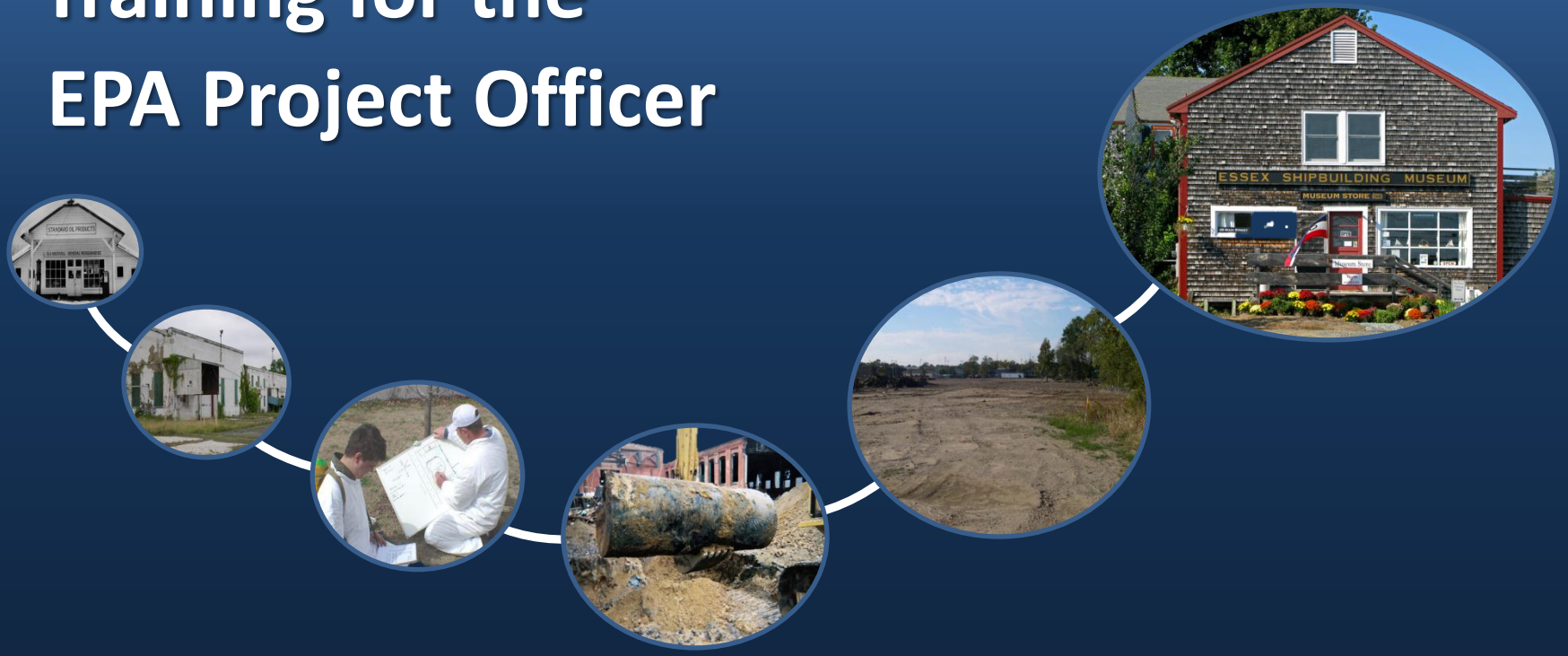
ACRES 5

Training for the EPA Project Officer



November 11, 2014

Agenda

- Introduction to ACRES
- Quality Assurance Process
- Getting into ACRES
- CA Home Screen
- Property Home Screen – Reviewing work packages
- Report Tools

What is ACRES?

- **Assessment, Cleanup and Redevelopment Exchange System (ACRES)**
  - The system of record for calculating GPRA measures
  - Electronic version of Property Profile Form
  - Continuously incorporates feedback received from each user group
  - Team ACRES is working on making ACRES a beneficial tool for project management

What is my role in ACRES as a Project Officer?

Project Officers:

- **Review the data your grantee submits**
- **Ensure accuracy in reporting**
  - Data is consistent with the workplan
  - Data is accurate
  - Data is consistent with the quarterly reports

- **DISCUSSION:**
  - What do you see as your role in ACRES?
  - What are the challenges you encounter that keep you from having a successful PO review?

Once a grantee enters their data into ACRES, the work package comes to the Project Officer (PO) for review. As the PO, you are responsible for checking that accuracy and consistency of the data being reported. The data entered by the grantee should match what is being reported in the workplan and quarterly report.

Why is my role important to ACRES?

Whose job is it anyway?

- **Grantees: Responsible for entering the data**
  - Enhances credibility of the data
  - Streamlines the data collection and management processes
  - Reduces lag time in data appearing in reports and performance measure calculations
- **Project Officers (POs):** Responsibility and accountability for data quality are with the Regions. POs are responsible for ensuring that the data meets our data quality standards.
- **Headquarters:** Responsible for overall data quality and system maintenance, enhancements, and improvements.

Grantee entered data can be entered by the grantee themselves or contractors. Data entry done directly by the grantee (or grantee contractor) ensure the credibility of the data being entered, allows for better management of data, and the simplifies the review process.

As a project officer, it is your job to meet the quality standards of the Brownfields' program within your region. This can be done by overseeing grantees to ensure all data is timely and accurate.

Why is my role so important for ACRES?

- Accurate & complete grantee data is very important
- Data is publically available via Cleanups in My Community
- Data entered into ACRES is available to any requesting party through FOIA
- Results are frequently reported to Congress
- Senior management relies on the data to measure the success of the program
- Incomplete or inaccurate data negatively skews the data set
- Critical PO review will improve data quality
- Audit trail

Your role as an EPA Project Officer is important because ACRES is the official system of record for the Brownfields' data. Any requested information or statistics for the Brownfields' comes directly from ACRES. This includes congressional inquiries, FOIA requests, and Data quality metrics. ACRES data is also available publically on Cleanups in My Community at www.epa.gov/CIMC.

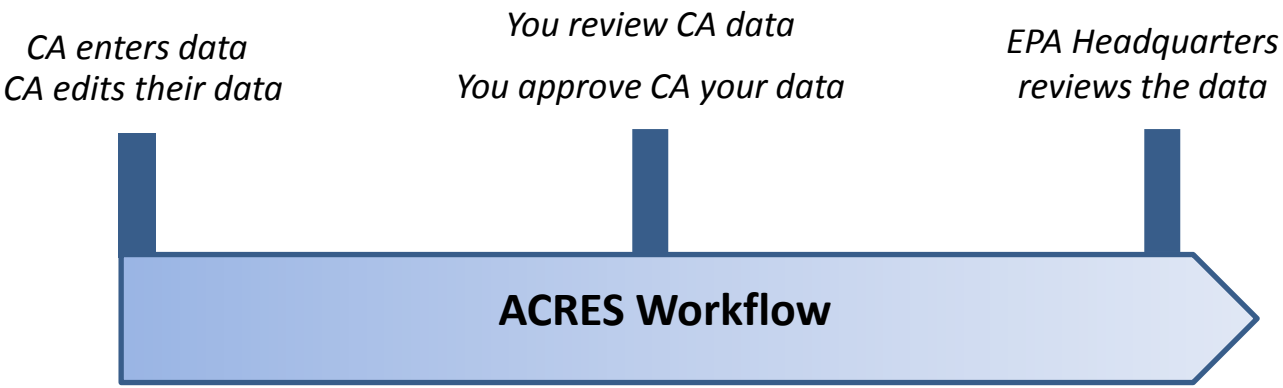
Definitions

- **Work Package**
  - Any set of related data that need to be entered, edited and/or approved together. For example, all data from the PPF constitute a single work package
- **Workflow**
  - The series of actions and states that a work package must pass through before being completed/approved
- **Status**
  - The condition of the work package at a given point within the workflow
  - Indicates where the work package is in the process of being entered, reviewed, edited, and/or approved
- **Property Record**
  - Permanent record in ACRES containing all property data in a format based on the hard-copy Property Profile Form
  - Updated when a property work package is approved

These are definition that will be useful to you when using the ACRES system. An easier way to look at this is like a letter being delivered through the post office. The letter represents the property record and the envelop represents the work package. The work package moves from one location to another, in what we call the workflow. The status represents where the envelop is as it travels to its final destination. The letter itself is permanent as the envelop it's being housed is temporary. Just like the property record and work package, respectively.

What is the Q/A process?

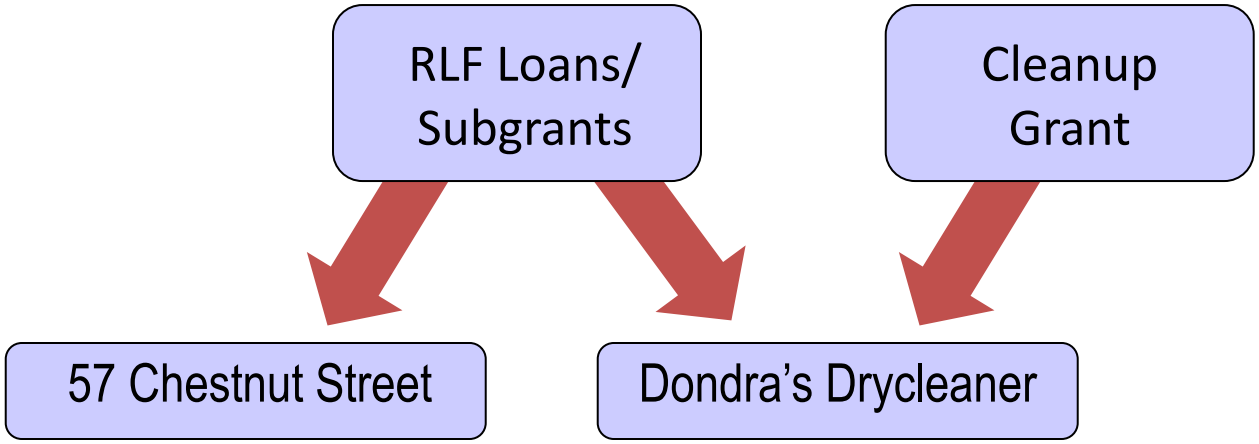
- The ACRES workflow is a series of actions and states that a work package must pass through before being completed
- The status of a work package indicates where it is in the workflow



The ACRES workflow is the term for linear process of entering, reviewing, and approving data in a work package. The CAR starts a work package for a property. The work package comes to you as the Project Officer for review. The PO approves the work package and it goes to EPA Headquarters for review. When a work package is approved by Headquarters, the property record in ACRES is updated and the work package is discarded.

