Training & Exchanges Automated Management System (TEAMS) User's Manual

A Mandatory Reference for ADS Chapter 252

Partial Revision Date: 08/31/2023
Responsible Office: M/MPBP
File Name: 252maa_083123

TEAMS

User’s Manual

Table of Contents

1 Introduction 6

1.1 Why teams? 6

1.2 Benefits of TEAMS 6

1.3 Where to Get help 7

2 What's Different? 8

2.1 TraiNet / VCS vs. TEAMS 8

3 How to Log into TEAMS 10

3.1 Logging in with a USAID Email 10

3.2 Logging in without a USAID Email 10

Creating your login.gov account 10

3.3 Application Time Out 11

4 Dashboards & Displays 12

4.1 R1 Initiator Dashboard 12

4.2 R2 Verifier & R3 Approver Dashboard 13

4.3 Export Data Page 14

5 Entering EV Cost Data 16

5.1 Details 16

Navigate to Add Cost to Program Form 16

Cost Form 16

Deleting an Existing Cost from the Cost panel 17

Costs Summary Box 17

Program Costs/Participant Costs 17

6 U.S. Program Data 19

6.1 User Roles in Teams 19

R1 Initiator 19

R2 Award and Country Verifier 20

R3 Approver 21

R4 RO (Responsible Officer (RO) or Alternate Responsible Officer (ARO)) 21

Shipper 22

Tech Support 22

View Only Role 22

6.2 Data Entry 23

Background and purpose 23
Overview 24
Details 24
7 U.S. Program Providers 29
7.1 Details 29
8 User Workflows 31
9 DS-2019 Process Overview 37
Requirements to Begin the Request DS-2019 Workflow 37
Request DS-2019 Workflow steps 37
What Happens After the Request DS-2019 Workflow Has Been Submitted? 38
10 Uploading Files 40
Which documents and when they are required: 40
How to upload files 40
11 Validate Participant Arrival 42
12 Update Data 44
13 Cancel Participants 46
Requirements to Begin the Cancel Participant Workflow 46
Cancel Participant Workflow steps 46
14 No Show Participants 48
Requirements to Begin the No Show Workflow Process 48
No Show Workflow Process 48
15 Terminate Participants 49
Requirements to Begin the Terminate Workflow Process 49
Terminate Workflow Process 49
16 Completed the Program 51
Requirements to Begin the Completed Workflow Process 51
Completed the Program (As Scheduled) Process 51
Completed the Program Early Process 51
Did Not Complete the Program Process 52
17 Failure to Extend Program 54
Requirements to begin the Failure to Extend Program Workflow Process 54
Failure to Extend Program Process 54
18 Participant Record Journal 55

19 Data Access and Reporting 57
TEAMS Data Export and Reporting Approach 57
TEAMS allows you to: 57
Where do I start? - Data Export Overview 57
What you will see in your Data Export. 57
Program Data Export 58
Program Cost Data Export 58
How do I export & Customize a CSV file? 60
Sorting the data 60
Filter the data 61
Customize the data to create a report 63
20 Notifications 65

1 INTRODUCTION

USAID sponsors U.S.-based Exchange Visitor (EV) programs for host country nationals to support country, regional, and sector development objectives. One major contributor to the story of USAID's EV programs is TEAMS, USAID's web-based data system that collects and produces information and reports on USAID-sponsored international exchanges. TEAMS supports USAID visa compliance for U.S. exchange programs and incorporates processes to support foreign nationals who come to the United States on a USAID J-1 visa.

1.1 WHY TEAMS?

TEAMS is a system for collecting USAID international EV information/data including:

- EV program information,
- Numbers of EVs, and
- Exchanges costs.

TEAMS manages EV data for USAID-sponsored programs by interfacing with SEVIS (Student and EV Information System), the system that the U.S. Department of Homeland Security uses to maintain and monitor EVs in U.S. programs.

TEAMS interfaces with SEVIS by:

- Obtaining DS-2019 forms from SEVIS, required as part of the visa application for the J-1 visa program;
- Maintaining and updating EV data in SEVIS; and
- Providing approval process workflows for TEAMS data sent to SEVIS.

1.2 BENEFITS OF TEAMS

- Ease of reporting and management of USAID-funded programs.
- U.S. programs interface with SEVIS for J-visa management.
- TEAMS allows tracking costs by:
    - Award
    - USAID Unit
    - Program
    - Individual EV

- TEAMS provide data exports for reports.

1.3 WHERE TO GET HELP

The TEAMS Helpdesk is available to answer technical and usability questions.

- Email: **TEAMS@usaid.gov**
- TEAMS Support Site: www.TEAMS.usaid.gov

2 WHAT'S DIFFERENT?

The following section explains the differences between TEAMS and USAID's predecessor systems (TraiNet/VCS).

2.1 TRAINET / VCS VS. TEAMS

- TEAMS is TraiNet and VCS combined into one system.
- All users – R1 Initiator, R2 Verifier, R3 Approver, R4 Responsible Officer (RO) – will see the same information in TEAMS.
    - The journal and all uploaded documents are available to all users.
    - All users can see who is responsible for Initiating, Verifying, Approving, and Submitting to SEVIS.

TraiNet/VCS	TEAMS
Two systems	One system
TraiNet/VCS login page	Login through USAID authentication ● USAID uses their USAID credentials to login. ● Implementing Partners login through their login.gov account.
International Exchanges and Training/programs linked to Site IDs	TEAMS does not use Site IDs. International EV programs are linked to awards (contracts, cooperative agreements, or grants).
Data presentation different in TraiNet and VCS	Uniform data presentation for all users. Dashboards tailored to user roles and assigned awards.
Must specify in-country, third country, or United States before entering Program.	TEAMS determines venue automatically by location* of exchange program and residence country of participants.

	*Note: Only U.S.-based EV programs are required to be entered into TEAMS.
Cost categories required: Instruction, participant, and travel	Funding source and program or EV cost.
Users in TraiNet see EV data differently than VCS users.	All users see the same EV data.
R1 Initiators can only enter data in TraiNet and they cannot see VCS processes or documents. TraiNet R1 Initiators must determine program and EV status and set those statuses manually. The names of the approved R1 Initiators, R2 Verifiers, R3 Approvers, and R4 RO were not available or not easy to find in VCS.	R1 Initiators enter data in TEAMS and can monitor the entire SEVIS process. Instead of manual statuses, TEAMS 'workflows' synchronize EV status with SEVIS status.
Reports: limited reporting capabilities by users.	TEAMS provides data export functionality so that users can export all the data they can access into external software (spreadsheets or reporting software) to create their own reports.
Additional key differences for R1 Initiators	
In addition to editing participant data, updates in TraiNet often involved updating EV status. This required the R1 Initiator to determine the proper status for an EV, update the status, and send it through the workflow described above.	In TEAMS, no one must update the EV status directly. TEAMS keeps track of the status based on the workflow underway.
Users must create or clone a program for each participant (For example, a short-term program with 15 EVs going to the United States).	For U.S. programs with more than one EV, only one program is created. Each EV is added to that program (no need to clone the program).

3 How to Log into TEAMS

The following section explains how to login to TEAMS and includes a tutorial and narrative text with step-by-step instructions.

3.1 Logging in with a USAID Email

1. Begin at the TEAMS login page (teams.usaid.gov). Click on Login with Identity Server.
2. This opens the TEAMS client login page. Click on USAID Users option.
3. This opens the USAID login page. Enter your username and password or USAID issued PIV or PIV-A card. Once you sign in successfully, you will be taken to *your* TEAMS dashboard.

3.2 Logging in without a USAID Email

1. Begin at the TEAMS login page. Click on Login with Identity Server.
2. This opens the TEAMS client login page. Click on Login.gov.
3. This opens the Login.gov page. If you already have a Login.gov account enter your username and password and you will be taken to your TEAMS dashboard. If you do *not* have a Login.gov account, you will need to create an account.

Creating your login.gov account

1. Go to the login.gov website.
2. Click on the sign in button, then click on Create an account.
3. Enter your email address. Login.gov will send an email confirmation. Confirm your email.
4. Create a strong password.
5. Set up two-factor authentication to add a second layer of security. You will be given a menu of options. Read carefully:
    a. If you have a *U.S. based phone number*, then we recommend you choose two of these three options: “phone”, “authentication app”, or “none of the above” for codes.
    b. If you *do not have a U.S. based phone number*, then we recommend you choose “authentication app” as your main authentication method and “none of the above” as your back-up authentication.
    c. If you have any questions setting up your two-factor authentication, please visit: https://www.login.gov/help/creating-an-account/two-factor-authentication/
6. For any other questions creating your login.gov account visit: https://www.login.gov/help/creating-an-account/how-to-create-an-account/ or contact the login.gov help desk: Get in touch.

If you have any *other* issues logging in, please contact the TEAMS help desk: https://teams.usaid.gov/login.

Link to Tutorial: How to Log into TEAMS

3.3 APPLICATION TIME OUT

Following USAID security procedures, the application will go idle after 10 minutes and users will be prompted with a dialog to either continue or to log out. If the user is idle for another 10 minutes after the dialog the application will log the user out, and users will need to log back in from the initial login screen.

4 DASHBOARDS & DISPLAYS

The following section displays and explains the different pages in TEAMS and how users can interact with these pages.

4.1 R1 INITIATOR DASHBOARD

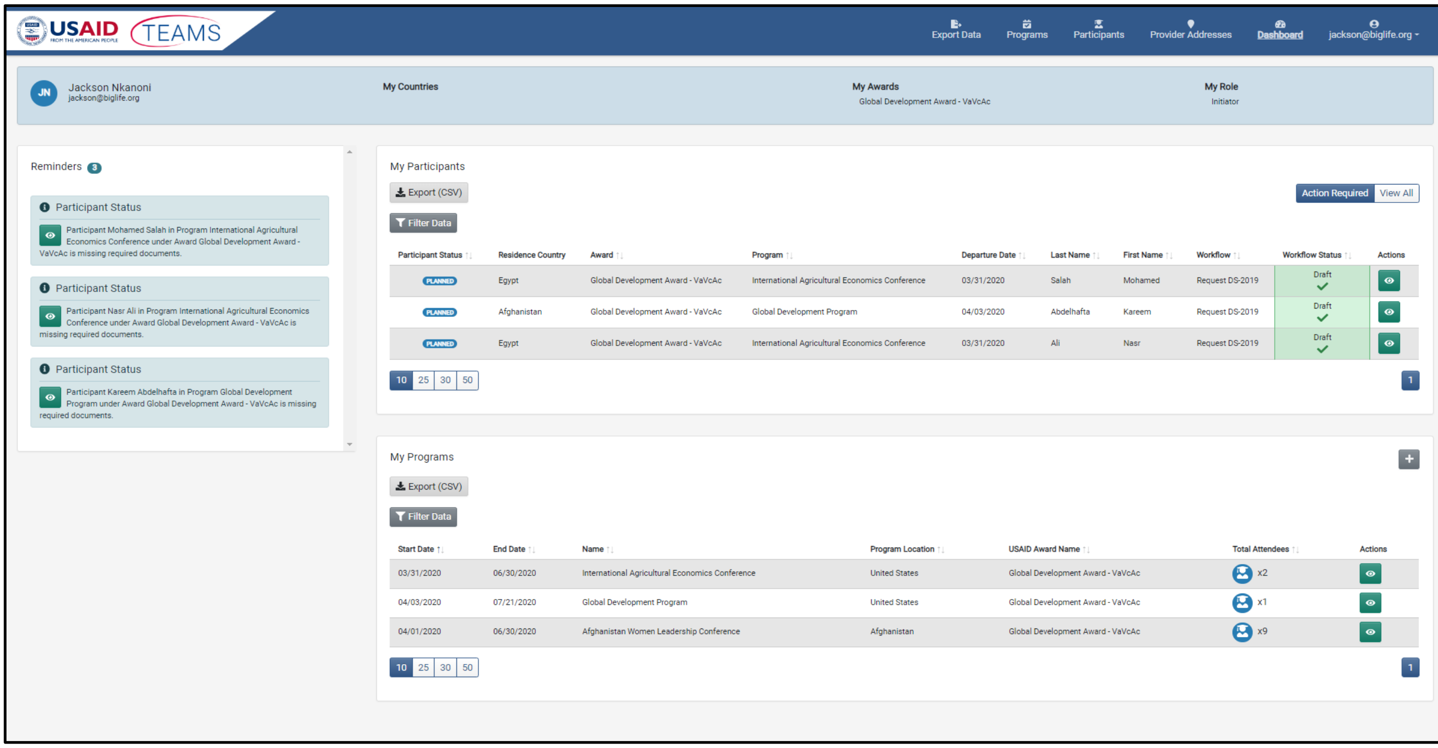
The dashboard includes several panels that display information for R1 Initiators:

- The profile panel displays R1 Initiator's Account Information.

