



Group Federal Officer (GFO) and Designated Federal Officer (DFO) User Guide

for the

Federal Advisory Committee Act (FACA) Database

V.3.0 09.27.2023



Revision History

Version	Date	Changes
1.0	September 24, 2018	Initial Version
2.0	October 21, 2022	Updated to reflect 2022 changes
3.0	September 27, 2023	Updated to reflect 2023 changes

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Additional Call-Outs

Pages may contain one or more of the following call-outs to highlight important information to the system or process.



BUSINESS PROCESS

Important business process notes will be called out by this blue cog icon.



IMPORTANT

Very important notes will be called out by this red exclamation point. Be sure to pay attention to them!



HINTS & TIPS

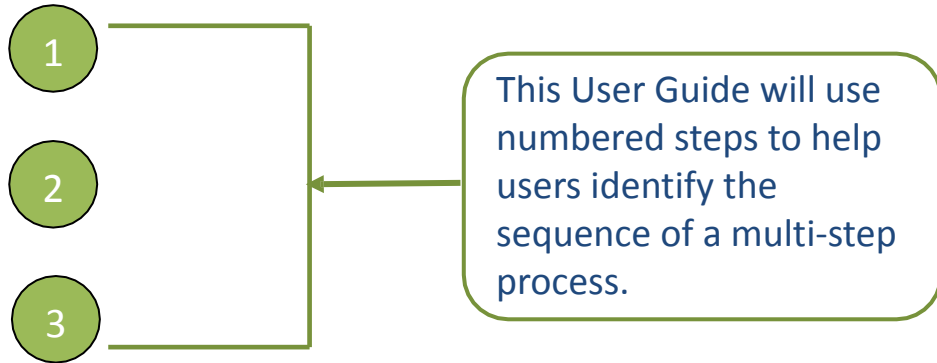
Helpful hints and tips are called out by the green light bulb.



SUPPORT PROCESS

This email icon will indicate what functions will require the assistance of the FACA Help Desk.

As shown below, each page of this User Guide may contain a combination of explanations, step-by-step instructions, screenshots, and/or tables to help users perform specific tasks in the FACA Database.



Page Element	Definition
Tables	This User Guide will use tables to display an abbreviated list of related content in an organized way.
Screen Shots	This User Guide will provide screen shots from the FACA Database whenever possible to support the learning process.



FACA Database Description

FACA Background

The Federal Advisory Committee Act (FACA) was enacted in 1972 to ensure that advice by the various advisory committees formed over the years is objective and accessible to the public. The Act formalized a process for establishing, operating, overseeing, and terminating these advisory bodies and created the Committee Management Secretariat to monitor compliance with the Act.

In 1976, Executive Order 12024 delegated to the administrator of GSA all responsibilities of the president for implementing the Federal Advisory Committee Act (FACA). Secretariat operations related to the FACA database are directed at reporting to the president and Congress on the activities of approximately 1000 federal advisory committees in compliance with the regulatory requirements and management of the FACA program. Samples of documents and forms used by the Secretariat and its clients can be found in the 'Advice and Guidance' section at www.gsa.gov/faca.

Executive orders and congressional revisions have further refined the extension and the application of the Act in 1993, 1997, and 1998, and the extent and nature of the Secretariat's reporting of the activities of the committees. For more details on the regulatory history of FACA, see the "[Legislation and Regulation](#)" section at www.gsa.gov/faca.

What is the FACA Database?

The Federal Advisory Committee Act (FACA) database (<https://facadatabase.gov/>) is a specialized database on the web. FACA originally required from 1972 forward that specific data items about advisory committees be collected by the President annually and transmitted to Congress for review. Since 1997 a web-based database has been used by all the government agencies that have advisory committees to collect that data. In 1995, the "Reports Reduction Act" phased out the "Annual Report," effective in 1999. While Congress no longer requires the "printed and transmitted" annual report, the Annual Comprehensive Review (ACR) requirements of FACA, and the responsibilities of the Committee Management Secretariat (CMS) and the agencies to provide that review information to the Congress and to the President are met through this online system. Since that time this system has been cited as required in both law and regulation.



FACA Database Overview

Usage Overview by Role

How does the CMS System Administrator (SA) use the FACA Database?

CMS SA users have the highest level of access to the system of all users which can login, with the exception of the FACA Help Desk. The CMS SA can edit certain fields other users can not, and performs the roll over of each agency after the completion of each ACR.

How does the CMS Desk Officer (DO) use the FACA Database?

The Desk Officer (DO) is a CMS staff member assigned to track and oversee the advisory committee program of one or more executive branch agencies or departments with at least one FACA committee. The CMS DO uses the database daily as part of their responsibilities in establishing, re-establishing, renewing, and terminating committees; in response to agency operational questions; during charter amendments, etc.; and for oversight management of their assigned agencies/committees.

How does the Committee Management Officer (CMO) use the FACA Database?

The Committee Management Officer (CMO) user has access with create, edit, and delete rights to the current fiscal year's data for committees at their agency or department in this system. Access to other agency or departments is available on the Public Site.

The CMO uses the system to add and manage advisory committees, update the information on advisory committees during the current reporting year, and produce reports on advisory committee trends across fiscal years.

FACA requires that the CMO provide information about the agency's advisory committees to keep Congress and the public informed as well as to conduct an Annual Comprehensive Review (ACR) as part of a government-wide review. The FACA database is a tool that allows the continual updating of committee information throughout the reporting year as well as providing committee management functionality. Keeping the data continuously up-to-date allows a focus on management and immediate relevance. With frequent and timely updates, the system becomes more useful to everyone, ranging from public users to interested agency officials to congressional staff with oversight responsibility.

How does the Group Federal Officer (GFO) use the FACA Database?

The Group Federal Officer (GFO) is not a term found in FACA, nor is it the formal legislated title of any official government employee. The GFO role was created by CMS to signify a person holding an agency "supervisory"/coordinating position over a group of committees, e.g. the committees of the National Park Service in the Department of the Interior, or the committees of the National Institutes of Health in the Department of Health and Human Services committee. This role uses the FACA database to track and manage a specific subset of committees, their activities and performance, and to participate in the Annual Comprehensive Review for advisory committees under their purview during the current fiscal year. The system provides the GFO user with create, edit, read, and delete rights for the group of committees they are assigned to.



FACA Database Overview

Usage Overview by Role

How does the Designated Federal Officer (DFO) use the FACA Database?

The Designated Federal Officer (DFO) uses the FACA Database to track and manage a specific committee's activities and performance and to update the Annual Comprehensive Review (ACR) information on their advisory committee during the current fiscal year. By doing so DFOs manage the committee information flow within the agency and supply the data required by law.

The system provides the DFO user with create, edit, read, and delete rights to the current fiscal year's data for their specific committee.



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This part of the manual describes how different users perform actions in the FACA Database and describes user roles and permissions in the system, and how to create and deactivate users.

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User Roles define what each user can do per their user account, and provide access to functionality so users can fulfill their role-related responsibilities. Below are the FACA system user roles in use. More information on specific functionality permissions by role can be found on the next page.

User Role	Description
Committee Management Secretariat System Administrator (CMS SA)	Responsible for overseeing and managing all aspects of the FACA Database platform. These users have the highest level access to the system of all roles.
Committee Management Secretariat Desk Officer (CMS DO)	Has create, edit, and read capabilities for all agencies and departments.
CMS Read-Only (CMS RO)	Mimics the CMS DO permission set, without create or edit capabilities.
Committee Management Officer (CMO)	Has create, edit, and read capabilities for all committees/subcommittees in their agency.
CMO Read-Only (CMO RO)	Mimics the CMO permission set, without create or edit capabilities.
Group Federal Officer (GFO)	Has specific rights for all committees/subcommittees within their assigned groups in their agency.
GFO Read-Only (GFO RO)	Mimics the GFO permission set, without create or edit capabilities.
Designated Federal Officer (DFO)	Has specific rights for their assigned committee/subcommittee within their agency.
DFO Read-Only (DFO RO)	Mimics the DFO permission set, without create or edit capabilities.

Permission Sets

Permission sets are collections of system capabilities which are assigned to user accounts and provide access to functionality so users can fulfill their role-related responsibilities. Below are the FACA Database system permissions sets in use for GFOs and DFOs: create, read, and edit.

Feature	GFO	DFO
Agency (Account)	R	R
Committees	RE	RE
Sub-committees	RE	RE
Committee Details	CRED	CRED
Consultations	R	R
User/Group Assignment	RE (Assigns DFOs only)	N/A
Reports	CRE	CRE
Messages	N/A	N/A
Score300	N/A	N/A
Bulk Upload	Yes	Yes
FACA User Search	Yes	N/A

C - Create, R - Read, E - Edit

Search for FACA Database Users

All users except DFOs can search for other FACA Database users. GFO user search is restricted to viewing users within their own agency.

Home Agencies/Committees View Reports Bulk Upload **FACA User Search** Training Links and Documents Contact Us

User Search

Agency:

Permission Set:

First Name:

Last Name:

Email Address:

Active?

A

Search

3

User Search

Agency:

Permission Set:

First Name:

Last Name:

Email Address:

Active?

4

Search

1 Records retrieved

A

Download as CSV

B

First Name	Last Name	Agency	Committ...	Permissi...	Last Login	Email Ad...	User Acti...
Whetsel	Cheryl	DOT		FACA - GFO U...		cheryl.whets...	Yes

1

Click the **FACA User Search** tab.

2

Enter desired search criteria to filter search results.

A. Uncheck the **User Active?** checkbox to search for deactivated users.

3

Click **Search**.

4

Once the page refreshes, the results will display below:

- A. Download all of the results to a Microsoft® Excel document to keep offline, as needed.
- B. Click the column headers to sort the information in ascending or descending order.



Accessing the FACA Database System

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Accessing the FACA Database System

Home Page: FACADatabase.gov

Information entered in the FACA Database is available to public stakeholders via a public website, FACADatabase.gov. The [public website](#) also serves as the point of entry (login access) for GFO and DFO users and also provides them with access to data beyond their own agency or committees. Below is an overview of the Home Page.

The screenshot shows the FACADatabase.gov home page. Callout A points to the GSA logo and the text 'An official website of the United States government'. Callout B points to the 'User Access' section showing 'CMO ReadOnly User, CMO User'. Callout C points to the user profile dropdown menu. Callout D points to the user profile dropdown menu. Callout E points to the main content area, which includes a welcome message and a description of the FACA Database system. The page also features a navigation menu with items like 'Home', 'Agencies/Committees View', 'Reports', 'User/Group Assignment', 'Score300', 'Messages', 'Bulk Upload', 'FACA User Search', and 'More'. A 'Return to top' link is located at the bottom left, and a 'Help Desk' link is at the bottom center.

- A. Official Government Website Header** – This is meant to help users identify official websites of the U. S. government. Be sure this is present upon each visit to this site.
- B. FACADatabase.gov Home Page** – Click this tab to at any time to return to this home page.
- C. Navigational Tabs**– Each tab is used to access the related area of the website.
- D. Agency Login** – This is where Federal Government users with FACA Database system accounts will login.
- E. Main Content Area**– The welcome text provides a brief description of the FACA Database system and its purpose, along with related links.

1

Locate and open the account verification email sent by the system.

2

Within the email, click the **Verify Account** button.

- A. Note the login URL for subsequent access.
- B. Note the Username for subsequent access. The username is the user's government-issued email.

3

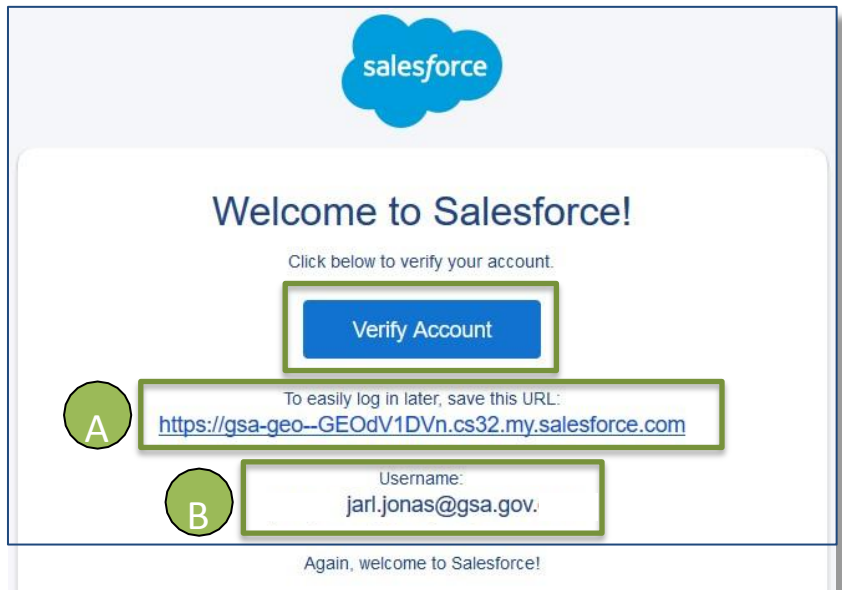
On the **Change Your Password** screen:

- A. Enter in a **New Password** that adheres to the listed criteria and confirm.
- B. **Confirm New Password** by re-entering what you inputted in the **New Password** box.
- C. Click **Change Password**.

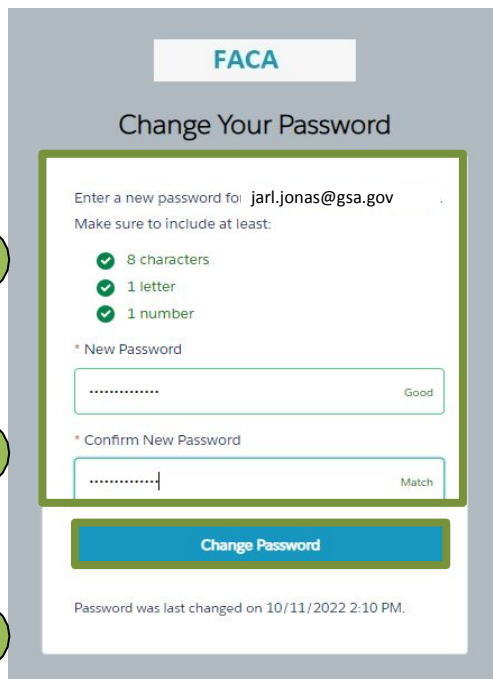
1

support@salesforce.com Sandbox: Welcome to Salesforce: Verify your account - Welcome to Salesforce! Click below to verify your account.

2



3



A

B

C



IMPORTANT

Accounts must be activated within **48 hours**, or else the verification email provided will expire and a new request will need to be sent to the FACA Help Desk.

Accessing the FACA Database System

How to Login (GFOs, DFOs, & RO Users)

1
Go to facadatabase.gov.
A. Click on **Login** and choose one of the login options below.

A OMB MAX Login

- Click the **Max Login** button.
- Login with your **PIV or CAC**; or
- Login with your **MAX User ID and Password**.

- For detailed, step-by-step instructions on how to register for OMB MAX authentication.

B FACA Database System Login

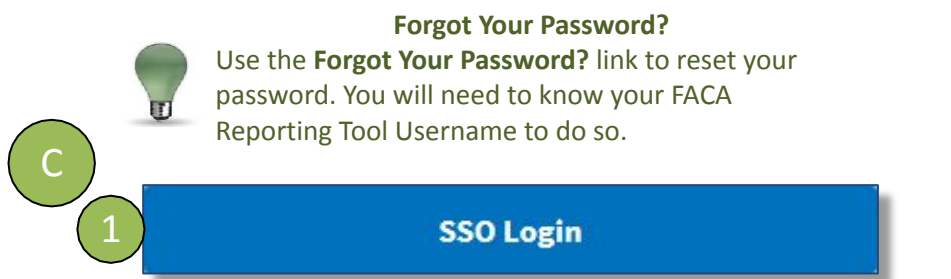
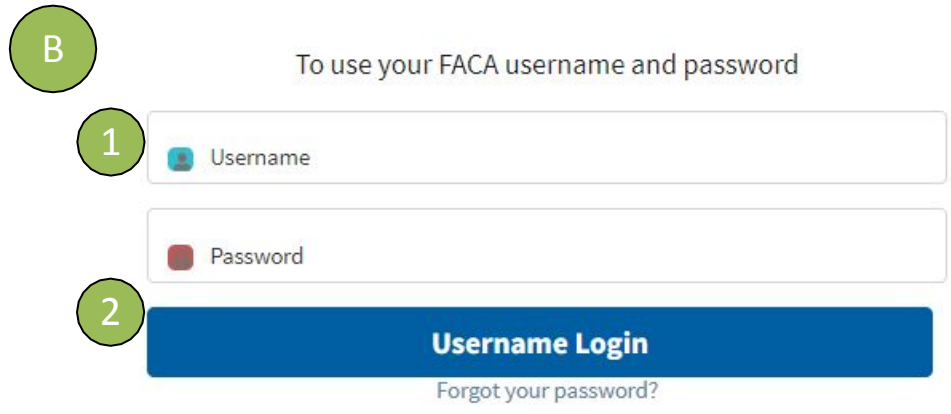
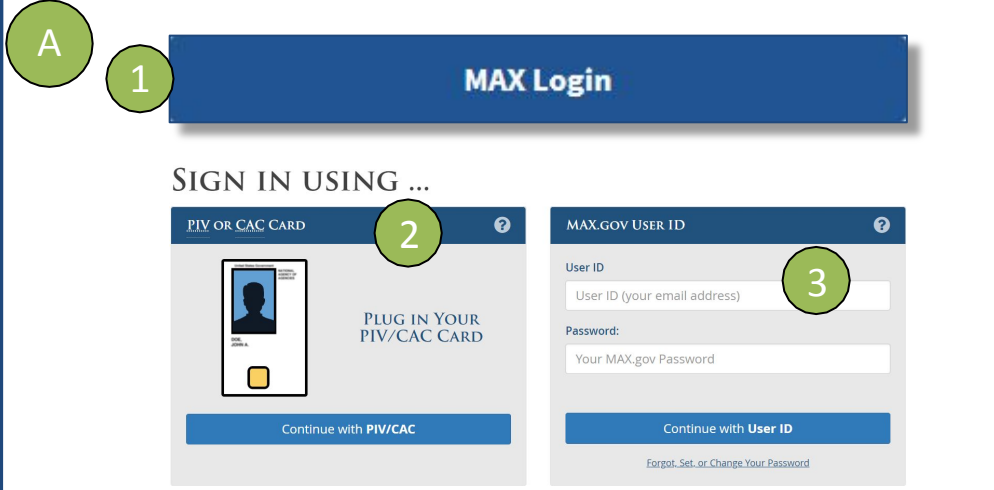
- Enter FACA Database **Username and Password**.
- Click **Username Login**.

- Note:** This login option requires 2-factor authentication upon each login. Users will need to enter the verification code that will be sent to the email or authenticator app affiliated with the account.

C GSA SSO Login

- Click the **SSO Login** button.
- Follow the GSA Two-factor authentication process (not pictured).

All users, excluding the CMS SA and CMS DO, have 2 ways to login to the FACA Database system: A. OMB MAX, B. Salesforce.com Login / Password, and C. GSA SSO (for GSA employees)





FACA Database System Overview

Table of Contents

The overview section orients the user to the layout of the pages in the FACA Database. Detailed instructions for each component will follow in their corresponding section within this guide.

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HINTS & TIPS

This visibility of each field icon is determined by the user interface.

For example, the **Pencil** and **Lock** icons appear when a user hovers the cursor over certain fields.

