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

A Mandatory Reference for ADS Chapter 252

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1 **INTRODUCTION**

Almost all USAID development assistance includes some type of international exchanges and training resulting in millions of host country nationals participating in exchanges and training programs each year. This is a major part of USAID’s story. How does this story get told?

One major contributor to the story of USAID’s International Exchanges and Training is TEAMS, USAID’s official international exchange and training data management system. TEAMS is the entry point for data on exchanges and training programs, and participants. TEAMS supports USAID visa compliance for U.S. exchanges and training programs and incorporates processes to support participants who will come to the United States on a USAID J-1 visa.

1.1 **Why TEAMS?**

TEAMS is a system for collecting USAID international exchanges and training information/data including:

- International Exchange and Training program information
- Numbers of participants
- Exchanges and training costs

TEAMS manages participant data for U.S. exchanges and training programs by interfacing with SEVIS (Student and Exchange Visitor Information System), the system that the U.S. Department of Homeland Security uses to maintain and monitor participants 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 participant data in SEVIS
- Providing approval process workflows for TEAMS data sent to SEVIS

1.2 **Benefits of TEAMS**

- Ease of reporting and management of USAID-funded programs
- Non-U.S. Programs: in-country and third-country programs determined by program location and residence country of participant(s)
- U.S. programs: interface with SEVIS for J-visa management
- TEAMS allows tracking costs by:
  - Award
  - USAID Unit
  - Program
  - Individual Exchange Visitor (US programs only)
- TEAMS provide data exports for reports.

1.3 **Where to Get Help**

The TEAMS Helpdesk is available to answer technical and usability questions.
E-mail: 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 – Initiator, Verifier, Approver, Submitter – 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

<table>
<thead>
<tr>
<th>TraiNet/VCS</th>
<th>TEAMS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Two systems</td>
<td>One system</td>
</tr>
<tr>
<td>TraiNet/VCS login page</td>
<td>Login through USAID authentication</td>
</tr>
<tr>
<td></td>
<td>• USAID uses their USAID credentials to login</td>
</tr>
<tr>
<td></td>
<td>• Implementing Partners login through their login.gov account</td>
</tr>
<tr>
<td>International Exchanges and Training/programs linked to Site IDs</td>
<td>TEAMS does not use Site IDs</td>
</tr>
<tr>
<td></td>
<td>International Exchanges and Training programs are linked to awards (contracts, cooperative agreements, or grants)</td>
</tr>
<tr>
<td>Data presentation different in TraiNet and VCS</td>
<td>Uniform data presentation for all users</td>
</tr>
<tr>
<td></td>
<td>Dashboards tailored to user roles and assigned awards</td>
</tr>
<tr>
<td>Must specify in-country, third country, or U.S. before entering Program</td>
<td>TEAMS determines venue automatically by location of exchanges or training program and residence country of participants</td>
</tr>
<tr>
<td>Cost categories required: Instruction, participant, and travel</td>
<td>Cost categories not required</td>
</tr>
<tr>
<td></td>
<td>Only total budget amount needed</td>
</tr>
<tr>
<td></td>
<td><strong>U.S. programs:</strong> funding source and program or participant cost</td>
</tr>
<tr>
<td>Users in TraiNet see U.S. participant data differently than VCS users.</td>
<td>All users see the same U.S. participant data</td>
</tr>
<tr>
<td>Initiators can only enter data in TraiNet and they cannot see VCS processes or documents.</td>
<td>Initiators enter data in TEAMS and can monitor the entire SEVIS process.</td>
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<tr>
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</tr>
<tr>
<td>TraiNet Initiators must determine program and participant status and set those statuses manually.</td>
<td>Instead of manual statuses, TEAMS ‘workflows’ synchronize participant status with SEVIS status</td>
</tr>
<tr>
<td>The names of the approved Initiators, Verifiers, Approvers, and Submitters were not available or not easy to find in VCS</td>
<td>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.</td>
</tr>
</tbody>
</table>

**Additional key differences for Initiators/R1s**

<table>
<thead>
<tr>
<th>In addition to editing participant data, updates in TraiNet often involved updating participant status. This required the Initiator to determine the proper status for a participant, update the status, and send it through the workflow described above.</th>
<th>In TEAMS, no one has to update the participant status directly. TEAMS keeps track of the status based on the workflow underway.</th>
</tr>
</thead>
<tbody>
<tr>
<td>For U.S. programs, users must create or clone a program for each participant (For example, a short-term program with 15 participants going to the U.S.)</td>
<td>For U.S. programs with more than one participant, only one program is created. Each participant is added to that program (no need to clone the program)</td>
</tr>
<tr>
<td>Program Providers required for all programs</td>
<td>Program Provider is not required for non-U.S. programs</td>
</tr>
<tr>
<td>TraiNet Users can add a new provider if they don’t find the provider name in the dropdown list</td>
<td>For U.S. programs, a master list of U.S. providers will be maintained by USAID</td>
</tr>
<tr>
<td></td>
<td>Users will select from the master list or request an addition if the provider is not in the list.</td>
</tr>
<tr>
<td></td>
<td>Users will enter the address of the provider in the program record.</td>
</tr>
<tr>
<td></td>
<td>Previously used addresses can be used again and managed by the user when creating a program from the same award.</td>
</tr>
</tbody>
</table>
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

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  **INITIATOR (R1) DASHBOARD**

The dashboard includes several panels that display information for initiators:

- The profile panel displays Initiator’s Account Information.
- The Reminders Panel notifies the user when different actions need to be performed for programs or participants.
  - 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 participants in programs associated with the user’s USAID Award and a button to navigate to the Manage Participants page of each participant. The My Participants panel includes two views.
  - The first view is an Action Required view that displays participants in programs that are in an active workflow that *require action from the Initiator*.
  - The second view is View All, which displays all participants in programs that are in an active workflow.
- The My Programs panel includes a list of programs under the award assigned to the 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 **Verifier (R2) & Approver (R3) Dashboard**

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

- The profile panel displays user’s Account Information.
- The My Participants panel includes a list of participants 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 participants 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 participants 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 Verifier or Approver. The My Program panel includes a button to navigate to the Manage Program page for a specific program.
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 Participants, Participant Travel Dates, Participant’s Birth, Citizenship, and Residence Country, Participant Status, and Participant’s Workflow information.
5  **NON-U.S. PROGRAM DATA**

USAID no longer requires the entry of non-U.S. program data into TEAMS at an Agency enterprise (i.e., Agency-wide) level. However, individual USAID Operating Units (OU) may elect to retain this requirement in their respective Mission Orders or Office Directives, which may apply to your work. Therefore, only if your USAID OU requires it, this section provides instruction on how to enter data to create a Non-U.S. program and includes a tutorial and narrative text with step-by-step instructions on how to create and edit non-U.S. programs in TEAMS.