- The Reminders Panel notifies the user when different actions need to be performed for programs or EVs. R1 Initiators can click the green View Page button in each reminder message to navigate to the page where the action is required.

- The My Participants panel includes a list of EVs in programs associated with the user's USAID Award and a button to navigate to the Manage Participants page of each EV. The My Participants panel includes two views.
    - The first view is an Action Required view that displays EVs in programs that are in an active workflow that *require action from the R1 Initiator*.
    - The second view is View All, which displays all EVs in programs that are in an active workflow.

- The My Programs panel includes a list of programs under the award assigned to the R1 Initiator. This panel includes a Create Program button in the top right of the panel to create new programs as needed. The panel also includes a button to navigate to the Manage Program page for a specific program.



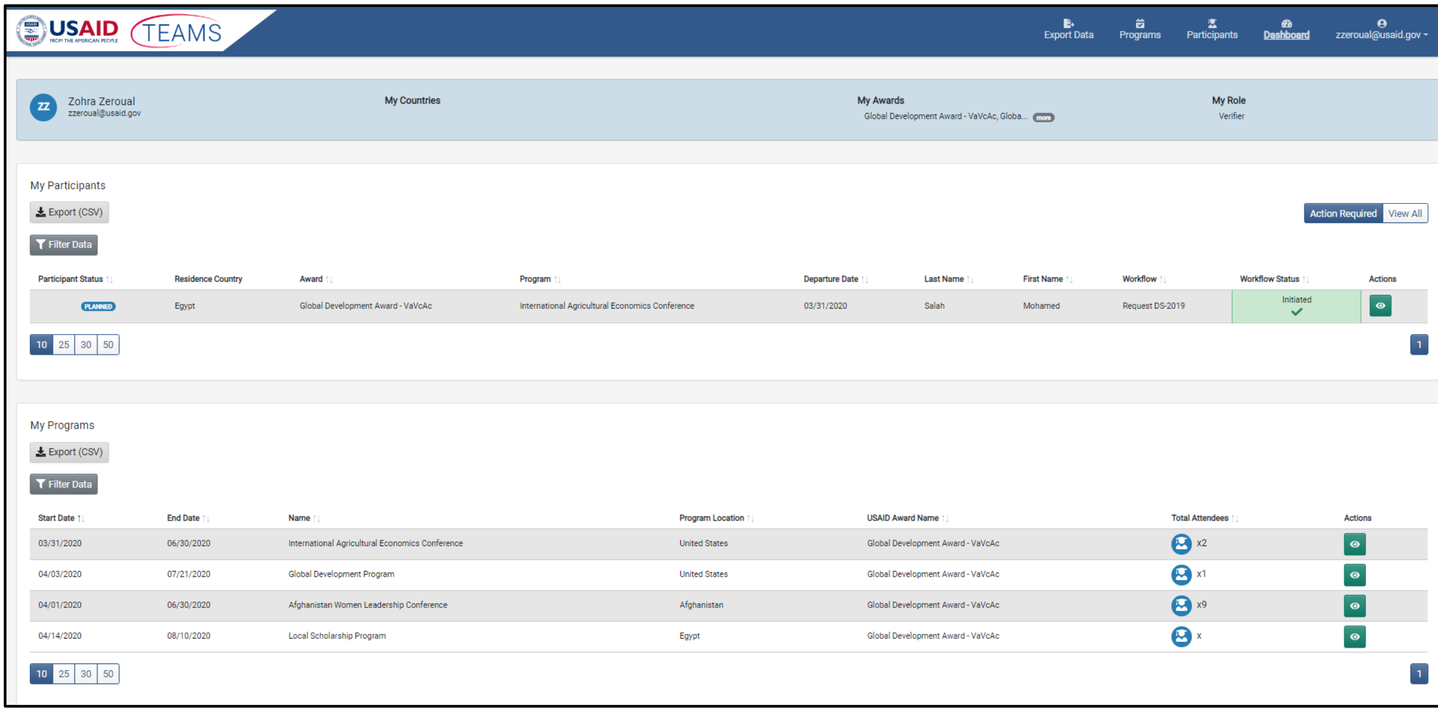
4.2 R2 Verifier & R3 Approver Dashboard

The dashboard includes several panels that display information for R2 Verifiers and R3 Approvers:

- The profile panel displays user's Account Information.

- The My Participants panel includes a list of EVs in programs associated to user's USAID Award and/or Country and a button to navigate to the Manage Participants page. The My Participants panel includes two views.
    - The first view is an Action Required view that displays EVs in user's programs that are in an active workflow and that *require action from the user*.
    - The second view is View All, which displays all EVs in the user's programs who are in an active workflow.

- The My Programs panel includes a list of programs under the award and/or country assigned to the R2 Verifier or R3 Approver. The My Program panel includes a button to navigate to the Manage Program page for a specific program.



4.3 EXPORT DATA PAGE

This page allows users to export TEAMS data into CSV files that can be viewed in Microsoft Excel or another spreadsheet software.

There are three types of data exports: Program Data, Program Cost Data, and Participant Data. All user roles will be able to export data from this page at any time.

The data exports will only display data associated to the user's awards and/or countries:

- To export data, user selects a Program Start Date, Program End Date, and Report Type.
- Depending on the Program Start Date and End Date the user selects in the Start and End Date fields, the system will display data for all programs that fall within that time span.
- Program Data Exports will display data related to the Program, USAID Award, Program Dates, Program Locations, and basic information related to Program Provider, Participants, and Program Cost.
- Program Cost Data reports will display data related to the Program, USAID Award, and Program Cost.

- Participant Data reports will display data related to the Program, USAID Award, Program Dates, Program Locations, Program Provider, Program Cost, and information related to EVs, EV Travel Dates, EV's Birth, Citizenship, and Residence Country, EV Status, and EV's Workflow information.

5 ENTERING EV COST DATA

This section provides instruction on how to enter cost data for programs and includes a tutorial and narrative text with step-by-step instructions.

5.1 DETAILS

Navigate to Add Cost to Program Form

1. You must be an R1 Initiator to perform these tasks.
2. Navigate to the Manage Program page.
3. Scroll down to Costs panel and select the grey button Add Cost to Program.

Cost Form

There are four types of Costs (Funding Sources) in TEAMS:

- USAID: funds provided by USAID (Mission, Regional Mission, or Central funding);
- Host Country Government: funds provided by the host country government;
- Private: funds provided by a private source such as the EV, or the EV's employer; and
- Other: funds provided by another source such as another donor (e.g., World Bank).

<u>USAID Cost:</u>

1. Select USAID as the Funding Source.
2. The USAID Unit and USAID Award Name auto-populate.
3. The Award Funding Type is pre-selected as either Bilateral, Regional/Central, or both.
4. Choose if this cost will be allocated to a program or participant:
    - To associate a cost to an EV, an EV must first be created in the program.
    - If the cost is allocated to an EV, then the option to choose which participant will appear to the right.
5. Type in the cost amount in dollars.
6. Select the blue button Create Cost to add and save the cost to program.

<u>Host Country Government:</u>

1. Select Host Country Government as the Funding Source.
2. Choose if this cost will be allocated to a program or participant:

- To associate a cost to an EV, an EV must first be created in the program.
- If the cost is allocated to an EV, then the option to choose which participant will appear to the right.

3. Type in the cost amount in dollars.
4. Select the blue button Create Cost to add and save the cost to program.

Private and/or Other:

1. Select Private if the funding source is Private. Select Other if the funding source is Other.
2. Enter a description in the Private/Other Funding Source field.
3. Choose if this cost will be allocated to a program or EV:

- To associate a cost to an EV, an EV must first be created in the program.
- If the cost is allocated to an EV, then the option to choose which participant will appear to the right.

4. Type in the cost amount in dollars.
5. Select the blue button Create Cost to add and save the cost to program.

Deleting an Existing Cost from the Cost panel

1. Navigate to the Cost panel in the Manage Program page.
2. Select the red Delete button next to the cost to delete. Costs can only be deleted if all participants in the program are not in an active workflow.
3. Select Yes in the Delete Cost Item pop-up screen. This will remove the cost from the program.

Costs Summary Box

This box provides a summary of all the program and participant costs by funding source in a pie chart (insert content on colors and costs).

1. Navigate to Manage Program page.
2. Scroll up to Costs Summary panel.

Program Costs/Participant Costs

Program Costs: costs related to implementation of the EV program such as tuition, training provider cost, conference, or workshop fees. A sample list of instruction costs includes the following items or their functional equivalents:

- Program fees (for registration or technical content);
- Instruction or instructional portion of a packaged program;
- Academic tuition and fees [excluding housing or lodging], as published;
- Transport of instructors or program providers;

- Books, computers, equipment, supplies, course handouts, Internet connectivity fees;
- Dissertation/thesis expenses, production allowance;
- Seminar/conference registration fees;
- Workshop fees;
- Professional society membership fees, journal, and media subscriptions;
- English language training;
- Orientations and airport meet and greet services;
- Escort/interpreter's fees; and
- Supplemental enrichment programs.

Participant Costs: costs related to the individual EV. If an EV is deleted from an exchange program, these costs will automatically be deleted, and the total program cost will be decreased by the amount of the deleted EV costs. A sample list of EV costs includes the following items or their functional equivalents:

- Housing or lodging, or lodging portion of a packaged program;
- Maintenance allowances and per diem rates;
- Transportation of participant;
- Health and accident insurance premium;
- Medical examination fees, if applicable;
- Visa or EV status fees, if any;
- W-7 certification fees (certification of non-U.S. residence for tax purposes); and
- Federal, state, and local income taxes, if any.

Link to Tutorial: [Creating Costs in TEAMS]

6 U.S. PROGRAM DATA

This section provides instruction on how to enter program data for U.S. EV programs, as well as associated TEAMS user workflows, and includes a tutorial and narrative text with step-by-step instructions.

6.1 USER ROLES IN TEAMS

There are seven roles for stakeholders involved in USAID's J-1 visa process:

1. R1 Initiator: Responsible for entering all required information for initiating visa applications and tracking EVs in TEAMS.

2. R2 Award Verifier and R2 Country Verifier (if applicable): Verifies EV data in TEAMS.

3. R3 Approver: Provides Mission confirmation of the legitimacy of each EV and exchange program; approves EV data after being verified by R2.

4. R4 RO: Using TEAMS and SEVIS, USAID/W RO (or AROs) submits approved EV data to SEVIS for processing, electronically signs and uploads DS-2019 forms to TEAMS or print/ships DS-2019 forms directly to the Mission if requested by the R3 Approver, manages user access to TEAMS, and monitors the workflow through SEVIS.

5. Shipper: Manages the shipment of DS-2019s to Missions.

6. Tech Support: Supports the RO/ARO with award and user set up.

7. View Only: Able to view program and EV data for awards and countries to which the user is associated.

NOTE: Information about a prospective USAID-sponsored EV must be gathered, reviewed, and managed by individuals serving in each of these roles before a DS-2019 form can be produced. If a candidate is rejected by the R2 Verifier, R3 Approver, or R4 RO at any time during the process, the candidate is sent back to the R1 Initiator.

R1 Initiator

This role is performed by the person responsible for data entry in TEAMS. All USAID-sponsored EVs must be entered into TEAMS. The R1 Initiator does not have to be a U.S. citizen. This role is typically carried-out by USAID Implementing Partner staff (contractor, recipient, or grantee), but central exchanges and training contractors and even USAID Mission staff may serve as R1 Initiators. There is no limit to the number of individuals who may be assigned to the R1 Initiator role.

At no time should the R1 Initiator perform the role of the R1 Initiator and R2 Verifier for the same record. The R1 Initiator should not use the username or password of the R2 Verifier to login to TEAMS.

Responsibilities of the R1 Initiator include:

- Entering data in TEAMS to create new programs (long term and short-term programs);
- Adding EV data;
- Adding dependents;
- Adding cost (for program and for EVs);
- Updating data in TEAMS during a program;
- Correcting data in TEAMS to resolve data errors;
- Uploading relevant documentation to TEAMS such as the EV's passport face page, DS-2019 form, and I-94 form; and
- Initiating workflows for U.S. programs.

Please see the list of notifications that each role will receive in section 21.

R2 Award and Country Verifier

- The R2 Award Verifier and R2 Country Verifier (if applicable) is responsible for ensuring that data entered into TEAMS is complete and correct.
- The R2 Verifier does not have to be a U.S. citizen. The R2 Verifier role can be served by a USAID contractor, centrally funded organization, or USAID Mission, but cannot be served by the same individual(s) in the R1 Initiator role. There may be more than one R2 Verifier for each award or country.