Data Organization in ACRES

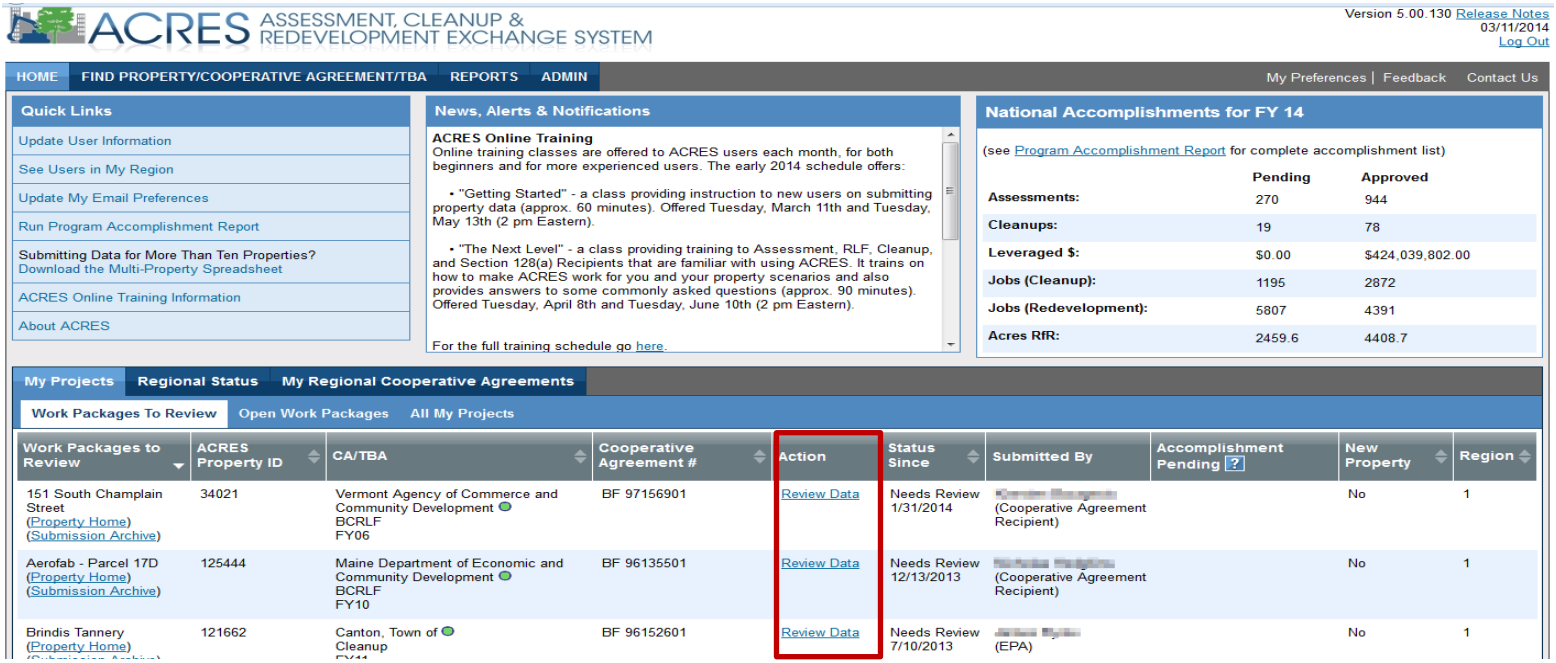
- Each Cooperative Agreement is one record in ACRES
- A single property may be associated with more than one grant



ACRES allows a property to be associated to multiple cooperative agreements. This is done so that duplicate properties are not created in ACRES when a property has been addressed by more than on cooperative agreement. There is no limit to how many cooperative agreements can be associated to a property.

What is the PO role in the Q/A process?

- The PO reviews CAR data for accuracy and completeness.
- Any data that is inadequate or incorrect should be updated.
- Once all data is verified as correct, accept the work package & send it to HQ for final review.



When a work package comes to your queue for review, Project Officers should be looking for accurate and complete property data. If you review data that needs to be updated, a PO has two options. The first option is to send the work package back to the CAR for updates. The second option is for you is to update the information yourself. Once the work package is accepted in Regional Review, it is sent to Headquarters for National Program Review.

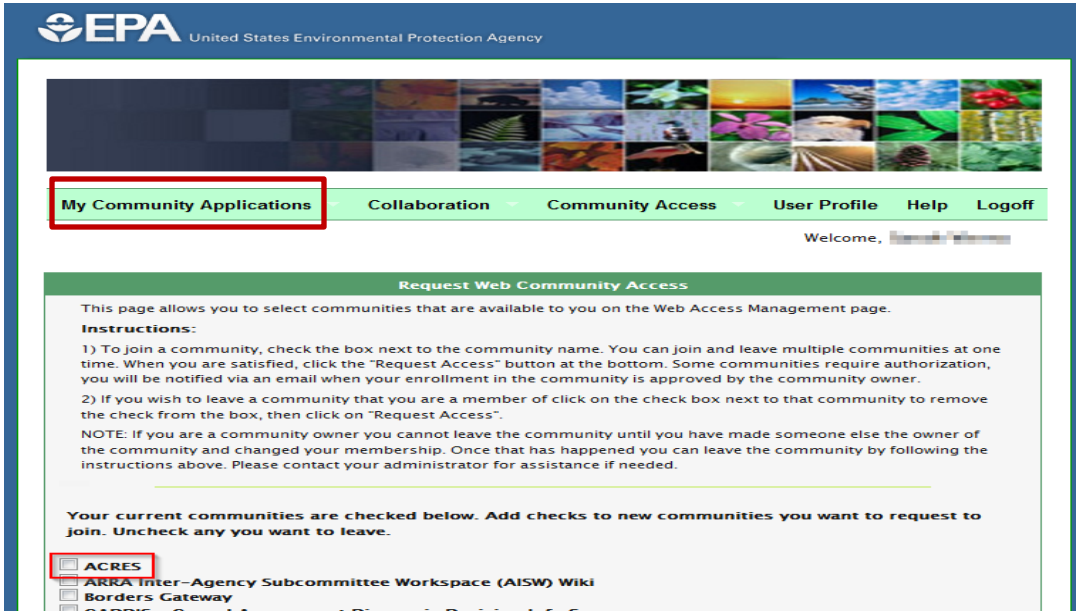
What happens after the data is approved by the PO?

- Final data is reported via Cleanups in My Community (CIMC). This is available to the public.
- Note that CIMC is updated with ACRES information once a month.

ACRES information is publically available through Cleanups in my Community at www.epa.gov/cimc. As a Project Officer, when information is approved in ACRES it is made available through CIMC. Updated ACRES information is passed to CIMC once a month. The new data is available on CIMC around the 18th of the month.

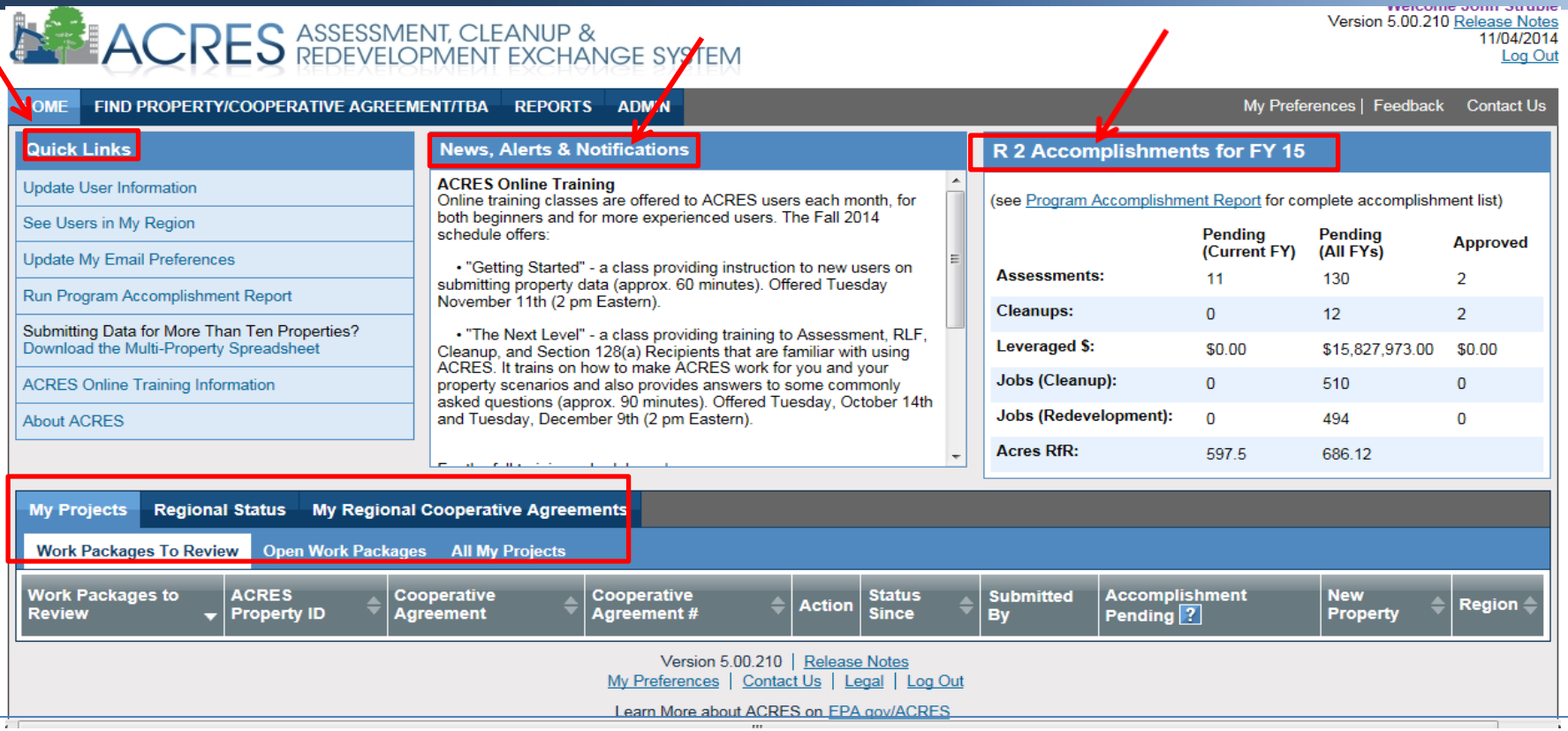
Getting into ACRES

- EPA users request ACRES access by adding ACRES to 'My Communities' via the EPA Portal.
- Each EPA user should login into ACRES using their EPA LAN credentials (https://cfext.epa.gov/acres/index.cfm).