**TIPS for Creating Programs**

- **Make the Program Name descriptive** – Many programs are similar, to help distinguish programs from each other, consider making the program names reflect either the group or the timeframe in which the program takes place (i.e. “Agriculture Seminar – June, 2010” or “Agriculture Seminar – Ministers of Agriculture”).

- **Program Dates** – Program dates should be inclusive of any travel time required to attend the program and not just reflect the actual start date of the seminar, workshop, or other program event.

**Method of Training** - There are three training delivery methods in TEAMS:

- **In-Person**, which means program delivery conducted in-person by trainers/facilitators
- **Online training (distance Learning or “e-Learning”),** which is learning, including online courses and degrees, that allows participants to acquire skills at their own pace. It also allows participants to earn credits, certificates, and degrees from universities. It offers cost savings to Missions that would otherwise be required to cover short- and long-term travel, housing, and other living costs
- **Both,** which means a program implements a combination of in-person and online program delivery.

5.1  **DETAILS**

The steps to create a non-U.S. program:
There are two ways in TEAMS to navigate to the Create Program form, from the Initiators Dashboard and from the Manage Programs page.

**From the Initiator Dashboard: Navigate to Create a Program form:**

1. You must be an *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 Program form appears

**From the Manage Programs page: Navigate to Create a Program form:**

1. You must be an *Initiator* or a *RO/ARO* 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

**The Create Program Form Steps/Fields:**

1. Enter 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
4. Select the non-U.S. country where the exchange or training is going to be held in the Program Location field.
5. Select the method of training. The choices are: In-person, online, or both.
6. Select the USAID Award the program is associated to in the USAID Award Name drop-down list.
7. When finished, select the Create Program button to create and save the new program in TEAMS.

![Create Program](image)

**How to View and Edit a Non-U.S. Program (From Initiator Dashboard)**

1. Navigate to the My Programs panel in the initiator’s dashboard.
2. Select the green View Program button next to the program to view.
3. This brings user to the Manage Program page.
4. To edit the program, select the Edit button (blue pencil icon) on the upper right-hand corner of page.
5. Selecting the Edit button allows user to edit any of the fields.
6. Update the data in any of the editable fields.
7. Select the green Save changes button to save the new program data. Select the red Cancel button to cancel saving new data.

**How to View and Edit a Non-U.S. Program (From Manage Programs page)**

1. Navigate to the Manage Programs page.
2. Select the green View Program button next to the program to view.
3. This brings user to the Manage Program page.
4. To edit the program, select the Edit button (blue pencil icon) on the upper right-hand corner of page.
5. Selecting the Edit button allows user to edit any of the fields.
6. Update the data in any of the editable fields.
7. Select the green Save changes button to save the new program data. Select the red Cancel button to cancel saving new data.

How to Add Participant Groups and Individual Participants to a Non-U.S. Program

1. Navigate to the Manage Programs page.
2. Select the View Program button next to a Non-U.S. Program to navigate to the Manage Program page.
3. To add a participant group, navigate to the Total Participants by Gender and Country panel and select the gray Add Participants button. This displays the Add Participants form.
4. In the Add Participants form, enter data for all the fields and select the Add Participants button. This will add the new Participant Group to the Non-U.S. program.
5. To add an Individual participant to the Non-U.S. Program, navigate to the Optional Participant Information panel and select the gray Add Participant Information button.
6. The Add Optional Participant Information form will appear. Enter all required data in fields and select the blue Add Participant button. This will add the participant to the Non-U.S. Program.

Link to Tutorial: Creating a Non-U.S. Program
6 **NON-U.S. & U.S. COST DATA**

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

6.1 **DETAILS**

The process of adding a Cost to a program is the same for a U.S. or a non-U.S. program.

**Navigate to Add Cost to Program Form**

1. You must be an *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 participant, or the participant's employer
- Other: funds provided by another source such as another donor (e.g. World Bank)

**USAID Cost:**

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
   - In order to associate a cost to a participant, a participant must first be created in the program.
   - If the cost is allocated to a participant, 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

**Host Country Government:**

1. Select Host Country Government as the Funding Source
2. Choose if this cost will be allocated to a program or participant
   - In order to associate a cost to a participant, a participant must first be created in the program.
   - If the cost is allocated to a participant, 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 participant.
   - In order to associate a cost to a participant, a participant must first be created in the program.
   - If the cost is allocated to a participant, 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.
   a. For Non-U.S. Programs, costs can be deleted at any time by initiators. For U.S. programs, 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 exchange or training 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;
Supplemental enrichment programs;

Participant Costs: costs related to the individual participant. If a participant is deleted from an exchange or training program, these costs will automatically be deleted and the total program cost will be decreased by the amount of the deleted participant costs. A sample list of participant 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 Exchange Visitor status fees, if any;
- W-7 certification fees (certification of non-U.S. residence for tax purposes);
- Federal, state, and local income taxes, if any.

Link to Tutorial: Creating Costs in TEAMS
7 U.S. Program Data

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

7.1 User Roles in TEAMS

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

1. Initiator (R1): responsible for entering all required information for initiating visa applications and tracking participants in TEAMS.

2. Verifier (R2): verifies participant data in TEAMS.

3. Approver (R3): provides Mission confirmation of the legitimacy of each participant and exchange or training intervention; approves participant data after being verified by R2.

4. Submitter (R4): Using TEAMS and SEVIS, USAID/W RO (or AROs) submits approved participant data to SEVIS for processing, 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 participant data for awards and countries to which the user is associated.

NOTE: Information about a prospective USAID-sponsored participant 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 Verifier, Approver, or Submitter at any time during the process, the candidate is sent back to the Initiator.

Initiator (R1)

This role is performed by the person responsible for data entry in TEAMS. All participants nominated for International Exchanges and Training in the U.S. must be entered into TEAMS.

The 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 Initiators. There is no limit to the number of individuals who may be assigned to the Initiator role.