NOTE: There are two distinct R2 Verifier roles, an R2 Award Verifier, and a R2 Country Verifier. R2 Award Verifiers are assigned to specific awards. A R2 Country Verifier is assigned to all awards assigned to a country. The R2 Country Verifier is generally a USAID Mission staff person. Missions are not required to have an R2 Country Verifier.

At no time should the R2 Verifier share his or her username and password with anyone.

Responsibilities of the R2 Award Verifier and R2 Country Verifier (if applicable) include:

- Verifying TEAMS data;
- Communicating data errors to the TEAMS R1 Initiator for correction in TEAMS;
- Determining disposition of EV by either removing nomination or moving to USAID Mission for approval through TEAMS;
- Communicating with the R3 Approver and R4 RO to determine status of questionable applications;
- Ensuring that all EVs are properly validated when the EV begins their program. Arrivals must be validated by the R1 Initiator, R2 Award Verifier, R2 Country

Verifier (if applicable), and R4 RO within 30 calendar days of their program start date;
- Providing the R4 RO with information and documentation pertaining to an EV upon request; and
- Nominating people to fill the role of R1 Initiator.

Please see the list of notifications that each role will receive in Section 21.

R3 Approver

This role must be performed by a U.S. citizen at a USAID Mission or at USAID/W to approve EV data or data updates for EVs. The number of individuals assigned the R3 Approver role is determined by the Mission Director or USAID representative, or Washington Office Director.

Responsibilities of the R3 Approver include:

- Providing Mission or Washington Office confirmation of the legitimacy of each EV who is a resident of the country, as well as confirmation of the exchange program.
- Approving data from field offices to send to R4 RO or AROs through TEAMS.
- Rejecting disapproved applications for correction or removal.
- Communicating potential problems to implementing partners.
- Nominating people to fill the role of R2 Country Verifier (the R2 Country Verifier role is not required, but the R3 Approver may choose to fill this role).

Please see the list of notifications that each role will receive in section 21.

R4 RO (Responsible Officer (RO) or Alternate Responsible Officer (ARO))

This role is performed by the RO or AROs within the Bureau for Management, Office of Management Policy, Budget and Performance (M/MPBP), approved by DOS to access SEVIS.

Responsibilities of the R4 RO include:

- Submitting approved applications to SEVIS through the batch transfer function.
- Sending disapproved applications back to the R1 Initiator for correction or removal.
- Receiving and processing alerts from SEVIS (Real Time Interface (RTI) and batch).
- Communicating potential problems to TEAMS supervisors in field offices and officers at USAID Missions.
- Electronically signing and uploading DS-2019 forms to TEAMS or signing, printing, and shipping DS-2019 forms to Missions if requested by the R3 Approver. .

- Managing TEAMS access of R2 Verifiers, R3 Approvers, and other R4 ROs.
- Managing all State Department and Department of Homeland Security reinstatements.

Please see the list of notifications that each role will receive in section 21.

Shipper

The shipper is responsible for printing and shipping DS-2019s. This role is performed by the RO/ARO or a USAID institutional support contractor assigned to this role on behalf of the Bureau for Management, Office of Management Policy, Budget and Performance, Policy Division (M/MPBP/POL). This role is performed by a USAID contractor assigned to this role, or by an RO/ARO.

Responsibilities of the shipper (USAID Contractor) include:

- Set up the FedEx shipment in TEAMS,
- Prepare the FedEx labels at the request of the R4 RO, and
- Update the shipment information in TEAMS (when packages are shipped).

Note: The R3 Approver may request the R4 RO/ARO physically sign and ship the DS-2019 form to Missions via postal mail, instead of digitally signing and uploading the form to TEAMS, by contacting the RO/ARO team (**EVpolicy@usaid.gov**). However, as this process takes an additional one to two weeks, the R4 RO/ARO highly recommends the use of digital signatures to avoid delays.

Please see the list of notifications that each role will receive in section 21.

Tech Support

The tech support role is responsible for the TEAMS help desk (teams@usaid.gov), for supporting R1 Initiator set up in TEAMS, and for supporting reporting needs. This role is performed by a USAID contractor on behalf of M/MPBP/POL.

Responsibilities of the tech support role:

- Manage the TEAMS help desk (**teams@usaid.gov**), replying to all incoming messages within 24 hours.
- Set up all roles (R1 Initiators, R2 Verifiers, R3 Approvers) in TEAMS for RO/ARO approval.

Please see the list of notifications that each role will receive in Section 21.

View Only Role

The View Only Role will be assigned by an RO/ARO and may be Mission staff such as COR/AORs or Office Leads or Implementing Partner staff such as the Chief of Party (COP). Persons with the View Only role may see the data for their awards as read only.

Please see the list of notifications that each role will receive in Section 21.

6.2 DATA ENTRY

Background and purpose

Thousands of people each year are brought to the United States for Exchange Visitor programs funded by the U.S. Agency for International Development (USAID). With few exceptions, every USAID-sponsored visitor to the U.S. must travel on a J-1 visa issued under USAID's program number.

The Student and EV Information System (SEVIS) is a Web-based system for maintaining information on EVs attending short- or long-term programs in the United States. SEVIS is administered by the Student and EV Program (SEVP), a division of U.S. Immigration and Customs Enforcement (ICE), the largest investigative arm of the Department of Homeland Security (DHS).

The purpose of SEVIS is to monitor the issuance of F, M, and J visas, and to gather and monitor information on EVs in the United States from entry to exit. In accordance with Department of State and Department of Homeland Security regulations, all International Exchanges and Training program sponsors, including USAID, are required to use SEVIS to sign the Certificate of Eligibility for EV (J-1) Status (Form DS-2019), and they must update SEVIS with information on all EVs in the United States. Only approved U.S. citizens, located in the United States, are permitted access to SEVIS. Agency policies address this need for a U.S.-based centralized Agency enterprise function.

This section provides an overview of, and specific guidance regarding, procedures and systems required for J-1 visa processing for USAID-sponsored EVs.

The preparation of the DS-2019 form is a critical step in the process of obtaining a visa for USAID sponsored EVs to the U.S. A hard (printed) copy of this form must be presented to the Consular Officer, along with supporting documents, for an EV to obtain a J-1 visa prior to travel to the United States. After the EV is issued his or her J-1 visa and arrives in the United States, the information required on the DS-2019 form must be kept up-to-date or the EV will fall out of status and could be subject to action by authorities.

All USAID EVs traveling to the United States are subject to the policies contained in USAID's policy documents ADS 252. USAID Missions, Washington Offices, and implementing partners must use TEAMS to track and report EVs to USAID/Washington (USAID/W). TEAMS is the sole source of information on all USAID-sponsored participants.

STUDENT AND EV INFORMATION SYSTEM (SEVIS)

SEVIS, the computer system created by DHS to vet, approve, and monitor EVs in the United States, creates a means for information collection and reporting via the Internet. TEAMS communicates DS-2019 information to SEVIS, which produces the actual forms. SEVIS reports errors and alerts related to participants. All automated processes are handled through TEAMS; however, there are instances that require the USAID/W Responsible Officer (RO) or an Alternate Responsible Officer (ARO) to utilize the real-time interface (RTI) to handle situations.

ROLES AND RESPONSIBILITIES/WORKFLOW

Sponsoring Units are responsible for tracking the whereabouts of their EVs in the United States and their return status at the conclusion of the exchange or training. Current information must be provided to the USAID Washington RO or AROs at any time upon request.

Overview
This section provides instructions on how to enter data for U.S.-based exchange programs, including a tutorial and narrative text with step-by-step instructions on how to create and edit U.S. programs in TEAMS.

The R1 Initiator:

- Must specify program provider;
- Must enter EVs individually:
    - Provide information required to obtain DS-2019 from SEVIS, and
    - Enter costs for individual EVs; and
- May enter multiple EVs for one program.

Details

The steps to Create a U.S. Program

I. Navigate to Create a Program Form (**from the R1 Initiator dashboard**)

1. You must be an R1 Initiator to perform this task.
2. Navigate to the Dashboard.
3. Scroll down to the "My Programs" panel and select the Add Program button (plus sign).
4. The "Create a Program" form appears.

II. Navigate to Create a Program form (**from Manage Programs page**):

1. You must be an R1 Initiator or a *R4 RO* to perform this task.
2. Navigate to the Dashboard.
3. Navigate to the Manage Programs page by clicking on the Programs button in the Navigation Bar.
4. Select the Create Program button in the top left of the Manage Programs page.
5. The "Create Program" form appears.

III. The Create a Program Form/Steps Page 1:

1. Enter the Program Name in the Name field.
2. Select the Start and End Dates of the program using the calendar (you also have the option to type these fields).
3. Select the Program Subject and Program Type from a drop-down list:

   Program Types in TEAMS:

   - Academic Research
   - Conference Workshop
   - Degree: Associate
   - Degree: Bachelor
   - Degree: Master
   - Degree: Doctoral
   - Meeting/Consultation
   - Non-Degree Academic
   - Observation
   - Professional Training, Internships, and Research

4. Select United States in the Program Location drop-down list.
5. Select the method of training. The choices are: In-person, online, or both.
6. Select the USAID Prime Award Name. An *award* is a contract, cooperative agreement, or grant. You will select the one you are assigned to.
7. Select the next button.

IV. The Create a Program Form/Steps Page 2: Program Provider Information

This page adds a second form to capture additional information for a U.S. program. This part of the form requires Program Provider information (see Section 10, U.S. Program Providers Providers).

1. Select the correct Program Provider from a drop-down list.
2. Check to see if there is the correct address saved in the Saved Addresses drop-down list.
3. If there is not a correct address saved, enter the program provider address.
4. When finished, Select the Create Program button to save the program.

V. View and Edit the Program (The Manage Program Page)

To view and edit programs, follow the same steps as for a non-U.S. program.

1. Creating a program brings you back to your Dashboard.
2. To view your program, look under the My Programs panel.
3. Look for the name of your U.S. program and select the green eye on the right side.
4. This brings you to the "Manage Program" page.
5. To edit, select the blue pencil on the upper right-hand corner.
6. Selecting the pencil allows you to edit any of the fields you entered to create the program initially, including program provider information.

The Steps to Add EVs to a U.S. Program

I. Navigate to the Add Individual Participant Form

1. Navigate to the Manage Program page.
2. Scroll down to the Total Participants panel.
3. Select the grey button, Add Individual Participant.
4. The Add Individual Participant Form appears.

II. The Add Individual Participant Form Part 1: Participant General Information

1. Enter data for the EV Email and Names fields.
2. Select their gender (choices are male, female, other).
3. Select Residence Country from a drop-down list.
4. Enter data for Birth Date and Birth City.
5. Select Birth Country and Citizenship Country from a drop-down list.
6. Select the blue button, Next, to proceed to part two of the form, adding participant VISA data.

III. The Add Individual Participant Form Part 2: Participant VISA Data

1. Select the Visa Type from drop-down list:

    - **J1**: EVs sponsored by USAID with USAID funding
    - **A1/A2**: Mission Directors or USAID/W Office Directors may, in consultation with RLOs or GC, and, on a class or case-by-case basis, exempt certain individuals from USAID's policy of requiring the use of a J-1 visa. Note: A1/A2 visa holders are not required to be tracked in TEAMS.

2. Select the Position Code from drop-down list.
3. The Residence Country Depart Date defaults to the same as the Program Start Date and the Residence Country Return Date defaults to the same as the Program End Date.

4. The US Site Arrival Date defaults to be one day after the Residence Country Depart date. The US Site Departure Date defaults to be one day before the Residence Country Return Date.
5. Check to make sure these dates are accurate and edit, if needed.
6. Type in the U.S. street address.
7. Select blue button, Add Participant, to Create and Save new participant in TEAMS.

IV. Participant Summary Panel

The Participant Summary panel provides a summary of the U.S. program's EVs by gender. Scroll up on the Manage Program page to Participant Summary panel (below program information).

V. Overview of U.S. Program Participant Statuses

Since TEAMS sets the EV status rather than the R1 Initiators, the TEAMS system keeps EVs status in sync with the status of that EV in SEVIS.

Users only need to know what action they want to take for an EV in TEAMS (see Section 11, Workflows in TEAMS for U.S. Programs). At the end of each workflow in TEAMS, the EV status is set properly, and has been approved by the R1 Initiator, R2 Verifier, R3 Approver, and R4 RO.

The EV status will appear at the top of the Manage Participant screen.

Participant Status in TEAMS	**What it means**
Planned	EV added to Program, but DS-2019 not issued yet
Initial	DS-2019 issued
Active	EV has started the program
Completed (implies Returned)	EV completed the program and returned home
Not Completed (implies Returned)	EV started, did not complete program, returned home
Terminated	EV terminated - **See Termination Reasons**
No Show	EV arrived in the U.S. but not at program site
Canceled	EV canceled before starting program

VI. Adding Dependents

Dependents can be added to an EV’s record in TEAMS prior to initiating a Request DS-2019 workflow or by initiating the Update Data workflow.