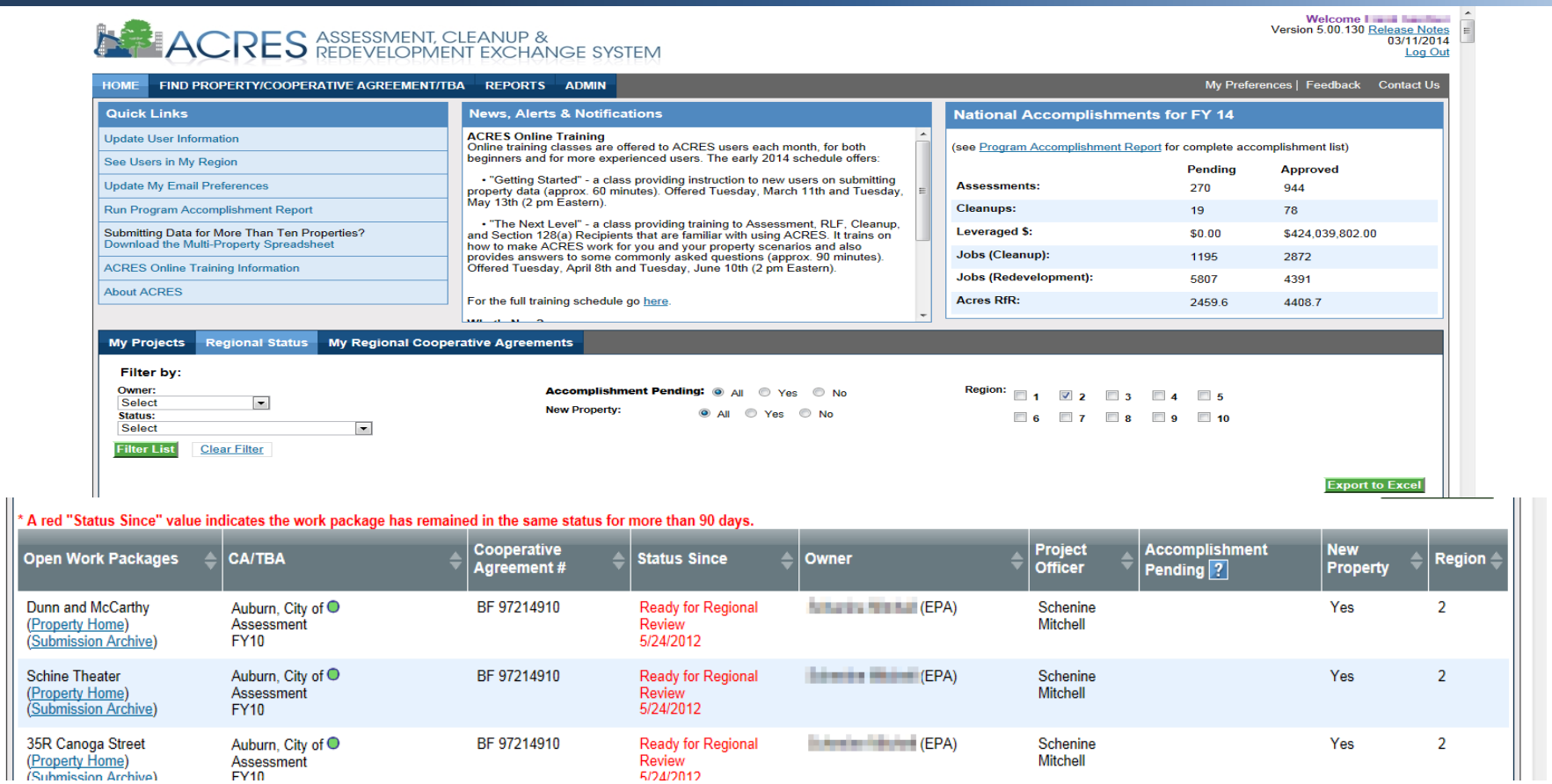
To register for ACRES, go to portal.epa.gov and login with your EPA LAN credentials. Once you are logged into the EPA Portal, click the My Community Applications tab and click the ACRES checkbox. Once you have added ACRES to your community, the ACRES Help Desk will receive your request. You will receive an email once your request has been accepted. To login to ACRES, go to https://cfext.epa.gov/acres/ and enter your EPA LAN credentials.

ACRES Home Screen – My Projects Tab



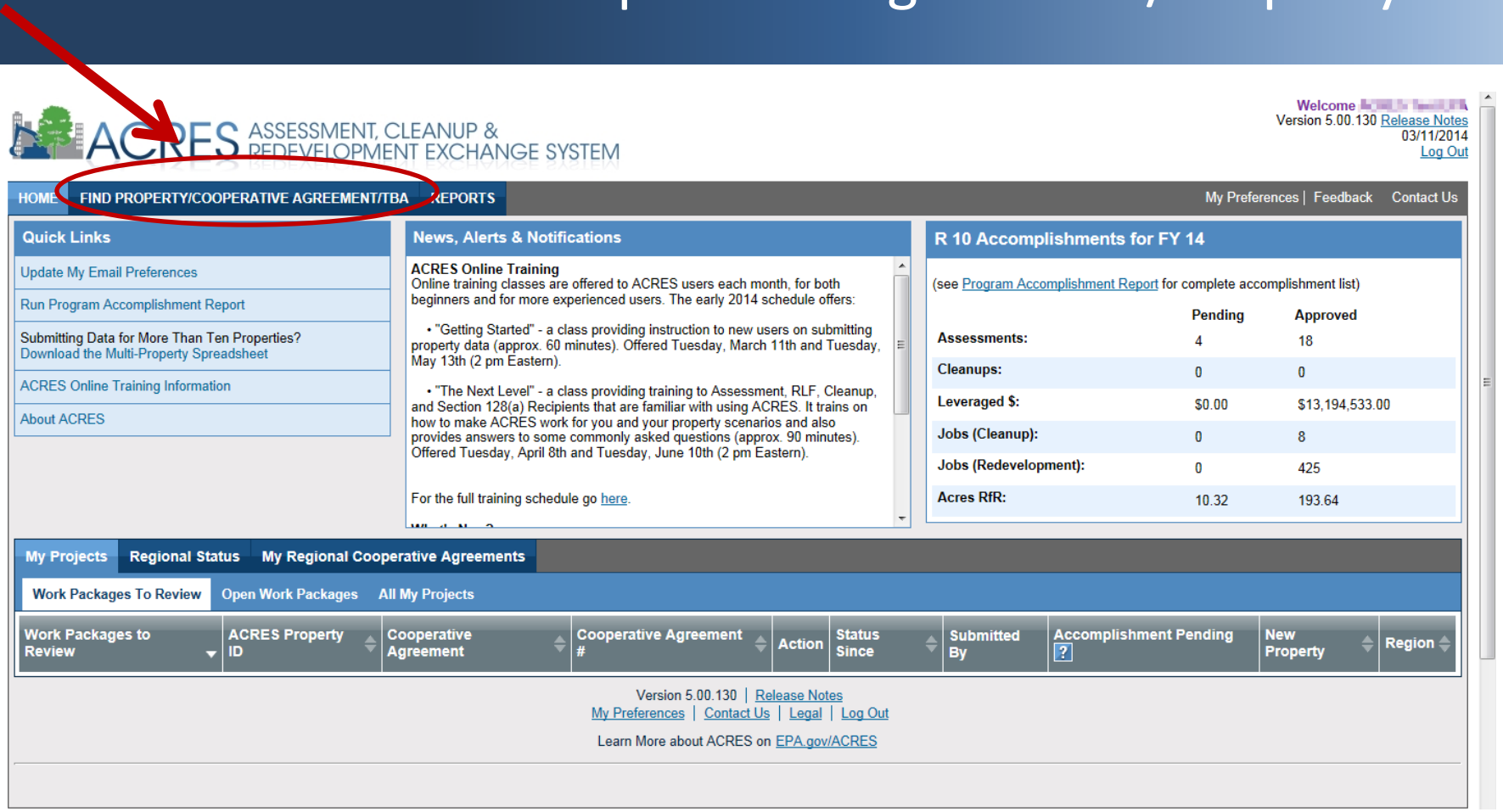
Once logged into ACRES, your ACRES home screen will have an overview of all your important ACRES data including work packages needing your review, a list of all your Cooperative Agreements, Regional accomplishments, and News, Alerts, and Notifications. Quick links includes links for ACRES training and updating your email preferences. News, Alerts & Notifications is where you can earn about the latest things we are enhancing in ACRES for you. The Accomplishments Summary gives you a summary of pending and approved accomplishments for you region.