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

Responsibilities of the Initiator include:
• Entering data in TEAMS to create new programs (long term and short-term programs).
• Adding participant data
• Adding dependents
• Adding cost (for program and for participants)
• Updating data in TEAMS during the course of 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.
• Initiating workflows for U.S. programs.

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

Verifier (R2)

The Verifier is responsible for ensuring that data entered into TEAMS is complete and correct. The Verifier does not have to be a U.S. citizen. The 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 Initiator role. There may be more than one Verifier for each award or country (see Note below).

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

Responsibilities of the Verifier include:

• Verifying TEAMS data.
• Communicating data errors to the TEAMS Initiator for correction in TEAMS.
• Determining disposition of participant by either removing nomination or moving to USAID Mission for approval through TEAMS.
• Communicating with the Approver and Submitter to determine status of questionable applications and to provide any information required for the Security Risk and Fraud Inquiry (SRFI) (see ADS 252.3.3).
• Ensuring that all participants are properly validated within three calendar days of their program start date.
• Retaining a black and white copy of the stamped, endorsed DS-2019 after EV’s arrival in the U.S.
• Providing the Submitter with information and documentation pertaining to an EV upon request.
• Nominating people to fill the role of Verifier.

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

NOTE: There are two distinct Verifier roles, an Award Verifier, and a Country Verifier. Award Verifiers are assigned to specific awards. A Country Verifier is assigned to all Awards assigned to a country. The Country Verifier will generally be a USAID Mission staff person. Missions decide if they would like to have either an Award Verifier or a Country Verifier, or both. If Missions decide to include both roles in TEAMS, the Award Verifier will verify participants first, then the Country Verifier will verify. The participant record will then move to the Approvers.
Approver (R3)
This role must be performed by a U.S. citizen at a USAID Mission or at USAID/W to approve participant data or data updates for EVs.

The number of individuals assigned the Approver role is determined by the Mission Director or USAID representative, or Washington Office Director.

Responsibilities of the Approver include:

- Providing Mission or Washington Office confirmation of the legitimacy of each participant who is a resident of the country, as well as confirmation of the exchange or training intervention, and certifies that an SRFI has been conducted.
- Approving data from field offices to send to USAID/W 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 Verifier.

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

NOTE: There are two distinct Approver roles, an Award Approver and a Country Approver. Award Approvers are assigned to specific awards. A Country Approver is assigned to all Awards assigned to a country. Missions will assign a Country Approver. There are some instances when a Mission or Washington Office may decide they would like to have an Award Approver rather than a Country Approver. For all awards, there will be only an Award Approver or a Country Approver, but not both.

RO/ARO (Responsible Officer/Alternate Responsible Officer) – Submitter Role

This role is performed by the Responsible Officer (RO) or Alternate Responsible Officers (AROs) within the M/MPBP office approved by DOS to access SEVIS.

Responsibilities of the Submitter include:

- Submitting approved applications to SEVIS through the batch transfer function.
- Sending disapproved applications back to the 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.
- Managing signing, printing, and shipping of DS-2019 forms to Missions and field offices.
- Managing TEAMS access of Verifiers, Approvers, and other Submitters.
- 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 contractor assigned to this role on behalf of the Management Bureau, 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:

- Check the DS-2019 print queue daily and print any DS-2019s
- Set up the FedEx shipment in TEAMS
- Obtain RO/ARO signatures on DS-2019s
- Prepare the FedEx labels
- Update the shipment information in TEAMS (when packages are shipped)

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 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 income messages within 24 hours
- Set up all roles (Initiators, Verifiers, 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.

7.2 DATA ENTRY

Background and purpose

Thousands of people each year are brought to the United States for International Exchanges and Training 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 Exchange Visitor Information System (SEVIS) is a Web-based system for maintaining information on participants attending short- or long-term programs in the United States. SEVIS is administered by the Student and Exchange Visitor 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 participants 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 electronically print the Certificate of Eligibility for Exchange Visitor (J-1) Status (Form DS-2019), and they must update SEVIS with information on all participants 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 participants.

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

All USAID participants 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 participants to USAID/Washington (USAID/W). TEAMS is the sole source of information on all USAID-sponsored participants.

STUDENT AND EXCHANGE VISITOR INFORMATION SYSTEM (SEVIS) SEVIS, the computer system created by DHS to vet, approve, and monitor participants 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 particular situations.

ROLES AND RESPONSIBILITIES/WORKFLOW Sponsoring Units are responsible for tracking the whereabouts of their participants 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 instruction on how to enter data U.S. programs, including a tutorial and narrative text with step-by-step instructions on how to create and edit U.S. programs in TEAMS.

The main differences between entering data for non-U.S. programs and U.S. programs are that, for U.S. Programs the Initiator:

- Must specify program provider
• Must enter participants individually
  ▪ Provide information required to obtain DS-2019 from SEVIS
  ▪ Enter costs for individual participants
• May enter multiple participants for one program

Details

The steps to Create a U.S. Program

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

1. You must be an 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 Initiator or a RO/ARO 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:

The steps are the same as creating a Non-U.S. program, except United States will be selected as the Program Location:

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:
    1. Academic Research
    2. Conference Workshop
    3. Degree: Associate
    4. Degree: Bachelor
    5. Degree: Master
    6. Degree: Doctoral
    7. Meeting/Consultation
    8. Non-Degree Academic
    9. Observation
    10. 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 Participants 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 participant 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:
1. **J1**: participants sponsored by USAID with USAID funding
2. **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.
3. **Other**: 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.
4. Select the Position Code from drop-down list
5. 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.
6. 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.
7. The Residence Country Depart/Return Dates should be within three days from the US Site Arrival/Departure Dates for short term programs (less than six months / <6 months)
8. The Residence Country Depart/Return Dates should be within seven days from the US Site Arrival/Departure Dates for long term programs (equal to or greater than six months / ≥6 months)
9. Check to make sure these dates are accurate and edit if needed.
10. Type in the U.S. street address
11. 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 participants by gender

1. 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 participant status rather than the Initiators, the TEAMS system keeps participant status in sync with the status of that participant in SEVIS.