1. Navigate to the Manage Participant page.

2. Scroll down to the Dependents panel and select the gray Add Dependents button. This will open the Add Dependents form. A dependent cannot be added to an EV if the EV is in an active workflow.
3. Enter data for all fields in the form then select the blue Add Dependent button. This will add the dependent to the EV record.

Link to Tutorial: Creating a U.S. Program

7 U.S. Program Providers

This section provides instruction on how to enter program data for U.S. program providers and includes a tutorial and narrative text with step-by-step instructions.

7.1 Details

Program Providers are institutions that conduct exchanges for U.S. Programs. It is important to keep track of Program Providers and their addresses in TEAMS. Program Providers can be created by RO/ARO users or Tech Support Users. The addresses of the Program Providers are created when Initiators create new U.S. Programs. Below are the steps to create and store Program Provider addresses from the Create Program form for several scenarios.

You must be an R1 Initiator to complete these tasks.

I. My Program Provider is listed and there is a saved address available:

1. Navigate to the Create Program Form.
2. Enter all the required data in the fields.
3. Select United States as the location and select the Next button.
4. Select correct Program Provider from Program Provider drop-down list.
5. Check for a saved address under Saved Addresses drop-down list. If the address exists, select the correct address and the address fields below auto-populate.
6. Select Create Program.

II. My Program Provider is listed but there is *not* a saved address available:

1. On the second page of the Create Program Form, select the Program Provider from the Program Provider drop-down list.
2. Check to see if there is a saved address in the Saved Addresses drop-down list.
3. If there are no saved addresses, type in the Program Provider Address in the address fields below.
4. Select the Create Program button.

    - TEAMS will save this Program Provider Address to this Program Provider for future use in the award. The address is stored in the Manage Program Provider Address page available only for R1 Initiators.
    - The Create Program form has a built-in address validator that validates if the U.S. address entered exists.

If you enter the correct address and the validator suggest the same address in a slightly different format, update the address to match the validator’s suggestions then select the Create Program button.

III. I need to edit or change the Program Provider:

1. Go to your dashboard. Under My Programs select the program that has the Program Provider that needs to be edited or changed.
2. This brings you to the Manage Program page. Click the blue pencil edit button at the top right corner of the page.
3. Choose a new Program Provider in the Program Provider drop-down list. Select a new address by selecting a Saved Address or add a new address.
4. Edit the existing address by typing a new address or selecting the provider address fields.

IV. I submitted an incorrect Program Provider Address

1. Select Provider Addresses from the blue navigation bar at the top of the screen.
2. This brings you to the Manage Program Provider Addresses page and a list of all Program Provider addresses associated to your Awards. Locate the incorrect Program Provider address and select the red X on the right side.
3. A pop-up appears asking if you wish to permanently delete the Program Provider Address. Select yes. The page updates with the changes.

V. The Program Provider is not listed

If you do not see the Program Provider, you need to:

1. Email the TEAMS help desk (teams@usaid.gov) and ask for an exchange provider to be added. The name of the provider should be given to the help desk.
2. The new program provider will be added as soon as possible by the help desk.

Link to Tutorial: Program Providers

8 User Workflows

Individuals who are selected to attend U.S. EV programs must comply with U.S. Government J-1 visa regulations. TEAMS provides a series of workflows (processes) to request the required DS-2019 visa document, and to monitor the EV during all phases of the U.S. exchanges or training program in compliance with J-1 visa regulations.

Workflow: Workflows are processes tied to U.S. based exchanges or training that require the R1 Initiator to enter data or change a status and pass that update to the R2 Award and Country Verifier (if applicable), who verifies the changes and sends the record to the R3 Approver, who reviews and approves the update and sends the record to the R4 RO, who reviews the update and submits it to SEVIS.

The following chart outlines each workflow in TEAMS and includes responsibilities for each TEAMS role:

Workflow	R1 Initiator	R2 Verifier (Award and Country, if applicable)	R3 Approver	R4 RO	Shipper
Request DS-2019	1. Enters all data. It is recommended that this step be done 4-6 weeks before the interview at the Consulate. This timeframe may vary by country. 2. Uploads documents and provides DS-2019 form to EV, once signed by R4.	Verifies that information is complete, correct, error free. Communicates errors to R1 Initiator for correction. Provides DS-2019 form to EV, once signed by R4.	Approves request. Provides DS-2019 form to EV, once signed by R4.	Submits request to SEVIS, manages SEVIS errors, electronically signs DS-2019 forms and uploads signed forms to TEAMS.	Prints DS-2019 forms, secures R4 RO signature, ships signed forms to the field (Only if requested by the R3 Approver.)
Validate Arrival in the United States	Confirms arrival of EVs and initiates Validate Arrival workflow immediately when the EV begins the program. **Note,**	Verifies status of arrival.	N/A	Submits arrival validation to SEVIS. This must be done within 30 business days of the	N/A

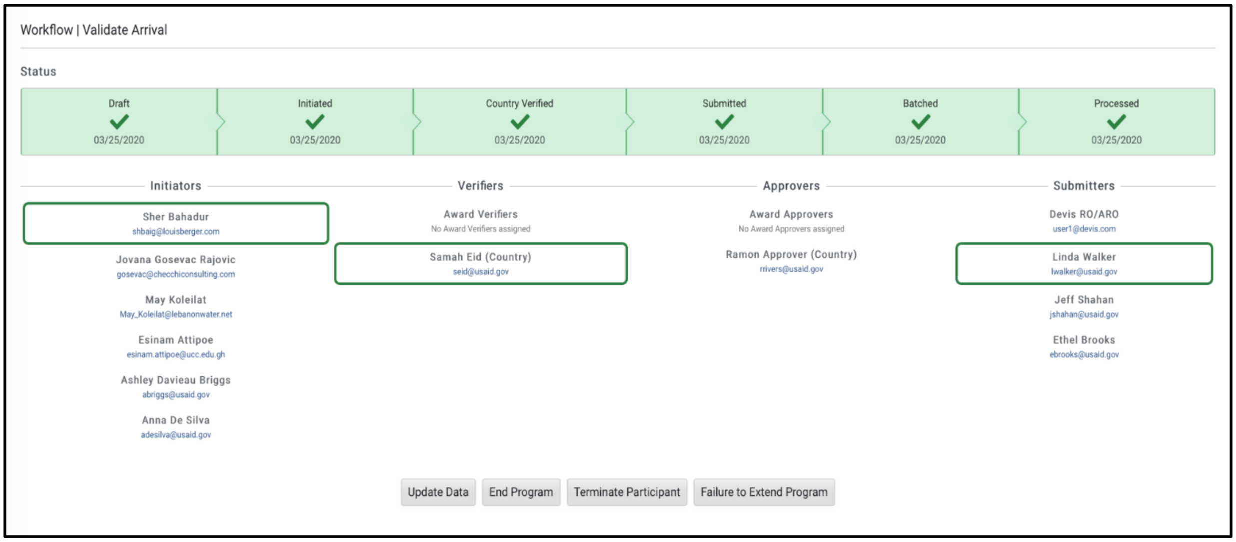
Workflow	R1 Initiator	R2 Verifier (Award and Country, if applicable)	R3 Approver	R4 RO	Shipper
	participants may arrive up to 30 days. before the start date of a program.			EV's. program start date.	
Update Data	Enter all data updates. **NOTE: Once the DS-2019 workflow has completed, data updates cannot be entered into TEAMS until after the Validate Arrival workflow is completed.**	Verifies updates.	Approves updates.	Submits updates to SEVIS.	N/A
Cancel - *Initial* **status**	Initiates cancel workflow for an EV in the ***Initial*** status.	Verifies cancellation of participant.	Approves cancellation of participant.	Submits cancellation to SEVIS.	
Cancel - *Planned* **status**	Initiates cancel workflow for an EV in the ***Planned*** status. **Note: When an EV has not been issued a DS-2019, they can either be deleted from the program or canceled. If canceled, no validation is needed by the R2 Verifier, R3 Approver, or the R4 RO.**	N/A	N/A	N/A	N/A

Workflow	R1 Initiator	R2 Verifier (Award and Country, if applicable)	R3 Approver	R4 RO	Shipper
No Show	Uploads No Show documentation. Initiates No Show workflow.	Verifies participant's No-Show workflow.	Approves participant's No. Show workflow.	Submits No Show workflow to SEVIS.	N/A
Terminate	Receives confirmation from USAID that an EV should be terminated, uploads USAID direction to terminate EV, starts terminate workflow, enters termination effective date and reason for termination.	Verifies EV's termination.	Approves EV's termination.	Submits termination to SEVIS.	N/A
Completed the Program Early	Starts Completed Program Early workflow, including entering new date for program end.	Verifies Completed Program Early workflow.	Approve Completed Program Early workflow.	Submits Completed Program Early workflow to SEVIS.	N/A
End Program: Did Not Complete Program	Starts Did Not Complete Program workflow, including entering new date for program end and selecting a program shorten reason code.	Verifies Did Not Complete Program workflow.	Approve Did Not Complete Program workflow.	Submit Did Not Complete Program workflow to SEVIS.	N/A
End Program: Complete Program as Scheduled	Starts complete program workflow. **Note: when participants finish their programs and depart the U.S.**	N/A	N/A	N/A	N/A

Workflow	R1 Initiator	R2 Verifier (Award and Country, if applicable)	R3 Approver	R4 RO	Shipper
	on time, SEVIS automatically updates the EV status and there is no need for TEAMS to submit program completion to SEVIS.				
Failure to Extend Program	Starts the failure to extend program workflow for an EV in the ***Completed*** status. Selects new program end dates.	Verifies failure to extend program, including new dates.	Approve failure to extend program, including new dates.	Submit failure to extend program, including new dates to SEVIS via RTI.	N/A

Workflows are found on the EV screen. TEAMS includes a Workflow Status Bar on each participant's page. The Workflow Status Bar shows:

- The workflow the EV is in or has completed.
- The step the EV has reached in a current workflow, indicated by a green checkmark in a green box with the date the action occurred.
- The R1, R2, R3, and R4 who initiated, verified, approved, and submitted the record.
- The options available for the next workflow.



Workflow | Validate Arrival
Status
Draft
03/25/2020
Initiated
03/25/2020
Country Verified
03/25/2020
Submitted
03/25/2020
Batched
03/25/2020
Processed
03/25/2020
Initiators
Sher Bahadur
shbaig@louisberger.com
Jovana Gosevac Rajovic
gosevac@checchiconsulting.com
May Koleilat
May_Koleilat@lebanonwater.net
Esinam Attipoe
esinam.attipoe@ucc.edu.gh
Ashley Davieau Briggs
abriggs@usaid.gov
Anna De Silva
adesilva@usaid.gov
Verifiers
Award Verifiers
No Award Verifiers assigned
Samah Eid (Country)
seid@usaid.gov
Approvers
Award Approvers
No Award Approvers assigned
Ramon Approver (Country)
rrivers@usaid.gov
Submitters
Devis RO/ARO
user1@devis.com
Linda Walker
lwalker@usaid.gov
Jeff Shahan
jshahan@usaid.gov
Ethel Brooks
ebrooks@usaid.gov
Update Data
End Program
Terminate Participant
Failure to Extend Program

Workflow Status Descriptions

Draft	Is the status after an R1 Initiator starts workflow
Initiated	After an R1 Initiator initiated a workflow
Award Verified	After an R2 Award Verifier verifies a workflow
Country Verified (if applicable)	After an R2 Country Verifier verifies a workflow
Approved	After an R3 Approver approves a workflow
Submitted	After a R4 RO submits a workflow to SEVIS Batch
Batched	After the workflow has been batched and sent to SEVIS
Batched Error	When an error occurs while SEVIS is processing the workflow
Processed	After a workflow has been processed in SEVIS
Processed Via RTI	After an R4 RO submits a workflow via RTI
Rejected	After a user rejects a workflow
Shipped	After a DS-2019's shipment shipped date has past

Workflow Action buttons:

Initiate – R1 Initiators select the Initiate button to start a workflow. This sends the EV record to the R2 Verifier.

Verify – R2 Award Verifier and R2 Country Verifier (if applicable) select the Verify button to verify a workflow. This sends the EV record to the R3 Approver (this sends a workflow to R4 RO during the Validate Arrival workflow).

Approve – R3 Approvers select the Approve button to approve a workflow. This sends the EV record to the R4 RO.

Reject – Any user may select the Reject button to Reject an EV record. This sends the EV record back to the R1 Initiator.