The **Required Information**, **Magnifying Glass** and **"I"** icons appear to the left or right of certain fields when the record is in *Edit* mode.

The **?** Icon is visible next to certain fields when viewing a record and contains the field description. This is useful when determining what may be required for FACA reporting requirement and the ACR versus what is required to save a record.

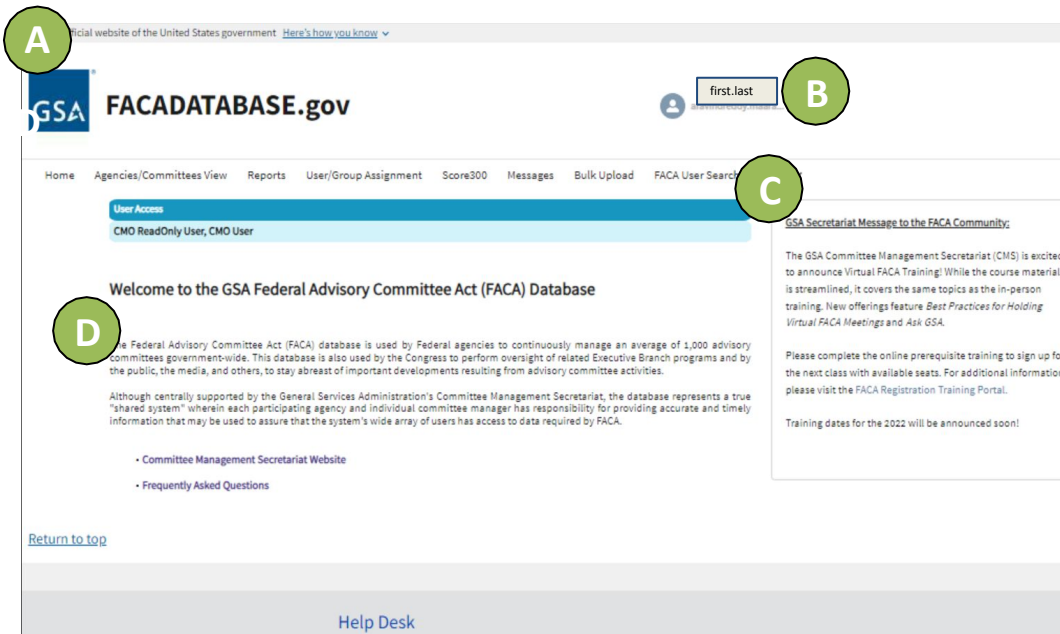
The following table defines some of the standard icons that are associated with fields displaying on record pages, such as on the **Committee Detail** screen.

Icon	Definition
	If the pencil icon appears when hovering over a field with the mouse, in-line editing is enabled for that field. Double click in the display area of the field to edit the field.
	If the lock icon appears when hovering over a field with the mouse, the field is locked and the user will not be able to edit the field.
* = Required	A red asterisk to the left of any field viewed in edit mode indicates that it is a system required field. Users must enter a value in the field in order to save the record.
	If the magnifying glass "lookup" icon appears next to a field when editing, this indicates that the field is used to associate the current record to another record in Salesforce, assuming the other record exists. If it doesn't, the association cannot be made until the desired record is created.
	If this icon appears to the right of a field when editing, it indicates that the field is dependent on another field (known as the controlling field) on the same record. The available values from which to pick for the dependent field may differ based on the value of the controlling field.
	If this icon appears to the right of a field label, hovering over it will display helpful text about the field in a pop-up window. Please see full definitions in the appendix in this manual.
*	Fields with * are required for FACA reporting purposes as well as the ACR. Check the help text for each field to confirm.

FACA Database System Overview

Main System & Navigational Components

Upon each login, users will land on the **Home** page. If already in the system, this area can be accessed by clicking on the **Home** tab. Below is a high level overview of several system components and where they are located.



- A. GSA Government Engagement Org (GEO) Header** – This helps users confirm what user and version of salesforce they are logged into.
- B. User Profile & Settings** – This is where the user’s name will display. The main uses of this feature include account setting updates and system logout.
- C. Global Search Tool** – This is used to search for information contained within the FACA Database. Search results reflect the user’s role within the database. (e.g. CMO will only see search results for their agency).
- D. Main Content Area** – This area contains general information about the FACA Database on the FACA Home tab. Different content and tools will display in this area on other tabs.

One way to locate information in the FACA Database is to use the **Global Search** feature. **Global Search** allows users to enter a term(s) on which to search all records in the system to which they have access. To expand or refine the results of the search, **Global Search** supports Boolean and wildcard search functionality.



1. Option 1: Enter in a term, or part thereof, and click **Search**. Any record containing that exact term, to which you have access, will be returned in the search results. *See next page for search results.*
2. Option 2: Use a link within the **My Recent Items** list. The system will display recently viewed or edited records that contain the search term(s). Clicking on a link will display the record and no search will be conducted.

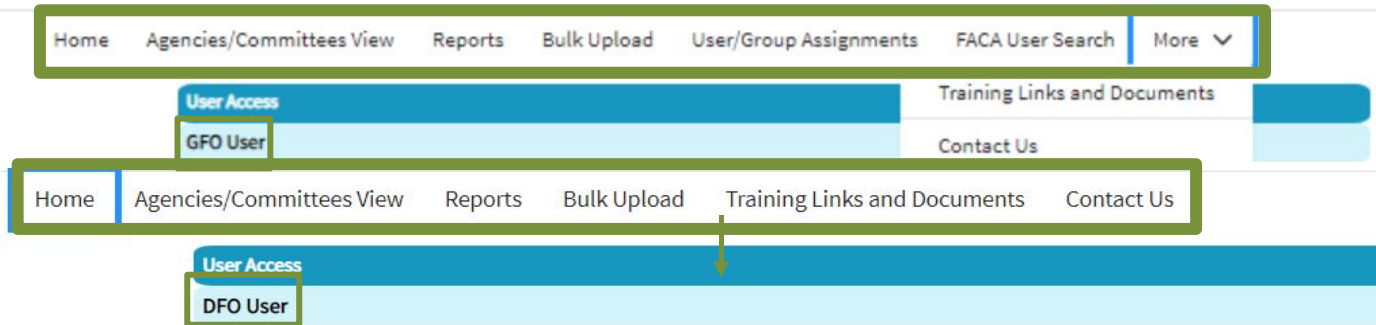
Search Feature	Description
* (Asterisk)	Broaden your search results with the asterisk wildcard. Use * to include one or more characters in the search term. For example, searching for bob jo* finds records with <i>Bob Jones</i> and <i>Bob Johnson</i> .
AND	Finds records that match all of the search terms. For example, acme AND bethesda finds records with both the word <i>acme</i> and the word <i>bethesda</i> . Note: Using AND is optional, since searching for acme bethesda is the same as searching for acme AND bethesda .
OR	Finds items with at least one of the search terms. For example, acme OR bethesda finds records with either <i>acme</i> or <i>bethesda</i> or both <i>acme</i> and <i>bethesda</i> .
AND NOT	Finds records that do not contain one of the search terms. For example, acme AND NOT bethesda finds records that have the word <i>acme</i> but do not have the word <i>bethesda</i> .
“ ” (Quotation Marks)	Use quotation marks around search terms to find an exact match. This can be especially useful when searching for text with punctuation. For example, "acme.com" finds records that contain the exact text <i>acme.com</i> . A search for "Department of Agriculture" finds items that contain the exact phrase <i>Department of Agriculture</i> .
? (Question Mark)	Use the question mark wildcard to make a character variable. For example, searching for jo?n finds items with <i>John</i> and <i>Joan</i> .

The results of a **Global Search** will display on the **Search Results** page. The page is divided into two main sections. The section on the left allows the user to refine the search by selecting an object to search within, for example Committees. The section on the right displays the search results. In the screenshot below, we are searching through all of the objects for the term “Medicine Bow”. The selected object is highlighted in light blue. Once you have found the result you are looking for, click on the record to view it. It is important to note, your search results will only contain data to which you have access.

AGENCY NAME	COMMITTEE NUMBER	COMMITTEE NAME	FISCAL YEAR	COMMITTEE SYSTEM ID
Department of Agriculture	73537	Medicine Bow-Roult Resource Advisory Committee	2020	COM-001036
Department of Agriculture	73537	Medicine Bow-Roult Resource Advisory Committee	2019	COM-036821
Department of Agriculture	73537	Medicine Bow-Roult Resource Advisory Committee	2018	COM-033440
Department of Agriculture	73537	Medicine Bow-Roult Resource Advisory Committee	2010	COM-008614
Department of Agriculture	73537	Medicine Bow-Roult Resource Advisory Committee	2011	COM-007565

- A. **Search Category.** To drill down into the results for a specific data object (i.e. Agencies or Committees), click on the object type name to see search results that fall under that category. The results will display to the right.
- B. To further refine your results, click on the subcategory link (i.e. **Agency Name**) to view the Agency record. (Agencies are also known as Accounts in Salesforce)
- C. Up to five (5) records will display by default within the search results. Click **View More** to see up to 25 records display. If there are more than 25 records, you will have the option to scroll to the Next or Previous 25 records.

Tabs are located towards the top of the **FACA Database** system and allow users to navigate to different areas of the system and perform tasks within that part of the system.



- **Home** is where all users land upon login. This page provides general information about the system, along with access to information regarding the user's role, support, training, and system documentation.
- **Agencies/Committees View** is where all users can access Agency information, Committee information (including Subcommittees), and Agency and Committee Reports for their assigned committees.
- **Reports** is the area to review, build, print, and/or export reports based on the selected data from the FACA Database.
- **Bulk Upload** is where all users (except Read Only users) can upload multiple member and meeting records at once for one or more committees.
- **User/Group Assignments** tab provides the tools for the CMS SA/DO and CMO users to assign GFOs to groups, committees to groups, and DFOs to committees. GFOs also assign DFOs to committees on this tab. GFOs only have the option to select DFO when assigning users.
- **FACA User Search** is the area where GFO users can search for and view their agency users information, last login, and whether they are an active or inactive user for their assigned committees.
- **Training Links and Documents** is where all training documents relative to your access level are located. This includes the User Guide, This Training video, and more! The training materials are viewable on this tab, however, you can also click the title to view it full size in a new tab or click the pdf to bring up the download button to download the pdf file to your device.
- **Contact Us** is where users go for technical assistance. The page has an easy to use contact form for the FACA Help Desk. The form will automatically fill in your contact details as well as application. Complete the required items to submit your request. If you have any screenshots or other helpful files they can be attached as well.



FACA Database System Overview

Tab Access by User Role

The table below shows which FACA Database **GFO/DFO** system tabs can be accessed by each User Role after login.

TABS	GFO	GFO RO	DFO	DFO RO
Home	Y	Y	Y	Y
Agencies/ Committees	Y	Y	Y	Y
Reports	Y	Y	Y	Y
Bulk Upload	Y	N	Y	N
User/Group Assignments	Y	N	N	N
FACA User Search	Y	Y	N	N
Training Links and Documents	Y	Y	Y	Y
Contact Us	Y	Y	Y	Y

The **Agencies/Committees View** tab provides the GFO and DFO users access to their agency and their assigned committees. As shown in the page title, agencies also are called ‘accounts’ in the system. Below is a high level overview of the page components and hierarchy. Please visit the Agencies section (pgs 30-38) and Committees section (pgs 39-61) for further information.

Home Agencies/Committees View Reports Bulk Upload Training Links and Documents Contact Us

Agencies

Current Fiscal Year Active Agencies

LIST VIEWS

- Agencies Without Active Committees
- Current Fiscal Year Active Agencies
- Recently Viewed
- Recently Viewed Agencies

Printable View

Search this list...

1 item • Sorted by Agency Name • Filtered by All agencies - Active Agency?, Record Type • Updated a few seconds ago

Agency Name ↑	Agency Abbreviation ↓	FACACommitteesC...	Fiscal Year	FACANewCount	FACATerminatedC...	FACAMergedCount
1 Department of Agriculture	USDA	148	2021	1	2	1

Committees Terminated/Merged Committees Agency Detail FACA Historical Agency Roll over Agency Reports

Download as CSV

Committee System ID	Committee Number	Committee Name ↑	Committee Status	Agency Name	Fiscal Year
COM-000849	13833	Columbia County Resource Advisory Committee	Chartered	Department of Agriculture	2021
COM-039847	84696	Test Committee	Pending	Department of Agriculture	2023

0-2 of 2 Records

Prev Next

- A. **List Views** – Users can view their agency and committee lists displayed using the dropdown.
 - **Agencies Without Active Committees, Current Fiscal Year Active Agencies & Recently Viewed Agencies Display Options** – Users can choose between these options to change the list of agencies displayed and their related committees. As displayed, the total number of agencies in each category is provided.
- B. **Agency Name & Abbreviation** – The Agency Name is a link, which provides access to the Agency Details page including its **Committee(s)**.
 - After selecting the dropdown list in step A, you will be able to click on the Agency Name which provides access to the Agency Detail page.
- C. **Committees Tab** – Once the Agency Detail page loads, The Committees Tab as well as other information will be displayed for your assigned committees. The Committee System ID is a link to access the committees details page. The list of committees for each agency updates automatically as new committees are added or terminated.
- D. **Terminated/Merged Committees** – This tab shows all terminated and merged Committees you have access to.
- E. **Agency Detail** – This tab shows all Agency information.
- F. **Agency Reports** – Users can select this tab to access agency-related reports for your assigned committee.
 - **Committee Reports** – Users can use this tab to access committee-related reports.
- G. **New Committee** – This button is for CMOs and GFOs/DFOs do not have access to this functionality.



FACA Database System Overview

Reports Tab (For Creating New Reports)

The **Reports** tab provides all users with access to the standard Salesforce reporting functionality, along with access to FACA **Agency** and **Committee Reports** for you to use in the management of your committees and to help in your committee review during the ACR process. When reports are run, results will vary depending on the user's role within the system and assignment to a particular agency level. Below is a high level overview of the page components and structure. Please visit the **Reports** sections for further information.

Home Agencies/Committees View **Reports** Bulk Upload Training Links and Documents Contact Us

Reports A

All Reports C Q Search all reports... **New Report**

74 items

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	2016 Committee_List		FACA Reports	aravindreddy.maara@geo.gs	7/7/2022, 3:54 PM	
Created by Me	2017 Committee_List		FACA Reports	aravindreddy.maeY0KTJ	7/13/2022, 5:02 PM	
Private Reports	2018 Comittee List by Pers Pa		FACA Reports	aravindreddy.maara@geo.gs	7/7/2022, 3:51 PM	
All Reports	2018 Comittee List by Pers Pa		FACA Reports	aravindreddy.maara@geo.gs	7/7/2022, 3:47 PM	
FOLDERS	2018 Committee List Authorit		FACA Reports	aravindreddy.maara@geo.gs	7/7/2022, 4:16 PM	
All Folders	2018 Committee List by Funci		FACA Reports	aravindreddy.maara@geo.gs	7/7/2022, 4:13 PM	
by Me	2018 Committee List by Funci		FACA Reports	aravindreddy.maara@geo.gs	7/7/2022, 4:10 PM	
Shared with Me						
FAVORITES						
All Favorites						

B

- A. Create New Report/Dashboard** – Users can create new reports to fulfill data analysis needs beyond the reports already provided. Dashboards are not being used at this time.
- B. Report Folders** – Reports are organized in the system with folders. Users click on the folder to access the reports within, which display in the report area.
- C. Reports Area** – Once a user clicks on a report folder, the reports contained within display in this area. Users can click on a report link to run the report and download results as needed. Further report customization capabilities are also available, such as adding new fields or filters or adjusting timeframes to further adjust the report results.



Business Process

Agency and Committee level reports can also be accessed from this tab by searching or browsing for the desired report. These reports can also be accessed on the **Agencies/Committees View** tab.

The **Bulk Upload** tab provides all users (except Read-Only) with the functions necessary to upload multiple meeting and member records for one or more committees. Below is a high level overview of the **Bulk Upload** page and functions. More information is provided within the **Committees/Bulk Upload** section.

Home Agencies/Committees View Reports **Bulk Upload** Training Links and Documents Contact Us

Bulk Upload

A

Importing Data

Start by downloading the appropriate template, and saving the corresponding file to your computer system. Open the downloaded file using Microsoft Excel (or a compatible spreadsheet program). Review the "Instructions" sheet within the template, and then fill in the corresponding rows on the appropriate sheet within the template. Save the template. Click the "Choose File" button on the form below, and select the saved template on your computer system using the "File Upload" window that will open. After closing the "File Upload" window, the name of the file to be uploaded will appear in the "Import File" field on the form. Click the "Import Data" button to start the import process.

The data import process will validate all of the information included on the corresponding sheet(s) of the uploaded template, verifying that the data in the uploaded template meets all of the same validation criteria as if you had manually entered that same information. If no errors are encountered, the data will be imported into the FACA system and a success message will appear at the top of this page.

If errors are identified in the data contained within the template, an email will be sent to you with one or more messages identifying each row containing an error will be generated, along with a description of the type of error encountered.

It is important to note that if any errors are encountered, none of the data will be imported. In that situation, you must return to the template on your computer system, correct the errors, save the template with the correction, and re-import the template using the form below. Only when all of the data is validated as having no errors will any of the data be imported.

Due to system limitations, we recommend processing no more than 1300 records/rows per file. If more than that, split into several files or contact your Committee Management Officer for assistance.

WARNING: Please note that the bulk upload feature is meant only to add new meeting or member records. It is not possible to update existing records. Duplication of records will occur if the same information is uploaded.

Step 1: Select Template Type

Template Type:

B

Step 2: Upload Data File

Download Template: [FACA Committee Meetings Template](#)

Select File: No file chosen

Your file has been submitted and results will be emailed to you.

C

Past Submission Status

D

Refresh the browser **after** an upload completes to check for status.

Id	Filename	Template Type	Date Uploaded	Status	Error CSV
J-000009902	FACA Committee Meetings Template.xlsx	FACA_Committee_Meetings_Template	10/18/2022 10:37 AM	Complete	

[More Submissions](#)

- A. Importing Data Instructions** – Instructions are provided to guide users through the bulk upload process.
- B. Bulk Upload Template Type** – Users will select either committee member or committee meetings template depending on the data to be uploaded.
- C. Template Download and Upload Data File** – Once the template type is chosen, the template becomes available for download. Users should then populate the spreadsheet as instructed and use the Choose File button to select and upload the file.
- D. Past Submission Status** – Should errors exist in the file uploaded, the system will provide an error file indicating which records may be missing required information or which do not adhere to the system standards.



IMPORTANT

Please review all instructions within the system and the upload template prior to attempting a Bulk Upload. Also, it is best practice to download the necessary upload template prior to each attempt in case it has been updated since your last upload.

The Bulk Upload feature can only accommodate 1300 rows – files can be broken up into 1300 row documents for upload. Contact the FACA Help Desk Faca.help@gsa.gov for larger uploads.

The User/Group Assignments tab provides the tools for the CMS SA/DO and CMO users to assign GFOs to groups, committees to groups, and DFOs to committees. GFOs also assign DFOs to committees on this tab. GFOs only have the option to select DFO when assigning users. Below is a high level overview of the DFO page components and functions. More information is provided within the User/Group Assignments section.

