or Printed Name and Title of Authorized Certifying Official.	Contacts	Name

OLDC/Form Section Label	PTMS Screen	PTMS Field
11a.Title of Authorized Certifying Official	Contacts	Title
N/A		
11b.Signature of Authorized Certifying Official.		
11c.Telephone (area code and number).	Contacts	Phone
Phone Ext.	Contacts	Ext
11d.Email Address.	Contacts	Email
11e.Date Report Submitted (Month, Day, Year).	Disposition>View Disposition	Request Date
12.Agency use only. This section is reserved for Federal agency use only.		
Text - Federal Grant(s) or Other Identifying Number(s) Assigned by Federal Agency(ies) Attachment A	Projects	Project Identifier
	Projects>Action>Select>View	Project Identifier

SF-429 A (General Reporting)

OLDC/Form Section Label	PTMS Screen	PTMS Field
13. From Date	Projects	Start Date
	Projects>Cost>Select>View	Project Dates>Start
	Projects>Action>Select>View	Project Dates>Start
	Federal Interest	FI Begin Date
	Federal Interest > Select > View	Start Date
13. To Date	Projects	End Date
	Projects>Cost>Select>View	Project Dates>End
	Projects>Action>Select>View	Project Dates>End

OLDC/Form Section Label	PTMS Screen	PTMS Field
13. Checkbox - Acquisition	Projects	Type
	Projects>Action>Select>View	Project Type
13. Checkbox - Renovation	Projects	Type
	Projects>Action>Select>View	Project Type
13. Checkbox - Construction	Projects	Type
	Projects>Action>Select>View	Project Type
13. Checkbox - Government Furnished Property	Projects	Type
	Projects>Action>Select>View	Project Type
14a. Real Property Name	View Property	Property Name
	Structure Details	Structure Name
	Find Property	Property Name
14a. Description of Real Property	Structure Details > Structure Non-Federal Interest	Description
14b. Legal Description	View Property	Legal Description
	Legal Description	Legal Description
14b. Attachment	Support Documents	Property
14b. Address Line 1	View Property	Address 1
	Find Property	Address
	Structure Details	Address 1
	Legal Description	Address 1
14b. Address Line 2	View Property	Address 2
	Find Property	Address
	Structure Details	Address 2
	Legal Description	Address 2
14b. Address Line 3	View Property	Address 3
	Find Property	Address
	Structure Details	Address 3

OLDC/Form Section Label	PTMS Screen	PTMS Field
	Legal Description	Address 3
4b. City	View Property	City
	Find Property	Address
	Structure Details	City
	Legal Description	City
14b. State	View Property	States (US)/Territory/Province
	Find Property	Address
	Structure Details	States (US)/Territory/Province
	Legal Description	States (US)/Territory/Province
14b. Zip Code	View Property	Zip/Postal Code
	Find Property	Address
	Structure Details	Zip/Postal Code
	Legal Description	Zip/Postal Code
14b. Zip Ext.	View Property	Ext.
	Structure Details	Ext.
	Legal Description	Ext.
14b. County/Parish	View Property	County/Parish
	Structure Details	County/Parish
	Legal Description	County/Parish
14b. Country	View Property	Country
	Structure Details	Country
	Legal Description	Country
14b. GPS Location Latitude	View Property	GPS Location Latitude
	Structure Details	GPS Location Latitude
	Legal Description	GPS Location Latitude
14b. GPS Location Longitude	View Property	GPS Location Longitude
	Structure Details	GPS Location Longitude