Submit to SEVIS – The R4 RO selects the Submit button to send the EV record to SEVIS, once the data has been processed in SEVIS the workflow status will be set to Processed.

Submit via RTI – The R4 RO selects the Submit by RTI button to manually process the record in SEVIS, rather than batching the record to SEVIS. This action sets the workflow status to Processed.

9 DS-2019 Process Overview

NOTE: The DS-2019 workflow is an administrative process to request the DS-2019 form needed to apply for a J-1 visa. Successful processing through TEAMS produces the DS-2019 form. The form itself does not guarantee that a visa will be granted. The decision to grant a visa is made by the Consular Office at the U.S. Embassy.

Requirements to Begin the Request DS-2019 Workflow

The R1 Initiator, R2 Verifier, R3 Approver, and R4 RO are needed for this workflow.

The R1 Initiator must have already:

- Created a U.S. program,
- Added an EV to the U.S. program, and
- Added costs to the U.S. program.

The EV must be in **Planned** status. The R1 Initiator begins the Request DS-2019 Workflow by:

1. Navigating to R1 Initiator's Dashboard and My Programs.
2. Select the U.S. Program.
3. On the Manage Program page, navigate to the Participants panel.
4. Select a Participant. In the workflow panel, select Request DS-2019 Workflow.
5. Select Yes in the Request DS-2019 Workflow pop-up screen to start the workflow.

Request DS-2019 Workflow steps

<u>R1 Initiator</u>

1. Navigate to the R1 Initiator's Dashboard.
2. Locate the My Participants panel - the R1 Initiator can see a list of EVs that require the R1 Initiator's action.
3. Select an EV that is in Planned status. This brings the R1 Initiator to the Manage Participant page.
4. Scroll down to the Documents panel and select the gray button in the upper right-hand corner.
5. Upload required documents. To initiate the Request DS-2019 workflow, user must upload the following documents: Passport Face Page, Health and Accident Coverage, Condition of Sponsorship with Participant Signature.
6. Scroll back up to the Workflow panel and select green button, Initiate. If the option to Initiate is not there - more documents may need to be uploaded.
7. Select Yes in the Request DS-2019 Workflow pop-up screen.

R2 Verifier

1. Navigate to R2 Verifier's Dashboard.
2. Locate the My Participants panel - the R2 Verifier can see a list of participants that require the R2 Verifier's action.
3. Select an EV that is in Planned status. This brings the R2 Verifier to the Manage Participant page.
4. R2 Verifier reviews participant information. If there are documents to add, the R2 Verifier can upload them at this time.
5. Scroll to Workflow panel at the top of the page and select green button, Verify.
6. A pop-up appears asking if the record has been reviewed, select Yes.

R3 Approver

1. Navigate to R3 Approver's Dashboard.
2. Locate the My Participants panel - the R3 Approver can see a list of participants that require the R3 Approver's action.
3. Select an EV that is in Planned status. This brings the R3 Approver to the Manage Participant page.
4. The R3 Approver reviews participant information. If there are documents to add, the R3 Approver can upload them at this time. All required documents (Passport Face Page, Health and Accident Coverage, Conditions of Sponsorship with Participant Signature, and Conditions of Sponsorship with Signature and USAID Signature) must be uploaded by this time to Approve the EV record.
5. Scroll to Workflow panel at the top of the page and select green button, Approve.
6. A pop-up appears asking if the record has been reviewed, select Yes.

R4 RO

1. Navigate to R4 RO's Dashboard.
2. Locate the My Participants panel - the R4 RO can see a list of EVs that require the R4 RO's action.
3. Select an EV that is in Planned status. This brings the R4 RO to the Manage Participant page.
4. The R4 RO reviews EV information. If there are documents to add, the R4 RO can upload them at this time. All required documents must be uploaded by this time.
5. Scroll to Workflow panel at the top of the page and select green button, Submit to SEVIS.
6. A pop-up appears asking if the record has been reviewed, select Yes. The EV record is submitted to SEVIS.

What Happens After the Request DS-2019 Workflow Has Been Submitted?

1. Data is sent to SEVIS and a DS-2019 is created for the EV.

2. The R4 electronically signs and uploads the DS-2019 form to TEAMS.
3. The Implementing Partner (R1 or R2) and Mission R3 coordinate with the EV to deliver the DS-2019 form (if the EV does not have access to a printer the R1/R2/R3 can also print on their behalf). The EV must bring a physical copy of the DS-2019 form to their visa application appointment and when entering the United States.
4. Users may check U.S. Consular visa wait times here: https://travel.state.gov/content/travel/en/us-visas/visa-information-resources/wait-times.html

Note: The R3 Approver may request the R4 RO/ARO physically sign and ship the DS-2019 form to Missions via postal mail, instead of digitally signing and uploading the form to TEAMS, by contacting the RO/ARO team (**EVpolicy@usaid.gov**). However, as this process takes an additional one to two weeks, the R4 RO/ARO highly recommends the use of digital signatures to avoid delays.

Link to Tutorial: Request DS-2019 Workflow

10 UPLOADING FILES

In TEAMS, not only can the R1 Initiator upload files, all other users in the workflow (R2 Verifier, R3 Approver, R4 RO) can upload them as well. Documents must be uploaded for each EV. These documents support the process of obtaining a DS-2019 from SEVIS.

NOTE: Do not upload medical documents with personal identifiable information (PII) such as medical examination documents.

Which documents and when they are required:

1. The first three: Passport Face Page, Health and Accident Coverage (HAC), and Conditions of Sponsorship with Participant Signature are required to Initiate. The R1 Initiator must upload these three documents.
2. The next one: Conditions of Sponsorship with Participant and USAID Signatures is required by the time the R3 Approver needs to Approve. The R1 Initiator, R2 Verifier, or R3 Approver can upload this document.

How to upload files

I. Navigate to the Documents panel

1. You must be an R1 Initiator, *R2 Verifier*, *R3 Approver, or R4 RO* to do these tasks.
2. Navigate to your dashboard and select an EV from the My Participants panel by clicking the green eye on the right side. This brings you to the Manage Participant page.
3. Scroll down to see the Documents panel on the right.

II. How to upload Documents

1. In the Documents panel, select the gray button in the upper right corner.
2. A pop-up window appears with the list of documents.

    - The Passport Face Page, Health and Accident Coverage (HAC), and Conditions of Sponsorship with Participant Signature) are required documents to initiate the DS-2019 workflow.
    - The Conditions of Sponsorship with Participant and USAID Signatures is required for other workflows or for adding a dependent to an EV.

3. There is a panel at the bottom to "Drag & drop your files or Browse". Click on the Browse button.
4. Use the File Explorer window to search for and select the documents you wish to upload to TEAMS for the EV.

5. The documents selected in File Explorer will appear with a drop-down list to select the type of document. Select the type of document that is to be uploaded (e.g., Passport Face page).
6. There is also a document type labeled "Other". This may be used to upload any additional documents required by the Mission, or documentation of participant issues encountered during the exchange or training. Documents labeled "Other" requires the user to enter a brief description of the document in the Description field.
7. Once all the documents have been uploaded and associated to the necessary document types, navigate to the bottom of the page and select the blue Save Files button.

III. How to view and edit Documents

1. In Documents panel, select the view button to the right of each document you would like to view.
2. To delete a document, select the gray button in the upper right corner of the Documents panel:

    - The list of documents you have uploaded should appear.
    - Delete one by clicking the red x on the right side.

Link to Tutorial: Uploading Documents

11 VALIDATE PARTICIPANT ARRIVAL

The R1 Initiator, R2 Verifier, and R4 RO are needed for this workflow. Remember, this is the only workflow that does not require an R3 Approver. All other workflows require the R1 Initiator, R2 Verifier, R3 Approver, and R4 RO.

The EV must be in **Initial** status (meaning a DS-2019 has already been issued). The R1 Initiator has already checked that the EVs have arrived at their exchanges or training site. Validation must happen within 30 calendar days of the EV's arrival date.

The R1 Initiator begins the Validate Arrival Workflow by:

1. Navigating to R1 Initiator's Dashboard and My Programs panel.
2. Select the U.S. Program that is about to begin.
3. On the Manage Program page navigate to Participants panel. Select EV whose arrival needs to be validated.
4. On Manage Participant page, the workflow panel (at the top) should show the Request DS-2019 Workflow has been Processed.
5. The option to Validate Arrival is underneath. R1 Initiator selects Validate Arrival button.
6. Select Yes in the Validate Arrival Workflow pop-up screen.

<u>R1 Initiator</u>

There are two ways to navigate to an EV that needs their Validate Arrival Workflow Initiated. The first way is directly after beginning the Validate Arrival Workflow. The option to initiate should appear after selecting the Validate Arrival button. A pop-up appears asking if user wishes to Initiate the Validate Arrival workflow. Select Yes.

The second way is looking at the R1 Initiator's Dashboard for an EV in Initial status that requires the R1 Initiator's action. Select the EV by selecting the green view Participant button on the right side. Select the Initiate button and in the Initiate Validate Arrival Pop-up screen select Yes.

<u>R2 Verifier</u>

1. Navigate to the R2 Verifier's Dashboard and then to Participants panel.
2. Look for an EV that is in Initial Status and in the Validate Arrival workflow. Select the green View Participant button on the right side.
3. On Manage Participant page, select Verify on the workflow panel at the top. Select yes when the pop-up appears.

<u>R4 RO</u>

1. Navigate to R4 RO's Dashboard and then to Participants panel.
2. Look for an EV that is in Initial Status and in the Validate Arrival workflow. Select the green eye on the right side.

3. On Manage Participant page, select Submit to SEVIS on the workflow panel at the top. Select yes when the pop-up appears.

Link to Tutorial: Validate Arrival Workflow

12 UPDATE DATA

The Update Data workflow is used when an EV needs to have their Bio Data, Logistics Data, or Dependent data updated. Update Data Workflow can only be started when an EV is either in an Initial or Active Status.

R1 Initiator

1. Navigate to the R1 Initiator's Manage Program Page.
2. Select the view Participant button for a user with EV status of Initial or Active and a workflow status of Processed or Processed via RTI. This takes user to the Manage Participant page.
3. In the Workflow panel, select the Update Data workflow button. Answer Yes in the pop-up screen.
4. Then press the green Initiate button. Answer Yes in the pop-up screen. This initiates the workflow.

R2 Verifier

1. Navigate to R2 Verifier's Dashboard.
2. Locate the My Participants panel - the R2 Verifier can see a list of participants that require the R2 Verifier's action.
3. Select the View Participant button for the EV in the Validate Arrival workflow that has been initiated. This takes use to the Manage Participant page.
4. In the Workflow panel, press the green Verify button. Answer Yes in the pop-screen. This verifies the workflow.

R3 Approver

1. Navigate to R3 Approver's Dashboard.
2. Locate the My Participants panel - the R3 Approver can see a list of participants that require the R3 Approver's action.
3. Select the View Participant button for the EV in the Validate Arrival workflow that has been verified. This takes user to the Manage Participant page.
4. In the Workflow panel, press the green Approve button. Answer Yes in the pop-up screen. This approves the workflow

R4 RO

1. Navigate to R4 RO's Dashboard.
2. Locate the My Participants panel - the R4 RO can see a list of participants that require the R4 RO's action.
3. Select the View Participant button for the EV in the Validate Arrival workflow that has been approved. This takes user to the Manage Participant page.

4. In the Workflow panel, press the green Submit to SEVIS button. Answer Yes in the pop-up screen. This approves the workflow

When to check the "Request New DS-2019" box:

1. Participant bio-data changes, such as name, date of birth, citizenship, etc.
2. Program date changes when the new program start/end dates are more than 30 days since the original program start/end date.
3. Change of venue or program description.

NOTE: Update Data Workflow can only be used if an EV is in Initial or Active Status. The R1 Initiator, R2 Verifier, or R3 Approver may check the box to request a new DS-2019 if there are changes in:

- End dates,
- Financial information,
- The site of the activity, and
- Biographical information.

When the R1 Initiator, R2 Verifier, or R3 Approver checks the box to request a new DS-2019 form, this is an indication to the R4 RO that the DS-2019 may need to be re-issued. The RO/ARO will make the final decision on whether to issue a new form.

If an EV is in Initial status and any of the above updates have been made, then the RO/ARO will Submit via RTI and decide whether to reissue the DS-2019. Prior to making any changes directly in SEVIS, the RO/ARO will confirm in SEVIS whether the EV has been issued his/her visa. Once the visa has been issued, only the EV's U.S. address can be updated. All other updates must wait until participants are in Active status.

If an EV is in Active status and any of the above updates have been made, the R1 Initiator, R2 Verifier, or R3 Approver should check the "Request New DS-2019" box. The RO/ARO will submit to SEVIS by batch and decide whether to reprint the DS-2019.