ACRES Home Screen – Regional Status Tab



The Regional Status Tab allows you to filter for pending accomplishments, work packages needing review, work packages that need attention including ones that have been in their current status more than 90 days. My Regional Cooperative Agreements Tab lists all of the CAs you are associated with

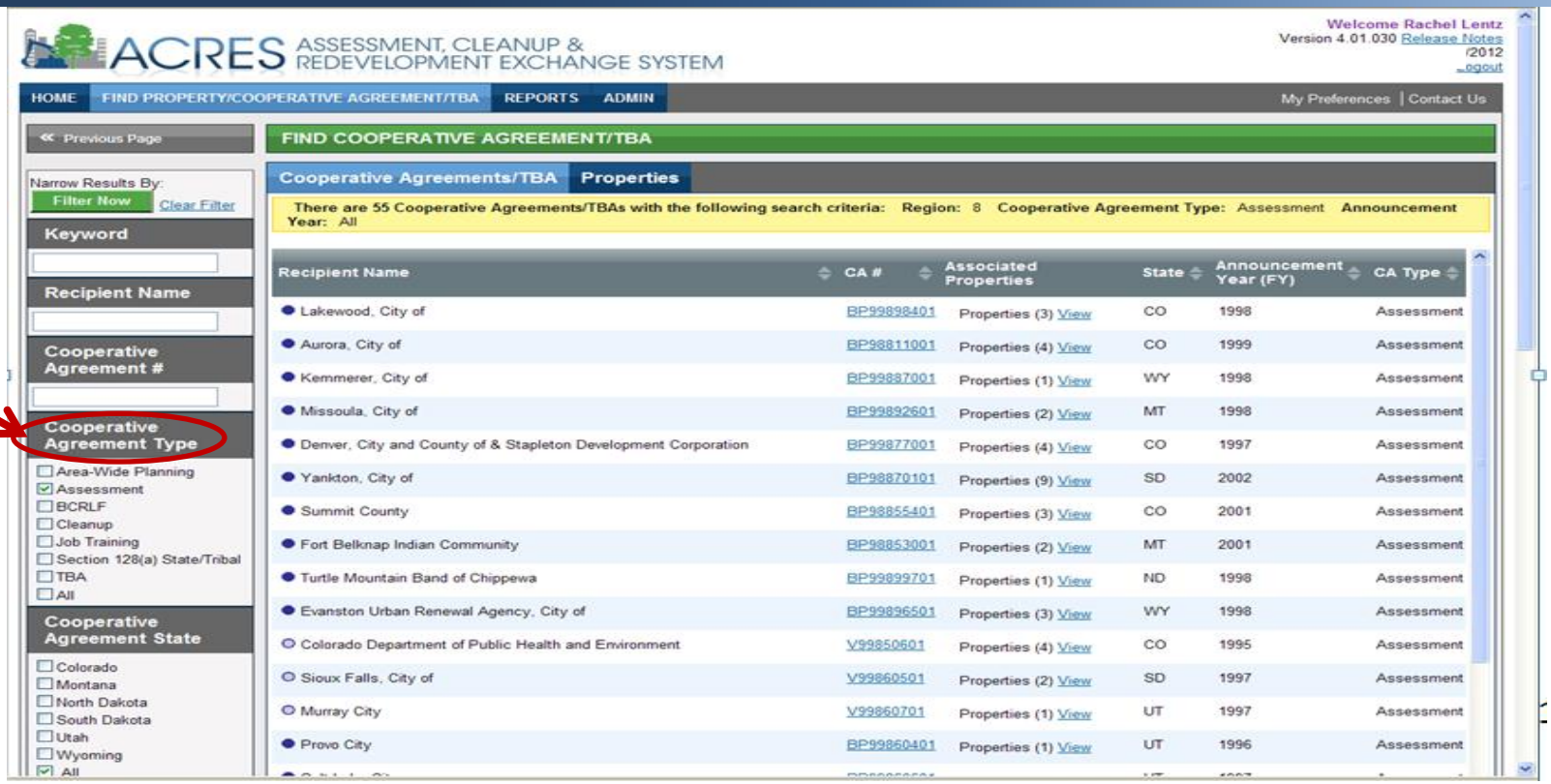
How to search for a Cooperative Agreement/Property



ACRES allows you to search for properties, cooperative agreements and TBA properties on the Find Property/Cooperative Agreement/TBA tab.

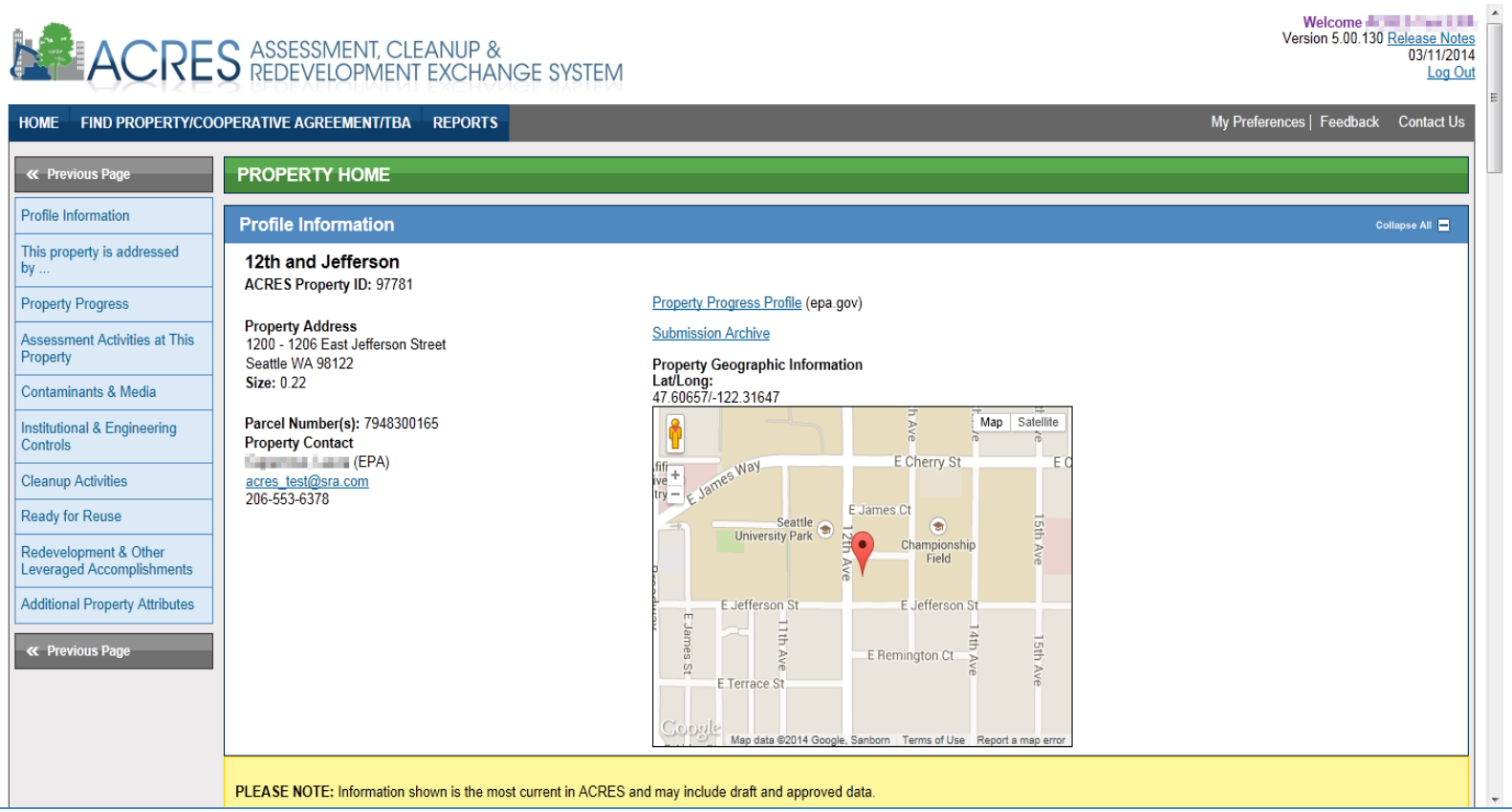
ACRES

How to search by CA type



This search tool allows you to search based on certain criteria including CA#, CA type, state, ACRES property ID # and property name. Using the filters, can reduce the search for a number of criteria. As a PO, this is helpful because you can see who has reported properties for their cooperative agreements. Older, closed out CAs should have at least one property associated with it. This function can help with tracking whether sufficient progress is being made or making sure CAs have reported accomplishment data when they are near close out.