Management Options:



DFO GFO

AGENCY: Corporation for National and Community Service



COMMITTEES:



NUMBER	NAME
1903	Civilian Community Corps Advisory Board
84691	Test committee
84692	Test GFO
84693	Public Health

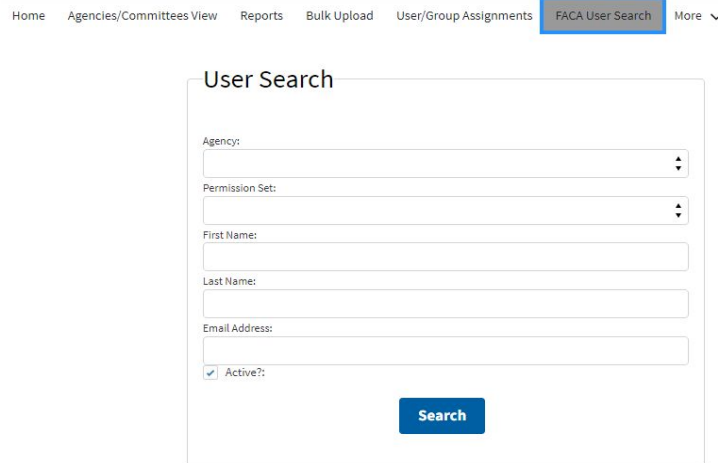
- A. Management Options (DFO & GFO)** – Users can choose between these two options depending on the tasks they need to perform for the related user role (i.e. Assign a DFO to a committee or GFO to a group.)
- B. Agency** –CMO users will only be able to work with GFOs, DFOs, groups and committees related to their agency.
- C. Committees/Groups** – Once the agency is selected, the existing, active committees and groups will display. Use these links to access a committee for which you want to assign a DFO. Follow the same options for managing assignments of GFOs and committees to groups.



Business Process

Users and **Groups** are created by the FACA Help Desk. Once created, these entities will appear in the system to be managed by these tools.

The **FACA User Search** tab provides all users, except DFOs including those with Read-Only permission, with the ability to search for other FACA Database users. Results will vary depending on the role of the individual searching (i.e. CMO or GFO). Below is a high level overview of the FACA User Search page search criteria. More information is provided within the User Search section.



The screenshot shows a navigation menu at the top with the following items: Home, Agencies/Committees View, Reports, Bulk Upload, User/Group Assignments, **FACA User Search** (highlighted), and More. Below the menu is a form titled "User Search" containing the following fields:

- Agency: (dropdown menu)
- Permission Set: (dropdown menu)
- First Name: (text input)
- Last Name: (text input)
- Email Address: (text input)
- Active?: (checkbox)

A blue "Search" button is located at the bottom right of the form.

A. User Search Criteria – Users can search using one or all of the criteria to find user information:

- **Agency** – GFO users can only search within their own agency.
- **Permission Set** – Permission sets are defined collections of system capabilities assigned to user accounts based on role. These are defined in the next section.
- **First Name** – User’s first name
- **Last Name** – User’s last name
- **Email Address** – User’s email address – partial email information can be entered.
- **User Active** – This check box allows users to search for active or inactive users.



FACA Database System Overview

Public Site Contact Us Tab

For technical assistance the Contact Us page has an easy to use contact form for the FACA Help Desk. The form will automatically fill in your contact details. Complete the required items to submit your request. If you have any screenshots or other helpful files they can be attached as well. You may also reach this page by clicking the Help Desk link found at the bottom of every page and on the login page.

If you have any questions please reach out to the FACA Help Desk by using the contact form on the Contact Us page or the Help Desk link at the bottom of every page, or by emailing help.faca@gsa.gov.



Login

Search...

Home Agencies/Committees Gov't-Wide Reports Datasets Search Help **Contact Us**

Contact Information

Public Users

- For information **A** about the Federal Advisory Committee Act and its implementation, please visit the [Committee Management Secretariat website](#).
- For general questions about the FACA Database, contact the Secretariat at cms@gsa.gov.
- For questions about a specific committee, please contact the [Committee Management Officer](#) for the agency
- For technical issues with the site, please contact the FACA Help Desk [online](#) or via email at Help.FACA@gsa.gov.

Federal Government Users

- To receive a user account, please **B** contact your [Committee Management Officer](#).
- To reset a password, please use the [Forgot Your Password?](#) link on the login page or contact the FACA Help Desk via email at Help.FACA@gsa.gov.
- For other technical issues with the site:
 - a. Designated Federal Officers should contact their Group Federal Officer (GFO) or [Committee Management Officer \(CMO\)](#)
 - b. Group Federal Officers should contact their [Committee Management Officer \(CMO\)](#); and
 - c. Committee Management Officers (CMO) should contact the FACA Help Desk via email at Help.FACA@gsa.gov or login to submit a web case.

List of Current CMOs



- A. Public Users** – Public users of the FACA database should use this contact information to contact appropriate person based on the issue they are having.
- B. [Federal Government Users](#)** – Use this contact information to contact appropriate person or group based on the issue they are having.
- C. List of Current CMOs** – Each of these links will bring up a downloadable contact sheet with information for CMOS for their respective agencies.



FACA Database System Overview

FACA Help Desk Contact Information

Contact/Case Form

Home Agencies/Committees View Reports Bulk Upload Training Links and Documents **Contact Us**

* Name
Aaron Voos

* Email
atvoos@fs.fed.us.invalid

* Application
FACA

* Sub-Application
Select a Community...

* Request Type
Select a Request Type...

* Subject

Description

Salesforce Sans 12 B I U C [List Icons] [Link Icon]

FACA Training Link

Upload Files Or drop files Create A Case

Email Address:

- help.faca@gsa.gov

Hours of Operation:

9:00 a.m. – 5:00 p.m. ET

Content	Page
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The list view is a multifunction dropdown menu, allowing users to select the Current Fiscal Year Active Agencies list view which shows agencies that are active during the current fiscal year, Agencies Without Active Committees which shows Agencies that are not active within the current Fiscal Year, Recently Viewed and Recently Viewed Agencies which shows the agencies that the user has viewed most recently.

The screenshot shows the 'Agencies' dropdown menu with the following callouts:

- A:** Points to the 'Current Fiscal Year Active Agencies' dropdown menu.
- B:** Points to the 'Printable View' button.
- C:** Points to the 'Search this list...' search bar.
- D:** Points to the gear icon for list view settings.
- E:** Points to the table icon for switching views.
- F:** Points to the circular arrow icon for refreshing data.
- G:** Points to the 'System Information' section at the bottom of the page.

The table below shows the current data for the 'Current Fiscal Year Active Agencies' view:

Fiscal Year	FACANewCount	FACATerminatedCount	FACAMergedCount	FACAActiveCount
2022	7	0	17	140

The 'System Information' section includes:

- Last Modified By: kara.rajchel@gsa.gov.ge, 10/3/2022 12:00 AM
- Parent Agency: [icon]
- Active Agency?

- A. List Views** - allows the user to view Agencies without Current Active Committees, Agencies with Current Fiscal Year Active Agencies, or the agencies the user has recently viewed. GFO and DFO will only see their assigned agency.
- B. Printable View** - will open an optimized for print version of the Agency list view.
- C. Search this list** - allows the user to search the current list view for a given search term or query.
- D. Gear Icon** - allows users to create their own list view or clone the existing one.
- E. Table Icon** - allows users to select their view, either as the current list view, or a kanban view.
- F. Circular Arrow Icon** - will refresh the listview with the most recent data from the system.
- G. System Information Section** – (bottom of Agency Detail page)- Lists system information including when the record was last modified, whether the agency is active, and whether the agency is nested under a parent item.

Agency
Department of Agriculture

+ Follow New Committee

A
Committees

B
Terminated/Merged Committees

C
Agency Detail

D
FACA Historical Agency

E
Roll over

F
Agency Reports

Download as CSV

Committee System ID	Committee Number	Committee Name ↑	Committee Status	Agency Name	Fiscal Year
COM-000849	13833	Columbia County Resource Advisory Committee	Chartered	Department of Agriculture	2021
COM-039847	84696	Test Committee	Pending	Department of Agriculture	2023

0-2 of 2 Records

Prev
Next

- A. Committees Tab** – Shows active committees in an agency. Allows access to committee records.
- B. Terminated/Merged Committees** – Shows Committees that have been terminated or merged in previous years.
- C. Agency Detail** – provides an overview of the Agency information and links all related information.
- D. FACA Historical Agency tab** – allows you to see previous fiscal year details at the Agency account level, as far back as 1997. This is not to be confused with the Data From Previous Years Tab where the user views historical data for an agency.
- E. Roll Over tab** – This page shows whether an agency is eligible for roll over or not. When the agency is eligible the roll over button will appear here, and it is for use by the CMS admin role only. The tab must be included on the Community Site in order for agency rollover to work properly for CMS on the Internal Site.
- F. Agency Reports tab** – contains links to all of the Agency level reports.

Agency (Account) Detail Committees Tab

As shown in the page title, agencies also are called ‘accounts’ in the system. The first tab you will see is the Committees tab. This tab allows you to navigate to a committee record as well as view general committee information. Committees will be discussed in more detail in the next chapter.



Committee System ID	Committee Number	Committee Name ↑	Committee Status	Agency Name	Fiscal Year
COM-000486	76888	Green Building Advisory Committee	Chartered	General Services Administration	2022
COM-039863	84704	New Committee	Chartered	General Services Administration	2023
COM-038842	84631	Presidential Commission on the Supreme Court of the United States	Terminated	General Services Administration	2022
COM-039862	84703	Test	Pending	General Services Administration	2023

0-4 of 4 Records

- A. **Committees Tab** – This tab shows the active committees in an agency.
- B. **Committee System ID** – A number generated to reference a specific committee within the system. Click this ID to view the committee detail.
- C. **Committee Number** – This is unique number of the committee.
- D. **Committee Name** – The Name of the committee.
- E. **Committee Status** - The status of a committee. This tab shows only active committees.
- F. **Agency Name** – The name of the agency you are currently viewing.
- G. **Download as CSV** – Allows you to download a csv of the committees shown.
- H. **Prev/Next Buttons** – If there are more committees than can be shown the prev & next buttons allow you to navigate to see more results.

Agency (Account) Detail Terminated/Merged Tab

The second tab you will see is the Terminated/Merged tab. This tab displayed all committees that have been either terminated or merged. This tab allows you to navigate to a terminated or merged committee record as well as view general committee information. Committees will be discussed in more detail in the next chapter.

Committees **A** Terminated/Merged Committees Agency Detail FACA Historical Agency Roll over Agency Reports

B **C** **D** **E** **F** **G** Download as CSV

B Committee System ID	C Committee Number	D Committee Name	E Committee Status	F Agency Name	G Fiscal Year
COM-000516	2612	Presidential Advisory Commission on Election Integrity	Terminated	General Services Administration	2018
COM-001484	76701	The President's Management Advisory Board	Terminated	General Services Administration	2017
COM-001751	2514	GSA Labor-Management Relations Council	Terminated	General Services Administration	2017
COM-003815	82193	Governmentwide Travel Advisory Committee	Terminated	General Services Administration	2015
COM-004912	50	Presidential Commission on Election Administration	Terminated	General Services Administration	2014
COM-009218	34734	Multiple Award Schedule Advisory Panel	Terminated	General Services Administration	2010
COM-009934	25122	General Services Administration Small Business Advisory Committee	Terminated	General Services Administration	2009
COM-012719	21506	Governmentwide Relocation Advisory Board	Terminated	General Services Administration	2006
COM-015831	13860	Governmentwide Per Diem Advisory Board	Terminated	General Services Administration	2003
COM-015903	13859	President's Homeland Security Advisory Council	Terminated	General Services Administration	2003
COM-017775	5242	President's Commission on the Celebration of Women in American History	Terminated	General Services Administration	2001
COM-017789	5181	Governmentwide Policy Advisory Board	Terminated	General Services Administration	2001
COM-021473	2003	Federal Advisory Committee on the National World War II Memorial Design Competition	Terminated	General Services Administration	1997

0-13 of 13 Records **H** Prev Next

- A. Terminated/Merged Committees Tab** – This tab shows the Terminated & Merged committees in an agency.
- B. Committee System ID** – A number generated to reference a specific committee within the system. Click this ID to view the committee detail.
- C. Committee Number** – This is unique number of the committee.
- D. Committee Name** – The Name of the committee.
- E. Committee Status** - The status of a committee. This tab shows only active committees.
- F. Agency Name** – The name of the agency you are currently viewing.
- G. Download as CSV** – Allows you to download a csv of the committees shown.
- H. Prev/Next Buttons** – If there are more committees than can be shown the prev & next buttons allow you to navigate to see more results.

Agency (Account) Detail Tab

The **Agency Detail Page** provides an overview of the Agency information and links all related information. As shown in the page title, agencies also are called ‘accounts’ in the system. Below is a high level overview of the page components and hierarchy. Agency users can only read this information, not modify it. If you believe there is an error in the Agency details, please reach out to your CMO, who will contact CMS to update the record.

[Committees](#)
[Terminated/Merged Committees](#)
[Agency Detail](#)
[FACA Historical Agency](#)
[Roll over](#)
[Agency Reports](#)

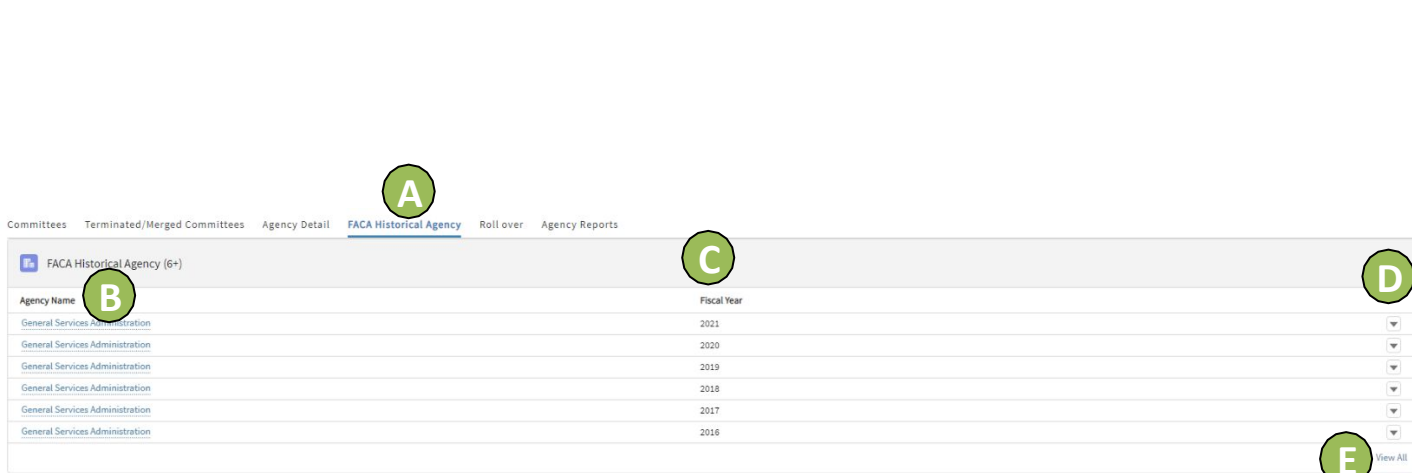
✓ Agency Information

Agency Name Department of Agriculture	
FACA Agency No 67	
Agency Abbreviation USDA	
Fiscal Year 2021	
Agency URL http://www.usda.gov/	
Desk Officer Tara	
Classification	
Cap Allocation 26	
Hierarchy 5	
Decision Maker Position Title Secretary	
Decision Maker Prefix Mr.	
Decision Maker First Name Sonny	
Decision Maker Middle Name	
Decision Maker Last Name	
Comm Mgmt Officer ACR Date	
CMS Review Date	
Comm Mgmt Position Title CMO	
Comm Mgmt Officer Prefix	
Comm Mgmt Officer First Name Cikena	
Comm Mgmt Officer Middle Name	
Comm Mgmt Officer Last Name Reid	
Comm Mgmt Officer Suffix	
Comm Mgmt Officer Office Address 1	
Comm Mgmt Officer Office Address 2	
Comm Mgmt Officer Office City	
Comm Mgmt Officer Office State	
Comm Mgmt Officer Office Zipcode	
Comm Mgmt Officer Phone	

- A. Agency Name** – This is the Agency Name.
- B. FACA Agency Number** – An Agency Number automatically generated by the FACA database.
- C. Agency URL** – This is the public URL for the Agency.
- D. Cap Allocation** – Allowable number of discretionary committees assigned to the agency.
- E. Hierarchy** - Position of the agency delineated by the Government Operations Manual.
- F. Decision Maker Information** – **This person is determined by agency.** They do not have a specific user system role.
- G. Comm Mgmt Officer Information** – This is the committee management officer (CMO). This section shows the CMOs contact information. Comm Mgmt Officer ACR Date and CMS Review Date denote ACR status.

Agency (Account) Detail FACA Historical Agency

The fourth tab you will see is the FACA Historical Agency tab, it shows all historical records of the agency. When an Agency has active committees and is rolled over by the CMS SA, records from previous fiscal years can be found in the FACA Historical Agency Section of the page. It will be discussed in more detail in this chapter.



Agency Name	Fiscal Year
General Services Administration	2021
General Services Administration	2020
General Services Administration	2019
General Services Administration	2018
General Services Administration	2017
General Services Administration	2016

- A. FACA Historical Agency Tab** – This tab shows historical records of the agency.
- B. Agency Name** – The name of the agency. Click this link to view the historical agency record.
- C. Fiscal Year** – The fiscal year of the historical record.
- D. Dropdown** – Click this icon to reveal additional functionality including Edit and Delete, if any exists for the current list view. As this is a historical record, no functionalities are present and the record cannot be edited or deleted.
- E. View All** - This link takes the user to a view of all historical agency records as this tab only shows the most recent 10 records.

Locate Historical Agency Information

1

Click the **Agencies/Committees View** tab.

2

In the Agency/Committee view, click the name of your agency to view historical information.

3

Once the **Agency Detail** page loads, select the **FACA Historical Agency** tab.

4

If you click on the hyperlink for fiscal year 2020 for example, it will take you to the information for that agency FY 2020.



Business Process

This record will only be found when an agency is rolled over and has active committees. An agency with no active committees at the point it is rolled over will be found in the main Agency/Committee view under **Agencies Without Active Committees** on the Public Site.

When an Agency has active committees and is rolled over by the CMS SA, records from previous fiscal years can be found in the FACA Historical Agency Section of the page.

The screenshot shows the 'Agencies/Committees View' page. At the top, there are three tabs: 'Home', 'Agencies/Committees View', and 'Reports'. Below this, there are two boxes: the first contains 'Department of Agriculture' and the second contains 'USDA'. A third box shows a search filter for 'FACA Historical Agency (6+)'. Below this is a table with the following columns: 'Agency Name' and 'Fiscal Year'. The table lists 'Department of Agriculture' for fiscal years 2020, 2019, 2018, 2017, 2016, and 2015. A 'View All' link is at the bottom right of the table.

Agency Name	Fiscal Year
Department of Agriculture	2020
Department of Agriculture	2019
Department of Agriculture	2018
Department of Agriculture	2017
Department of Agriculture	2016
Department of Agriculture	2015

Agency Detail

Agency Information

Agency Name
Department of Agriculture

Agency Abbreviation ⓘ
USDA

Agency URL ⓘ
<http://www.usda.gov/>

FACA Agency No ⓘ
67

Fiscal Year ⓘ
2020

Desk Officer ⓘ
Tara

Classification ⓘ

Cap Allocation ⓘ
26

Hierarchy ⓘ
5

1

Click the **Agencies/Committees View** tab.

2

In the Agency/Committee view, you will see your assigned agency, click the **Agency Name**.

3

Once the **Agency Detail** page loads, click the **Agency Report** tab. Select the desired report to view or run. Some reports may require additional steps to obtain results, such as the **Current Status** report.