Link to Tutorial: Update Data Workflow

Requirements to Begin the Cancel Participant Workflow

The R1 Initiator, R2 Verifier, R3 Approver, and R4 RO are needed for this workflow. The EV must be in **Planned** or **Initial** status. The R1 Initiator must be notified that an EV needs to be canceled.

Cancel Participant Workflow steps

R1 Initiator

If the EV is in *Planned* status meaning a DS-2019 has not been issued yet, then just the R1 Initiator needs to cancel the EV. There are no other steps after the R1 Initiator cancels the EV. If the EV is in *Initial* status meaning a DS-2019 has been issued already, then the workflow must go through all the roles:

1. Navigate to the R1 Initiator's Dashboard. Locate the program the EV was going to attend under My Programs. Click the green eye on the right side.
2. In the Manage Programs page, scroll down to My Participants and select the EVs that needs to begin the workflow by clicking the green eye on the right side.
3. In the Manage Participant page, select Cancel Participant in the Workflow panel (at top of page).
4. A pop-up appears asking if the EV has departed their home country. The R1 Initiator selects "No".
5. The option to Initiate appears - select the green button Initiate.
6. Select Yes in the Initiate Cancel Participant Workflow pop-up screen.

R2 Verifier

1. The R2 Verifier navigates to Manage Participant page. (From dashboard, go to My Participants, select participant by clicking green eye on the right side).
2. Select the green button Verify.
3. Select Yes in the Verify Cancel Participant Workflow pop-up screen.

R3 Approver

1. The R3 Approver navigates to Manage Participant page. (From dashboard, go to My Participants, select participant by clicking green eye on the right side).
2. Select the green button Approve.
3. Select Yes in the Approve Cancel Participant Workflow pop-up screen.

R4 RO

1. The R4 RO navigates to Manage Participant. (From dashboard, go to My Participants, select participant by clicking green eye on the right side).

2. Select the green button Submit to SEVIS.
3. Select Yes in the Submit Cancel Participant Workflow pop-up screen.

Link to Tutorial: Cancel Participant Workflow

Requirements to Begin the No Show Workflow Process
The R1 Initiator, R2 Verifier, R3 Approver, and R4 RO are needed for this workflow. The EV must be in **Initial** status and have left their country.

No Show Workflow Process

R1 Initiator

1. Navigate to the R1 Initiator's Dashboard. Locate the program the EV was going to attend under My Programs. Click the green eye on the right side.
2. In the Manage Programs page, scroll down to My Participants and select the EV that needs to begin the workflow by clicking the green eye on the right side.
3. Before selecting the No-Show button at the top of the page, scroll down to upload any no show confirmations under No Show Documentation.
4. Scroll up, select No Show in the Workflow panel (at top of page).
5. A pop-up appears asking “Has USAID directed you to set this participant SEVIS status to ‘No Show’”? Select Yes.
6. The option to Initiate appears - select the green button Initiate.
7. Select Yes in the Initiate No Show Participant Workflow pop-up screen.

R2 Verifier

1. The R2 Verifier navigates to Manage Participant page. (From dashboard, go to My Participants, select participant by clicking green eye on the right side).
2. Select the green button Verify.

R3 Approver

1. The R3 Approver navigates to Manage Participant page. (From dashboard, go to My Participants, select participant by clicking green eye on the right side).
2. Select the green button Approve.

R4 RO

1. The R4 RO navigates to Manage Participant. (From dashboard, go to My Participants, select participant by clicking green eye on the right side).
2. Select the green button R4 RO.

Link to Tutorial: No Show Participant Workflow

15 TERMINATE PARTICIPANTS

Requirements to Begin the Terminate Workflow Process
The R1 Initiator, R2 Verifier, R3 Approver, and R4 RO are needed for this workflow. The EV must be in **Active** or **Completed** status. The R1 Initiator must be notified by USAID by email that an EV's program needs to be terminated.

Terminate Workflow Process

R1 Initiator

1. Navigate to the R1 Initiator's Dashboard. Locate the program the EV is currently attending under My Programs. Click the green eye on the right side.
2. In the Manage Programs page, scroll down to My Participants and select the EV that needs to begin the workflow by clicking the green eye on the right side.
3. Before selecting the Terminate Participant button at the top of the page, scroll down to upload any Termination documentation confirmations under Termination Documentation.
4. Scroll up, select Terminate Participant button in the Workflow panel (at top of page).
5. A pop-up appears asking "Has USAID directed you to terminate this participant due to violations of the Conditions of Sponsorship or SEVIS reasons for termination?" Select Yes.
6. The option to Initiate appears - select the green button Initiate.
7. Select Yes in the Initiate Terminate Participant Workflow pop-up screen.
8. Select the Termination Reason and Effective Termination dates in the second pop-up screen. Press the blue Submit button.

R2 Verifier

1. The R2 Verifier navigates to Manage Participant page. (From dashboard, go to My Participants, select participant by clicking green eye on the right side).
2. Select the green button Verify. Confirm yes in the Verify Terminated Participant pop-up screen.

R3 Approver

1. The R3 Approver navigates to Manage Participant page. (From dashboard, go to My Participants, select participant by clicking green eye on the right side).
2. Select the green button Approve. Confirm yes in the Approve Terminated Participant pop-up screen.

R4 RO

1. The R4 RO navigates to Manage Participant. (From dashboard, go to My Participants, select participant by clicking green eye on the right side).

2. Selects the green button Submit to SEVIS. Confirm yes in the Submit Terminated Participant pop-up screen.

Link to Tutorial: Terminate Participant Workflow

16 COMPLETED THE PROGRAM

Requirements to Begin the Completed Workflow Process

The R1 Initiator, R2 Verifier, R3 Approver, and R4 RO are needed for this workflow. The EV must be in **Active** status. The R1 Initiator must be notified by USAID that an EV's program has ended. The Completed the Program button has three separate workflows: Completed as Scheduled, Completed Early, and Did Not Complete. When beginning a Complete the Program workflow, users will determine which type of workflow they are starting based on the how they answer the 4 pop-up questions that appear when starting a Completed the Program workflow.

Completed the Program (As Scheduled) Process

R1 Initiator

1. Navigate to the R1 Initiator's Dashboard. Locate the program the EV is currently attending under My Programs. Click the green eye on the right side.
2. In the Manage Programs page, scroll down to My Participants and select the EV that needs to begin the workflow by clicking the green eye on the right side.
3. Scroll up, select End Program button in the Workflow panel (at top of page).
4. A pop-up appears asking "Did the EV return to their home country on or before their U.S. Site Depart date?" Select Yes.
5. A pop-up appears asking "Did the EV violate USAID program rules or U.S. EV program regulations?" Select No.
6. A pop-up appears asking "Did the EV complete the Program?" Select Yes.
7. A pop-up appears asking "Did the EV complete the Program EARLY?" Select No.
8. The option to Initiate appears - select the green button Initiate.
9. Select Yes in the Initiate Completed the Program Workflow pop-up screen. Workflow has been completed. Participant status is marked as Completed.

Completed the Program Early Process

R1 Initiator

1. Navigate to the R1 Initiator's Dashboard. Locate the program the EV is currently attending under My Programs. Click the green eye on the right side.
2. In the Manage Programs page, scroll down to My Participants and select the EV that needs to begin the workflow by clicking the green eye on the right side.
3. Scroll up, select End Program button in the Workflow panel (at top of page).
4. A pop-up appears asking "Did the EV return to their home country on or before their U.S. Site Depart date?" Select Yes.

5. A pop-up appears asking “Did the EV violate USAID program rules or U.S. EV program regulations?” Select No.
6. A pop-up appears asking “Did the EV complete the Program?” Select Yes.
7. A pop-up appears asking “Did the EV complete the Program EARLY?” Select Yes.
8. The option to Initiate appears - select the green button Initiate.
9. Select Yes in the Initiate Completed the Program Early Workflow pop-up screen.
10. Select the new US Site Depart Date and Residence Country Return Date in the pop-up screen. Press the blue Save button.

<u>R2 Verifier</u>

1. The R2 Verifier navigates to Manage Participant page. (From dashboard, go to My Participants, select participant by clicking green eye on the right side).
2. Select the green button Verify. Confirm yes in the Verify Completed the Program Early Workflow pop-up screen.

<u>R3 Approver</u>

1. The R3 Approver navigates to Manage Participant page. (From dashboard, go to My Participants, select participant by clicking green eye on the right side).
2. Select the green button Approve. Confirm yes in the Approve Completed the Program Early Workflow pop-up screen.

<u>R4 RO</u>

1. The R4 RO navigates to Manage Participant. (From dashboard, go to My Participants, select participant by clicking green eye on the right side).
2. Selects the green button Submit to SEVIS. Confirm yes in the Submit Completed the Program Early Workflow pop-up screen.

Did Not Complete the Program Process

<u>R1 Initiator</u>

1. Navigate to the R1 Initiator's Dashboard. Locate the program the EV is currently attending under My Programs. Click the green eye on the right side.
2. In the Manage Programs page, scroll down to My Participants and select the EV that needs to begin the workflow by clicking the green eye on the right side.
3. Scroll up, select End Program button in the Workflow panel (at top of page).
4. A pop-up appears asking “Did the EV return to their home country on or before their U.S. Site Depart date?” Select Yes.
5. A pop-up appears asking “Did the EV violate USAID program rules or U.S. EV program regulations?” Select No.
6. A pop-up appears asking “Did the EV complete the Program?” Select No.
7. The option to Initiate appears - select the green button Initiate.

8. Select Yes in the Initiate Did Not Complete the Program Workflow pop-up screen.
9. Select the new US Site Depart Date, Residence Country Return Date, and Shortened Program Reason code in the pop-up screen. Press the blue Save button.

R2 Verifier

1. The R2 Verifier navigates to Manage Participant page. (From dashboard, go to My Participants, select participant by clicking green eye on the right side).
2. Select the green button Verify. Confirm yes in the Verify Did Not Complete the Program Workflow pop-up screen.

R3 Approver

1. The R3 Approver navigates to Manage Participant page. (From dashboard, go to My Participants, select participant by clicking green eye on the right side).
2. Select the green button Approve. Confirm yes in the Approve Did Not Complete the Program Workflow pop-up screen.

R4 RO

1. The R4 RO navigates to Manage Participant. (From dashboard, go to My Participants, select participant by clicking green eye on the right side).
2. Selects the green button Submit to SEVIS. Confirm yes in the Submit Did Not Complete the Program Workflow pop-up screen.

Link to Tutorial: End Program Workflows

17 FAILURE TO EXTEND PROGRAM

Requirements to begin the Failure to Extend Program Workflow Process

The R1 Initiator, R2 Verifier, R3 Approver, and R4 RO are needed for this workflow. The EV must be in **Active** or **Completed** status. The R1 Initiator must be notified by USAID when an EV's program needs to be extended.

Failure to Extend Program Process

R1 Initiator

1. Navigate to the R1 Initiator's Dashboard. Locate the program the EV is currently attending under My Programs. Click the green eye on the right side.
2. In the Manage Programs page, scroll down to My Participants and select the EV that needs to begin the workflow by clicking the green eye on the right side.
3. Scroll up, select Failure to Extend Program button in the Workflow panel (at top of page).
4. A pop-up appears asking "Do you need to correct your minor infraction of extending the program in a timely manner?" Select Yes.
5. In the EV Logistics panel, user selects the Edit button in the top right of the panel. The US Site Depart Date and Residence Country Return Date fields can be edit.
6. Update the new US Site Depart Date and Residence Country Return Date fields. Then press the green save changes button (check mark icon).
7. Select the green button Initiate in the workflow panel.
8. Select Yes in the Initiate Failure to Extend Program pop-up screen.

R2 Verifier

1. The R2 Verifier navigates to Manage Participant page. (From dashboard, go to My Participants, select participant by clicking green eye on the right side).
2. Select the green button Verify. Confirm yes in the Verify Failure to Extend Program pop-up screen.

R3 Approver

1. The R3 Approver navigates to Manage Participant page. (From dashboard, go to My Participants, select participant by clicking green eye on the right side).
2. Select the green button Approve. Confirm yes in the Approve Failure to Extend Program pop-up screen.

R4 RO

1. The R4 RO navigates to Manage Participant. (From dashboard, go to My Participants, select participant by clicking green eye on the right side).

2. Selects the green button Submit to SEVIS. Confirm yes in the Submit Failure to Extend Program pop-up screen.

18 PARTICIPANT RECORD JOURNAL

Table of all Participant Record Journal Entries.