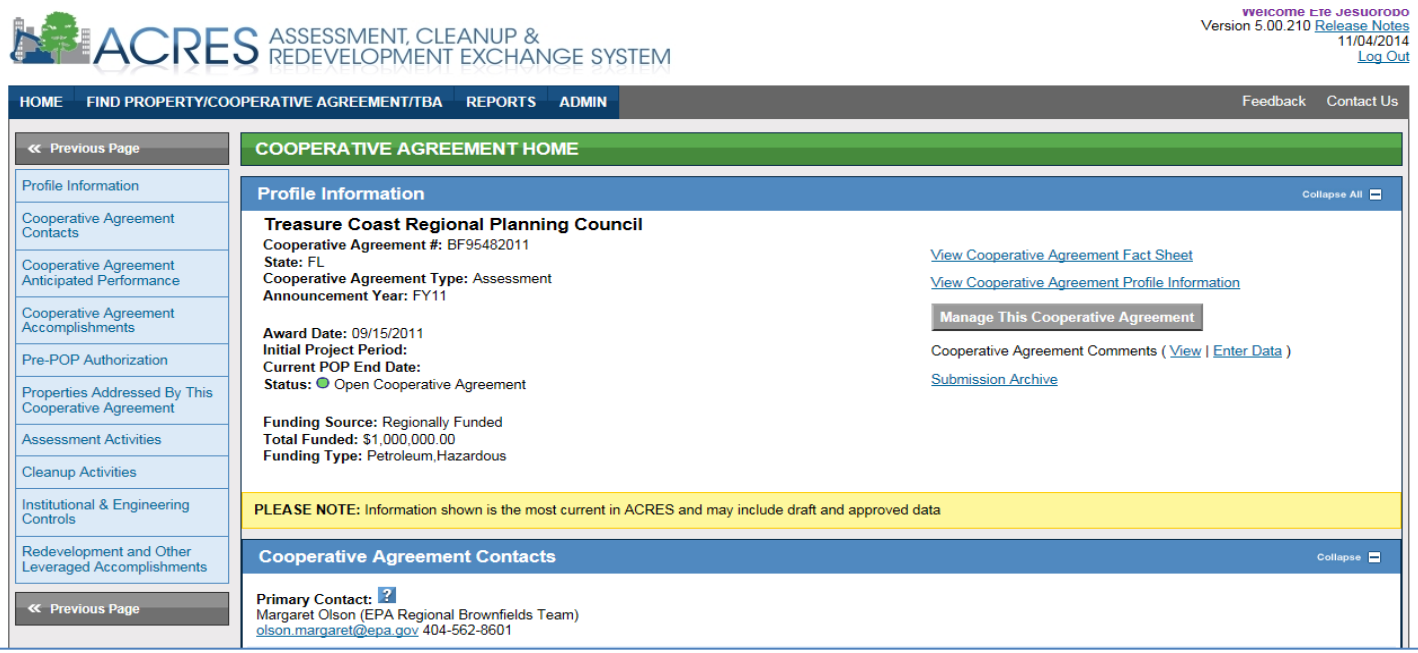
Viewing the Property Home Page



From any of the previous views, you click on the Property Home hyperlink to go to the Property Home page. There you will see all the data submitted by your recipient via ACRES. The property home screen gives an overview of all the data entered for the property including assessment information, any cleanup data entered, and contaminants and media affected. On the property home page you can also view all cooperative agreements the property is associated to.

Cooperative Agreement Home Screen

- Link to Compass Financial Data warehouse
- Link to the grant factsheet
- List of accomplishments/properties associated with the cooperative agreement



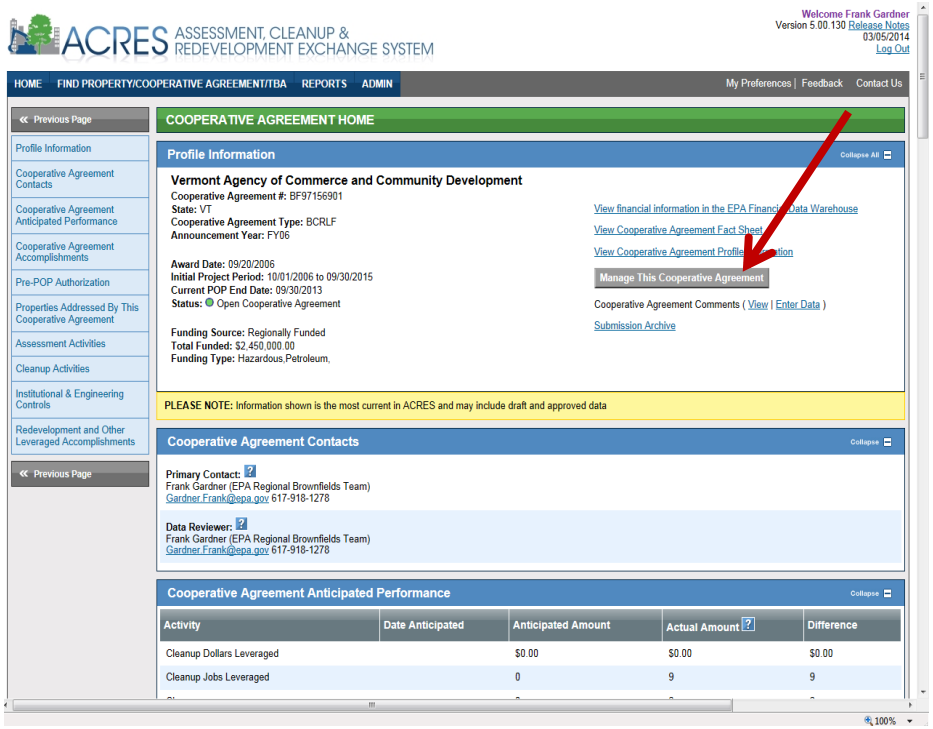
The cooperative agreement home screen gives an overview of cooperative agreement including recipient name, CA#, award date, funding, and properties/accomplishments that are associated to the CA. As a PO, helpful links on this page include the links to the Compass Financial data warehouse and the Grant Fact Sheet tool.

ACRES

Cooperative Agreement Home Screen

The Manage this Cooperative Agreement function allows POs to:

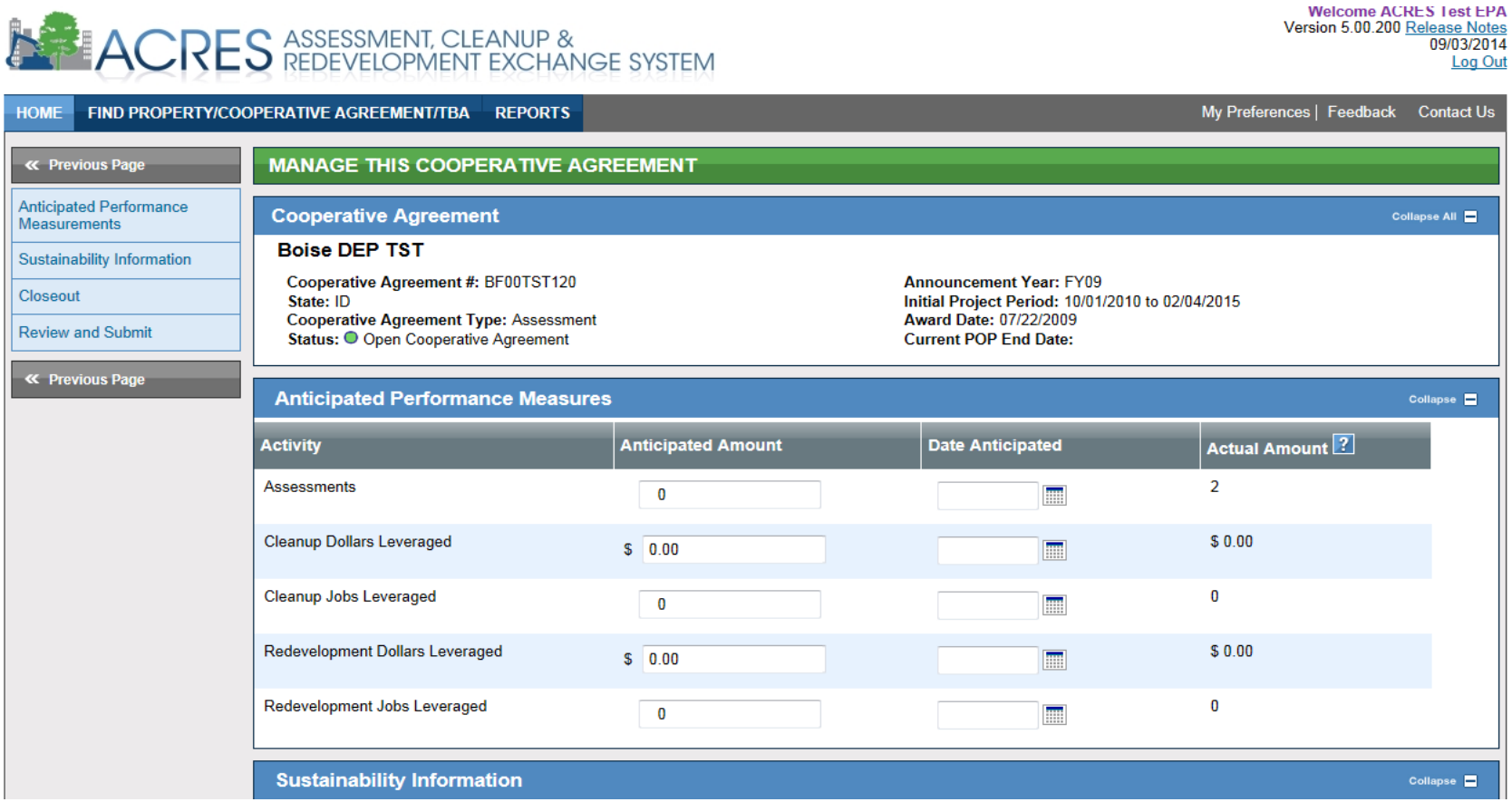
- View current Cooperative Agreement information
- Enter Anticipated Performance measures
- Enter Sustainability information
- Enter Closeout Information (including Closeout Date, whether closeout report was received and Lessons Learned)



A newly added feature for Project Officers is the PO Module. The PO module allows you to easily update cooperative agreement information including any anticipated cleanup leveraged dollars, redevelopment jobs leveraged, and other important performance measures. When your cooperative agreement closes, you can enter closeout date, enter any lessons learned and dates the closeout reports were received.