A. Many reports are located within the **Other Agency Reports** area as shown in the screenshot to the right.

All users can access standard Agency reports for their Agency.

Agencies/Committees View

Current Fiscal Year Active Agencies

Agency Name ↑	Agency Abbreviation	Committees Count	Fiscal Year	FACANewCount	FACATerminatedCount	FACAMergedCount	FACAActiveCount
Environmental Protection Agency	EPA	21	2023	0	0	0	21

Committees Terminated/Merged Committees Agency Detail FACA Historical Agency Roll over Agency Reports

Agency Information

Agency Name
Department of Agriculture

FACA Agency No.
67

Comm Mgmt Officer ACR Date

CMS Review Date

Committees Terminated/Merged Committees Agency Detail FACA Historical Agency Roll over Agency Reports

- Charter Date Report
- Committees in Groups Report
- Subcommittees Report
- Performance Measures (ACR) Totals
- Totals for Committees
- Agency Annual Reports

Other Agency Reports

GSA Agency Department of Agriculture

+ Follow New Committee

Other Agency Reports

- Administratively Inactive Committees
- Agency Decision Maker Information
- Agency History
- Charter Dates All Years
- Charter in Process Committee
- Committee Management Officer Information
- Committee Verify
- Designated Federal Officer Information
- Desk Officer Information
- Discretionary Committee Ceiling Limit
- Group Federal Officer Information
- Organization Committee Report
- Terminated Committees
- Committee System ID Cross Walk



Committees

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Committees

High-Level Establishment

The CMO, in cooperation with the GFO, if relevant, and the DFO help to manage the committee creation and management process for their agency.

The step-by-step process for the establishment of a new committee, along with ongoing maintenance, generally occurs in the following manner:

1. CMO creates a new committee in the system, which automatically generates an Establishment consultation.
 - a. The information added during the online creation process should already exist and be complete enough to address the new committee's general information.
2. The CMO requests the FACA Help Desk to create a user account for the GFOs, and DFOs or assigns existing GFOs or DFOs to the committee or committee group.
 - a. Similarly, should the new committee require a new group, the CMO can request that a group and GFO user(s) account be created by contacting the help desk.
3. Once the new GFO or DFO user(s) are created by the FACA Help Desk, the the GFO and DFO log into the system and complete the appropriate fields and information

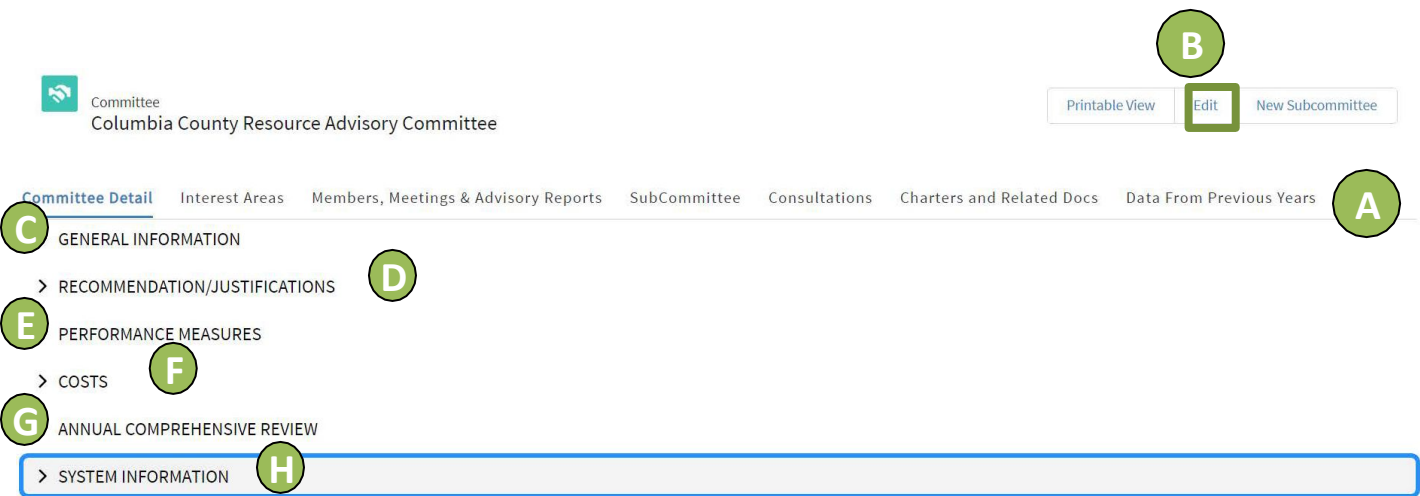
Business rules

When a CMO is establishing a new committee:

1. The Committee Name cannot be identical to any existing/currently active committee within the Agency, and cannot be changed once the record is saved. Contact your GSA Desk Officer or the FACA Help Desk if you need to update a Committee Name.
2. For new or re-established committees, the Committee Status will default to pending. The field will change to Chartered after the charter is filed by the CMO with GSA via the database.

Committee Detail Page Overview

The Committee Detail page shows several components of a committee record: **General Information, Recommendation/Justifications, Performance Measures, Costs, Annual Comprehensive Review (ACR) and System Information.**



- A. **Tabs** – Users can click these tabs to quickly proceed to these sections.
- B. **Edit Button** – All users (except Read-Only) can edit many fields within the General Information, Recommendation/Justifications, Performance Measures, and Costs sections using this button. In- line editing is also available for individual field updates.
- C. **General Information** – This section displays the fields related to the General Information component of a committee.
- D. **Recommendation/Justifications** - This section displays the fields related to the Recommendation/Justifications component of a committee.
- E. **Performance Measures** – This section displays the fields related to the Performance Measures component of a committee.
- F. **Costs** - This section displays the fields related to the Costs component of a committee.
- G. **Annual Comprehensive Review** – This section displays the status of the ACR process, namely if and when each level (DFO, GFO, CMO, and CMS/DO) has verified or reviewed.
- H. **System Information** - This section displays audit information including the date and time of the last committee update.

Committee Detail Page Overview, Continued

The Committee Detail page is made up of several sections. Each item is maintained by using the related tabs.

Committee Detail **Interest Areas** Members, Meetings & Advisory Reports SubCommittee Consultations Charters and Related Docs More

Update Interest Areas

Category	Area
Agriculture	Forestry

Columbia County Resource Advisory Committee

To view all the members, meetings and advisory reports for this committee please click here

Members, Meetings & Advisory Reports (30)

Committee	Committee Name	Head/Chair	Type	Subcommittee	Last Name	First Name	Meeting Start	Report Date	Last Modified
1	Columbia County Resource Advisory Committee	2020	Committee Member	Yes	Henry	Debra			Last Modified
2	Columbia County Resource Advisory Committee	2020	Committee Member	Yes	Henry	Debra			Last Modified

Committee Detail **Interest Areas** Members, Meetings & Advisory Reports SubCommittee Consultations **Committee Reports** More

- Committees Charter Date All Years
- Committee Current Status
- Committee Level Report
- Member Report
- Committee History Report

Committee Detail **Interest Areas** Members, Meetings & Advisory Reports **SubCommittee** Consultations Charters and Related Docs Data From Previous Years Committee History Committee Reports

Subcommittees (0)

Consultations (8)

8 Items • Sorted by Received Date • Updated 5 minutes ago

Consult No	Consult Type	Received D...	CMS Review/...	Charter Date	Committee Managem...	Committee Managem...
1	CN-013395	Renewal	8/19/2019	8/23/2019	10/17/2019	Review and response prov...
2	CN-007528	Renewal	8/1/2018		12/3/2018	Secure Rural Schools RACs...

Committee Detail **Interest Areas** Members, Meetings & Advisory Reports SubCommittee Consultations **Charters and Related Docs** More

Files (6+)

Title	Owner	Last Modified	Size
USDA SRS RAC_Charter as filed ...	Egypt.Collins.6224.FACA	10/26/2021 10:48 AM	206KB

Data from Previous Years (10+)

10+ items • Sorted by Fiscal Year • Updated a few seconds ago

Committee System ID	Committee Name	Fiscal Year
1	COM-038305	Columbia County Resource Advisory Committee
		2020

Committee History (8)

8 items • Sorted by Date • Updated a few seconds ago

Date	Field	User	Original Value	New Value
1	3/3/2022 12:09 PM	Verified By CMO	Cikena.Reid.4519.FACA	<input type="checkbox"/>
				<input checked="" type="checkbox"/>

- A. Interest Areas** – lists the interest areas that the GFO/DFO has assigned to the committee.
- B. Members, Meetings, & Advisory Reports** – Users can view and manage these committee-related entities (e.g. create entries, edit, upload meeting minutes and reports) in this section.
- C. Subcommittees** – Users can view and manage Subcommittees here.
- D. Consultations** – GFO and DFO users can view Consultations in this section.
- E. Charters and Related Docs** – Users can view charters and related documents in this section.
- F. Data from Previous Years** – shows all historical committee detail information from all previous years the committee existed.
- G. Committee History** – provides insight into which user performed what actions on the committee page, and when.
- H. Committee Reports** - contains links to all committee level reports.

Edit Committee Detail (Fields)

Once a committee is created, All users (excluding Read-Only) can edit the Committee Detail (some fields will be restricted). This includes the information contained within the **General Information**, **Recommendation /Justifications**, **Performance Measures**, and **Costs** sections. Other related items, such as Meetings, Members, and Advisory Reports, are managed separately.

1
Click the **Agencies/Committees View** tab and click your agency Name.

2
A. Click the Committee System ID of the committee to be edited.

3
Once on the **Committee Detail** page:

A. Use the **Edit** button to edit multiple fields at once; or use 'in-line' editing to edit fields individually.

4
To enter multiple fields at once:

A. Click the previously mentioned **Edit** button (3A).

B. Update desired fields.
• Committee System ID and Agency Name cannot be edited.

C. Click **Save & New or Save**.
To edit fields individually:

- Hover your cursor over a field to highlight. Double-click to enter **Edit Mode** and enter the field value or information

5
Click **Save & New or Save**.

1 Home Agencies/Committees View Reports

2 Committees Terminated/Merged Committees Agency Detail FACA Historical Agency Roll over Agency Reports

System ID	Committee Number	Committee Name ↑	Committee Status	Agency Name	Fiscal Year
COM-000411	2051	Arizona Resource Advisory Council	Chartered	Department of the Interior	2021

3 Committee Arizona Resource Advisory Council [Printable View] **A** [Edit] [Clone]

4 Committee Detail Interest Areas Members, Meetings & Advisory Reports Subcommittee Consultations Charters and Related Docs Data From Previous Years More

GENERAL INFORMATION

Committee System ID: COM-000411

Agency Name: Department of the Interior

Edit COM-000411

GENERAL INFORMATION

Committee System ID: COM-000411

Agency Name: Department of the Interior

Committee Name: Arizona Resource Advisory Council

Committee Number: 2051

Fiscal Year: 2021

Original Establishment Date: 10/1/1995

Actual Termination Date:

New Committee This FY: No

Terminated This FY: No

Current Charter Date: 3/5/2020

Date of Renewal Charter: 3/5/2022

Projected Termination Date:

Committee URL: <https://www.blm.gov/get-involved/resource-advisory-council>

Presidential Appointments: No

Max Number of Members: 15

Designated Fed Officer Position Title: BLM Arizona State Director

Designated Federal Officer Prefix: Mr.

Designated Federal Officer First Name: Raymond

Designated Federal Officer Middle Name:

5 [Cancel] [Save & New] [Save]

5 Committee URL [i] [↑] [Committee URL] <https://www.blm.gov/get-involved/resource-advisory-council/near-you/arizona> [Cancel] [Save & New] [Save]

4 If the committee posts information on a website, enter the website address here. Example: <https://www.blmdatacenter.gov>

4 Hover over the **i** icon next to fields to view help text.

Committees

View Consultations

1

Click the **Agencies/Committees View** tab and click the agency name.

2

Click the Committee System ID, then click the Consultations tab.

1

Home Agencies/Committees View Reports

2

Committee: Air Ambulance and Patient Billing Advisory Committee

Committee Detail Interest Areas Members, Meetings & Advisory Reports SubCommittee Consultations Charters and Related Docs Data From Previous Years Committee History Committee Reports

Consultations (5)

Consult No.	Consult Type	Received Date	CMS Review/Concur Date	Charter Date	Committee Management Secretariat Comm...	Committee Management Officer Rem...
1	CN-014893	Re-establishment		9/12/2022		
2	CN-014892	Termination				
3	CN-014890	Re-establishment				
4	CN-013156	9/7/2021	9/8/2021	9/12/2021	CMS reviewed the charter with a minor commen...	EDITED DOT is reissuing Air Ambulance a...
5		9/12/2019	7/30/2019	9/12/2019	CMS review occurred on 7/30/19. SB	Charter was filed on 9/12/19

A

B

C

Consultation CN-013768

Consultation Detail Consultation History

Information

Consult Type
Renewal

Received Date
2/26/2020

CMS Review/Concur Date

- A. Click the “View All” button (top right) or link (bottom right).
- B. Use the **Consultation Number (Consult No)** to view.
- C. Once the Consult No is selected, users will be able to view the consultation.

Committees

Add New Members

1

Click the **Agencies/Committees View** tab and click the Agency Name.
 A. Click the name of the Committee System ID.

2

Select the **Members, Meetings, & Advisory Reports** tab at the top.
 A. Click the **New** button.

3

A. Select a record type
 B. Click the **Next** button.

4

Enter in the **Member** information.
 A. When ready, click **Save & New** or **Save**.



IMPORTANT

Fields with a **black *** are required for FACA reporting purposes and the ACR, and to save the record. Fields with a **red *** are required to save the record.

Check the help text icon (i) for each field to confirm what is required.



HINTS & TIPS

See the **Bulk Upload** section on page 52 on how to add multiple **Member** records.

As **Members** are a part of the Committee record, they can be added to the Committee from the **Committee Detail** page.

Use the **i** icon next to fields to view help text

1

Click the **Agencies/Committees View** tab and click the Agency Name.

A. Click the name of the Committee System ID.

2

Select the **Members, Meetings, & Advisory Reports** quick link at the top.

A. To view all the meetings, members and advisory reports for the committee; Click the “here” link or “View All”.

B. To **Edit or Delete** the member record, click the dropdown arrow at the end of entry.

3

When editing a Member record, update the desired fields.

A. When ready, click **Save & New or Save**.



IMPORTANT

Fields with a **black *** are required for FACA reporting purposes and the ACR, and to save the record. Fields with a **red *** are required to save the record.

Check the help text icon (i) for each field to confirm what is required.

As **Members** are a part of the Committee record, they can be viewed and edited from the **Committee Detail** page.

The screenshot shows the 'Agencies/Committees View' page. At the top, there are navigation tabs: Home, Agencies/Committees View (selected), and Reports. Below this is a sub-menu with options: Committees, Terminated/Merged Committees, Agency Detail, FACA Historical Agency, Roll over, and Agency Reports. A table lists committee details:

Committee System ID	Committee Number	Committee Name
COM-000486	76888	Green Building Advisory Committee

Below the table, there are quick links: Committee Detail, Interest Areas, Members, Meetings & Advisory Reports (selected), Subcommittee, Consultations, Charters and Related Docs, Data From Previous Years, Committee History, and Committee Reports. A message says: 'To view all the members, meetings and advisory Reports for this committee please click [here](#)'.

The main table is titled 'Members, Meetings & Advisory Reports (10*)' and is sorted by Committee Detail. It has columns for Committee ID, Committee Name, Fiscal Year, Type, Include in Annual Report, Last Name, First Name, Meeting Start Date, Report Date, and Last Modified By. The table contains 10 rows of member data. A dropdown menu is visible at the end of the first row, with options: Edit, Delete, and View All.

3 Edit CD-159234

The screenshot shows the 'Edit CD-159234' form. It is divided into two columns of fields:

- Information:** Subcommittee Name (Columbia County Resource Advisory Committee), Committee Name (Columbia County Resource Advisory Committee), Type (Committee Member), Fiscal Year (2021), Include in Annual Report (Yes), Prefix, First Name (Debra), Middle Name, Last Name (Seneby), Suffix, Chairperson.
- Appointment Details:** Appointment Start Date (6/21/2017), Appointment End Date (6/21/2021), Appointment Type (Agency), Member Designation (Representative Member), Appointment Term (4 Years), Pay Plan (Travel and Per Diem Only), Pay Source (Executive Branch), Occupation Or Affiliation (Public at Large), Represented Group (Public at Large).

At the bottom, there are buttons for Cancel, Save & New, and Save.

Committees

Add New Meetings

1

Click the **Agencies/Committees View** tab and click the Agency Name.

- A. Click the name of the Committee System ID.

2

Select the **Members, Meetings, & Advisory Reports** tab at the top.

- A. Click the **New** button.

3

- A. Select a record type
- B. Click the **Next** button.

4

Enter in the **Meeting** information.

- A. When ready, click **Save & New** or **Save**.

- **Note:** Files, such as Meeting minutes, can be uploaded once a Meeting is created. Please see the View/Edit Meeting page for instructions.



IMPORTANT

Fields with a **black *** are required for FACA reporting purposes and the ACR, and to save the record. Fields with a **red *** are required to save the record.

Check the help text icon (i) for each field to confirm what is required.



HINTS & TIPS

See the **Bulk Upload** section on page 52 on how to add multiple **Meeting** records.

As **Meetings** are a part of the Committee record, they can be added to the Committee from the **Committee Detail** page.

The screenshot shows the 'Agencies/Committees View' page. A table lists committees, with 'COM-000486 Green Building Advisory Committee' highlighted. The 'Members, Meetings & Advisory Reports' tab is selected, and the 'New' button is clicked. The 'New Committee Details' form is shown with 'Committee Meeting' selected as the record type. The 'Purpose' field is highlighted with a red box, and a red arrow points to it from the 'IMPORTANT' section. The 'Minutes Link' field is also highlighted with a red box, and a red arrow points to it from the 'Use the help text icon' callout. The 'Save & New' button is highlighted with a green box and labeled 'A'.

Use the help text icon (i) to fields to view help text.

Committees

View and Edit Meetings

1

Click the **Agencies/Committees View** tab and click the Agency Name.

A. Click the name of the Committee System ID.

2

Select the **Members, Meetings, & Advisory Reports** tab at the top.

3

A. To view all the meetings, members and advisory reports for the committee; Click the **“here”** link or **“View All”**.

B. To **Edit** or **Delete** the meeting record, click the dropdown arrow at the end of entry.

4

When editing a **Meeting** record, update the desired fields.

A. When ready, click **Save & New** or **Save**.

As **Meetings** are a part of the Committee record, they can be viewed and edited from the **Committee Detail** page. Files, such as meeting minutes can be added once the **Meeting** records are created.