Journal Entry	Date / Timestamp	Role	Type	User's Info	Message
Participant Added to a US Program	Yes (05/03/2019 - 1:56 PM EDT)	Role	System	First/Last Name, Email	Record Created
Workflow Started	Yes (05/03/2019 - 1:56 PM EDT)	Role	System	First/Last Name, Email	**X** workflow started (**Request DS-2019** workflow started)
Dependent Added to a US Participant	Yes (05/03/2019 - 1:56 PM EDT)	Role	System	First/Last Name, Email	Dependent **X** added (dependent **Sara Smith** added)
Documents Uploaded or Deleted	Yes (05/03/2019 - 1:56 PM EDT)	Role	System	First Name, Last Name, Email	**Action** - **File Type** (**Uploaded** - **Biodata Form** or **Deleted** - **Passport Face Page**)
Workflow Initiated	Yes (05/03/2019 - 1:56 PM EDT)	Role	System	First/Last Name, Email	**X** workflow initiated (**Request DS-2019** workflow initiated)
Workflow Verified (Award/Country)	Yes (05/03/2019 - 1:56 PM EDT)	Role	System	First/Last Name, Email	**X** workflow verified (**Request DS-2019** workflow verified)
Workflow Approved	Yes (05/03/2019 - 1:56 PM EDT)	Role	System	First/Last Name, Email	**X** workflow approved (**Request DS-2019** workflow approved)
Workflow Submitted (for SEVIS batch)	Yes (05/03/2019 - 1:56 PM EDT)	Role	System	First/Last Name, Email	**X** workflow submitted for SEVIS batch (**Request DS-2019** workflow submitted for SEVIS batch)
Workflow recalled before batch (R4 RO)	Yes (05/03/2019	Role	System	First/Last Name, Email	**X** workflow recalled before SEVIS batch (**Update Data** workflow

Journal Entry	Date / Timestamp	Role	Type	User's Info	Message
	- 1:56 PM EDT)				recalled before SEVIS batch)
Workflow Submitted (for SEVIS RTI)	Yes (05/03/2019 - 1:56 PM EDT)	Role	System	First/Last Name, Email	**X** workflow submitted via SEVIS RTI (**Terminate Participant** workflow submitted via SEVIS RTI)
Track Changes in the Updated Data Workflow	Yes (05/03/2019 - 1:56 PM EDT)	Role	System	First Name, Last Name, Email	Updated **Field** - from **Original Data** to **New Data** (Updated: **Position Code** - from **AGRICULTURE, OTHER** to **AGRICULTURAL MANAGER**; **Last Name** - from **Smith** to **Jones**)
Workflow Rejected + Comments (65K characters)	Yes (05/03/2019 - 1:56 PM EDT)	Role	System	First/Last Name, Email	**X** workflow rejected - **Comments** (**Request DS-2019** workflow rejected - **Update the Program Dates**)
Comments (65K characters)	Yes (05/03/2019 - 1:56 PM EDT)	Role	User	First Name, Last Name, Email	**Comments**
Workflow SEVIS Approved (no SEVIS errors)	Yes (05/03/2019 - 1:56 PM EDT)	Role	System	N/A	**X** workflow has been successfully processed by SEVIS (**Request DS-2019** workflow has been successfully processed by SEVIS)
Termination Reason and Effective Termination Date selected for Terminate Participant Workflow	Yes (05/03/2019 - 1:56 PM EDT)	Role	System	First/Last Name, Email	Termination Reason: **X** Effective Termination Date: **X** (Termination Reason: **Convicted of a crime /** Effective Termination Date: 09/19/2019)

TEAMS Data Export and Reporting Approach

TEAMS allows you to:

- Export your data in a standard CSV format (comma-separated values);
- Import the data into a spreadsheet or other data management tool;
- Filter, sort, arrange data to suit your needs; and
- Print, copy, or share the data however you wish.

Where do I start? - Data Export Overview

To begin exporting data from TEAMS follow these steps:

1. Click the Export Data button on the navigation bar. This takes you to the Export Data page.
2. Choose a Start Date and End Date for the program related information you wish to export.
3. Choose a Report Type

    a. Program Data - includes a detailed Program information as well as an EV and Funding Source Summary
    b. Program Cost Data - includes detailed Cost data: by Program, by Participant, by Funding Source, etc.
    c. Participant Data - includes detailed US EV information, as well as Program and Cost summary

4. Click the Export Data button.
5. Your browser will download a CSV file.*

When you click the Export Data button, your browser downloads the file containing the data to your local computer. *Note that the downloaded file has a 'csv' extension. TEAMS exports data as comma-separated-values file – or CSV. CSV is an industry-standard format that can be used in many different applications for data analysis, visualization, or many other purposes.

Depending on how your browser is configured, the file will probably be saved in your Downloads folder. If you have trouble finding the file, most browsers support a **Show in Folder** option somewhere in a download status bar. Try that if you need help finding where the browser saved the TEAMS csv file.

What you will see in your Data Export.

Now that you have downloaded a TEAMS data file, review the data it contains.

Each TEAMS user is limited as to what data they can export from TEAMS. Only the RO/ARO or Tech Support role can see and export all data in TEAMS.

For other user roles, the data in your csv file will be limited to:

- Programs for the Awards you have been assigned to, or
- Programs attended by EVs from the Countries assigned to you.

Unless you have the RO/ARO or Tech Support role, the data in your csv export will be much more restricted. There are three types of exports TEAMS supports.

Program Data Export
The Program Data export provides an in-depth view of data related to Programs the users have access to. It provides detailed information about the Program's:

- Program Name, USAID Award, Implementing Partner, Start and End Dates, Program Subject, Program Type, Method of Training.
- Program Location (country where the program was held), Program Provider, MSI, Program Address.

In addition, the Program Data export also provides high-level information about:

- Total number of EVs by
    - Gender
    - Residence Country
- Total costs by funding source: USAID, Host-Country, Private, or other source

Program Cost Data Export
The Program Cost data export is much like the Program Data export, with a couple of key differences:

- The Program Cost export includes high-level Program data and in-depth Program Cost data.
- The Program Cost export includes every cost you entered into TEAMS for each program in the export.
- It provides detailed information about the program's: Name, Award, Implementing Partner, Start and End Dates, Program Subject, Program Type, Method of Training etc.
- It also provides detailed information about the program costs: Cost Source, Amount, Cost type, USAID Unit, Award Funding Type, and USAID Award.
- The result is that you will have multiple rows for Programs for which you entered multiple costs.

Here are some examples of the detailed reports you can create by filtering your Program Cost Data export:

- Costs by funding source: USAID, Host-country, Private or Other funding, in any combination.
- USAID costs by Award or USAID Unit.
- Total costs by Implementing Partner.
- Total funding for individual participants.

In summary, the Program Cost data export is mainly for analyzing program costs at a fine level of detail.

Participant Data Export
The EV Data export includes detailed information of all Participants in U.S. programs. It's very important to keep in mind that this data export includes *personally identifiable information*, which must be protected. Be sure to follow standard data protection practices when using the EV Data export.

One way to think of the EV Data Export is that it includes all the data you entered in TEAMS that is required to obtain a DS-2019 from SEVIS.

The EV data export includes detailed information about Program's: Program Name, USAID Award, Implementing Partner, Start and End Dates, Program Subject, Program Type, Method of Training.

The EV data export includes detailed information about Participant's:

- Email, First and Last Name, Gender, U.S. Address, U.S. Arrival and Departure Dates, Residence Country Depart and Arrival Dates, Visa Types
- Birth City, Birth Country, and Birth Date
- Residence Countries, Citizenship Countries, etc.

It also includes high level information about the EV's workflow: Participant's Status, Workflow, and Workflow Status.

In addition, the export includes the same Program data included in the Program Data and Cost exports. That means you can filter your participant data, for example, by:

- Award
- Implementing Partner
- Program, Program Type, Subject, etc.

You could use the EV Data export to create a mailing list for Participants from:

- One or more Awards

- One or more Countries
- In Programs at a given Program Provider or university, and so forth

How do I export & Customize a CSV file?
If you have Microsoft Office, then your .csv file will automatically open in **Microsoft Excel**. For users that do not have Microsoft Office, you can open .csv files in **Google Sheets or other applications**. In this section we will explain these steps using Google Sheets.

To import your CSV into a Google Sheet (bear in mind you will need a Google or Gmail account to create your own Google Sheets):

1. Log into Gmail or your Google account, and open Google Drive.
2. Click the **New** button.
3. Choose **Google Sheets** > **Blank spreadsheet.**
4. On the main menu, click **File** > **Import.**
5. Click the **Upload** tab.
6. Click **Select a file from your device.**
7. Locate the TEAMS csv file on your computer. It will probably be in your **Downloads** folder. Select csv file and open it.
8. An **Import file** dialog box will appear. Make these selections:
    a. Import location: **Replace spreadsheet**
    b. Separator type: **Detect automatically**
    c. Convert text to numbers, dates, formulas ...: **Yes**
9. Click **Import data**.

Now that you know how to import your TEAMS csv file into Google Sheets, we will show you how to produce useful output using filtering, sorting, and other data manipulation. **Microsoft Excel** is a software that is very similar to Google Sheets, so the steps to follow should be similar for Excel users.

Sorting the data
To make it easier to sort and view your data, let us Freeze the top row of the exported csv, which contains the column headings that TEAMS exports for you:

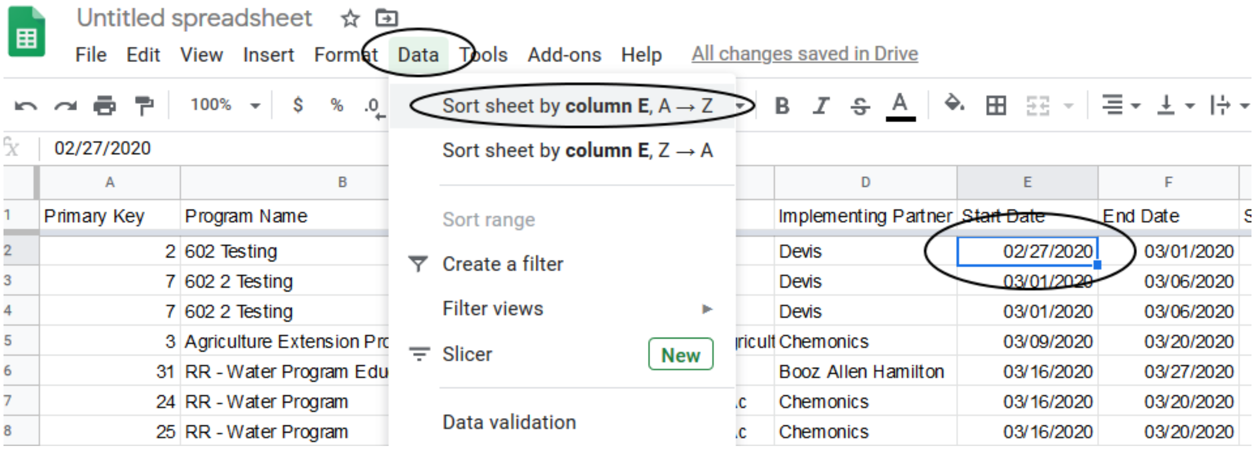
1. Choose **View** on the main menu.
2. Choose **Freeze > 1 row.**

Now to sort the data:

1. Place the cursor in the column you wish to sort by
2. Choose **Data** on the main menu, then:

    a. Sort sheet by column x, A → Z to sort values from lowest to highest

    b. Sort sheet by column x, Z → A to sort values from highest to lowest



In the example above we are sorting the programs by start date, but you can sort by any column by placing the cursor in that column and choosing

- **Data > Sort by column x ...**

That is all there is to basic sorting. Let us move on to something more interesting: filtering.

Filter the data

Filtering is a powerful tool for analyzing and presenting your TEAMS data. Filtering allows you to display only the data you need for a question you are trying to answer, or a presentation you want to create.