OLDC/Form Section Label	PTMS Screen	PTMS Field
	Legal Description	GPS Location Longitude
14b. A Zoning information	View Property	Zoning Information
	Structure Details	Zoning Information
	Legal Description	Zoning Information
14c. Land Acreage Enter Amount	Structure Details	Property Measurements>Acreage
14c. Select units:	Structure Details	Property Measurements>Acreage Units
14d. Enter Amounts: Gross	Structure Details	Property Measurements>Gross Amount
14d. Usable	Structure Details	Property Measurements>Acreage
14d. Select units:	Structure Details	Property Measurements>Acreage
14e.Checkbox A. Owned	Structure Details	Property Ownership Types
	Ownership	Formation Type
	Ownership > Actions > View	Formation Type
14e.Checkbox B Co-Owned	Structure Details	Property Ownership Types
	Ownership	Formation Type
	Ownership > Actions > View	Formation Type
14e.Checkbox C. Fee-Simple	Structure Details	Property Ownership Types
	Ownership	Formation Type
	Ownership > Actions > View	Formation Type
14e.Checkbox D. Corporate	Structure Details	Property Ownership Types
	Ownership	Formation Type
	Ownership > Actions > View	Formation Type
14e.Checkbox E. Joint Tenancy	Structure Details	Property Ownership Types
	Ownership	Formation Type
	Ownership > Actions > View	Formation Type
14e.Checkbox F. Partnership	Structure Details	Property Ownership Types

OLDC/Form Section Label	PTMS Screen	PTMS Field
	Ownership	Formation Type
	Ownership > Actions > View	Formation Type
14e.Check box G Limited Liability Partnership	Structure Details	Property Ownership Types
	Ownership	Formation Type
	Ownership > Actions > View	Formation Type
14e.Check box H. Co-Operative.	Structure Details	Property Ownership Types
	Ownership	Formation Types
	Ownership > Actions > View	Formation Type
14e.Checkbox I. GFP	Structure Details	Property Ownership Types
	Ownership	Formation Types
	Ownership > Actions > View	Formation Type
14e.Checkbox J. Others	Structure Details	Property Ownership Types
	Ownership	Formation Type
	Ownership > Actions > View	Formation Type
14e.Text - J. Others	Structure Details	Property Ownership Types
	Ownership	Formation Type
	Ownership > Actions > View	Formation Type
14f. Real Property Cost	Projects > Actions > Select > View	Real Property Cost
	Cost Summary	Cost
	Cost Summary	Cost Type
14f. Real property cost attachments		
14f. Amount - Federal Share ( \$ )	Cost Summary	Federal Share
	Federal Interests > Actions > View > View Notice of Federal Interest	Amount
14f. Percent - Federal Share ( % )	Cost Summary	FS%
14f. Amount - Non Federal Share ( \$ )	Cost Summary	Non Federal Share



OLDC/Form Section Label	PTMS Screen	PTMS Field
14f. Percent - Non Federal Share ( % )	Cost Summary	NFS%
14f. Amount -Total (sum of Federal and Non Federal Share): ( \$ )	Cost Summary	Total
14f. Percent - Total (sum of Federal and Non Federal Share): ( % )	Cost Summary	
14g.Has a deed, lien, covenant or other related documentation be recorded to establish a federal interest in this property? Yes/No/NA	Federal Interests > Actions > View > View Notice of Federal Interest	Instrument Used
14g. If yes (unless previously reported), describe the instrument used and enter the date and jurisdiction in which it was recorded.		
14g.Instrument Used	Federal Interests > Actions > View > View Notice of Federal Interest	Instrument Used
14g.Comments	Federal Interests > Actions > View > View Notice of Federal Interest	Comments
14g.Date Recorded	Federal Interests > Actions > View > View Notice of Federal Interest	NFI Posted Date
	Federal Interests	NFI Posted Date
14g.County/Municipality	Federal Interests > Actions > View > View Notice of Federal Interest	County
	Federal Interests	County
14g.State	Federal Interests > Actions > View > View Notice of Federal Interest	State
14g.Reference Number	Federal Interests > Actions > View > View Notice of Federal Interest	NFI Reference
	Federal Interests	NFI Reference
14g.Amount	Federal Interests > Actions > View > View Notice of Federal Interest	Amount