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

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

<table>
<thead>
<tr>
<th>Participant Status in TEAMS</th>
<th>What it means</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planned</td>
<td>Participant added to Program, but DS-2019 not issued yet</td>
</tr>
<tr>
<td>Initial</td>
<td>DS-2019 issued</td>
</tr>
<tr>
<td>Active</td>
<td>Participant has started the program</td>
</tr>
<tr>
<td>Completed (implies Returned)</td>
<td>Participant completed the program and returned home</td>
</tr>
<tr>
<td>Not Completed (implies Returned)</td>
<td>Participant started, did not complete program, returned home</td>
</tr>
<tr>
<td>Terminated</td>
<td>Participant terminated - See Termination Reasons</td>
</tr>
<tr>
<td>No Show</td>
<td>Participant arrived in the U.S. but not at program site</td>
</tr>
<tr>
<td>Canceled</td>
<td>Participant canceled before starting program</td>
</tr>
</tbody>
</table>
VI. Adding Dependents

Dependents can be added to a participant’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 a participant if the participant 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 participant record.

Link to Tutorial: Creating a U.S. Program
8 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.

8.1 DETAILS

Program Providers are institutions that conduct exchanges or training 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 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 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 or training 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
Participants who are selected to attend U.S. exchanges or training programs must comply with U.S. Government J visa regulations. TEAMS provides a series of workflows (processes) to request the required DS-2019 visa document, and to monitor the participant 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 Initiator (R1) to enter data or change a status, and pass that update to
- The Verifier (R2), who verifies the changes and sends the record to
- The Approver (R3), who reviews and approves the update and sends the record to
- The Submitter (R4), who reviews the update and submits it to SEVIS

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

<table>
<thead>
<tr>
<th>Workflow</th>
<th>Initiator</th>
<th>Verifier</th>
<th>Approver</th>
<th>RO/ARO</th>
<th>Shipper</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Request DS-2019</strong></td>
<td>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</td>
<td>Verifies that information is complete, correct, error free. Communicates errors to Initiator for correction</td>
<td>Manages Security Risk and Fraud Inquiry, approves request</td>
<td>Submits request to SEVIS, manages SEVIS errors, may print DS-2019 forms and ships signed forms to the field</td>
<td>Prints DS-2019 forms, secures RO/ARO signature, ships signed forms to the field</td>
</tr>
<tr>
<td><strong>Validate Arrival in the U.S.</strong></td>
<td>Confirms arrival of participants and initiates Validate Arrival workflow within 3 business days of the arrival. Note, participants may arrive 3 days before the start date of a short-term program, and 7 days before the start date of a long-term program.</td>
<td>Verifies status within 3 business days of arrival</td>
<td>N/A</td>
<td>Submits arrival validation to SEVIS</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Update Data</strong></td>
<td>Enter all data updates. Note: Once the DS-2019 workflow has completed, data updates cannot be</td>
<td>Verifies updates</td>
<td>Approves updates</td>
<td>Submits updates to SEVIS</td>
<td>N/A</td>
</tr>
<tr>
<td>Workflow</td>
<td>Initiator</td>
<td>Verifier</td>
<td>Approver</td>
<td>RO/ARO</td>
<td>Shipper</td>
</tr>
<tr>
<td>----------------------------------</td>
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<td>--------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------</td>
<td>--------</td>
<td>---------</td>
</tr>
<tr>
<td></td>
<td>entered into TEAMS until after the Validate Arrival workflow is completed</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Cancel - Initial status</strong></td>
<td>Initiates cancel workflow for a participant in the <em>Initial</em> status.</td>
<td>Verifies cancellation of participant</td>
<td>Approves cancellation of participant</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Submits cancellation to SEVIS</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Cancel - Planned status</strong></td>
<td>Initiates cancel workflow for a participant in the <em>Planned</em> status.</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>Note: When a participant 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 Verifier, Approver or the RO.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>No Show</strong></td>
<td>Uploads No Show documentation.</td>
<td>Verifies participant’s No Show workflow</td>
<td>Approves participant’s No Show workflow</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Initiates No Show workflow.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Terminate</strong></td>
<td>Receives confirmation from USAID that participant should be terminated, uploads USAID direction to terminate participant, starts terminate workflow, enters termination effective date and reason for termination.</td>
<td>Verifies participant’s termination</td>
<td>Approves participant’s termination</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Complete the Program Early</strong></td>
<td>Starts Completed Program Early workflow, including entering new date for program end</td>
<td>Verifies Completed Program Early workflow,</td>
<td>Approve Completed Program</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Submits Completed Program Early</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

35
<table>
<thead>
<tr>
<th>Workflow</th>
<th>Initiator</th>
<th>Verifier</th>
<th>Approver</th>
<th>RO/ARO</th>
<th>Shipper</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>End Program: Did Not Complete Program</strong></td>
<td>Starts Did Not Complete Program workflow, including entering new date for program end and selecting a program shorten reason code.</td>
<td>Verifies Did Not Complete Program workflow</td>
<td>Approve Did Not Complete Program workflow</td>
<td>Submit Did Not Complete Program workflow to SEVIS</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>End Program: Complete Program as Scheduled</strong></td>
<td>Starts complete program workflow. <strong>Note:</strong> Participants must arrive home within 3 calendar days after the end of a short-term program, and by 7 days after a long-term program. <strong>Note:</strong> when participants finish their programs and depart the U.S. on time, SEVIS automatically updates the participant status and there is no need for TEAMS to submit program completion to SEVIS</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Failure to Extend Program</strong></td>
<td>Starts the failure to extend program workflow for a participant in the <strong>Completed</strong> status. Selects new program end dates</td>
<td>Verifies failure to extend program, including new dates</td>
<td>Approve failure to extend program, including new dates</td>
<td>Submit failure to extend program, including new dates to SEVIS via RTI</td>
<td>N/A</td>
</tr>
</tbody>
</table>

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

- The workflow the participant is in, or has completed
- The step the participant 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 Status Descriptions

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>Is the status after an Initiator starts workflow</td>
</tr>
<tr>
<td>Initiated</td>
<td>After an initiator initiated a workflow</td>
</tr>
<tr>
<td>Award Verified</td>
<td>After an award verifier verifies a workflow</td>
</tr>
<tr>
<td>Country Verified</td>
<td>After a country verifier verifies a workflow</td>
</tr>
<tr>
<td>Award Approved</td>
<td>After an award approver approves a workflow</td>
</tr>
<tr>
<td>Country Approved</td>
<td>After a country approver approves a workflow</td>
</tr>
<tr>
<td>Submitted</td>
<td>After a RO/ARO submits a workflow to SEVIS Batch</td>
</tr>
<tr>
<td>Batched</td>
<td>After the workflow has been batched and sent to SEVIS</td>
</tr>
<tr>
<td>Batched Error</td>
<td>When an error occurs while SEVIS is processing the workflow</td>
</tr>
<tr>
<td>Processed</td>
<td>After a workflow has been processed in SEVIS</td>
</tr>
<tr>
<td>Processed Via RTI</td>
<td>After an RO/ARO submits a workflow via RTI</td>
</tr>
<tr>
<td>Rejected</td>
<td>After a user rejects a workflow</td>
</tr>
<tr>
<td>Shipped</td>
<td>After a DS-2019’s shipment shipped date has past</td>
</tr>
</tbody>
</table>

**Workflow Action buttons:**

- **Initiate** – Initiators select the Initiate button to start a workflow. This sends the participant record to the verifier.