Home **Agencies/Committees View** Reports

Committees Terminated/Merged Committees Agency Detail FACA Historical Agency Roll over Agency Reports

Committee System ID	Committee Number	Committee Name ↑
COM-000486	76888	Green Building Advisory Committee

Committee Detail **Members, Meetings & Advisory Reports** Committee Consultation Meeting Minutes Meeting Docs Data from Previous Years Committee History Committee Reports

To view all the members, meetings and advisory Reports for this committee please click **here**

Members, Meetings & Advisory Reports (10+)

Committee Detail No	Committee Name	Fiscal Year	Type	Include in Annual Re.	Last Name	First Name	Meeting Start Date	Report Date	Last Modified By
1	CD-199284	2021	Committee Member	Yes	Seray	Debra			Lorelei Kowalski
2	CD-199283	2021	Committee Member	Yes	Maddal	Gerold			Lorelei Kowalski
3	CD-199282	2021	Committee Member	Yes	Talbot	Mike			Lorelei Kowalski
4	CD-199281	2021	Committee Member	Yes	Abramson	Gregory			Lorelei Kowalski
5	CD-199280	2021	Committee Member	Yes	McDaniel	Shannon			Lorelei Kowalski
6	CD-199279	2021	Committee Member	Yes	Foltz	John			Lorelei Kowalski
7	CD-199278	2021	Committee Member	Yes	Doegman	Kan			Lorelei Kowalski
8	CD-199277	2021	Committee Member	Yes	Haring				Lorelei Kowalski
9	CD-199276	2021	Committee Member	Yes	Mendel	Glenn			Lorelei Kowalski
10	CD-199275	2021	Committee Member	Yes	Didonan	Jennifer			Lorelei Kowalski

Edit COM-000411

GENERAL INFORMATION

Committee System ID: COM-000411

Committee Name: Arizona Resource Advisory Council

Fiscal Year: 2021

Original Establishment Date: 10/1/1995

Actual Termination Date:

Now Committee This FY: No

Terminated This FY: No

Current Charter Date: 3/5/2020

Date of Renewal Charter: 3/5/2022

Projected Termination Date:

Agency Name: **Department of the Interior**

Committee Number: 2091

Committee URL: https://www.blm.gov/get-involved/resource-advisory-council

Presidential Appointments: No

Max Number of Members: 15

Designated Fed Officer Position Title: BLM Arizona State Director

Designated Federal Officer Prefix: Mr.

Designated Federal Officer First Name: Raymond

Designated Federal Officer Middle Name:

Buttons: Cancel Save & New Search

IMPORTANT

Fields with a **black *** are required for FACA reporting purposes and the ACR, and to save the record. Fields with a **red *** are required to save the record.

Check the help text icon (i) for each field to confirm what is required.

Committees

Upload Files to Meetings

1

To upload files related to the **Meeting**, locate the **Files** area on the Meeting record page. Click the **Add Files** button.

2

Click the **Upload Files** button.

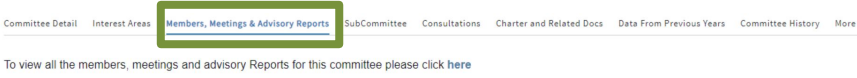
3

Use the file picker to choose the file to upload.
A. When ready, click **Open**.

4

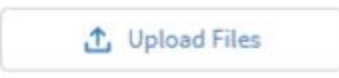
Once the file upload is complete, click the **Done** button.
A. The screen will refresh and the file will appear within the Files section.
B. Files can be downloaded or deleted using the file **Title** link.

1

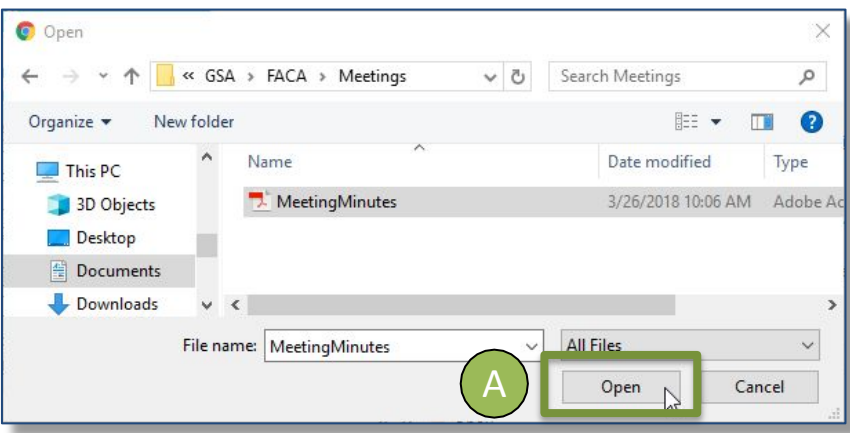


To view all the members, meetings and advisory Reports for this committee please click [here](#)

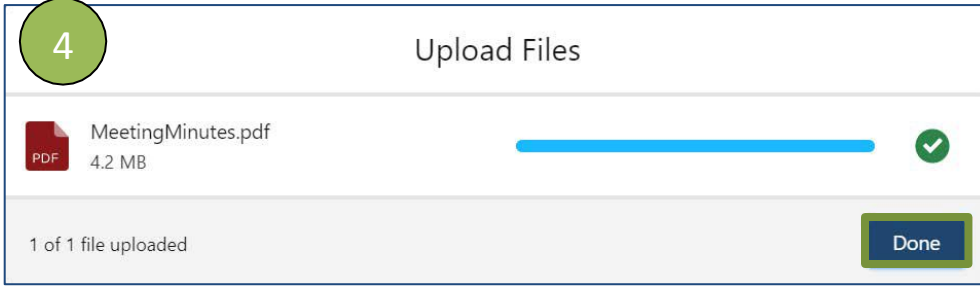
2



3



4

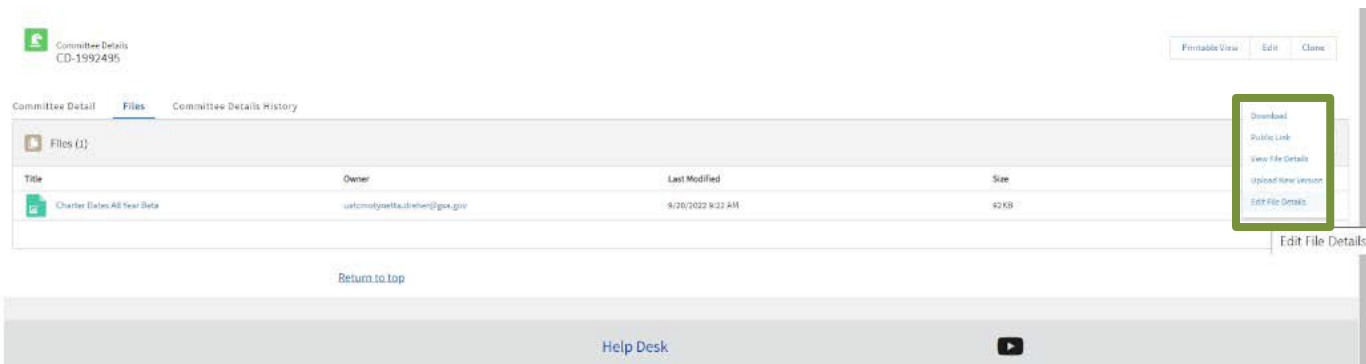


A

B



The down arrow on the right of the page will reveal several options relating to the file that has been uploaded. These options are available on Files that are found in Committees and Subcommittees.



- **Download** allows the user to download a copy of the file to their device.
- **Public Link** allows the user to create a public link for the file. Please note, that the system automatically creates public links for the file to display on the public site and that users do not need to take any action to create a public link.
- **View File Details** allows users to view the file record which includes information such as file size, extension, owner, a file preview, file details, shared with which shows who or what the file is shared with, followers, and file versions. Additionally all of the actions available in the list view from the down arrow button are available here, one the file detail page.
- **Upload New Version** allows users to upload a new version of the file. Please note, users should NOT use this feature. To protect the integrity of historical documents a new file should be uploaded instead of a new version.
- **Edit File Details** allows the user to update the file name and add a description of the file.
- **Delete** allows the user who uploaded the file to delete it from the system. If a mistake is made it is recommended that users delete the file and upload a new file. Additionally historical versions of files, charters and related docs MUST NOT be deleted.

Business Rules:

- The **Bulk Upload** tab holds instructions on how to go through the Bulk Upload process, including many of these business rules.
- **Members** and **Meetings** are the only two record types that can be added through the Bulk Upload process.
- Only new **Member** and **Meeting** records can be added through the Bulk Upload process. **Existing records cannot be updated through this process; file duplication will occur if attempted.**
- In order for a successful upload, users **MUST** use the templates provided on the **Bulk Upload** page.
- The system will not check the Excel® file for accuracies, however, it will check the file for errors (i.e. blank required fields.)
- All fields which are required in the system also are required to be populated in the Excel file and are noted by red text.
- The upload is an ‘all or nothing’ process, meaning that if the file has 1 error, then all of the records will fail and nothing will upload. The user has to fix that 1 record in the original file and then re-upload the file.
- If the upload is successful or unsuccessful, the system will send a notification via email to the user who completed/attempted the upload.
- If unsuccessful the email sent will contain a link to the **Bulk Upload** page where the user can download an error file to help rectify issues.
- **The error file (.csv) provided by the system cannot be used as the data file to update and fix errors. The user needs to update the original Excel file and re-upload.**



HINTS & TIPS

- (1) If you have more than 25 meetings or members records, we recommend the bulk upload feature when inputting your data.
- (2) The Committee System ID is a separate number from that of the Committee Number and can be found at the top of the committee or subcommittee page with the letters COM followed by a numerical sequence.

Bulk Upload Meeting & Member Records

All users (except read only) can use **Bulk Upload** feature to add **Meeting** and **Member** records. **This feature is meant to add records only and not update existing records.**

1 Click on the **Bulk Upload** tab.

2 Read & Follow the **Importing Data** Instructions.

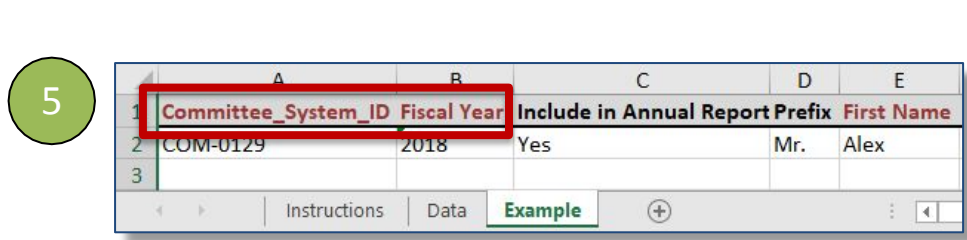
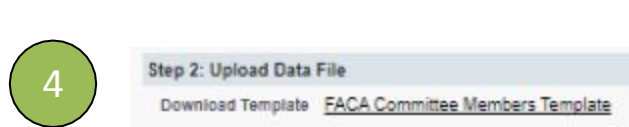
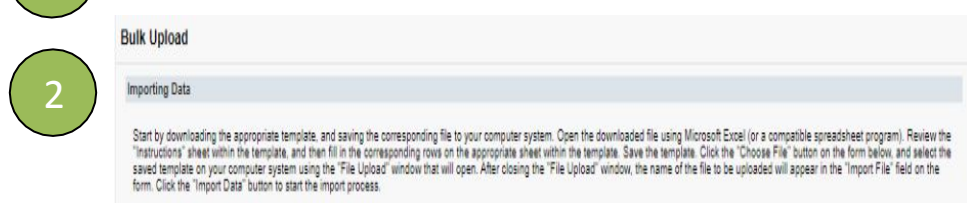
3 Select the **Template Type** based on what you will upload. Meeting and Member data cannot be combined.

4 Download the template by clicking the **Template Name**.

5 Complete the spreadsheet, ensuring that all required fields are provided, and save the file to your computer.

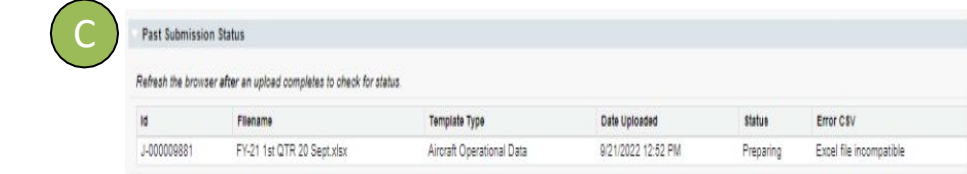
6

- Use the **Choose File** button to select the completed file.
- Once the file name appears next to Choose File, click the **Import Data** button.
- The system will send an email to the user once the upload is complete. If unsuccessful, an error file will be provided, which can be downloaded to assist with rectifying errors. Be sure to correct issues in the original file and re-upload.



IMPORTANT

Fields which include a red header are required by the system and need to be included for a successful upload. Also, do not rearrange the order of the columns or the order of the worksheets (tabs at the bottom.)



Add New Advisory Reports

1

Click the **Agencies/Committees View** tab and click the Agency Name.

A. Click the name of the Committee System ID.

2

Select the **Members, Meetings, & Advisory Reports** tab at the top.

A. Click the **New** button.

3

A. Select a record type
B. Click the **Next** button.

4

Enter in the **Advisory Report** information. Note the Title field has a character limit of 255.

A. When ready, click **Save & New** or **Save**.

- **Note: Advisory report files can be uploaded after an Advisory Report is created. Please see the View/Edit Meeting page for instructions.**



Business Process

Advisory Reports cannot be added to committees which have a **Committee Status of Administratively Inactive or Pending**. A FACA Help Desk ticket is required to add an Advisory Report to a terminated committee in a previous fiscal year.

1



1a

Committee System ID	Committee Number	Committee Name ↑
COM-0004B6	76888	Green Building Advisory Committee



2

To view all the members, meetings and advisory Reports, please click here

Members, Meetings & Advisory Reports (10+)

10+ items - Sorted by Committee Detail last updated a minute ago

Committee Detail No ↓	Committee Name	Fiscal Year	Type	Include in Annual Rpt.	Last Name	First Name	Meeting Start Date	Report Date	Last Modified By
1	CD 23224	Columbia County Resource Advisory Committee	2021	Committee Member	Yes	Sorey	Debra		Loicé Rowland

A

New Committee Details

3

Select a record type

- Committee Advisory Report
- Committee Meeting
- Committee Member

B



New Committee Details: Committee Advisory Report

Information

Fiscal Year 2023

* Report Date

* Report Title

Include in Annual Report Yes

Report Link

4

System Information

* Committee COM-000549

Committee Detail No

Use the **icon** next to fields to view help text.



IMPORTANT

Fields with a **black *** are required for FACA reporting purposes and the ACR, and to save the record. Fields with a **red *** are required to save the record.

Check the help text icon (i) for each field to confirm what is required.

A

View and Edit Advisory Reports

As **Advisory Reports** are a part of the Committee record, summary information can be viewed and edited from the **Committee Detail** page.

1

Click the **Agencies/Committees View** tab and click the Agency Name.

A. Click the name of the Committee System ID.

2

Select the **Members, Meetings, & Advisory Reports** tab at the top.

A. To view all the meetings, members and advisory reports for the committee; Click the **“here”** link or **“View All”**.

B. Use the **Edit** button to update the **Advisory Reports** record, or the related **Committee Detail No** link to view.

3

When editing a record, update the desired fields.

A. When ready, click **Save & New** or **Save**.



IMPORTANT

Fields with a **black *** are required for FACA reporting purposes and the ACR, and to save the record. Fields with a **red *** are required to save the record.

Check the help text icon (**?**) for each field to confirm what is required.

The screenshot shows the 'Agencies/Committees View' page. A box labeled '1' highlights the 'Home Agencies/Committees View Reports' navigation bar. Below it, a table lists committee details. A box labeled 'A' highlights the 'COM-000466' Committee System ID. The 'Members, Meetings & Advisory Reports' tab is selected, and a box labeled '2' highlights the 'here' link. A table of reports is shown, with a box labeled 'A' highlighting the 'here' link in the first row and a box labeled 'B' highlighting the 'Edit' button in the last row. Below the table is an 'Information' section with fields for 'Fiscal Year' (2023), 'Report Date', 'Report Title', 'Include in Annual Report' (Yes), and 'Report Link'. A box labeled '3' highlights the 'Fiscal Year' field. The 'System Information' section shows the 'Committee' field with the value 'COM-000849' highlighted in a red box. At the bottom right, a box labeled 'A' highlights the 'Save & New' and 'Save' buttons.

Upload Advisory Report Files

1

To upload files related to the **Advisory Report** record, locate the **Files** area on the Advisory Report record page. Click the **Add Files** button.

2

Click the **Upload Files** button.

3

Use the file picker to choose the file to upload.

A. When ready, click **Open**.

4

Once the file upload is complete, click the **Done** button.

A. The screen will refresh and the file will appear within the Files section.

B. Files can be downloaded or deleted using the file **Title** link.

Committee Detail Interest Areas **Members, Meetings & Advisory Report** SubCommittee Consultations Charter and Related Docs Data From Previous Years Committee History More

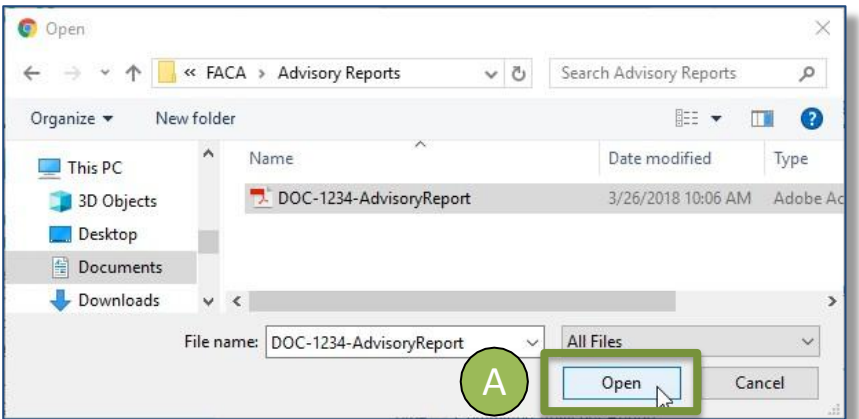
To view all the members, meetings and advisory Reports for this committee please click here

Members, Meetings & Advisory Reports (10+)

10+ items • Sorted by Committee Detail No • Updated a few seconds ago

Committee...	Committee Name	Fiscal Year	Type	Include In An...	Last Name	First Name	Meeting Start...	Report Date	Last Modified By
1	CD-2055912	Assembly of the Admin...	2023	Committee Memb...	Yes	Vice	Daniel		tynetta.dreher@QJEF
2	CD-2055902	Assembly of the Admin...	2023	Committee Memb...	Yes	Todd	Kate		tynetta.dreher@QJEF

Upload Files



Upload Files

4

DOC-1234-AdvisoryReport.pdf 4.2 MB

1 of 1 file uploaded

Done

A

Committee Detail Interest Areas Members,Meetings & Advis... SubCommittees Consultations **Files** More

Files (2) Add Files

DOC-1234-AdvisoryReport Nov 14, 2022 • 4.2MB • pdf

B



The title of the file that will display in the Title column is the actual filename (without the extension). Be sure to save files with a descriptive name before uploading advisory reports.

View Charter and Related Documents

1

Navigate to the **Charters and Related Docs** tab on the **Committee Page**.

2

Click the **Title** of the File you wish to view.



The title of the file that will display in the Title column is the **actual filename (without the extension)**. Be sure to save files with a name that meets CMS naming conventions before uploading a file.

Charter files may be viewed by GFOs and DFOs but neither can upload charter files. Only the CMO may upload charter documents.

1

Committee Detail Interest Areas Members, Meetings & Advisory Reports SubCommittee Consultations **Charters and Related Docs** Data From Previous Years Committee History Committee Reports

Files (0)				Add Files
Title	Owner	Last Modified	Size	
USA SRS RAC_Charter as Filed 10.15.21	Egypt Collins.8024.FRCA	10/28/2021 10:48 AM	206KB	
SRS RAC_Membership Balance Plan_FY2021 Final File 10.15.21	Egypt Collins.8024.FRCA	10/28/2021 10:48 AM	112KB	

2

Committee Detail Interest Areas Members, Meetings & Advis... SubCommittees Consultations **Files** More ▾

Files (2)		Add Files
ACUS CHARTER	Nov 14, 2022 • 2.3MB • docx	

Committees

Update Interest Areas

Once a committee is created all users (excluding Read-Only) can update the committee **Interest Areas**. Adding Interest Areas helps public users search for committees based on these criteria.