OLDC/Form Section Label	PTMS Screen	PTMS Field
14g. Instrument Attachment	Support Documents	Federal Interest
RadioButton - YesNo 14h. Has Federally required insurance coverage been secured for this real property?	Projects > Actions > Select > View	Insurance Secured checkbox
14h. Insurance Attachment		
Radio Button – Yes No 14i. Are there any Uniform Relocation Act requirements applicable to this real property?	Dispositions>View>Select	checkbox
Attachment	Structure Overview > Support Documents	
14j. Radio Button - 14j. Are there any environmental compliance requirements related to the real property?	Dispositions>View>Select	checkbox
	Projects > Actions > Select > View	checkbox
14j. Text - If yes, describe them (Attach additional sheets if necessary)	Dispositions>View>Select	Compliance Comments
	Projects > Actions > Select > View	Compliance Comments
14j. Environmental compliance attachments	Dispositions>View>Select	Compliance Comments
	Projects > Actions > Select > View	Compliance Comments
	Structure Overview > Support Documents	
14k. In accordance with the National Historic Preservation Act (NHPA), does the property possess historic significance, and/or is listed or eligible for listing in the national Register of Historic Places?	Dispositions>View>Select	Checkbox
	Projects > Actions > Select > View	checkbox
14k. Text - If yes, describe them (attach additional documentation if necessary)	Dispositions>View>Select	Compliance Comments

OLDC/Form Section Label	PTMS Screen	PTMS Field
	Projects > Actions > Select > View	Compliance Comments
14k. NHPA file attachments	Dispositions>View>Select	Compliance Comments
	Projects > Actions > Select > View	Compliance Comments
	Structure Overview > Support Documents	
Radio Button - 15. Has a significant change occurred with the real property, or is there an anticipated change		
15. Text - If yes, describe the change (Attach additional sheets if necessary.		Comments
	Projects > Actions > Select > View	Comments
15. Significant change file attachments		
16A. Check Box- Sold	Dispositions	Disposition Preference
16B. Check Box - Transferred to different award	Dispositions	Disposition Preference
16C. Check Box - Used other Federally sponsored project/program	Dispositions	Disposition Preference
16D. Check Box- Transferred title	Dispositions	Disposition Preference
16E. Check Box- Retained Title	Dispositions	Disposition Preference
16F. Check Box- NA	Dispositions	Disposition Preference
16 i. If the Federal agency provided the recipient disposition instructions to sell or retain title to the real property, the amount of the funds owed to the Federal Government		Federal Share
16 ii. (Description field)		Non-Federal Share
16 iii. If the Federal agency directed the recipient to transfer title to the real property, enter the amount of funds the Federal agency owes.		Federal Release Amount
	Dispositions	Federal Share
16 ii. If applicable, enter the amount of any net proceeds from sale of the real		Non-Federal Share

OLDC/Form Section Label	PTMS Screen	PTMS Field
property and describe how the proceeds were distributed		
17. Indicate the cumulative energy consumption for the previous 12 months:	Projects > Actions > Select > View	Cumulative Energy Consumed In
17A. Electric (kWh)	Projects > Actions > Select > View	Electric KWH
17A. or (Btu)	Projects > Actions > Select > View	Electric BTU
17 B. Petroleum (Gal)	Projects > Actions > Select > View	Petroleum Gallons
17 C. Natural Gas (cu ft)	Projects > Actions > Select > View	Natural Gas Cubic Feet
17 D. Other (Specify) - Number	Projects > Actions > Select > View	Other
17 D. Other (Specify) - Text	Projects > Actions > Select > View	Other
18. Text Box Remarks	Projects > Actions > Select > View	Description
Remarks for project file attachments		

SF-429 B (Request to Acquire, Improve or Furnish)

OLDC/Form Section Label	PTMS Screen	PTMS Field
Text - Federal Grant(s) or Other Identifying Number(s) Assigned by Federal Agency(ies). Attachment B	Projects	Project Identifier
	Projects>Action>Select>View	Project Identifier
Text Box - 13a. Real Property Name	View Property	Property Name
	Structure Details	Structure Name
	Find Property	Property Name
	Find Property	Structure Name
Text - 13a. Description of Real Property	Structure Details	Description
13b. Legal Description	Legal Description	Legal Description
13b. Address Line 1	View Property	Address 1
	Structure Details	Address 1
	Legal Description	Address 1
	Find Property	Address
13b. Address Line 2	View Property	Address 2
	Structure Details	Address 2
	Legal Description	Address 2
	Find Property	Address
13b. Address Line 3	View Property	Address 3
	Structure Details	Address 3
	Legal Description	Address 3
	Find Property	Address
13b. City	View Property	City
	Structure Details	City
	Legal Description	City
	Find Property	Address
13b. State	View Property	States (US)/Territory/Province