- **Verify** – Verifiers select the Verify button to verify a workflow. This sends the participant record to the Approver (this sends a workflow to RO/ARO during the Validate Arrival workflow).

- **Approve** – Approvers select the Approve button to approve a workflow. This sends the participant record to the RO/ARO
Reject – Any user may select the Reject button to Reject a participant record. This sends the participant record back to the initiator.

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

Submit via RTI – The RO/ARO 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.
10 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 Initiator, Verifier, Approver, and Submitter are needed for this workflow.

The Initiator must have already:

● Created a U.S. program,
● Added a participant to the U.S. program, and
● Added costs to the U.S. program.

The participant must be in Planned status.

The Initiator begins the Request DS-2019 Workflow by:

1. Navigating to 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
Initiator

1. Navigate to the Initiator's Dashboard.
2. Locate the My Participants panel - the initiator can see a list of participants that require the Initiator's action.
3. Select a participant that is in Planned status. This brings the 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, Biodata Form, 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.

Verifier

1. Navigate to Verifier's Dashboard.
2. Locate the My Participants panel - the Verifier can see a list of participants that require the Verifier's action.
3. Select a participant that is in Planned status. This brings the Verifier to the Manage Participant page.
4. Verifier reviews participant information. If there are documents to add, the 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.

**Approver**

1. Navigate to Approver's Dashboard.
2. Locate the My Participants panel - the Approver can see a list of participants that require the Approver's action.
3. Select a participant that is in Planned status. This brings the Approver to the Manage Participant page.
4. The Approver reviews participant information. If there are documents to add, the Approver can upload them at this time.
   - All required documents (Passport Face Page, Biodata Form, Health and Accident Coverage, Conditions of Sponsorship with Participant Signature, Conditions of Sponsorship with Signature and USAID Signature, and Security Risk and Fraud Inquiry) must be uploaded by this time in order to Approve the participant 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.

**RO/ARO (Submitter)**

1. Navigate to Submitter's Dashboard.
2. Locate the My Participants panel - the Submitter can see a list of participants that require the Submitter’s action.
3. Select a participant that is in Planned status. This brings the submitter to the Manage Participant page.
4. The Submitter reviews participant information. If there are documents to add, the Submitter 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 participant 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 participant.
2. The DS-2019 is sent back to the DS-2019 Print Queue for the Shipper or Submitter to print.
3. Once the DS-2019 is printed, it is shipped to the appropriate USAID Mission or participant in the United States.

Link to Tutorial: [Request DS-2019 Workflow](#)
11 UPLOADING FILES

In TEAMS, not only can the Initiator upload files, all other users in the workflow (Verifier, Approver, Submitter) can upload them as well. Documents must be uploaded for each U.S. Participant. 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 four: Passport Face Page, Biodata Form, Health and Accident Coverage (HAC), and Conditions of Sponsorship with Participant Signature are required to Initiate. The Initiator must upload these four documents.
2. The next two: Conditions of Sponsorship with Participant and USAID Signatures and Security Risk and Fraud Inquiry (SRFI) are required by the time the Approver needs to Approve. The Initiator, Verifier, or Approver can upload these documents.

How to upload files

I. Navigate to the Documents panel

1. You must be an Initiator, Verifier, Approver, or Submitter to do these tasks.
2. Navigate to your dashboard and select a participant 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, Biodata Form, Health and Accident Coverage (HAC), and Conditions of Sponsorship with Participant Conditions of Sponsorship with Participant and USAID Signatures and Security Risk and Fraud Inquiry (SRFI) are required documents to initiate the DS-2019 workflow.
   • The remaining documents are required for other workflows or for adding a dependent to a participant.
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 participant.
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
12  VALIDATE PARTICIPANT ARRIVAL

The Initiator, Verifier, and Submitter are needed for this workflow. Remember, this is the only workflow that does not require an Approver! All other workflows require the Initiator, Verifier, Approver, and Submitter.

The participant must be in Initial status (meaning a DS-2019 has already been issued). The initiator has already checked that the participants have arrived at their exchanges or training site. Validation must happen within three calendar days of the participant's arrival date.

The Initiator begins the Validate Arrival Workflow by:

1. Navigating to 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 participant 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. Initiator selects Validate Arrival button.

**Initiator**

There are two ways to navigate to a participant 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 Initiator's Dashboard for a participant in Initial Status that requires the Initiator's action. Select the participant 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.

**Verifier**

1. Navigate to the Verifier's Dashboard and then to Participants panel
2. Look for a participant 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.

**Submitter**

4. Navigate to Submitter's Dashboard and then to Participants panel
5. Look for a participant that is in Initial Status and in the Validate Arrival workflow. Select the green eye on the right side.
6. 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

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13 **Update Data**

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

**Initiator**

1. Navigate to the Initiator's Manage Program Page
2. Select the view Participant button for a user with participant 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.

**Verifier**

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

**Approver**

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

**RO/ARO (Submitter)**

14. Locate the My Participants panel - the Submitter can see a list of participants that require the Submitter's action.
15. Select the View Participant button for the participant in the Validate Arrival workflow that has been approved. This takes user to the Manage Participant page.
16. 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 ‘print DS-2019’ box:
17. Participant bio-data changes, such as name, date of birth, citizenship, etc.
18. Program date changes
19. Change of venue or program description

NOTE: Update Data Workflow can only be used if a participant is in Initial or Active Status. The Initiator, Verifier, or Approver may check the box to request a reprint of the DS-2019 if there are changes in:
• end dates
• financial information
• the site of the activity
• biographical information

When the Initiator, Verifier, or Approver checks the box to reprint the DS-2019, this is an indication to the RO/ARO Submitter that the DS-2019 may need to be reprinted. The RO/ARO will make the final decision on whether or not to reprint the form.