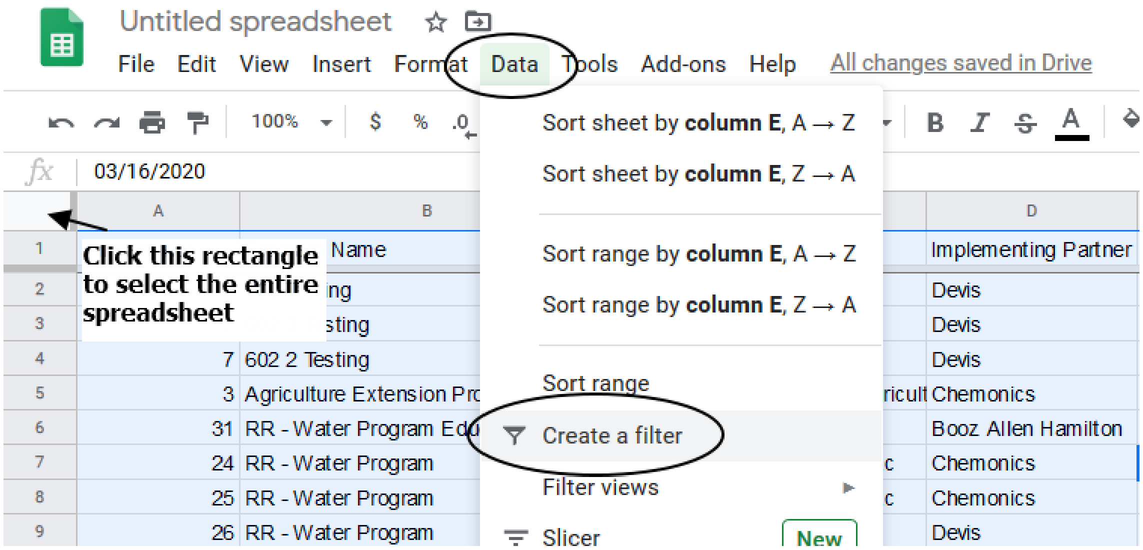
For example, let us say your supervisor wants you to produce a report of conferences managed by a specific Award – in the example and images that follow below we will use the 'DT - Agriculture Award'.

You will want to work only with programs that match these criteria:

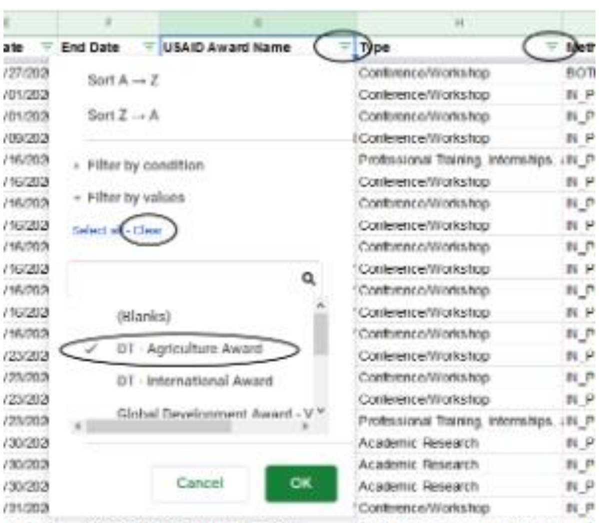
- **Program Type:** Conference/Workshop
- **USAID Award Name**: DT - Agriculture Award

Here is how to use filtering to produce this report for your supervisor:

1. First, click the white rectangle in the upper left-hand corner of the sheet – the rectangle between the columns heading 'A' and the row number '1'. This **selects all the cells** and tells Google Sheets you want to filter the entire worksheet.
2. Click **Data** on the main menu.
3. Click **Create a Filter**. This causes a filter icon to appear in each column of the header row where the column names appear. You can set a filter simultaneously on as many columns as you wish.



1. Click the Filter icon in the **USAID Award Name** column.
2. Click **Clear.**
3. Check the **DT - Agriculture Award** to select it.
4. Click **OK.**
5. Now only Programs for the **DT - Agriculture Award** are displayed.



1. Click the Filter icon in the Type column.
2. Click **Clear.**
3. Check the **Conference/Workshop** program type.
4. Click **OK.**
5. Now the spreadsheet displays only:

    a. **Conference/Workshops** programs

    b. Sponsored by the **DT - Agriculture Award**

6. Now you can **send this report to your supervisor**, by selecting the filtered cells and copy/pasting them into a document or an email. More on this in a minute.

Customize the data to create a report
All the data export files contain all data available in TEAMS. You may *not* want or need all the columns in each export. When that is the case, it is easy to

- Delete or hide the columns you don't need.
- Rearrange the columns any way you wish.

To delete or hide a single column:

1. Right-click in the letter heading for the column you want to hide or delete.
2. Then from the popup menu, select either: Delete Column or Hide Column.

If you want to delete or hide multiple columns at once:

1. Hold down the Control key (or the Command key on a Mac).
2. For each column you want to hide or delete, click in the column's letter heading.
3. Right click anywhere in the last column you selected.
4. From the popup menu, choose:

    a. Delete Selected columns, or
    b. Hide Columns

Rearranging columns to better suit your needs is easy:

1. Grab the letter heading of any column and drag it to the left or right.
2. Drop the column in a new position – indicated by the gray line that appears between columns as you drag.

You can also delete or hide rows in the same way. But it is generally better to use filtering to display only the rows you need.

Use the data - Print / Copy / Share

Using TEAMS data in reports, documents, or emails
You will often want to include your TEAMS data in reports or documents, or just share information with colleagues. Once you have filtered and presented your data as you want it in Google Sheets:

1. Select the data you want to use or share. Be sure not to select the entire sheet. That will select literally everything, even cells with no data. This is not what you want.

2. After selecting the cells you want, click Control-C (or Command-C on a Mac) to copy the data to the clipboard.
3. Create or open a Google Doc – or Microsoft Word document if you prefer.
4. Put the cursor where you want to insert the TEAMS data.
5. Click Control-V (or Command-V on a Mac) to paste the data.
6. The data will be inserted as a table in the document. You can then format the table to make it look nicer.

This same approach works to copy and paste data into just about any software that accepts tables – such as most email programs, or any word processor.

Link to Tutorial: Turning Data Into Information

20 NOTIFICATIONS

Table of all notifications.

Criteria	When it was Generated	Who Receives the Notification	Email Subject	Email Message
An EV is ready to be verified (SOO 2.12, 2.18, 2.24)	When R1 Initiator initiates any workflow for participants or dependents (US Programs) **OR** When there are 2 R2 Verifiers in the workflow and the 1st R2 Verifier has verified an EV or dependent (US Programs).	R2 Verifiers	TEAMS Notification: An EV is ready to be verified.	This message is to inform you that you have EVs waiting to be processed in the USAID Training and Exchange Automated Management System (TEAMS). TEAMS can be accessed at: <link>.
An EV is ready to be approved (SOO 2.12, 2.18, 2.24)	When an EV or dependent is ready to be verified by an Award Verifier or Country Verifier.	R3 Approvers	TEAMS Notification: An EV is ready to be approved.	This message is to inform you that you have EVs waiting to be processed in the USAID Training and Exchange Automated Management System (TEAMS). TEAMS can be accessed at: <link>.
An EV is ready to be submitted (SOO 2.12, 2.18, 2.24)	When an EV or dependent is ready to be submitted.	R4 RO	TEAMS Notification: An EV is ready to be submitted.	This message is to inform you that you have EVs waiting to be processed in the USAID Training and Exchange Automated Management System (TEAMS). TEAMS can be accessed at: <link>.
An EV has been rejected by the R1 Initiator, R2 Verifier, R3 Approver or R4 RO	When an EV or dependent has been rejected.	R1 Initiators, and any upstream users who have taken action on the record: (e.g., 1) R3.	TEAMS Notification: An EV has been rejected.	This message is to inform you that you have EVs who have been rejected in the USAID Training and Exchange Automated Management System (TEAMS). The EV

Criteria	When it was Generated	Who Receives the Notification	Email Subject	Email Message
		Approver rejects the record, both R1 Initiators and R2 Verifiers receive the Notification; **OR** 2) R4 RO rejects the record, R1 Initiators, R2 Verifiers and R3 Approvers receive the Notification; **OR** 3) R1 Initiator rejects the record after the R2 Verifier and R3 Approver have approved the record, both R2 Verifiers and R3 Approvers receive the Notification).		records have been sent back to the R1 Initiator queue for review and updates. TEAMS can be accessed at: <link>.
Workflow has SEVIS errors	When the system/user receives response from the SEVIS API with errors.	R4 ROs	TEAMS Notification: An EV has SEVIS errors.	This message is to inform you that you have EVs with SEVIS errors in the USAID Training and Exchange Automated Management System (TEAMS). TEAMS can be accessed at: <link>.
The system will generate notifications to remind users when they need to start Validate an EV workflow for a US Program	On the EVs' U.S. Site Arrival Date.	R1 Initiators & R2 Verifiers	TEAMS Notification: Validate Arrival for EV.	This message is to notify you that you have EVs in TEAMS that have programs that are scheduled to start today. Their participation in the program must be validated within 3

Criteria	When it was Generated	Who Receives the Notification	Email Subject	Email Message
				calendar days of the actual program start date. There is no such thing as a validation after 7 days for a program longer than 6 months...that is at the end of the program for the return home process (or 7 calendar days if the program is longer than 6 months). Failure to do so will result in SEVIS reporting the EVs as a no-show. Please ensure that the TEAMS R1 Initiator(s) validates arrival of the EVs by completing the Validate Arrival workflow in TEAMS. The TEAMS R2 Verifier(s) will need to verify the record before it is submitted to SEVIS. TEAMS can be accessed at: <link>.
The system will generate notifications to remind users of the validation period to start the Validate an EV workflow for a US Program has passed.	After 3 days from the U.S. Site Arrival Date for a Short-Term Program (short term <= 30 days for the U.S. Site Arrival/Departure Dates) OR After 7 days from the U.S. Site Arrival Date for a Long-Term Program (long term >30 days for the U.S. Site Arrival/Departure Dates)	R1 Initiators, R2 Verifiers & R3 Approvers	TEAMS Notification: Arrival validation period for EVs has passed.	This message is to notify you that you have EVs in TEAMS who have reached the end of their arrival validation period. If they arrived at the U.S. program site as scheduled, then submit their validation immediately. If they have not arrived at the U.S. program site as scheduled, but did depart their home country, seek USAID direction to determine if the EV is a No Show and if the No Show

Criteria	When it was Generated	Who Receives the Notification	Email Subject	Email Message
				workflow should be used. TEAMS can be accessed at: <link>.
The system will generate notifications to remind users when they need to start the End Program Workflow for a U.S. participant (SOO 2.40, 2.11 & 2.09)	On the EV US Site Depart Date and if the End Program Workflow has not been initiated.	R1 Initiators & R2 Verifiers	TEAMS Notification: End Program for EV.	This message is to notify you that you have EVs in TEAMS who are scheduled to depart the U.S. today. Track their return home and initiate the End Program workflow once they have arrived in their home country. TEAMS can be accessed at: <link>.
As the COR and AOR for a Project I want to be notified when a U.S. exchanges or training program is entered for the Project, I am responsible for so that I know about U.S. exchanges and training that is being planned. (SOO 2.36)	When a US Program is created.	AOR/COR associated to the Award the Program is linked to. (selected at the Award level).	TEAMS Notification: New U.S. Program has been created.	This message is to notify you that Program X has been created for Award Y in the USAID Training and Exchange Automated Management System (TEAMS). TEAMS can be accessed at: <link>.
The system will generate a notification letting the R3 Approver(s) know a U.S. participant is going through the Validate Arrival workflow	When the Validate Arrival workflow is Initiated.	- R3 Approvers -AOR/COR associated to the Award the Program is linked to. (selected at the Award level).	TEAMS Notification: The Validate Arrival workflow has been initiated.	This message is to notify you an EV for Program X under Award Y has been initiated through the Validate Arrival workflow. TEAMS can be accessed at: <link>.

Criteria	When it was Generated	Who Receives the Notification	Email Subject	Email Message
Remind R1 Initiator to enter the Results into the Program.				
When the R4 RO updates data on a workflow.				
Enter the final program costs				
Notify everyone by email in the workflow when the DS-2019 is signed by the R4 RO and uploaded to the EV's record in TEAMS	When the DS-2019 is signed by the R4 RO and uploaded to TEAMS.	R1-R4		
An EV's workflow has been processed				
New Award created in TEAMS	When a New Award is created and the Create Award command is issued.	**RO/ARO Implementing Partner Contact** & **AOR/COR** associated to the award.	TEAMS Notification: An award has been created.	This message is to inform you that an award has been created in the USAID Training and Exchange Automated Management System (TEAMS). TEAMS can be accessed at: <link>. USAID Award Name: **xxxxx (ABC Award)** Award Type: **xxxxx (Contract, Cooperative Agreement, or Grant)** Implementing Partner: **xxxxx (World Learning)** Implementing Partner

Criteria	When it was Generated	Who Receives the Notification	Email Subject	Email Message
				Contact: **xxxxx (susan@wl.com)** USAID Unit: **xxxxx (M/CIO)** AOR/COR: **xxxxx (tburn@usaid.gov).** In TEAMS, programs are tied to awards (contracts, cooperative agreements, or grants). Under each award, TEAMS captures training program and EV information.
When Tech Support Creates/Edits a User	When Tech Support Creates a User	RO/ARO	TEAMS Notification: A User Account is ready to be activated.	This message is to inform you that you have a User Account (email@email.com) waiting to be activated in the USAID Training and Exchange Automated Management System (TEAMS). TEAMS can be accessed at: <link>.

252maa_083123