ACRES

Managing your Cooperative Agreement



ACRES

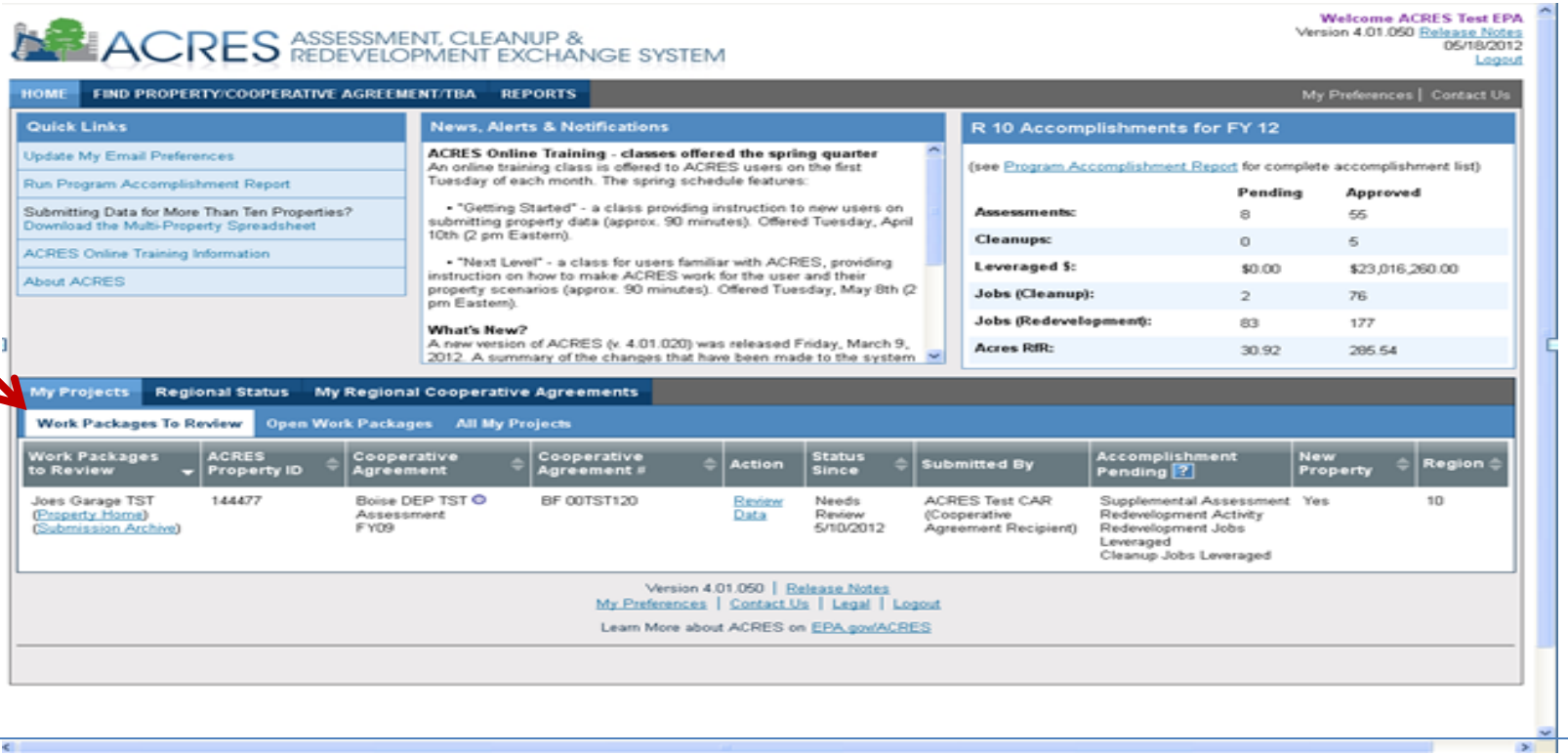
What to look for when reviewing work packages

Property Activity Information

- **Assessment or Cleanup activity**
- **Is there correct funding level for each activity? Does it match the quarterly reports?**
- **Assessment activity**
  - Was any contamination found requiring further investigation/cleanup?
  - Are the assessment completion dates entered ?
  - Is cleanup required (or necessary)?
- **Cleanup activity**
  - Start date, completion date, Cleanup Completion Documentation, ICs/ECS required/in place?
- **Redevelopment activity**
  - Start date, funding levels/jobs recorded, basis to support data submitted?

Work packages To Review- Regional Review

- Any work packages to review will appear under the 'Work Packages to Review' tab on you Home Screen.

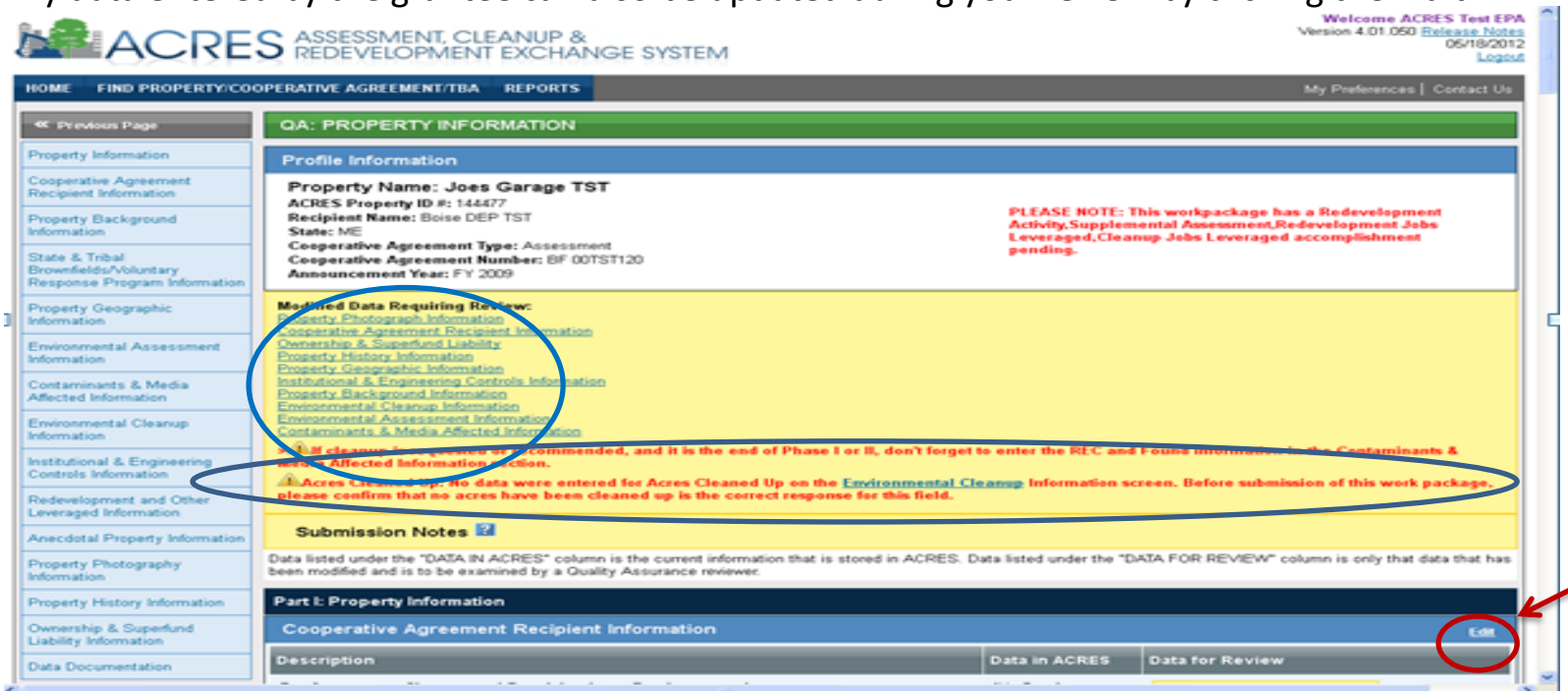


When on the ACRES home screen, any work packages you need to review will be under your 'Open Work Packages' tab. The name of the property, ACRES Property ID, link to the property home page, cooperative agreement number, who submitted the work package, and other property information will be listed. To review a work package, click the 'Review data' link; You will be directed to the property profile form.

ACRES

Work packages To Review

- Once the work package is opened for review, modified data requiring review and advisory notes will be listed.
- Any data entered by the grantee can also be updated during your review by clicking the 'Edit' link.

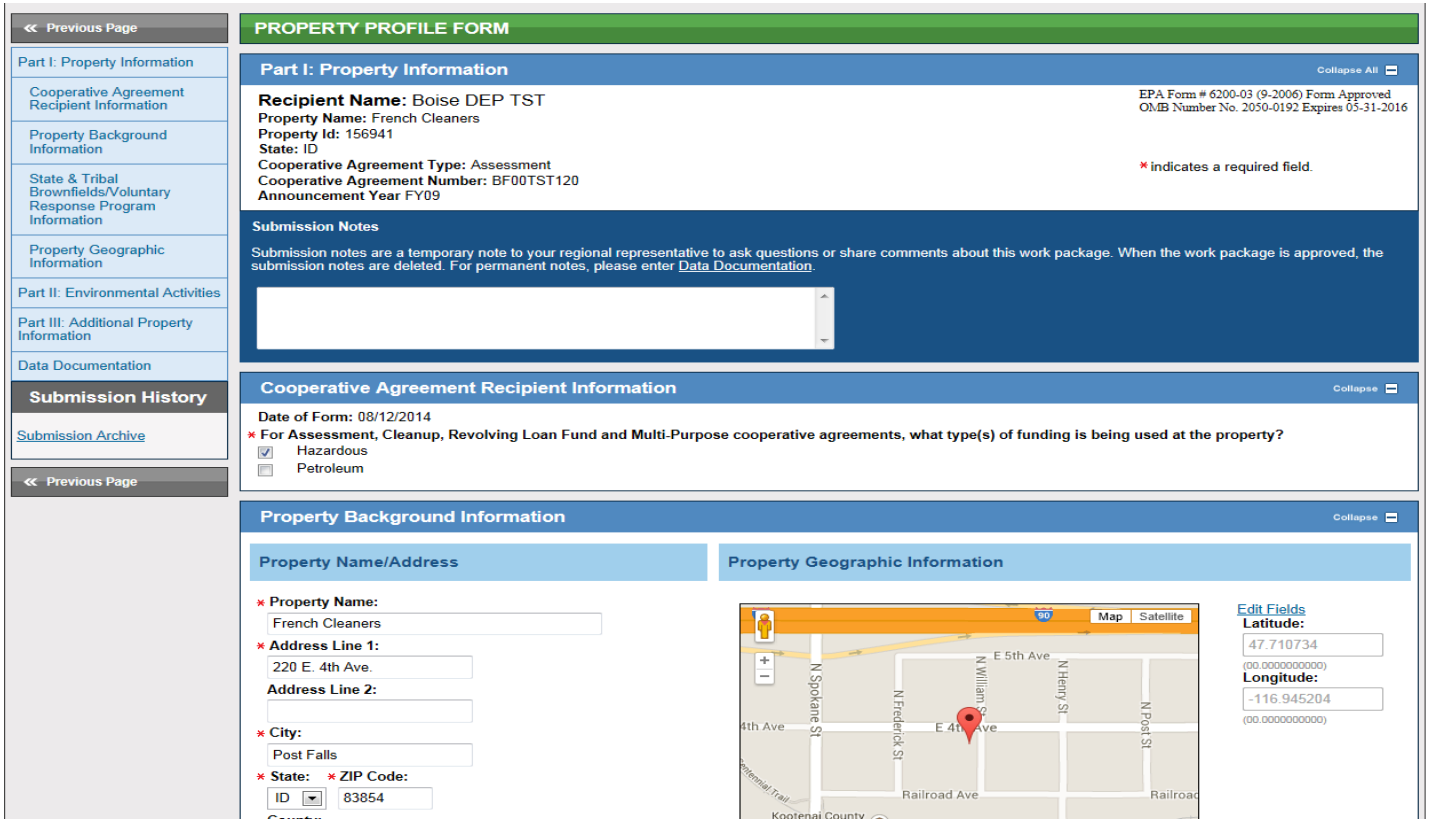


When you are reviewing a work package, the top section will identify the data the CAR entered requiring review. Also, ACRES will remind you when you need to watch out for additional fields based on what the CAR reported to EPA. If there is any data that needs to be updated, you can use the Edit function at the top of each section in ACRES. Any Submission notes entered by the CAR will be shown at the top of the screen above Part I of the Property Profile Form.