- 1 Click the **Agencies/Committees View** tab and click the Agency Name.
 - A. Click the name of the Committee System ID.

- 2 Select the **Interest Areas** tab and click on the **Update Interest Areas** button.

- 3 Scroll through the list of Categories and select all Areas that apply.

- 4 Scroll back to the top, or the bottom of the list and click **Save**.
 - A. Once saved, the **Interest Areas** section is updated and reflects the selection.

The screenshot shows the 'Agencies/Committees View' page. A table lists committees, with the 'Green Building Advisory Committee' (COM-000486) selected. The 'Interest Areas' tab is active, showing a list of categories and a list of areas to be selected. The 'Forestry' area is selected under the 'Agriculture' category. A 'Save' button is highlighted at the bottom.

Committee System ID	Committee Number	Committee Name ↑
COM-000486	76888	Green Building Advisory Committee

Interest Areas

Category	Area
Agriculture	<input type="checkbox"/> Plant Biology <input type="checkbox"/> Rural Development <input checked="" type="checkbox"/> Forestry <input type="checkbox"/> Agriculture
Animals	<input type="checkbox"/> Animal Sciences and Husbandry <input type="checkbox"/> Fish and Wildlife <input type="checkbox"/> Veterinary Medicine
Land	<input type="checkbox"/> Land Management and Use <input type="checkbox"/> Conservation and Preservation

Save Cancel

Verify Committee for ACR

As part of the ACR, committee information is reviewed and verified at each level (DFO, GFO, CMO), with a final review by CMS. The verification/review is documented on the Committee Detail page, using checkboxes under the ACR section, and will be timestamped. Higher levels can override lower level reviews. Once checked, the record is locked to anyone below that review level.

1

Click the **Agencies/Committees View** tab and click the Agency Name.

- A. Click the name of the Committee System ID.

2

- A. Go to the **Annual Comprehensive Review** section.
- B. Double click on the appropriate level section pencil to make the checkbox editable.
- C. Click the check box for your role after data is reviewed and approved.
- D. Click Save.

3

After reloading the page the timestamp will show next to the **Review At** section.

The screenshot shows the 'Agencies/Committees View' page. At the top, there are navigation tabs: 'Home', 'Agencies/Committees View', and 'Reports'. Below this is a table with columns for 'System ID', 'Committee Number', and 'Committee Name'. The first row shows '000486', '76888', and 'Green Building Advisory Committee'. Below the table, there are navigation links: 'Home', 'Agencies/Committees View', 'Reports', 'User/Group Assignment', 'Score300', 'Messages', 'Bulk Upload', 'FACA User Search', and 'More v'. The main content area shows the 'Committee Detail' for the 'Arizona Resource Advisory Council'. On the right side, there are buttons for 'Printable View', 'Edit', and 'Clone'. Below the committee name, there are several sections: 'GENERAL INFORMATION', 'RECOMMENDATION/JUSTIFICATIONS', 'PERFORMANCE MEASURES', 'COSTS', 'ANNUAL COMPREHENSIVE REVIEW', and 'SYSTEM INFORMATION'. The 'ANNUAL COMPREHENSIVE REVIEW' section is expanded, showing a list of review levels: 'CMS Reviewed', 'Verified By CMO', 'Verified By GFO', and 'Verified By DFO'. Each level has a checkbox and a pencil icon. The 'CMS Reviewed' checkbox is checked. To the right of this section, there is a 'Review At' section with timestamps: 'CMS Review At 3/3/2022 2:28 PM', 'Verify CMO At 3/3/2022 12:09 PM', 'Verify GFO At 12/13/2021 11:05 AM', and 'Verify DFO At 10/29/2021 3:55 PM'. Below this, there is a 'SYSTEM INFORMATION' section with fields for 'Created By' (ADFick, 1/17/2013 1:42 PM), 'Owner' (ADFick), and 'Parent Committee'. At the bottom right, there are 'Cancel' and 'Save' buttons.

Locate Committee Reports

1

Click the **Agencies/Committees View** tab and click the Agency Name.

- A. Click the name of the Committee System ID.

2

In the Agency/Committee view, locate the committee for which you want to view a report(s) and click the **Committee Reports** tab.

Once the **Committee Reports** page loads, click the report you wish to view.

- A. A new page will open either in salesforce or PDF. Some of these reports are downloadable.

1



A

Committee System ID	Committee Number	Committee Name ↑
COM-000486	76888	Green Building Advisory Committee

2



- Committees Charter Date All Years
- Committee Current Status
- **Committee Level Report**
- Member Report
- Committee History Report

A

2021 Current Fiscal Year Report: Columbia County Resource Advisory Committee

Report Run Date: 10/12/2022 02:25:49 PM

1. Department or Agency Department of Agriculture	2. Fiscal Year 2021
3. Committee or Subcommittee Columbia County Resource Advisory Committee	3b. GSA Committee No. 13833
4. Is this New During Fiscal Year? No	5. Current Charter 10/17/2019
6. Expected Renewal Date 10/17/2021	7. Expected Term Date
8a. Was Terminated During Fiscal Year?	8b. Specific Termination Authority
	8c. Actual Term Date

View/Add/Edit Subcommittees

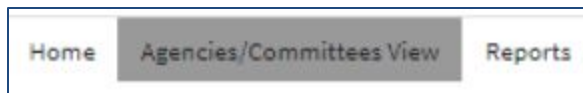
Once a new subcommittee is created all users (except RO users) can edit detail (fields), add members, meetings, and costs.

1

Click the **Agencies/Committees View** tab and click the Agency Name.

- A. Click the name of the Committee System ID.

1



Committee System ID	Committee Number	Committee Name ↑	Committee Status	Agency Name	Fiscal Year
COM-000411	2051	Arizona Resource Advisory Council	Chartered	Department of the Interior	2021

2

Once on the **Committee Detail** page:

- A. Select the SubCommittee tab
- B. To view the SubCommittee, select the record
- C. To edit/delete the SubCommittee, click the Edit or Delete button

2

A

SubCommittee

3

Fill in the required information and click Save.

3

Edit CD-159234

Information

Subcommittee Name: [Empty]

Committee Name: Columbia County Resource Advisory Committee

Type: Committee Member

Fiscal Year: 2021

* Include In Annual Report: Yes

Prefix: [Empty]

* First Name: Debra

Middle Name: [Empty]

* Last Name: Seney

Suffix: [Empty]

* Chairperson: [Empty]

* Appointment Start Date: 6/21/2017

Appointment End Date: 6/21/2021

* Appointment Type: Agency

* Member Designation: Representative Member

* Appointment Term: 4 Years

* Pay Plan: Travel and Per Diem Only

* Pay Source: Executive Branch

* Occupation Or Affiliation: Public at Large

Represented Group: Public at Large

Buttons: Cancel, Save & New, Save

4

After saving the page will refresh to show the updated **Subcommittee**.

Hover over the **i** icon next to fields to view help text.

View Committee Data from Previous Years

When an Agency has active committees and is rolled over, records from previous fiscal years can be found in the committee details, under the Data From Previous Years tab.

1

Click the **Agencies/Committees View** tab and click the Agency Name.

A. Click the name of the Committee System ID.

2

Once the **Agency Detail** page loads, Select the **Data from Previous Years** tab.

A. Click on the the Committee System ID link to view previous years information.

3

This brings up the committee details page of historical information for that specific fiscal year.



Committee System ID	Committee Number	Committee Name ↑	Committee Status	Agency Name	Fiscal Year
COM-000411	2051	Arizona Resource Advisory Council	Chartered	Department of the Interior	2021

President's Committee on the International Labor Organization

Interest Areas Members, Meetings & Advisory Reports SubCommittee Consultations Charters and Related Documents Data From Previous Years Committee History Committee Reports

Data From Previous Years (10+)

Committee System ID	Committee Name	Fiscal Year
1 COM-038951	President's Committee on the International Labor Organization	2020
2 COM-038953	President's Committee on the International Labor Organization	2019
3 COM-032703	President's Committee on the International Labor Organization	2018
4 COM-001551	President's Committee on the International Labor Organization	2017
5 COM-000868	President's Committee on the International Labor Organization	2016
6 COM-000720	President's Committee on the International Labor Organization	2015
7 COM-000835	President's Committee on the International Labor Organization	2014
8 COM-000814	President's Committee on the International Labor Organization	2013
9 COM-000870	President's Committee on the International Labor Organization	2012
10 COM-007030	President's Committee on the International Labor Organization	2011

President's Committee on the International Labor Organization

Information

Committee System ID COM-038951	Agency Name Department of Labor
Committee Name President's Committee on the International Labor Organization	Committee Number 849
Fiscal Year 2020	Committee Status Chartered
Original Establishment Date 8/27/1984	Committee URL
Actual Termination Date	President's Appointments Yes
New Committee This Year No	Max Number of Members 7
Terminated This FY No	Designated Fed Officer Position Title Acting Deputy Undersecretary for International Affairs
Current Charter Date 1/22/2020	Designated Federal Officer Title Mark
Date of Renewal Charter 1/22/2022	Designated Federal Officer Middle Name A.
Projected Termination Date 9/30/2021	Designated Federal Officer Last Name Methausser
Search From Previous No	



Business Process

This record will only be found when an agency is rolled over and has active committees. An agency with no active committees when rolled over will be found in the main Agency/Committee view under **Agencies Without Active Committees**.

Content	Page
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Salesforce Reporting	65
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This tab allows access to agency reports such as Current Status, ACR totals, and Subcommittee reports.

1

Click the **Agencies/Committees View** tab and click the Agency Name.

2

After clicking the **Agency Reports** tab it will take you to this page. Click on the report section to open each section.

3

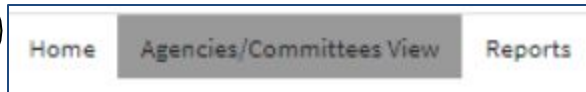
After clicking the button of the available reports for that section will show up. Some reports are downloadable in CSV and/or PDF formats. (This screen shot shows the Charter Date Report).



HINTS & TIPS

All users can access standard Agency reports for their Agency, and their level of access will depend on their user role (i.e., DFOs will see the data for the committees they are assigned to).

1



Committees Terminated/Merged Committees Agency Detail FACA Historical Agency Roll over Agency Reports

[Download as CSV](#)

Committee System ID	Committee Number	Committee Name ↑	Committee Status	Agency Name	Fiscal Year
COM-000411	2051	Arizona Resource Advisory Council	Chartered	Department of the Interior	2021

GSA Agency Administrative Conference of the United States

[+ Follow](#)
[Delete](#)
[Edit](#)
[New Opportunity](#)

Committees Terminated/Merged Committees Agency Detail FACA Historical Agency Roll over **Agency Reports**

3

- [Charter Date Report](#)
- Committees in Groups Report
- Subcommittees Report
- Current Status
- Performance Measures (ACR) Totals
- Totals for Committees
- Agency Annual Reports
- Other Agency Reports

2

GSA Agency Administrative Conference of the United States

[+ Follow](#)
[Delete](#)
[Edit](#)
[New Opportunity](#)

Charter Dates Report

3

[Download as CSV](#)

Current Charter Date ↑	Committee Number	Committee Name
08/30/2022	84686	New Test Committee 8.30.2022

The Agency Report Tab contains:

- The Charter Dates Report where users can view the Charter dates for all the committees for that agency.
- Committees in Groups Report, which will tell you which committees are assigned to what groups for the agency
- Subcommittee Report which tells you what subcommittees exist under which committee in the agency
- Current status report will provide you a top level view of what is going on in your Agency's committees, regarding Annual Reporting Activity during the ACR, upcoming events in the next 6 months to include scheduled meetings committee renewals or terminations, and member appointment expirations, as well as any possible problems with the uploaded data for your Agency's committees.
- Performance Measures (ACR) totals will allow you to select the fiscal year you're looking for to see the cumulative performance measure totals for the agency.
- Totals for Committees show the agency metrics that feed into the government-wide totals report and are a summation of committee data for the agency.
- Agency Annual Report is a compilation of all the committee level reports for an agency. Due to its size it is generated and delivered to you by email
- Other Agency Reports contain reports that users may find helpful in managing their agency FACA program. Note the Committee System ID CrossWalk shows you all the Committee System ID's, which will be helpful during Bulk uploads.

1

Click the **Agencies/Committees View** tab.
 A. Click the Agency Name
 B. Click the name of the Committee System ID.

2

Click the **Committee Reports** tab. This will bring up available reports by committee.

3

Click on the report name and that report will open in a new tab as a PDF.

4

This shows a PDF opened in a new tab. To navigate back to the previous page go to your tabs on your internet browser.



HINTS & TIPS

When a committee is CMS reviewed during the ACR, the Committee Report, in PDF form, is saved as part of the CMS permanent record for the ACR.

This tab allows access to available committee reports.

1

A

B

2

3

4

2021 Current Fiscal Year Report: Columbia County Resource Advisory Committee
 Report Run Date: 10/12/2022 02:25:49 PM

1. Department or Agency Department of Agriculture	2. Fiscal Year 2021
3. Committee or Subcommittee Columbia County Resource Advisory Committee	3b. GSA Committee No. 13833
4. Is this New During Current Fiscal Year? No	5. Current Charter 10/17/2019
6. Expected Renewal Date 10/17/2021	7. Expected Term Date
8a. Was Terminated During Fiscal Year?	8b. Specific Termination Authority
	8c. Actual Term Date

All users can access Committee Reports and the data they see are again based on their user role. These reports are accessed in a committee record on the committee reports tab. Committee reports contain reports similar to the Agency reports, including:

- Committee Charter Dates for All Years
- Committee Current Status report which will inform you of any Upcoming Events in the next 6 months or possible problems with the submitted data.
- Committee Level Report which will generate in a different tab to give you a summary of that Committees data.
- Member Report will display all members of the committees and subcommittees a user has access to based on their role.
- Committee history report, which will show you the Committee over the fiscal years, where you can select to review individually

Standard reports are located in the Agencies/Committees Tab view and should be accessed through those links. This is an explanation of the Reports function in Salesforce and should only be run when the agency and committee links do not meet your needs.

1

From the **Home Page**, go to the **Reports** Tab.

1



2

On the left sidebar, there is a list of **Report Folders**. Click on a **Folder** to access **Reports**:

2

REPORTS	Name	Created By	Created On	Last Modified By	Last Modified Date
Recent	Address Validation Reports	aravindreddy.meet@GSA	7/8/2022, 9:59 PM	aravindreddy.meet@GSA	7/8/2022, 9:59 PM
Private Reports	Charters Reports	hamedulrah.mohammed	4/18/2016, 2:45 PM	hamedulrah.mohammed	4/18/2016, 2:45 PM
All Reports	Charters Reports	igurn	1/26/2017, 6:59 PM	igurn	1/26/2017, 6:59 PM
FOLDERS	Communities Reports	igurn	1/26/2017, 6:59 PM	igurn	1/26/2017, 6:59 PM
All Folders	Community Management Home Reports	igurn	1/26/2017, 6:59 PM	igurn	1/26/2017, 6:59 PM
Created by Me	Digital Government (Section 556)	lauren.smith	6/20/2018, 11:59 AM	lauren.smith	6/20/2018, 11:59 AM
Shared with Me	HRIS Reports	nikhilteah.kasala	6/21/2017, 1:54 PM	nikhilteah.kasala	6/21/2017, 1:54 PM
FAVORITES	HRIS Reports	nikhilteah.kasala	6/21/2017, 1:54 PM	nikhilteah.kasala	6/21/2017, 1:54 PM
All Favorites	HRIS Reports	automatedprocess	10/9/2021, 1:29 AM	automatedprocess	10/9/2021, 1:29 AM

3

REPORTS	Name	Description	Folder	Created By	Created On	Subscribed
Recent	A - # Comments Per Post	The average number of comments per post.	Communities Reports	igurn	1/26/2017, 6:59 PM	
Private Reports	A - Contributions By Member Type LAD	Trending reports posts and comments in the last 90 days in groups and user profiles sorted by member type.	Communities Reports	igurn	1/26/2017, 6:59 PM	
All Reports	A - # Contributions LAD	Trending reports posts and comments in the last 90 days in groups and user profiles.	Communities Reports	igurn	1/26/2017, 6:59 PM	
FOLDERS	A - # Comments LAD	Total number of comments in groups and user profiles in the last 90 days.	Communities Reports	igurn	1/26/2017, 6:59 PM	
All Folders	A - # Comments Per Post LAD	The average number of comments per post.	Communities Reports	igurn	1/26/2017, 6:59 PM	
Created by Me	A - # Members Contributing LAD	Members who have contributed to Chatter in the last 90 days.	Communities Reports	igurn	1/26/2017, 6:59 PM	
Shared with Me	A - # Members Who Never Contributed	Members who have never contributed to Chatter.	Communities Reports	igurn	1/26/2017, 6:59 PM	
FAVORITES	A - # Members Who Never Contributed	Members who have never contributed to Chatter.	Communities Reports	igurn	1/26/2017, 6:59 PM	
All Favorites	A - # Members Who Never Contributed	Members who have never contributed to Chatter.	Communities Reports	igurn	1/26/2017, 6:59 PM	

3

Click on the desired **Report Name** to access the **Report Details**.



IMPORTANT

Results will show below the report filter options and the orange line, continue to scroll for full results.

Committee Name	Agency Name	Committee System ID	Current Charter Date	Fiscal Year
Bridger-Teton Resource Advisory Committee (12)	Department of Agriculture	COM-036040	12/9/2018	2019
	Department of Agriculture	COM-033375	6/21/2016	2018
	Department of Agriculture	COM-002487	6/21/2016	2016
	Department of Agriculture	COM-007530	10/23/2009	2011
	Department of Agriculture	COM-006061	6/11/2012	2013
	Department of Agriculture	COM-038272	10/17/2019	2020
	Department of Agriculture	COM-000859	10/17/2019	2021
	Department of Agriculture	COM-001843	6/21/2016	2017
	Department of Agriculture	COM-003334	6/10/2014	2015
	Department of Agriculture	COM-008874	10/23/2009	2010
	Department of Agriculture	COM-004573	6/10/2014	2014
	Department of Agriculture	COM-005420	6/11/2012	2012
Subtotal				
Total (12)				

Customizing Reports

All users will be able to **Edit** already created reports. Users will also be able to **Customize** and **Save As**. Access to reports and the data inside the reports will depend on the permissions of that user.

1

From the **Home Page**, go to the **Reports** Tab.

2

A. Go to the **Report Folder**, and find a **Report** already created. Click on the **Report Name**

3

Some of the areas that can be customized:

- A. **Filters**
- B. **Groups and Columns**
- C. **Fields**
- D. **Click Run Report when complete.**

4

To keep a copy of this report with the selected parameters click **Save As** (shown when you click the **Save** dropdown). This will save a copy to your "My Personal Custom Reports" folder and will only be accessible by you.

The screenshot illustrates the 'Reports' interface. At the top, navigation tabs include 'Home', 'Agencies/Committees View', and 'Reports'. A table lists various reports with columns for Name, Created By, Created On, Last Modified By, and Last Modified Date. A 'Chatter Reports' folder is highlighted. Below the table, customization options are shown: 'Filters' (A), 'Groups and Columns' (B), and a list of available fields (C). At the bottom, the 'Save As' dialog is open, showing the report name 'Copy of CH - Chatter Edits', a unique name, a description 'Number of Chatter edits made in the community.', and the folder 'Communities Reports'. A 'Save' button is highlighted in the 'Save As' dialog.