If a participant is in Initial status and any of the above updates have been made, then the RO/ARO will Submit via RTI and decide whether or not to reprint the DS-2019. Prior to making any changes directly in SEVIS, the RO/ARO will confirm in SEVIS whether or not the participant has been issued his/her visa. Once the visa has been issued, only the participant’s U.S. address can be updated. All other updates must wait until participants are in Active status.

If a participant is in Active status and any of the above updates have been made, the Initiator, Verifier, or Approver should check the Reprint DS-2919 box. The RO/ARO will submit to SEVIS by batch and decide whether or not to reprint the DS-2019.

Link to Tutorial: Update Data Workflow
14 **CANCEL PARTICIPANTS**

Requirements to Begin the Cancel Participant Workflow

The Initiator, Verifier, Approver, and Submitter are needed for this workflow. The participant must be in **Planned** or **Initial** status. The Initiator must be notified that a participant needs to be canceled.

**Cancel Participant Workflow steps**

**Initiator**

If the participant is in **Planned** status meaning a DS-2019 has not been issued yet, then just the Initiator needs to cancel the participant. There are no other steps after the Initiator cancels the participant. 

If the participant 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 Initiator's Dashboard. Locate the program the participant 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 participants 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 participant has departed their home country. The Initiator selects "No".
5. The option to Initiate appears - select the green button Initiate.

**Verifier**

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

**Approver**

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

**Submitter**

13. The Submitter navigates to Manage Participant. (From dashboard, go to My Participants, select participant by clicking green eye on the right side)
14. Select the green button Submit to SEVIS
15. Select Yes in the Submit Cancel Participant Workflow pop-up screen.

Link to Tutorial: Cancel Participant Workflow
15 No Show Participants

Requirements to Begin the No Show Workflow Process
The Initiator, Verifier, Approver, and Submitter are needed for this workflow. The participant must be in Initial status and have left their country.

No Show Workflow Process

Initiator

1. Navigate to the Initiator's Dashboard. Locate the program the participant 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 participant 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. <upload documents>
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.

Verifier

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

Approver

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

Submitter

12. The Submitter navigates to Manage Participant. (From dashboard, go to My Participants, select participant by clicking green eye on the right side)
13. Select the green button Submitter

Link to Tutorial: No Show Participant Workflow
16 TERMINATE PARTICIPANTS

Requirements to Begin the Terminate Workflow Process
The Initiator, Verifier, Approver, and Submitter are needed for this workflow. The participant must be in Active or Completed status. The Initiator must be notified by USAID by email that a participant’s program needs to be terminated.

Note: If a participant is a non-returnee, use the terminate workflow, selecting the reason that the participant violated Sponsor regulations.

Terminate Workflow Process

Initiator

1. Navigate to the Initiator’s Dashboard. Locate the program the participant 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 participant 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. <upload documents>
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.

Verifier

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

Approver

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

Submitter

13. The Submitter navigates to Manage Participant. (From dashboard, go to My Participants, select participant by clicking green eye on the right side)
14. Selects the green button Submit to SEVIS. Confirm yes in the Submit Terminated Participant pop-up screen.

Link to Tutorial: Terminate Participant Workflow
17  COMPLETED THE PROGRAM

Requirements to Begin the Completed Workflow Process

The Initiator, Verifier, Approver, and Submitter are needed for this workflow. The participant must be in Active status. The Initiator must be notified by USAID that a participant’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

Initiator

1. Navigate to the Initiator’s Dashboard. Locate the program the participant 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 participant 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 participant return to their home country on or before their U.S. Site Depart date?” Select Yes.
5. A pop-up appears asking “Did the participant violate USAID program rules or U.S. Exchange Visitor program regulations?” Select No.
6. A pop-up appears asking “Did the participant complete the Program?” Select Yes.
7. A pop-up appears asking “Did the participant 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

Initiator

1. Navigate to the Initiator’s Dashboard. Locate the program the participant 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 participant 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 participant return to their home country on or before their U.S. Site Depart date?” Select Yes.
5. A pop-up appears asking “Did the participant violate USAID program rules or U.S. Exchange Visitor program regulations?” Select No.
6. A pop-up appears asking “Did the participant complete the Program?” Select Yes.
7. A pop-up appears asking “Did the participant 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.

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

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

Submitter
15. The Submitter navigates to Manage Participant. (From dashboard, go to My Participants, select participant by clicking green eye on the right side)
16. 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

Initiator
1. Navigate to the Initiator's Dashboard. Locate the program the participant 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 participant 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 participant return to their home country on or before their U.S. Site Depart date?” Select Yes.
5. A pop-up appears asking “Did the participant violate USAID program rules or U.S. Exchange Visitor program regulations?” Select No.
6. A pop-up appears asking “Did the participant 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.
Verifier

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

Approver

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

Submitter

14. The Submitter navigates to Manage Participant. (From dashboard, go to My Participants, select participant by clicking green eye on the right side)
15. 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
Requirements to begin the Failure to Extend Program Workflow Process

The Initiator, Verifier, Approver, and Submitter are needed for this workflow. The participant must be in **Active** or **Completed** status. The Initiator must be notified by USAID when a participant’s program needs to be extended.

**Failure to Extend Program Process**

**Initiator**

1. Navigate to the Initiator's Dashboard. Locate the program the participant 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 participant 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 Participant 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.

**Verifier**

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

**Approver**

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

**Submitter**

13. The Submitter navigates to Manage Participant. (From dashboard, go to My Participants, select participant by clicking green eye on the right side)
14. Selects the green button Submit to SEVIS. Confirm yes in the Submit Failure to Extend Program pop-up screen.
## 19 PARTICIPANT RECORD JOURNAL

Table of all Participant Record Journal Entries.