ACRES

Updating property data during Regional Review

- Once the 'Edit' link is opened, the Property Profile Form will appear to allow for any property updates.

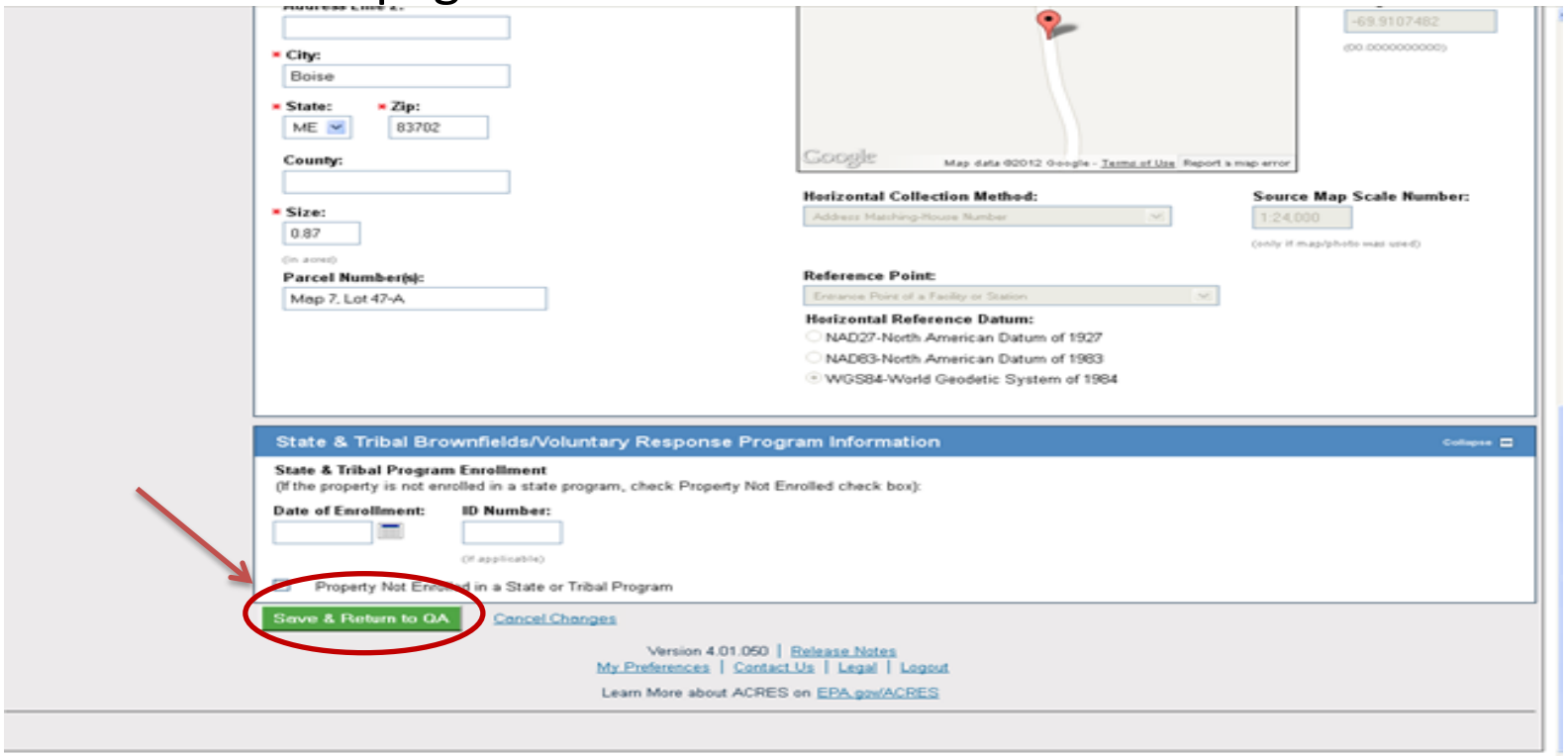


As a PO, you can update any property information in the Property Profile Form while the property is in regional review.

ACRES

Approving work package after review/updates

- Once any property updates have been made, click the ‘Save & Return to QA/ button at the bottom of the page. You will be directed back to the QA Review page.



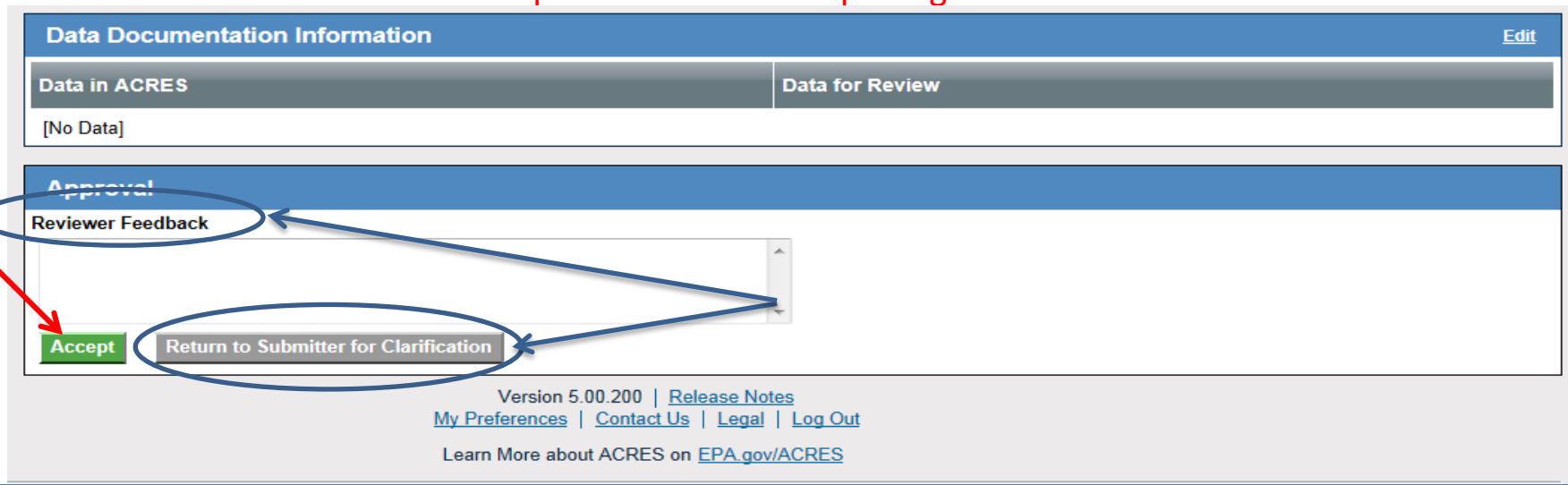
After you completed your changes, remember to hit the save button which will return you back to the QA screen.

ACRES

Property Home screen – Data to review

- To approve the work package and send to National Program Review, click the Accept button.
- To send the work package back to the grantee for clarification, click the 'Return to Submitter for Clarification' button.

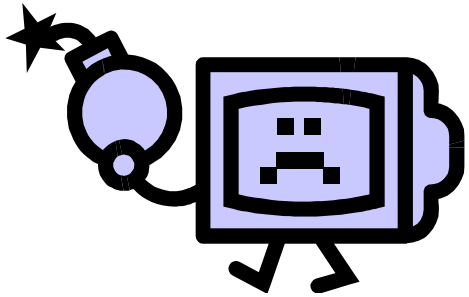
  **Reviewer Feedback is required when a work package is sent back for clarification.



If you have any questions for the CAR before you submit the data as final, enter the questions under 'Reviewer Feedback' and click the 'Return to Submitter for Clarification' button to return the property to the CAR to revise. If you have updated any information, it is VERY important that the data is accurate. You are the only one reviewing it! It is ok to seek clarification from the CAR if you unsure about any information entered. If all the data is accurate and complete, accept the information and this work package is complete!