OLDC/Form Section Label	PTMS Screen	PTMS Field
	Structure Details	States (US)/Territory/Province
	Legal Description	States (US)/Territory/Province
	Find Property	Address
13b. Zip Code	View Property	Zip/Postal Code
	Structure Details	Zip/Postal Code
	Legal Description	Zip/Postal Code
	Find Property	Address
13b. Zip Ext.	View Property	Ext.
	Structure Details	Ext.
	Legal Description	Ext.
13b. County/Parish	View Property	County/Parish
	Structure Details	County/Parish
	Legal Description	County/Parish
13b. Country	View Property	Country
	Structure Details	Country
	Legal Description	Country
13b. GPS Location Latitude	View Property	GPS Location Latitude
	Structure Details	GPS Location Latitude
	Legal Description	GPS Location Latitude
13b. GPS Location Longitude	View Property	GPS Location Longitude
	Structure Details	GPS Location Longitude
	Legal Description	GPS Location Longitude
13b. Zoning information	View Property	Zoning Information
	Structure Details	Zoning Information
	Legal Description	Zoning Information
14a. Describe the intended use of the real property and how it will benefit the program:	Projects > Actions > Select > View	Proposed Use

OLDC/Form Section Label	PTMS Screen	PTMS Field
14a. Checkbox - Acquisition	Projects > Actions > Select > View	Project Type > "Unspecified"
	Projects	Type > "Unspecified"
14a. Checkbox - Renovation	Projects > Actions > Select > View	Project Type > "Unspecified"
	Projects	Type > "Unspecified"
14a. Checkbox - Construction	Projects > Actions > Select > View	Project Type > "Unspecified"
	Projects	Type > "Unspecified"
14a. Checkbox - Government Furnished Property	Projects > Actions > Select > View	Project Type > "Unspecified"
	Projects	Type > "Unspecified"
14a. Textbox	Projects > Actions > Select > View	Proposed Use
14 b. Proposed Real Property Ownership Type (s) :	Header	
14b. Check Box A. Owned	Structure Details	Property Ownership Types
	Ownership	Formation Type
	Ownership > Actions > View	Formation Type
14b. Check Box B. Co-Owned	Structure Details	Property Ownership Types
	Ownership	Formation Type
	Ownership > Actions > View	Formation Type
14b. Check Box C. Fee Simple	Structure Details	Property Ownership Types
	Ownership	Formation Type
	Ownership > Actions > View	Formation Type
14b. Check Box D. Corporate	Structure Details	Property Ownership Types
	Ownership	Formation Type
	Ownership > Actions > View	Formation Type
14b. Check Box E. Joint Tenancy	Structure Details	Property Ownership Types

OLDC/Form Section Label	PTMS Screen	PTMS Field
	Ownership	Formation Type
	Ownership > Actions > View	Formation Type
14b. Check Box F. Partnership	Structure Details	Property Ownership Types
	Ownership	Formation Type
	Ownership > Actions > View	Formation Type
14b. Check Box G. Limited Liability Partnership	Structure Details	Property Ownership Types
	Ownership	Formation Type
	Ownership > Actions > View	Formation Type
14b. Check Box H. Co-Operative	Structure Details	Property Ownership Types
	Ownership	Formation Types
	Ownership > Actions > View	Formation Type
14b. Check Box I. GFP	Structure Details	Property Ownership Types
	Ownership	Formation Types
	Ownership > Actions > View	Formation Type
Attachment B 14b. Check Box J. Other	Structure Details	Property Ownership Types
	Ownership	Formation Type
	Ownership > Actions > View	Formation Type
14b. J. Other text area	Structure Details	Property Ownership Types
	Ownership	Formation Type
	Ownership > Actions > View	Formation Type
14c. Proposed Acquisition Date (MM/DD/YYYYI:	Projects > Actions > Select > View	Start
	Projects	Start Date
	Structure Details	Comments
14d. Enter Amount	Structure Details	Property Measurements>Acreage
14d. Select units:	Structure Details	Property Measurements>Acreage
14e. Enter Amounts: Gross	Structure Details	Property Measurements>Acreage