<table>
<thead>
<tr>
<th>Journal Entry</th>
<th>Date / Timestamp</th>
<th>Role</th>
<th>Type</th>
<th>User’s Info</th>
<th>Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participant Added to a US Program</td>
<td>Yes (05/03/2019 - 1:56 PM EDT)</td>
<td>Role</td>
<td>System</td>
<td>First/Last Name, Email</td>
<td>Record Created</td>
</tr>
<tr>
<td>Workflow Started</td>
<td>Yes (05/03/2019 - 1:56 PM EDT)</td>
<td>Role</td>
<td>System</td>
<td>First/Last Name, Email</td>
<td>X workflow started (Request DS-2019 workflow started)</td>
</tr>
<tr>
<td>Dependent Added to a US Participant</td>
<td>Yes (05/03/2019 - 1:56 PM EDT)</td>
<td>Role</td>
<td>System</td>
<td>First/Last Name, Email</td>
<td>Dependent X added (dependent Sara Smith added)</td>
</tr>
<tr>
<td>Documents Uploaded or Deleted</td>
<td>Yes (05/03/2019 - 1:56 PM EDT)</td>
<td>Role</td>
<td>System</td>
<td>First Name, Last Name, Email</td>
<td>Action - File Type (Uploaded - Biodata Form or Deleted - Passport Face Page)</td>
</tr>
<tr>
<td>Workflow Initiated</td>
<td>Yes (05/03/2019 - 1:56 PM EDT)</td>
<td>Role</td>
<td>System</td>
<td>First/Last Name, Email</td>
<td>X workflow initiated (Request DS-2019 workflow initiated)</td>
</tr>
<tr>
<td>Workflow Verified (Award/Country)</td>
<td>Yes (05/03/2019 - 1:56 PM EDT)</td>
<td>Role</td>
<td>System</td>
<td>First/Last Name, Email</td>
<td>X workflow verified (Request DS-2019 workflow verified)</td>
</tr>
<tr>
<td>Workflow Approved</td>
<td>Yes (05/03/2019 - 1:56 PM EDT)</td>
<td>Role</td>
<td>System</td>
<td>First/Last Name, Email</td>
<td>X workflow approved (Request DS-2019 workflow approved)</td>
</tr>
<tr>
<td>Workflow Submitted (for SEVIS batch)</td>
<td>Yes (05/03/2019 - 1:56 PM EDT)</td>
<td>Role</td>
<td>System</td>
<td>First/Last Name, Email</td>
<td>X workflow submitted for SEVIS batch (Request DS-2019 workflow submitted for SEVIS batch)</td>
</tr>
<tr>
<td>Workflow recalled before batch (Submitter)</td>
<td>Yes (05/03/2019 - 1:56 PM EDT)</td>
<td>Role</td>
<td>System</td>
<td>First/Last Name, Email</td>
<td>X workflow recalled before SEVIS batch (Update Data workflow recalled before SEVIS batch)</td>
</tr>
<tr>
<td>Workflow Submitted (for SEVIS RTI)</td>
<td>Yes (05/03/2019 - 1:56 PM EDT)</td>
<td>Role</td>
<td>System</td>
<td>First/Last Name, Email</td>
<td>X workflow submitted via SEVIS RTI (Terminate Participant workflow submitted via SEVIS RTI)</td>
</tr>
<tr>
<td>Journal Entry</td>
<td>Date / Timestamp</td>
<td>Role</td>
<td>Type</td>
<td>User’s Info</td>
<td>Message</td>
</tr>
<tr>
<td>------------------------------------------------------------------------------</td>
<td>------------------</td>
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<td>------</td>
<td>--------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Track Changes in the Updated Data Workflow                                   | Yes              | 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              | Role | System | First/Last Name, Last Name, Email    | X workflow rejected - Comments  
(Request DS-2019 workflow rejected - Update the Program Dates)                                                                                                                                                                                                                                                                     |
| Comments (65K characters)                                                    | Yes              | Role | User  | First Name, Last Name, Email         | Comments                                                                                                                                                                                                                                                                                                                              |
| Workflow SEVIS Approved (no SEVIS errors)                                   | Yes              | 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              | Role | System | First/Last Name, Email               | Termination Reason: X  
Effective Termination Date: 09/19/2019 (Termination Reason: Convicted of a crime / Effective Termination Date: 09/19/2019)                                                                                                                                                                                                 |
DATA ACCESS AND REPORTING

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
● 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 a Participant 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 Participant information, as well as Program and Cost summary
2. Click the Export Data button
3. 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 Participants 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 has 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 participants by Gender
- Residence Country
  - Note that comparing the participants’ Residence Countries with the Program Location will tell you whether the program was in-country, third-country or a U.S. program
- 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 Participant Data export includes detailed information of all Participants in U.S. programs, and any participant data entered in in-country or third country 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 Participant Data export.

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

The Participant 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 Participant 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 participant’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 Participant 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
1. 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'.
   a) This selects all the cells and tells Google Sheets you want to filter the entire worksheet.
1. Click **Data** on the main menu
2. 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
   a) Click **Clear**
   b) Check the **DT - Agriculture Award** to select it
   c) Click **OK**
   d) Now only Programs for the **DT - Agriculture Award** are displayed.
2. Click the Filter icon in the Type column
3. Click Clear
4. Check the Conference/Workshop program type
5. Click OK
6. 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 of the data export files contain all data available in TEAMS. You may not want or need all the columns in a given 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 your filtered and presented your data as you want it in Google Sheets,

1. Select the data you want to use or share.
   a) Be sure not to select the entire sheet. That will select literally everything ... even cells with no data. This is not what you want.
1. After selecting the cells you want, click Control-C (or Command-C on a Mac) to copy the data to the clipboard.
2. Create or open a Google Doc – or Microsoft Word document if you prefer
3. Put the cursor where you want to insert the TEAMS data.
4. Click Control-V (or Command-V on a Mac) to paste the data.
5. 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
# 21 Notifications

Table of all notifications.