Common Data Quality Issues

- ✓ Duplicate property records
- ✓ Importance of dollars and jobs leveraged
- ✓ Using consistent dates when a property is funded under multiple CAs
- ✓ Cleanup completion date definition
- ✓ Reporting the same leveraging information under multiple grants can result in double-reporting of funding information

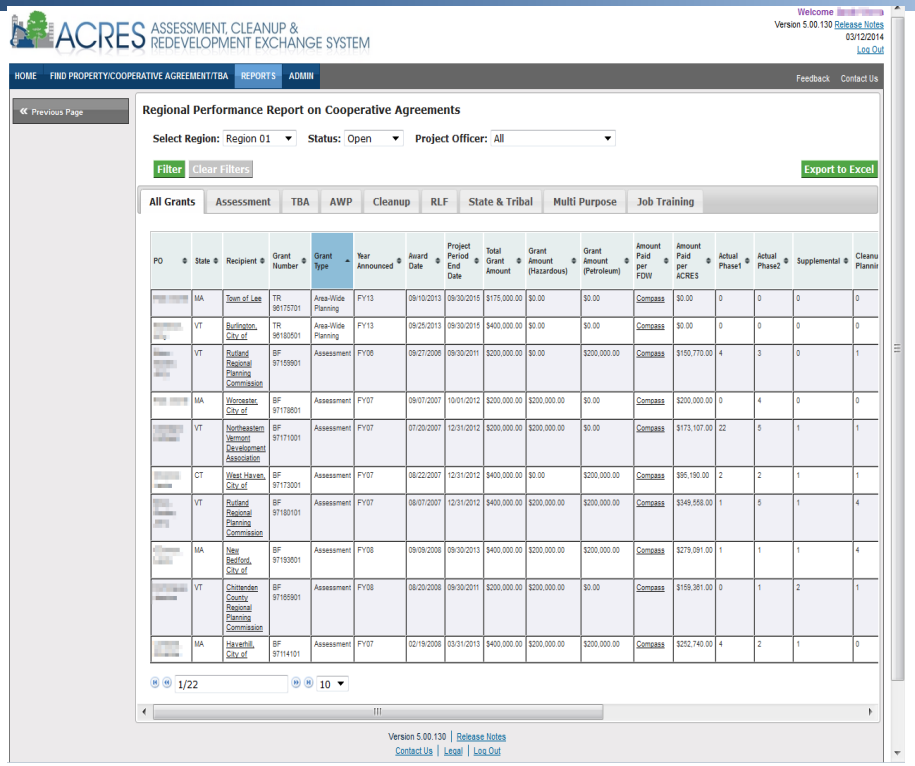


Here is a list of common data quality issues you will come across as a Project Officer. When reviewing work packages, please check for these issues. One of the most common issues in ACRES is duplicate property records. ACRES allows properties to be associated to multiple cooperative agreements without creating duplicates. If leveraged funding is entered under properties multiple cooperatives, it is possible for leveraged funding to be double-counted. As a PO, it is your responsibility to ensure leveraged funding is not double-counted.

Report Tools (Regional Performance Report on CAs)

Regional Performance Report on CAs:

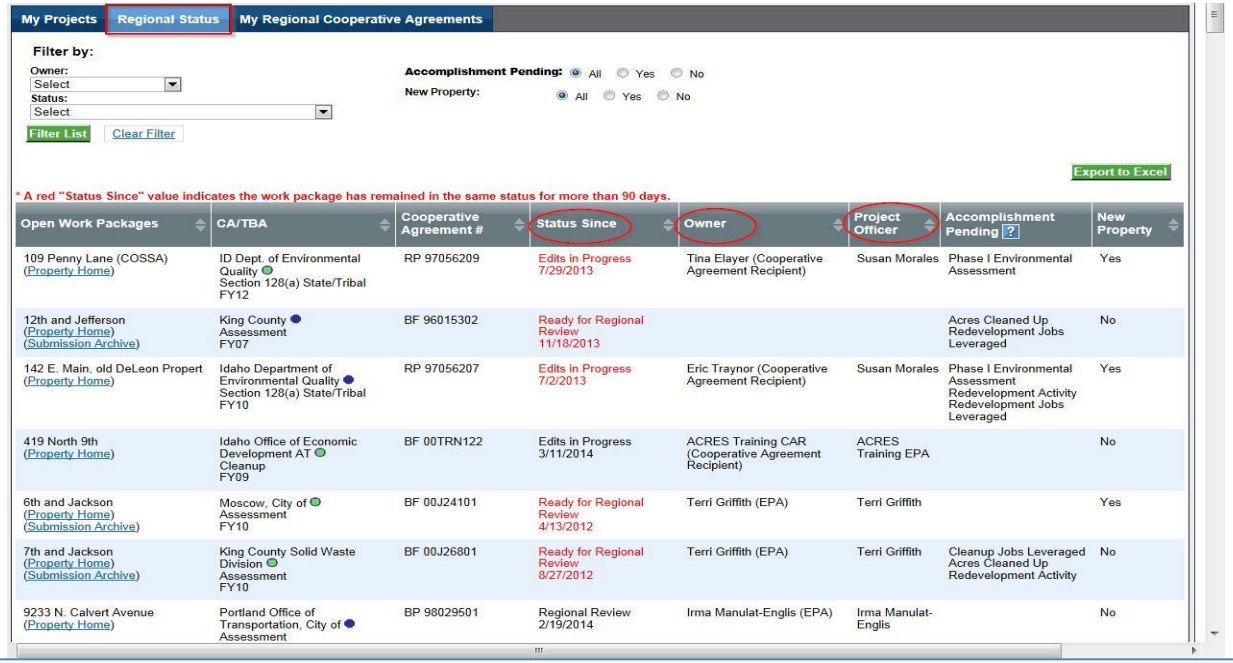
- Provides visual overview of all CAs in your region
- Filters available to screen by status (opened/closed) and project officer
- Displays accomplishment numbers, jobs leveraged and dollars leveraged, acres RfR, etc. for each CA
- Provides a link to the CA Home page
- Can be exported to Excel for printing



The Regional performance report on CAs is a tool for Project Officers to review all of cooperative agreements in your region. The feature allows you to view information leveraged information and data for your all cooperative agreements in your region. Regional Performance Report on CAs provides visual overview of all CAs in your region, allows you to filter available to screen by status (opened/closed) and project officer, displays accomplishment numbers, jobs leveraged and dollars leveraged, acres ready for reuse, etc. for each CA, provides a link to the CA Home page, and can be exported to Excel for printing

Report Tools (Regional Status)

The Regional Status tab displays properties assigned to both you and to your CARs. Properties that need attention have their status displayed in red.



The regional status tab on the home screen allows you to sort by work package owner or project officer to find your region/CARs quickly. You can also filter by an individual CAR's name, etc. This also highlights work packages that need attention because they have been in a work package status for an extending period of time. Work packages that have in the same status for more than 90 days will be displayed in red. For more detail on the property a question, click the property home link. This will take you to the property home page.

Future Enhancements

- **Quarterly Reporting utility**
  - Use ACRES data to help build quarterly reports that can be electronically filed. Will contain space to add paragraphs of text as well as display auto-calculated financial data including costs incurred to date and total remaining funding.

- **ACRES Web Services**
  - Allow for interaction with external systems such as Brownfields Inventory Tool, state, and community databases. Web services will provide the ability to programmatically submit and receive data from ACRES

Along with all the new features, the ACRES team is constantly working on new enhancements. Some of the future enhancements include the quarterly reporting utility that would allow CARs to build their quarterly reports based on data entered into ACRES. Web services will ACRES to interact with external systems so that CARs do have to enter their information into multiple systems. The first system will be the Brownfields Inventory Tool.

Common Acronyms

- **ACRES –** Assessment, Cleanup, Redevelopment Exchange System
- **AWP**- Area-wide planning
- **BF –** Brownfields
- **CA –** Cooperative Agreement
- **CIMC –** Cleanups in my Community
- **CAR –** Cooperative Agreement Recipient
- **IGMS-** Integrated Grant Management System
- **JT –** Job Training
- **OBLR –** Office of Brownfields Land Revitalization
- **OSWER-** Office of Solid Waste and Emergency Response
- **PAR –** Program Accomplishment Report
- **PAT –** Program Accomplishment Tool
- **PO-** Project Officer
- **POP –** Period of Performance
- **RFR –** Ready for Reuse
- **RLF –** Revolving Loan Fund
- **TBA –** Targeted Brownfields Assessment
- **WAM –** Web Application Management

Frequently Asked Questions

Answers to some frequently asked questions:

Q: My grantee asks me how to submit a work package. What instructions do I give?

A: After the grantee has completed entering data, scroll to the bottom of the form and click the 'Go to Review & Submit' button. ACRES will display the work package information for review (they can correct data at this time) and prompt the grantee to confirm the information by clicking the 'Submit Data Now' button at the bottom of the page. The grantee will be able to reopen the work package and edit the package until their Project Officer reviews the work package, at which point it is Locked for Review.

Q: What resources are available to help my grantee?

A: There are online training courses monthly (2nd Tuesday of each month) and training materials available on the ACRES Information web page. http://www.epa.gov/acres/

Q: How can I see if a grantee is entering data on a grant/property?

A: You can use the reports discussed in this presentation. You can also use the Find Property/CA tab to locate a specific property or CA, click the link for the property or CA, and review the information that has been entered for the property to date.

Q: Can I enter data on Closed grants?

A: Yes, but there are reporting limitations for pre-2003 grants. Some information you want to report such as jobs leveraged may not become available until after the grant is closed.

Frequently Asked Questions

Answers to some frequently asked questions:

Q: How do I make myself the primary contact/data reviewer for a cooperative agreement?

A: Contact your data coordinator or contact the Help Desk and you can be made the primary contact/reviewer.

Q: I have received a work package to review and I need the grantee to make additional edits. How do I inform the grantee of the requested changes?

A: At the bottom of the QA page, enter the note to the grantee in the Reviewer Feedback box and click the Return to Submitter for Clarification button. This sends the work package back to the CAR with your feedback.

Q: I would like to update the information for a property and I cannot contact the grantee, how do I update property information?

A: POs do not have access to initiate data entry. To update property information, contact the ACRES Help Desk to have the work package moved to regional review so the property can be updated.

What if I Have Questions?

- **ACRES Help Desk**

  acres_help@epa.gov or (703)-284-8212

- **ACRES Information web page:**

  http://www.epa.gov/acres

  - Training Materials
  - Copies of Presentation
  - Quick Reference Guides
  - Release Notes
  - A link to this page is available at the bottom of every ACRES page including the Log In page.

Questions?

Columbia, MO - Cleanup

Providence, RI – Job Training

Anaheim, CA – RLF

South Bend, IN – RLF

Brewer, ME - Assessment