OLDC/Form Section Label	PTMS Screen	PTMS Field
14e. Usable	Structure Details	Property Measurements>Acreage Units
14e. Select units:	Structure Details	Property Measurements>Gross Amount
	Structure Details	Property Measurements>Acreage
14f. Appraised Value	Structure Details	Property Measurements>Acreage
	Cost Summary	Cost Type > Unspecified
	Cost Summary	Property Cost by Grant Budget Period
	Project > Actions > Select > View	Real Property Cost
14f. Attachment	Structure Overview > Support Documents	
		Source of Funds
14f. Federal Share	Cost Summary	Federal Share
14f. Federal Share Percentage	Cost Summary	FS%
14f. Non-Federal Share	Cost Summary	Non Federal Share
14f. Non-Federal Share Percentage	Cost Summary	NFS%
14f. Total (Sum of Federal and Non Federal Share): Value	Cost Summary	Total
14f. Total (Sum of Federal and Non Federal Share): Percentage	Cost Summary	
14g. Are there any Uniform Relocation Act (URA) requirements related to the real property? Radio Button	Projects > Actions > Select > View	URA checkbox
14h. Radio Button - Are there any environmental compliance requirements related to the real property?	Projects > Actions > Select > View	Environmental compliance requirements checkbox
14h. If yes, describe them (Attach additional sheets if necessary)	Projects > Actions > Select > View	Compliance Comments
Environmental compliance attachments	Structure Overview > Support Documents	

OLDC/Form Section Label	PTMS Screen	PTMS Field
14i. In accordance with the National Historic Preservation Act (NHPA) does the property possess historic significance, and/or is listed or eligible for listing in the National Register of Historic Places? Radio Button	Projects > Actions > Select > View	NHPA applicable checkbox
14i. Text - If yes, describe them (Attach additional sheets if necessary)	Projects > Actions > Select > View	Compliance Comments
NHPA file attachments	Structure Overview > Support Documents	
Checkbox - 14j.A. Integrated Design Principles	Projects > Actions > Select > View	Environmental Impact
Checkbox - 14j.B. Enhances Indoor Environmental Quality	Projects > Actions > Select > View	Environmental Impact
Checkbox - 14j.C. Protects and conserves Water	Projects > Actions > Select > View	Environmental Impact
Checkbox - 14j.D. Reduces Environmental Impact of Materials	Projects > Actions > Select > View	Environmental Impact
Checkbox - 14j.E. Optimizes Energy Performance	Projects > Actions > Select > View	Environmental Impact
14k.A. Electric (kWh)	Projects > Actions > Select > View	Electric KWH
14k.or (Btu)	Projects > Actions > Select > View	Electric BTU
14k.B. Petroleum (Gal)	Projects > Actions > Select > View	Petroleum Gallons
14k.C. Natural Gas (cu ft)	Projects > Actions > Select > View	Natural Gas Cubic Feet
14k.D.Text Box - Other (Specify)	Projects > Actions > Select > View	Other
		Other Description
14l.A. Electric (kWh)	Projects > Actions > Select > View	Electric KWH
14l.or (Btu)	Projects > Actions > Select > View	Electric BTU
14l.B. Petroleum (Gal)	Projects > Actions > Select > View	Petroleum Gallons
14l.C. Natural Gas (cu ft)	Projects > Actions > Select > View	Natural Gas Cubic Feet

OLDC/Form Section Label	PTMS Screen	PTMS Field
		Other
14I.D. Text Box - Other (Specify)	Projects > Actions > Select > View	Other Description
15. Remarks (attached additional sheets if necessary)	Projects > Actions > Select > View	Comments
Remarks for project file attachments		

SF-429 C (Disposition or Encumbrance Request)

OLDC/Form Section Label	PTMS Screen	PTMS Field
13a. Real Property Name	View Property	Property Name
	Structure Details	Structure Name
	Find Property	Property Name
13a. Description of Real Property	Structure Details	Description
13b. Legal Description of Real Property	Legal Description	Legal Description
13a. Property Name Attachment	Structure Overview > Support Documents	
13b. Address Line 1	View Property	Address 1
	Structure Details	Address 1
	Legal Description	Address 1
13b. Address Line 2	View Property	Address 2
	Structure Details	Address 2
	Legal Description	Address 2
13b. Address Line 3	View Property	Address 3
	Structure Details	Address 3
	Legal Description	Address 3
13b. City	View Property	City
	Structure Details	City
	Legal Description	City
13b. State	View Property	States (US)/Territory/Province