Creating New Reports

All users also will be able to create their own new reports. Access to the data and fields to create these reports will depend on the permissions of that user.

1

From the **Home Page**, go to the **Reports Tab**

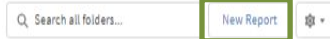
1



2

On the **Reports Home Page**, click **New Report**

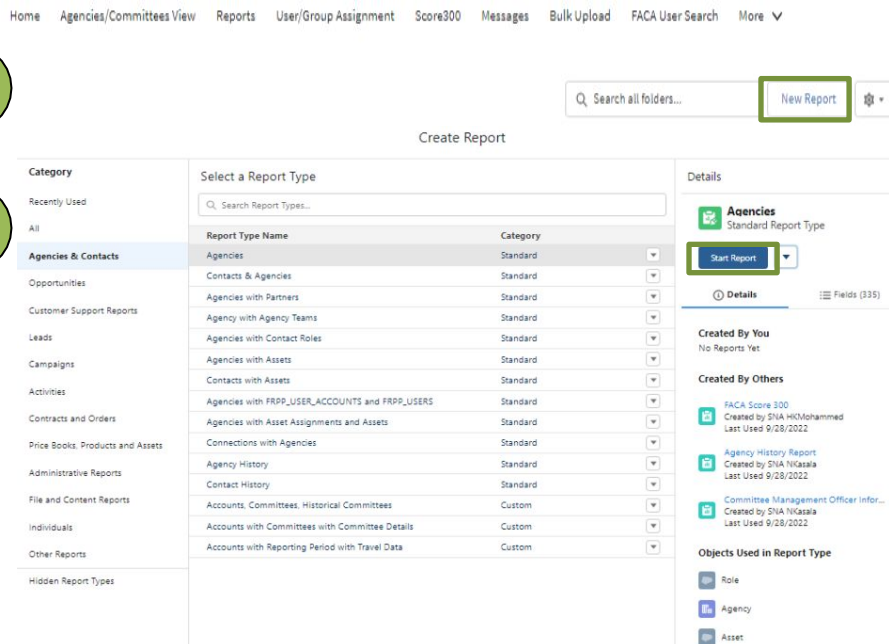
2



3

Choose a **Report Type**
Click **Start Report**.

3



Use the below chart for the 4 main types of reports that can be created

Report Type	Description
Committees with Committee Details	This report can be used to pull Committee Data (general info, recommendations/justification, performance measures, costs, ACR) with Committee Details Data (Meetings, Members, Advisory Report)
Committees with Consultations	This report can be used to pull Committee Data (general info, recommendations, justification, performance measures, costs, ACR) with Consultations Data
Accounts with committees and committee details	This report can be used to pull Agency Details Data with Committee Data (general info, recommendations, justification, performance measures, costs, ACR) and with Committee Details Data (Meetings, Members, Costs)
Accounts	This can be used to pull in only Account Details Data

Creating New Reports Continued

4

On the left hand sidebar, look through the **Fields Pane** which displays fields from the selected **Report Type**, organized by folder:

- A. Double click any **Field** to add it to the report
- B. Create, View, Edit, and Delete custom **Summary Formulas** and **Bucket Fields** (use the search)



HINTS & TIPS

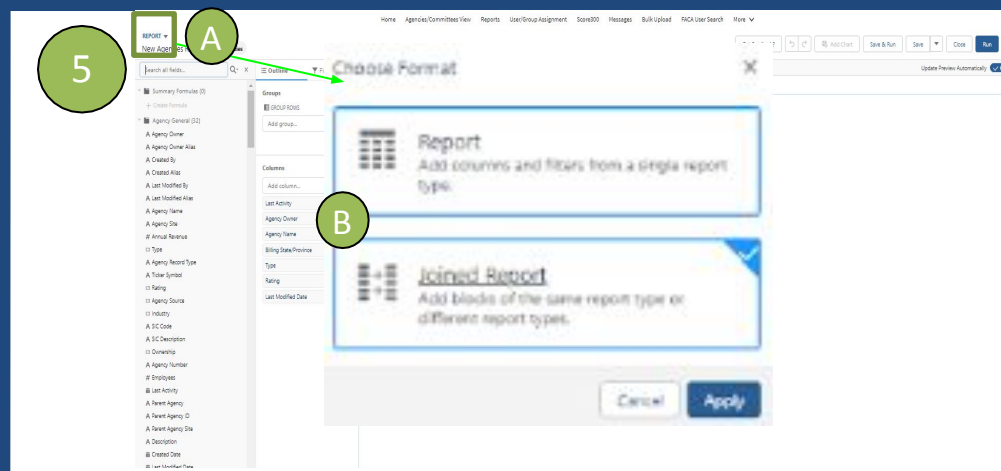
Ordering and Sorting Fields: Reorder report columns by grabbing a column header and dragging it to a new location. Press **CTRL** to select multiple columns. To sort your report by a column, click its column header. You can also click the column menu and choose **Sort Ascending** or **Sort Descending** from the drop-down list. Sort is disabled when **Show | Details** isn't selected.

You can select multiple fields to add, remove, or reorder. Drag an entire folder to add all its fields. To select multiple fields or columns, press **CTRL** (Windows) or **Command** (Mac). When you add multiple fields, they appear in the report in the order selected.

Creating New Reports Continued

5

- To **Format** the data:
- A. Go to the **Report** dropdown section in the upper left corner
 - B. Click the dropdown and select desired report.



Tabular Reports

Tabular reports are the simplest and fastest way to look at data. Similar to a spreadsheet, they consist simply of an ordered set of fields in columns, with each matching record listed in a row. Tabular reports are best for creating lists of records or a list with a single grand total. They can't be used to create groups of data or charts, and can't be used in dashboards unless rows are limited. Examples include contact mailing lists and activity reports.

Summary Reports

Summary reports are similar to tabular reports, but also allow users to group rows of data, view subtotals, and create charts. They can be used as the source report for dashboard components. Use this type for a report to show subtotals based on the value of a particular field or when you want to create a hierarchical list, such as all opportunities for your team, subtotaled by Stage and Owner. Summary reports with no groupings show as tabular reports on the report run page.

Matrix Reports

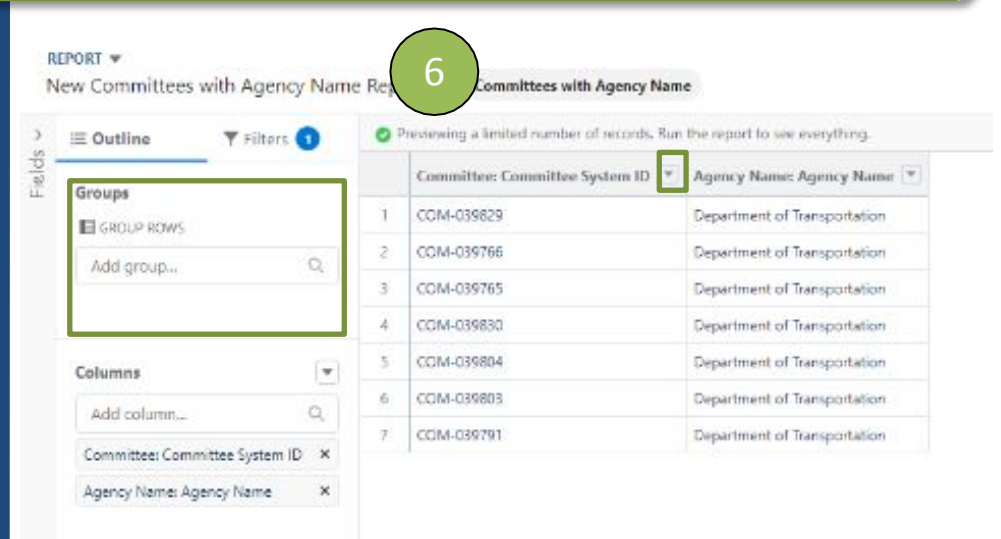
Matrix reports are similar to summary reports but allow you to group and summarize data by both rows and columns. They can be used as the source report for dashboard components. Use this type for comparing related totals, especially if you have large amounts of data to summarize and you need to compare values in several different fields, or you want to look at data by date and by product, person, or geography. Matrix reports without at least one row and one column grouping show as summary reports on the report run page.

Joined Reports

Joined reports let you create multiple report blocks that provide different views of your data. Each block acts like a "sub-report," with its own fields, columns, sorting, and filtering. A joined report can even contain data from different report types.

6

- To **Group** the data, drop a field from the **Fields Pane** into the **Groups** section (Note: You can also begin typing the name of the field you want to group, as well as using the drop-down arrow in the Preview area next to the field you wish to Group.)



Creating New Reports Continued

7

To show different levels of detail, go to the **Preview Pane**.

Record Count

Click **Record Count** to toggle between showing or not showing total number of records

Details

Click **Details** to toggle between showing or hiding records.

Drop Zones

Click on **Drop Zone** to remove or keep where it allows you to drop a field to create a column grouping

Conditional Highlighting

Highlight field values on summary or matrix reports based on ranges and colors you specify. To enable conditional highlighting, your report must contain at least one summary field or custom summary formula.

8

Filters Pane is where filters can be created and edited on the top of the **Report Details** section. You can set the view, time frame, and custom filters to limit the data shown in the

7

Committee Name ↑	Agency Name	Committee: Committee System ID	Current Charter Date	Fiscal Year
Bridger-Teton Resource Advisory Committee (12)	Department of Agriculture	COM-036040	12/3/2018	2019
	Department of Agriculture	COM-033375	6/21/2016	2018
	Department of Agriculture	COM-002497	6/21/2016	2016
	Department of Agriculture	COM-007530	10/23/2009	2011
	Department of Agriculture	COM-006061	6/11/2012	2013
	Department of Agriculture	COM-038272	10/17/2019	2020
	Department of Agriculture	COM-000859	10/17/2019	2021

HINTS & TIPS



The dynamic preview makes it easy for you to customize your report. Add, reorder, and remove columns, summary fields, formulas, groupings, and blocks. Change the report format and display options, or add a chart.

8

The screenshot shows the FACADATABASE.gov website with a report titled 'Report: Committees Charter Dates All Years Report'. The main content area displays 'No Results' with a cactus illustration. A 'Filters' pane on the right shows the current filter settings: 'Show Me: All committees', 'Created Date: All Time', and 'Record Type: Equate Committee, Committee History'.

A

This dialog box allows filtering by 'Created Date'. It includes a 'Date' field, a 'Range' dropdown set to 'All Time', and a 'Customize' link. There are 'Cancel' and 'Apply' buttons at the bottom.

B

This dialog box allows editing a filter. It shows 'Show Me' set to 'All experiences' and 'Created Date' set to 'All Time'. There are 'Cancel' and 'Apply' buttons at the bottom.

C

- A. To filter by a field, click **Add | Field Filter**.
 - a. With tabular, summary, and matrix reports, you can drag a field from the **Fields Pane** to the **Filters Pane** to add a report filter
 - b. Cross filters work like ordinary filters, but they have some special characteristics of their own. To add one, click **Add | Cross Filter**
- B. To see records only applicable to a certain subset (My records, my team's records, all records) select it from the picklist value in **Show**
- C. To limit the **Time Frame**, select the **Date Field** value, the **Range**, and the **Dates**

Creating New Reports Continued

9

At the top of the **Report**, click **Save** to save the report for future use.

9



- A. Fill out the **Report Name**
- B. Enter in a **Report Description**
- C. Select the **Report Folder** to save the report in a designated location for future access.
- D. Click **Save OR Save and Run the Report** (Save will bring you back to the editable report page, while Save and Run the Report will bring you to the viewable report page)

Save Report

Report Name
Copy of CH - # Chatter Edits **A**

Report Unique Name

Report Description
Number of Chatter edits made in the community. **B**

Folder
Communities Reports **C** Select Folder

Cancel Save **D**



IMPORTANT

Best Practice is to save personal new reports in the **“My Personal Custom Report”** folder

10

Navigate back to reports by clicking on the Salesforce logo and clicking Reports Tab. This report will not be in your **“My Personal Custom Reports.”**

10



HINTS & TIPS

Best Practice is to save before leaving the record otherwise the system will not save your information

Reports

All Folders > Communities Reports

Q Search all folders... New Report

REPORTS	Name	Description	Folder	Created By	Created On	Subscribed
Recent	A - # Comments Per Post	The average number of comments per post.	Communities Reports	kgpm	1/28/2017, 8:28 PM	
Created by Me	A - Contributions By Member Type LMO	Trending report on posts and comments in the last 90 days in groups and user profiles, sorted by member type.	Communities Reports	kgpm	1/28/2017, 8:28 PM	
Public Reports	A - Contributions LMO	Trending report on posts and comments in the last 90 days in groups and user profiles.	Communities Reports	kgpm	1/28/2017, 8:28 PM	
All Reports	A - # Comments LMO	Total number of comments in groups and user profiles in the last 90 days.	Communities Reports	kgpm	1/28/2017, 8:28 PM	
FOLDERS	A - # Comments Per Post LMO	The average number of comments per post.	Communities Reports	kgpm	1/28/2017, 8:28 PM	
All Folders	A - # Members Contributing LMO	Members who have contributed to Chatter in the last 90 days.	Communities Reports	kgpm	1/28/2017, 8:28 PM	
Created by Me	A - # Members Who Never Contributed	Members who have never contributed to Chatter.	Communities Reports	kgpm	1/28/2017, 8:28 PM	
Shared with Me	A - # Members Who Never Contributed	Members who have never contributed to Chatter.	Communities Reports	kgpm	1/28/2017, 8:28 PM	
FAVORITES	A - # Members Who Never Contributed	Members who have never contributed to Chatter.	Communities Reports	kgpm	1/28/2017, 8:28 PM	
All Favorites	A - # Members Who Never Contributed	Members who have never contributed to Chatter.	Communities Reports	kgpm	1/28/2017, 8:28 PM	

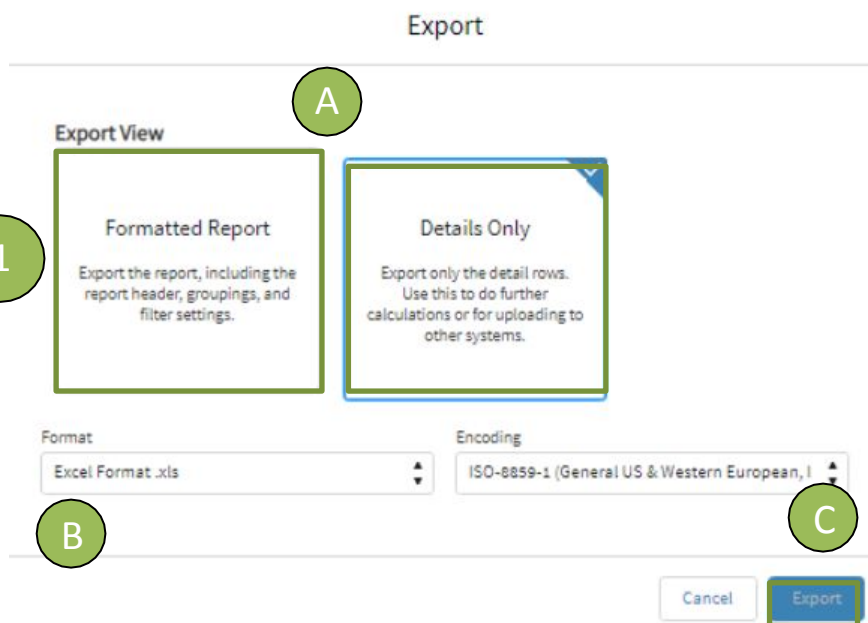


IMPORTANT

You can export up to 256 columns and 65,536 rows of data in one report

There are two ways to export report details, both in excel but with different formatting.

- Formatted Report:** Export the Report, including the report header, groupings, and filter settings.
- Details Only:** Export only the detail rows. Use this to do further calculations or for uploading to other systems.



1

From the **Report Details Page:**

- Click the **Formatted Report OR Details Only View** button
- Set format to **Excel Format .xls** or **Comma delimited .csv**
- Click **Export**
*If prompted by a browser dialog, click **Yes** on the **Alert**

1

A

B

C





Appendix

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Committee Fields Definitions

Below are the **Field Names** and **Descriptions** for all of the fields within the General Information, Recommendation/Justifications, Performance Measures, and Costs sections of the Committee Detail page. These also can be found within the system by hovering your cursor over the **black icon (i)** to the right of each field.

General Information	
Field Name	Description
Committee System ID	System generated number.
Committee Name	This will be the name of committee.
Fiscal Year	This information applies to this Fiscal Year.
Original Establishment Date	This is the date that the committee was originally established, if known and documented.
Actual Termination Date	This is the date on which the committee terminated during the fiscal year being reported, e.g., 04/19/2004, and the field remains and displays as blank until the committee is terminated. This date is displayed as a result of data entered on the Consultation page and cannot be edited on this page. This data is added to the General Information page when the Consultation Form is saved.
Actual Merged Date	Date the committee merged during the FY being reported, e.g., 04/19/2004; the field remains and displays as blank until the committee is merged. This date results from data input on the Consultation Form and cannot be edited here.
New Committee This FY	This item is Yes if the committee was established during the fiscal year being reported, otherwise No, and cannot be edited on this page. This data is displayed as a result of data entered by the agency CMO or Committee Management Secretariat on the Consultation page. This data is added to the General Information page when the committee is established.
Terminated this FY	This item should be Yes if the committee was terminated during the fiscal year being reported, otherwise No. This data is displayed as a result of data entered on the Consultation page by the agency CMO or the Committee Management Secretariat. This data is added to the General Information page when the Consultation Form is saved. This field cannot be edited on this page.
Merged This FY	This item should be Yes if the committee was merged during the fiscal year being reported, otherwise No. This date is entered on the Consultation page by the CMO or CMS and cannot be edited here.
Current Charter Date	This is the date on which the current charter is expected to be renewed and re-filed, e.g., 04/17/2006. This date is normally two years after the Current Charter Date described above. This date is automatically entered by the program as a result of data entered on the Consultation page by the agency CMO or the Committee Management Secretariat when the Consultation Form is saved. This date can be edited on this page if a different renewal date is appropriate, needed, or anticipated
Date Of Renewal Charter	This is the date on which the current charter is expected to be renewed and re-filed, e.g., 04/17/2006. This date is normally two years after the Current Charter Date. The system defaults to a 2-year charter, but the date can be edited where appropriate.
Projected Termination Date	This is the date on which the committee will terminate based upon information in the legislation, Executive order, or charter, or could reasonably be expected to terminate. This date is unnecessary if the committee is not expected to terminate and/or if the Expected Renewal Date is 2 years later than the Current Charter Date.