<table>
<thead>
<tr>
<th>Criteria</th>
<th>When Generated</th>
<th>Who Receives the Notification</th>
<th>Email Subject</th>
<th>Email Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>A participant is ready to be verified (SOO 2.12, 2.18, 2.24)</td>
<td>When Initiator initiates any workflow for participants or dependents (US Programs) OR When there are 2 Verifiers in the workflow and the 1st Verifier has verified a participant or dependent (US Programs)</td>
<td>Verifiers</td>
<td>TEAMS Notification: An exchange visitor is ready to be verified</td>
<td>This message is to inform you that you have exchange visitors waiting to be processed in the USAID Training and Exchange Automated Management System (TEAMS). TEAMS can be accessed at: &lt;link&gt;</td>
</tr>
<tr>
<td>A participant is ready to be approved (SOO 2.12, 2.18, 2.24)</td>
<td>When a participant or dependent is ready to be verified by an Award Verifier or Country Verifier</td>
<td>Approvers</td>
<td>TEAMS Notification: An exchange visitor is ready to be approved</td>
<td>This message is to inform you that you have exchange visitors waiting to be processed in the USAID Training and Exchange Automated Management System (TEAMS). TEAMS can be accessed at: &lt;link&gt;</td>
</tr>
<tr>
<td>A participant is ready to be submitted (SOO 2.12, 2.18, 2.24)</td>
<td>When a participant or dependent is ready to be submitted.</td>
<td>Submitters</td>
<td>TEAMS Notification: An exchange visitor is ready to be submitted</td>
<td>This message is to inform you that you have exchange visitors waiting to be processed in the USAID Training and Exchange Automated Management System (TEAMS). TEAMS can be accessed at: &lt;link&gt;</td>
</tr>
<tr>
<td>A participant has been rejected by the Initiator, Verifier,</td>
<td>When a participant or dependent has been rejected.</td>
<td>Initiators, and any upstream users who have taken action on the record:</td>
<td>TEAMS Notification: An exchange visitor has</td>
<td>This message is to inform you that you have exchange visitors who have been rejected in the USAID Training</td>
</tr>
<tr>
<td>Criteria</td>
<td>When Generated</td>
<td>Who Receives the Notification</td>
<td>Email Subject</td>
<td>Email Message</td>
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<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Approver or Submitter</td>
<td></td>
<td>(e.g. 1) Approver rejects the record, both Initiators and Verifiers receive the Notification; OR 2) Submitter rejects the record, Initiators, Verifiers and Approvers receive the Notification; OR 3) Initiator rejects the record after the Verifier and Approver have approved the record, both Verifiers and Approvers receive the Notification)</td>
<td>been rejected</td>
<td>and Exchange Automated Management System (TEAMS). The exchange visitor records have been sent back to the Initiator queue for review and updates. TEAMS can be accessed at: &lt;link&gt;</td>
</tr>
<tr>
<td>Workflow has SEVIS errors</td>
<td>When the system/user receives response from the SEVIS API with errors</td>
<td>Submitters</td>
<td>TEAMS Notification: An exchange visitor has SEVIS errors</td>
<td>This message is to inform you that you have exchange visitors with SEVIS errors in the USAID Training and Exchange Automated Management System (TEAMS). TEAMS can be accessed at: &lt;link&gt;</td>
</tr>
<tr>
<td>The system will generate notifications to remind users when they need to start Validate a Participant workflow for a US Program</td>
<td>On the Participants’ U.S. Site Arrival Date</td>
<td>Initiators &amp; Verifiers</td>
<td>TEAMS Notification: Validate Arrival for exchange visitor</td>
<td>This message is to notify you that you have exchange visitors in TEAMS that have programs that are scheduled to start today. Their participation in the program must be validated within 3 calendar days of the</td>
</tr>
<tr>
<td>Criteria</td>
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</tr>
<tr>
<td>The system will generate notifications to remind users of the validation period to start the Validate a Participant workflow for a US Program has passed.</td>
<td>After 3 days from the U.S. Site Arrival Date for a Short Term Program (short term &lt;= 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 &gt;30 days for the U.S. Site Arrival/Departure Dates)</td>
<td>Initiators, Verifiers &amp; Approvers</td>
<td>TEAMS Notification: Arrival validation period for exchange visitors has passed</td>
<td>This message is to notify you that you have exchange visitors 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 participant is a No Show and if the No</td>
</tr>
<tr>
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<td>Email Subject</td>
<td>Email Message</td>
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<td>------------------------------------------------------------------------</td>
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</tr>
<tr>
<td>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 &amp; 2.09)</td>
<td>On the participant US Site Depart Date and if the End Program Workflow has not been initiated.</td>
<td>Initiators &amp; Verifiers</td>
<td>TEAMS Notification: End Program for exchange visitor</td>
<td>This message is to notify you that you have exchange visitors 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: &lt;link&gt;</td>
</tr>
<tr>
<td>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)</td>
<td>When a US Program is created</td>
<td>AOR/COR associated to the Award the Program is linked to. (selected at the Award level)</td>
<td>TEAMS Notification: New U.S. Program has been created</td>
<td>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: &lt;link&gt;</td>
</tr>
<tr>
<td>The system will generate a notification letting the Approver(s) know a U.S. participant is going through the Validate Arrival workflow</td>
<td>When the Validate Arrival workflow is Initiated</td>
<td>- Approvers -AOR/COR associated to the Award the Program is linked to. (selected at the Award level)</td>
<td>TEAMS Notification: The Validate Arrival workflow has been initiated</td>
<td>This message is to notify you an exchange visitor for Program X under Award Y has been initiated through the Validate Arrival workflow. TEAMS can be accessed at: &lt;link&gt;</td>
</tr>
<tr>
<td>Remind Initiator to enter the</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
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<td>----------</td>
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</tr>
<tr>
<td>Results into the Program.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>When the Submitter/RO updates data on a workflow</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enter the final program costs</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Notification to the shipper by email that participants are waiting in the print queue</td>
<td>When there are participants in the print queue</td>
<td>Shipper</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Notify everyone by email in the workflow when the package is shipped (with tracking number either in TEAMS or in email)</td>
<td>When the package is shipped</td>
<td>R1-R4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A participant's workflow has been processed</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Award created in TEAMS</td>
<td>When a New Award is created and the Create Award command is issued.</td>
<td>RO/ARO Implementing Partner Contact &amp; AOR/COR associated to the award</td>
<td>TEAMS Notification: An award has been created</td>
<td>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: &lt;link&gt; USAID Award Name: xxxxx (ABC Award) Award Type: xxxxx (Contract, Cooperative Agreement, or Grant) Implementing Partner: xxxxx (World Learning) Implementing Partner Contact: xxxxx (<a href="mailto:susan@wl.com">susan@wl.com</a>)</td>
</tr>
</tbody>
</table>

USAID Award Name: xxxxx (ABC Award) Award Type: xxxxx (Contract, Cooperative Agreement, or Grant) Implementing Partner: xxxxx (World Learning) Implementing Partner Contact: xxxxx (susan@wl.com)
<table>
<thead>
<tr>
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<th>Email Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>USAID Unit: xxxxx (M/CIO) AOR/COR: xxxxx (<a href="mailto:tburn@usaid.gov">tburn@usaid.gov</a>)</td>
<td>USAID Unit: xxxxx (M/CIO) AOR/COR: xxxxx (<a href="mailto:tburn@usaid.gov">tburn@usaid.gov</a>)</td>
<td>In TEAMS, programs are tied to awards (contracts, cooperative agreements, or grants). Under each award, TEAMS captures training program and participant information for in-country, third country, and U.S. programs.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| 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> |

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