OLDC/Form Section Label	PTMS Screen	PTMS Field
	Structure Details	States (US)/Territory/Province
	Legal Description	States (US)/Territory/Province
13b. Zip Code	View Property	Zip/Postal Code
	Structure Details	Zip/Postal Code
	Legal Description	Zip/Postal Code
13b. Zip Ext.	View Property	Ext.
	Structure Details	Ext.
	Legal Description	Ext.
13.b. County/Parish	View Property	County/Parish
	Structure Details	County/Parish
	Legal Description	County/Parish
13b. Country	View Property	Country
	Structure Details	Country
	Legal Description	Country
13b. GPS Location Latitude	View Property	GPS Location Latitude
	Structure Details	GPS Location Latitude
	Legal Description	GPS Location Latitude
13b. GPS Location Longitude	View Property	GPS Location Longitude
	Structure Details	GPS Location Longitude
	Legal Description	GPS Location Longitude
13b. Text - 13b. Zoning information	View Property	Zoning Information
	Structure Details	Zoning Information
	Legal Description	Zoning Information
13b. Legal Description Attachment		
13c. Land Acreage or Square Units:	Header	
13c. Enter Amount	Structure Details	Property Measurements>Acreage

OLDC/Form Section Label	PTMS Screen	PTMS Field
13c. Select units:	Structure Details	Property Measurements>Acreage Units
13d. Enter Amounts: Gross	Structure Details	Property Measurements>Gross Amount
13d. Usable	Structure Details	Property Measurements>Acreage
13d. Select units:	Structure Details	Property Measurements>Acreage
14a. Disposition Preference or Encumbrance Request [Check one]:	Dispositions	
14a. A. Sell – Check Box	Dispositions	Disposition Preference
	Dispositions > View Dispositions	Disposition Preference
14a.B. Transfer to different award – Check Box	Dispositions	Disposition Preference
	Dispositions > View Dispositions	Disposition Preference
14a.C. Use in other Federally sponsored project/program – Check Box	Dispositions	Disposition Preference
	Dispositions > View Dispositions	Disposition Preference
14a.D. Transfer title – Check Box	Dispositions	Disposition Preference
	Dispositions > View Dispositions	Disposition Preference
14a.E. Retain Title – Check Box	Dispositions	Disposition Preference
	Dispositions > View Dispositions	Disposition Preference
14a.F. Encumber Property	Dispositions	Disposition Preference
	Dispositions > View Dispositions	Disposition Preference
14b. Proposed grant number	Dispositions>View Disposition	Proposed Grant Number
14b. Transfer Receiving Entity in OLDC	Dispositions>View Disposition	Transfer - Receiving Entity (RE)
14c. If this is a request to use the real property in other Federal-sponsored		

OLDC/Form Section Label	PTMS Screen	PTMS Field
projects/activities, describe the proposed use of the real property.		Proposed Use
14c. Checkbox - Acquisition		Project Type
14c. Checkbox - Renovation		Project Type
14c. Checkbox - Construction		Project Type
14c. Checkbox - Government Furnished Property		Project Type
14c. Textbox		
14d. If this is a request to transfer title, identify the proposed receiving entity:		Transfer - Receiving Entity (RE) and Proposed Grant Number
	Dispositions > View Disposition	Transfer - Receiving Entity (RE)
14d. Contact Person for this Entity:		
14d. First Name	Dispositions > View Disposition	Transfer - RE - First Name
14d. Middle	Dispositions > View Disposition	MI
14d. Last Name	Dispositions > View Disposition	Transfer - RE - Last Name
N/A		Contact Type
14d. Phone	Dispositions > View Disposition	Transfer - RE - Phone
14d. Extention		
14d. Email	Dispositions > View Disposition	Transfer - RE - Email
14d. Fax		
14e. Appraised Value	Dispositions	Disposition Appraised Value
	Dispositions > View Disposition	Disposition Appraised Value
14e. Attachment		