Committee Fields Definitions, Continued

General Information, Continued	
Field Name	Description
Exempt from Renewal	This item is required. This item is only Yes if so stated in legislation; otherwise No. The DFO or CMO should edit the Date of Renewal Charter field to reflect the earliest expected date of review or renewal.
Specific Termination Authority	This item is required. This is the date that the document in Specific Establishment Authority above, e.g., 11/28/1990 took effect. This is not the date of the current charter.
Establishment Authority	This item is required. There are four kinds of authority used to establish a committee. The authority is displayed based on decisions made when a committee was established.
Specific Establishment Authority	This item is required. This is the agency decision document, the statute, or the Executive order (other than EO 12838), e.g., Executive Order 13017 or 21 U.S.C. 394. This is not a letter from OMB, a consultation with (or concurrence from) GSA, the charter, or a section of FACA.
Effective Date Of Authority	This item is required. This is the date that the document in Specific Establishment Authority above, e.g., 11/28/1990 took effect. This is not the date of the current charter.
Exempt From EO 13875 Discretionary Cmte	EO 13875 limits new agency authority committees if govt-wide total discretionary cmtes exceed 350. For discretionary cmtes, indicate if exempt from the govt-wide cap or a waiver has been granted; otherwise NA. For non-discretionary cmtes, select NA.
Committee Type	This item is required. All committees are either "Ad hoc" or "Continuing." For this system, an Ad hoc committee is one which is not renewed beyond its original biennial charter and generally exists for two years or less. Select either Ad hoc or Continuing.
Presidential	This item is required. This item should be Yes if a Presidential Type committee. If the report includes recommendations to the President, a follow-up report on the actions is due from the agency a year later.
Committee Function	This item is required. Select the function of this committee, which may be a National Policy Issue Advisory Board, Non Scientific Program Advisory Board, Scientific Technical Program Advisory Board, Grant Review Committee, Regulatory Negotiations Committee, Other Committee, or a Special Emphasis Panel. A Special Emphasis Panel generally has a purpose similar to a Grant Review Committee and is not just an advisory committee dealing with a single topic of great concern. This term has limited usage and most SEPs are located in NIH. If a committee must be described by more than one function, select "Other" and add an explanation to Remarks on the Agency Recommendations Page.
Agency Name	Official Agency Name as listed in Government Operations Manual or specified by CMS ADM (e.g., for independent Commissions).
Committee Number	Committee Number - Assigned by FACA Database
Committee Status	The status will display as Pending or Chartered or Terminated or Administratively Inactive or Charter In Process and cannot be edited on this page. This data is displayed as a result of data entered by the agency CMO or Committee Management Secretariat on the Consultation page.



Appendix

Committee Fields Definitions, Continued

General Information, Continued	
Field Name	Description
Designated Fed Officer Position Title	This item is required. This can be the title the DFO is assigned or wishes to use or it can be simply DFO.
Designated Federal Officer Prefix	This item is not required. This is the DFO's title or the form of formal reference, i.e., Dr., Mr., Col., Honorable, Ms., etc.
Designated Federal Officer First Name	This item is not required. This is the DFO's commonly used first name.
Designated Federal Officer Last Name	This item is required. This is the DFO's last name. While all the name fields are desired, the Prefix, First name, Middle name and Suffix fields can be left blank. Last Name is the only required name field. Place holders like TBDs are not allowed because a committee cannot exist or function without a DFO.
Designated Federal Officer Suffix	This item is not required. This is a qualifier to a DFO's name, i.e., Jr. or III, or a degree, i.e., PhD, EdD.
Designated Federal Officer Phone	This item is required. Any format may be used.
Designated Federal Officer Fax	DFO Fax Number
Designated Federal Officer Email	This item is required.
Designated Federal Officer Title	This item is required. This can be the title the DFO is assigned or wishes to use or it can be simply DFO.
Designated Maker Position Title	This item is required. This can be the title the DMO is assigned or wishes to use or it can be simply DMO.
Decision Maker Prefix	This item is not required. This is the DMO's title or the form of formal reference, i.e., Dr., Mr., Col., Honorable, Ms., etc.
Decision Maker First Name	This item is not required. This is the DFO's commonly used first name.
Decision Maker Middle Name	This item is not required. This is the DFO's middle name.
Decision Maker Last Name	This item is required. This is the DMO's last name. While all the name fields are desired, the Prefix, First name, Middle name and Suffix fields can be left blank. Last Name is the only required name field. Place holders like TBDs are not allowed because a committee cannot exist or function without a DMO.
Decision Maker Suffix	This item is not required. This is a qualifier to a DMO's name, i.e., Jr. or III, or a degree, i.e., PhD, EdD.
Decision Maker Phone	This item is required. Any format may be used.
Decision Maker Fax	DMO Fax number
Decision Maker Email	DMO work email



Appendix

Committee Fields Definitions, Continued

Recommendation/Justifications	
Field Name	Description
Agency Recommendation	This item is required. This item reflects the recommendation of the agency officials responsible for the continuation or termination of the committee (It does not refer to recommendations generated by the committee and made to the agency). Select either Continue or Terminate or Merge.
Legislation to Terminate Required	This item should be completed with a Yes or a No if Terminate or Merge was selected in Recommendation above. If an explanation is necessary, use Remarks below.
Legislation Status	If legislation is required to terminate the committee, select either Pending or Enacted to indicate the status of the legislation and include the bill number for proposed legislation or the statute (U.S.C.) for enacted legislation in Remarks.
How does cmte accomplish its purpose?	This item is required. When the committee was first established, this response was a statement of the plan for achieving the committee's purpose. For all subsequent reviews, this response should be a statement of how the committee continues to accomplish its purpose
How is membership balanced?	This item is required. When the committee was first established, this response was a statement of the plan for having a balanced membership on the committee. For all subsequent reviews, this response should be a statement of how the committee continues to keep its membership balanced?
How frequent and relevant are cmte mtgs?	This item is required. When the committee was first established, this response was a statement of the schedule for having meetings at a frequency that would allow the committee to do its work effectively. For all subsequent reviews, this response should be a statement of how the committee continues to keep meetings timely and relevant.
Why advice can't be obtained elsewhere	This item is required. This response should be updated annually.
Why close or partially close meetings	This question only requires a response if committee meetings were closed, otherwise N/A. Answers to these Annual Comprehensive Review questions are required except for committees terminated during the fiscal year being reported. Be specific and feel free to be descriptive and illustrative of the committee's activities. Please confine answers to activities from the reported fiscal year. All answers should be as complete as possible.
Recommendation Remarks	This memo field can be used for any explanations, details, or notations that are needed to properly answer or qualify other items in this report.

Committee Fields Definitions, Continued

Performance Measures	
Field Name	Description
Outcome Improvements to Health or Safety	Program Outcomes: (Required). Some typical outcomes are supplied. Please select Yes from the drop down list if the outcome applies. Select No if the outcome does not apply. Do not leave blank.
Outcome Trust in Government	Please select Yes if the outcome applies. Select No if the outcome does not apply. Do not leave blank.
Outcome Major Policy Changes	Please select Yes if the outcome applies. Select No if the outcome does not apply. Do not leave blank.
Outcome Advance in Scientific Research	Please select Yes if the outcome applies. Select No if the outcome does not apply. Do not leave blank.
Outcome Effective Grant Making	Please select Yes if the outcome applies. Select No if the outcome does not apply. Do not leave blank.
Outcome Improved Service Delivery	Please select Yes if the outcome applies. Select No if the outcome does not apply. Do not leave blank.
Outcome Increase Customer Satisfaction	Please select Yes if the outcome applies. Select No if the outcome does not apply. Do not leave blank.
Outcome Implement Laws/Reg Requirements	Please select Yes if the outcome applies.
Outcome Other	Please select Yes if the outcome applies. Select No if the outcome does not apply. Do not leave blank. Please illustrate in the Comments Box.
Outcome Comment	Explanatory detail for Outcome field selection.
Cost Savings	Cost Savings: (Required). Select the most appropriate answer or range. Add explanatory detail in Comments.
Cost Savings Comment	Explanatory detail for Cost Savings field selection.
Number Of Recommendations	Number of Recommendations for the Life of the Committee: (Required). This number is the total of the separate and distinct recommendations conveyed formally to the decision maker "using" the committee for the committee's life to date. Explanatory detail should be provided in the Number of Recommendations Comments Box.
Number Of Recommendations Comment	Please add explanatory detail.
% of Recs Fully Implemented	Percentage of Recommendations Fully Implemented: (Required). This number is the cumulative total percentage of the formally-conveyed recommendations that have been fully implemented over the life of the committee thus far. Clarifications and explanations should be included in the Percent of Recommendations Fully Implemented Comments Box.
% of Recs Fully Implemented Comment	Please add explanatory detail.
% of Recs Partially Implemented	Percentage of Recommendations Partially Implemented: (Required). This number is the cumulative percentage of the formally-conveyed recommendations that have been partially implemented over the life of the committee thus far. Clarifications and explanations should be included in the Percent of Recommendations Partially Implemented Comments Box.

Committee Fields Definitions, Continued

Performance Measures, Continued	
Field Name	Description
% of Recs Partially Implemented Comment	Please add explanatory detail.
Agency Feedback	Agency Feedback about Recommendations: (Required). This item requires selecting a Yes, No, or Not Applicable. If the response is No or Not Applicable, please explain in the No Comments Box why feedback is not considered necessary. If the response is Yes, please explain in the Yes, We Provide Feedback Comments Box how the feedback is provided.
Yes Agency Feedback Comment	If your answer to Agency Feedback about Recommendations is Yes, How does the agency provide this feedback?
Narrative Description	Describe the mission/purpose of the advisory committee.
Action Reorganize Priorities	Actions the Agency Has Taken: (Required). Select Yes from the drop down list if the action applies. Select No if the action does not apply. For No responses please provide an explanation in the Comments Box.
Action Reallocate Resources	Please select Yes if the outcome applies. Select No if the outcome does not apply. Do not leave blank.
Action Issued New Regulations	Please select Yes if the outcome applies. Select No if the outcome does not apply. Do not leave blank.
Action Proposed Legislation	Please select Yes if the outcome applies. Select No if the outcome does not apply. Do not leave blank.
Action Approved Grants or Payments	Please select Yes if the outcome applies. Select No if the outcome does not apply. Do not leave blank. Please illustrate in the Comments Box.
Action Other	Please select Yes if the outcome applies. Select No if the outcome does not apply. Do not leave blank. Please illustrate in the Comments Box.
Action Comment	Please add explanatory detail.
Grants Review	Engaged in Review for Grants: (Required). Select Yes or No. If Yes is selected, then add values to the questions below.
Number of Grants Reviewed	Number of Grants reviewed for the FY.
Number of Grants Recommended	Recommended number of grants for the FY.
Dollar Value of Grants Recommended	Provide an Estimated Dollar Value of the Grant Requests Recommended for Approval.
Grants Review Comment	Please add explanatory detail.
Access Contact Designated Fed. Officer	Access to Committee Information and Documentation: (Required). Select Yes from the drop down list if the method applies. Select No if the method does not apply.
Access Agency Website	Select Yes from the drop down list if the method applies. Select No if the method does not apply.
Access GSA FACA Website	Select Yes from the drop down list if the method applies. Select No if the method does not apply.
Access Publications	Select Yes from the drop down list if the method applies. Select No if the method does not apply.
Access Other	For an Other response of Yes, please provide information in the Comments Box
Access Comment	Please add an explanation to Comments if Other, above, is selected.

Committee Fields Definitions, Continued

Costs	
Field Name	Description
Include Costs in Annual Report	This will always be yes, unless the committee does not operate using appropriated funds.
Payments to Non-Federal Members	This item is required if funds are spent in this category and represents the value of any monies given by the Government to any advisory committee member who is not a Federal employee and who is not a consultant, where the monies are not reimbursement for travel expenses.
Payments to Federal Members	This item is required if funds are spent in this category and represents the value of any monies paid by the Government to any advisory committee member who is a Federal employee. The amount may simply be their salaries (including benefits) for the days they attended committee meetings or otherwise worked on committee activity. In the rare situation where the Federal member is on leave from their Federal responsibility to work on advisory committee activity, the amount reported should be the combination of their salary (including benefits) and any additional monies paid by the office sponsoring the advisory committee, where the monies are not reimbursement for travel expenses.
Payments to Federal Staff	This item is required if funds are spent in this category and represents the value of any monies paid to any Federal employees who are not committee members but whose work supports the activity of the committee. This includes the DFO if he or she is not an appointed member. Here's an example of costs attributable to a committee. A GS-11 with a salary level including locality pay of \$53,000 per year is spending 10% of his/her duty time working as an assistant staff director for a committee. The total cost of the GS-11 for committee activity is salary plus benefits (figure 17% for benefits) times 10% or \$6,202. In this case the dollar amount of 6201 should be included in Payments to Federal Staff. Cost for Federal members and Federal staff should always include benefits costs. To compute benefits, you can multiply salary by the benefit percentage generally used by your agency (normally between 14% to 18%) or by the Government average of 16%.
Payments to Consultants	This item is required if funds are spent in this category and represents the value of any monies paid to consultants to the committee. These consultants are not appointed members, nor are they Federal employees, and the payments are not reimbursement for travel expenses.
Travel Reimb. For Non-Federal Members	This item is required if funds are spent in this category and should include all travel and per diem costs incurred by committee activity and authorized by 5 U.S.C. 5703 and paid to Non-Federal members.
Travel Reimb. For Federal Members	This item is required if funds are spent in this category and should include all travel and per diem costs incurred by committee activity and authorized by 5 U.S.C. 5703 and paid to Consultants.
Travel Reimb. For Federal Staff	This item is required if funds are spent in this category and should include all travel and per diem costs incurred by committee activity and authorized by 5 U.S.C. 5703 and paid to Federal Staff.



Appendix

Committee Fields Definitions, Continued

Costs, Continued	
Field Name	Description
Travel Reimb. For Consultants	This item is required if funds are spent in this category and should include all travel and per diem costs incurred by committee activity and authorized by 5 U.S.C. 5703 and paid to Consultants.
Other Costs	This item is required if funds are spent in this category. This field includes all administrative costs not attributable either to personnel payments or to travel and per diem. This may include the costs of meeting rooms, transcripts, maintenance of a committee web site, etc.
Total Costs	This item is required and the program computes and inserts the totals when the user clicks Save Changes. This field cannot be edited. Changes are made to this value by entering data in the correct boxes above and clicking Save Changes. Please be careful to enter your figures in the correct fields and do not leave any fields blank. NOTE: In calculating personnel payments and other costs associated with Federal advisory committee activities under FACA, only those discrete costs directly related to the committee's scope and duties should be reported. Agencies must assure that only those incremental costs necessary to directly support the committee are captured for purposes of this Current FY Annual Comprehensive Review. As a general rule, agencies should not include expenses which: (1) are part of ongoing program activities; (2) are incurred as part of efforts not directly related to the committee's functions; or (3) were programmed for other purposes prior to the establishment of the committee. Each agency should follow any additional internal guidance developed or derived from either statutory or other administrative authorities which are peculiar to that agency. Any questions concerning a specific agency's advisory committee cost reporting for this Current FY Annual Comprehensive Review, or regarding the guidance provided in these instructions, should be directed to the Committee Management Secretariat.
Date Cost Last Modified	Date the cost were last modified.
Federal Staff Support(FTE)	This item is required and is the total of the Federal FTE count supporting the committee's activities, to the nearest tenth, e.g., 4.3. There should be a direct comparable relationship in fiscal value between item Federal Staff Support and Payments to Federal Staff. In the example for Payments to Federal Staff above (10% of his/her duty time) Federal Staff Support should show .1 FTE for the Federal staff member working as an assistant staff director on the committee's work.
Cost Remarks	Include clarifications, caveats, or any other information important for the public to know regarding these costs.
Est. Payments to Non-Fed Members Next FY	This item is required if funds are spent in this category and represents the value of any monies given by the Government to any advisory committee member who is not a Federal employee and who is not a consultant, where the monies are not reimbursement for travel expenses.
Est. Payments to Fed Members Next FY	This item is required if funds are spent in this category and represents the value of any monies paid by the Government to any advisory committee member who is a Federal employee. The amount may simply be their salaries (including benefits) for the days they attended committee meetings or otherwise worked on committee activity. In the rare situation where the Federal member is on leave from their Federal responsibility to work on advisory committee activity, the amount reported should be the combination of their salary (including benefits) and any additional monies paid by the office sponsoring the advisory committee, where the monies are not reimbursement for travel expenses.



Appendix

Committee Fields Definitions, Continued

Costs, Continued	
Field Name	Description
Estimated Payments to Federal Staff	<p>This item is required if funds are spent in this category and represents the value of any monies paid to any Federal employees who are not committee members but whose work supports the activity of the committee. This includes the DFO if he or she is not an appointed member.</p> <p>Here's an example of costs attributable to a committee. A GS-11 with a salary level including locality pay of \$53,000 per year is spending 10% of his/her duty time working as an assistant staff director for a committee. The total cost of the GS-11 for committee activity is salary plus benefits (figure 17% for benefits) times 10% or \$6,202. In this case the dollar amount of 6201 should be included in Payments to Federal Staff. Cost for Federal members and Federal staff should always include benefits costs. To compute benefits, you can multiply salary by the benefit percentage generally used by your agency (normally between 14% to 18%) or by the Government average of 16%.</p>
Est. Payments to Consultants Next FY	<p>This item is required if funds are spent in this category and represents the value of any monies paid to consultants to the committee. These consultants are not appointed members, nor are they Federal employees, and the payments are not reimbursement for travel expenses.</p>
Est Travel Reimb to Fed Staff Next FY	<p>This item is required and is the total of the Federal FTE count supporting the committee's activities, to the nearest tenth, e.g., 4.3. There should be a direct comparable relationship in fiscal value between item Federal Staff Support and Payments to Federal Staff. In the example for Payments to Federal Staff above (10% of his/her duty time) Federal Staff Support should show .1 FTE for the Federal staff member working as an assistant staff director on the committee's work. This is an estimated amount for the next fiscal year.</p>
Est. Travel Reimb to Consultants Next FY	<p>This item is required if funds are spent in this category and should include all travel and per diem costs incurred by committee activity and authorized by 5 U.S.C. 5703 and paid to Consultants. This should be estimated amounts for next fiscal year.</p>
Est. Other Costs Next FY	<p>This item is required if funds are spent in this category. This field includes all administrative costs not attributable either to personnel payments or to travel and per diem. This may include the costs of meeting rooms, transcripts, maintenance of a committee web site, etc.</p>
Est. Total Next FY	<p>This item is required and the program computes and inserts the totals when the user clicks Save Changes. This field cannot be edited. Changes are made to this value by entering data in the correct boxes above and clicking Save Changes. Please be careful to enter your figures in the correct fields and do not leave any fields blank.</p> <p>NOTE: In calculating personnel payments and other costs associated with Federal advisory committee activities under FACA, only those discrete costs directly related to the committee's scope and duties should be reported. Agencies must assure that only those incremental costs necessary to directly support the committee are captured for purposes of this Current FY Annual Comprehensive Review. As a general rule, agencies should not include expenses which: (1) are part of ongoing program activities; (2) are incurred as part of efforts not directly related to the committee's functions; or (3) were programmed for other purposes prior to the establishment of the committee. To be continued onto the next page.</p>



Appendix

Committee Fields Definitions, Continued

Costs, Continued	
Field Name	Description
	Each agency should follow any additional internal guidance developed or derived from either statutory or other administrative authorities which are peculiar to that agency. Any questions concerning a specific agency's advisory committee cost reporting for this Current FY Annual Comprehensive Review, or regarding the guidance provided in these instructions, should be directed to the Committee Management Secretariat.
Est. Fed Staff Support Next FY	This item is required and is the total of the Federal FTE count supporting the committee's activities, to the nearest tenth, e.g., 4.3. There should be a direct comparable relationship in fiscal value between item Federal Staff Support and Payments to Federal Staff. In the example for Payments to Federal Staff above (10% of his/her duty time) Federal Staff Support should show .1 FTE for the Federal staff member working as an assistant staff director on the committee's work.
Est. Cost Remarks	Include clarifications, caveats, or any other information important for the public to know regarding these costs.