OLDC/Form Section Label	PTMS Screen	PTMS Field
14e. Federal Share ( \$ )	Dispositions	Federal Share
	Dispositions > View Disposition	Federal Share
	Dispositions > View Disposition	Federal Share
	Cost Summary	Federal Share
14e. Federal Share Percentage ( % )	Cost Summary	FS%
14e. Non-Federal Share ( \$ )		Non-Federal Share
	Dispositions > View Disposition	Non-Federal Share
	Dispositions > View Disposition	Non-Federal Share
	Cost Summary	Non Federal Share
14e.Non-Federal Share Percentage ( % )	Cost Summary	NFS%
14e.Total (sum of Federal and Non-Federal Share): Value	Cost Summary	Total
14e.Total (sum of Federal and Non-Federal Share): Percentage	Cost Summary	
14f. Are there any Uniform Relocation Act (URA) requirements related to the real property? Radio Button	Dispositions > View Disposition	Uniform Relocation Act (URA) applicable
	Dispositions > View Disposition	Check Box - Uniform Relocation Act (URA) applicable
Attachments	Structure Overview > Support Documents	
14g.Are there any environmental compliance requirements related to the real property? Radio Button	Dispositions > View Disposition	Check Box - Environmental compliance requirements
14g. If yes, describe them (Attach additional sheets if necessary)	Dispositions > View Disposition	Compliance Comments
Environmental compliance attachments	Structure Overview > Support Documents	

OLDC/Form Section Label	PTMS Screen	PTMS Field
14h. In accordance with the National Historic Preservation Act (NHPA) does the property possess historic significance, and/or is listed or eligible for listing in the National Register of Historic Places? Radio Button	Dispositions > View Disposition	Check Box - National Historic Preservation Act (NHPA) applicable
14h. If yes, describe them (Attach additional sheets if necessary)	Dispositions > View Disposition	Compliance Comments
NHPA file attachments		
14i. If this is a request to encumber the property, identify the party or parties	Dispositions > View Disposition	Request to Encumber Comments
14i. Encumbrance Attachment	Structure Overview > Support Documents	
15. If this is a request for a release from the obligation to report on the real property		Release from Reporting Comments
Release from obligation attachments		
16. Remarks	Dispositions > View Disposition	Comments
Remarks for project file attachments		



## GLOSSARY

**Acquisition.** The purchase of real property.

**Appraised Value.** The independent third party appraised value of the real property (current market value).

**Approval.** An OGM action in OLDC that signifies approval of the SF-429 form(s).

**Construction.** The development of a building, structure, or facility, including the installation of equipment, site preparation, landscaping, associated roads, parking, environmental mitigation and utilities, which provides space not previously available. It includes freestanding structures, additional wings or floors, enclosed courtyards or entryways, and any other means to provide usable space that did not previously exist (excluding temporary facilities). Minor and major renovations are excluded.

**Corporate.** Owned by a corporation, including a limited liability corporation (LLC).

**Co-Operative.** Owned by a legal entity created through the establishment of a co-operative agreement recognized under the applicable state law. Ownership takes form of shares in a corporation.

**Co-Owned.** More than one entity owns an identified share in a property with rights of severance; also, termed tenancy in common.

**Disposition.** When real property is no longer needed for the original authorized purpose, the non-Federal entity must obtain disposition instructions from the Federal government. The instructions must provide for one of the following alternatives: retain title after compensating the Federal government, 2) sell and compensate the Federal government, or 3) transfer to the Federal government or to a third party designated and approved by the Federal awarding agency.

**Encumber Property.** Any of several actions including conveying, transferring, assigning, mortgaging (with or without subordination of the Federal interest). All require formal written prior approval from the granting agency as deviations from standard Federal policy.

**Encumbrance.** A right to, interest in, or legal liability on real property. These include liens, mortgages, easements, encroachments, licenses, or deed restrictions.

**Fee-Simple.** Owned outright, without encumbrance, limitation, or condition.

**Furnish.** Also known as “Government Furnished Property”. A furnished property is provided by the Federal Government. Title does not pass to the recipient but remains vested in the Government.

NOTE: Government Furnished Property is not an option for ACF recipients.

**Grantor.** The Federal awarding agency.

**Improve.** Also known as “Renovation” is referred to as a major alteration (major A&R). The renovation is a structural change (e.g., to the foundation, roof, floor, or exterior or load-bearing walls of a facility, or extension of an existing facility) to achieve the following: increase the floor area: and/or, change function and purpose of the facility. Federal agencies may adopt a dollar amount (e.g., \$250,000 or 25% of the total budget, etc.) as a specific indicator of major A&R. Construction and minor renovations are excluded.

**Joint Tenancy.** Property owned by two or more people (i.e., entities) at the same time, in equal shares. When one member in a joint tenancy dies, the other(s) have rights of survivorship (i.e., lack rights of severance).

**Limited Liability Partnership.** Form of joint ownership that shields individuals (members) from personal liability and offers some tax benefits.

**Owned.** Owned entirely by an individual (entity); also termed sole ownership.

**Partnership.** Owned by a legal entity created through the establishment of a partnership agreement. Can take several forms: a real estate investment trust, tenancy in common, limited liability partnership (LLP) or a limited liability corporation (LLC).

**Project.** Purchase, construction, major renovations, disposition, or encumbrance of a building or facility that exists on a real property. Each structure may have multiple projects.

- All SF-429 Attachment A forms approved in the Online Data Collection (OLDC) system create a new project in PTMS, even if no changes are reported. The project is based on the line 13, Type of Federal Interest.
- All SF-429 Attachment B forms approved in OLDC create a new project in PTMS. The project is based on the line 14a, *Describe the intended use of the real property and how it will benefit the program.*
- A new project is only created when the SF-429 Attachment C is approved in OLDC if line 14a option C (*Use in other Federally sponsored project/program*) is selected.

**Property.** Any real property owned or leased in which there is Federal interest.

**Real Property Cost** (SF-429 Attachment A). The total cost of the real property acquired (purchase price only) or improved, including the amount of the Federal Awarding agency's participation in the cost of the original purchase price (and cost of any improvements), and the amount of non-Federal share contributed to or for the non-Federal entity.

**Retain Title** (SF-429 Attachment C). When a property is no longer needed for program purposes, a grantee may request permission to keep real property purchased or improved with grant funds. In such cases, it would be required to reimburse the awarding agency for its share in the property as calculated as a percentage of the fair market value.

**Retained Title** (SF-429 Attachment A). Federal agency approved a grantee request to keep real property purchased or improved with grant funds. The action required prior approval and the Federal awarding agency was compensated for its share in the property as calculated as a percentage of the fair market value.

**Sell**. The transfer of property from one entity to another in exchange for money. The action requires prior approval and the Federal awarding agency must be compensated for its share in the property as calculated as a percentage of the fair market value.

**Sold**. Transfer of property from one entity to another in exchange for money. The action required prior approval and the Federal awarding agency was compensated for its share in the property as calculated as a percentage of the fair market value.

**Structure**. Building or facility that exists on a real property. A property may have one or more associated structures.

**Transfer Title** (SF-429 Attachment C). Also known as Voluntary Alienation. A grantee voluntarily transfers title to the awarding agency or a third party designated or approved by the awarding agency. The grantee is entitled to be paid for its share in the property as calculated as a percentage of fair market value.

**Transferred Title** (SF-429 Attachment A). A grantee voluntarily transferred title to the awarding agency or a third party designated or approved by the awarding agency. The grantee was entitled to its fair share in the property as calculated as a percentage of fair market value.

**Transfer to a Different Award** (SF-429 Attachment C). Also known as direct transfer. Allows Federal agencies to direct that title to property subject to a Federal interest be transferred from a former to a subsequent or replacement grantee. This is not a grantee option. It is a remedy available to the awarding agency when the grantee is no longer funded to operate the program under which funds for purchase or improvement were awarded.

***Transferred to Different Award (SF-429 Attachment A).*** Federal agency allowed the title of a property, subject to a Federal interest, to be transferred from a former to a subsequent or replacement grantee.

***Use in other Federally Sponsored Project/Program (SF-429 Attachment C).*** When property is no longer needed for the purposes of the original project, a grantee may request authority to transfer the property to a similar Federally-sponsored project in which it participates.

***Used other Federally Sponsored Project/Program (SF-429 Attachment A).*** When property is no longer needed for the purposes of the original project, a grantee requested authority to transfer the property to a similar Federally-sponsored project in which it participates.