Course 2: Grant Proposal and Project Statement TRACS Manual

(Updated 11/9/2021)

This course takes you through the steps for upfront project entry including entering the grant proposal, creating a project statement, adding objectives, and completing a project statement.

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Lesson 2a: Enter Grant Proposal

By the end of this lesson, learners will be able to:

1. Describe the standardized naming convention for the grant title.
2. Describe the steps required to search for a grant.
3. Identify the required steps to enter a new grant proposal.

The grant proposal contains the administrative information for your grant. Some of this information can be found on the Application for Federal Assistance (SF-424). You may copy and paste from the SF-424 into TRACS or vice versa (crosswalk information is included as available).

The SF-424 forms can be found at https://www.grants.gov/web/grants/forms/sf-424-family.html.

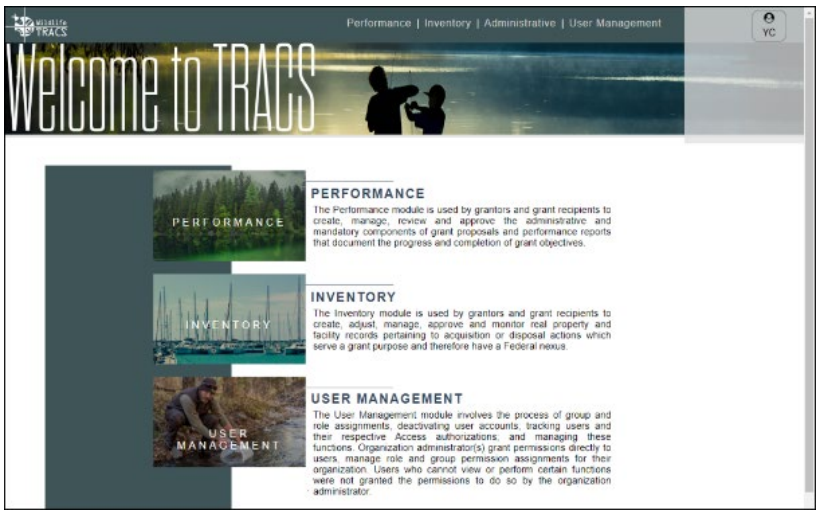
Best Practice Tips:

- TRACS is not a grants management system or a substitute for the overall grant application, but provides a complementary system that provides grant performance reporting tools not found in any other system. TRACS serves as WSFR's electronic repository system for all performance and accomplishment reporting related to those Federal awards administered by the WSFR program.

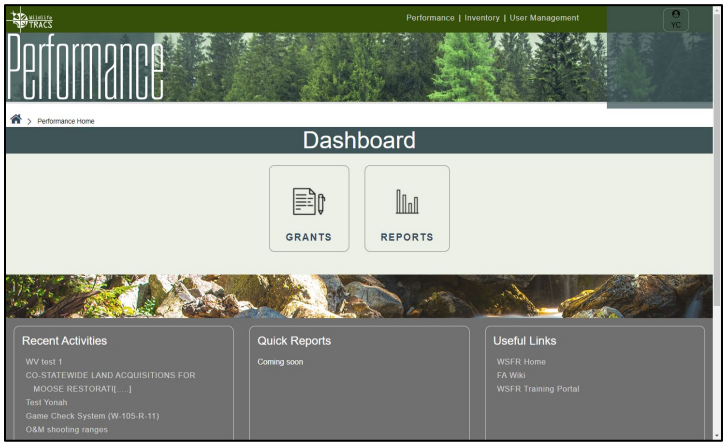
- It is more time and cost effective to enter and submit the Grant Proposal and Project Statement(s) in TRACS as part of the grant approval process. The TRACS-generated Grant Proposal and Project Statement are well organized and complete, increasing both efficiency and quality.

Steps to Search for a Grant in TRACS

1. After logging into TRACS, the home page will display. Click on the "**Performance**" module.



2. The Dashboard page opens. If you recently worked on a grant and want to open it again, look in the "Recent Activities" box (a user-specific list of recent grants you recently worked on). If the grant is listed, click on the title to open it. If not, click on the "**Grants**" icon.

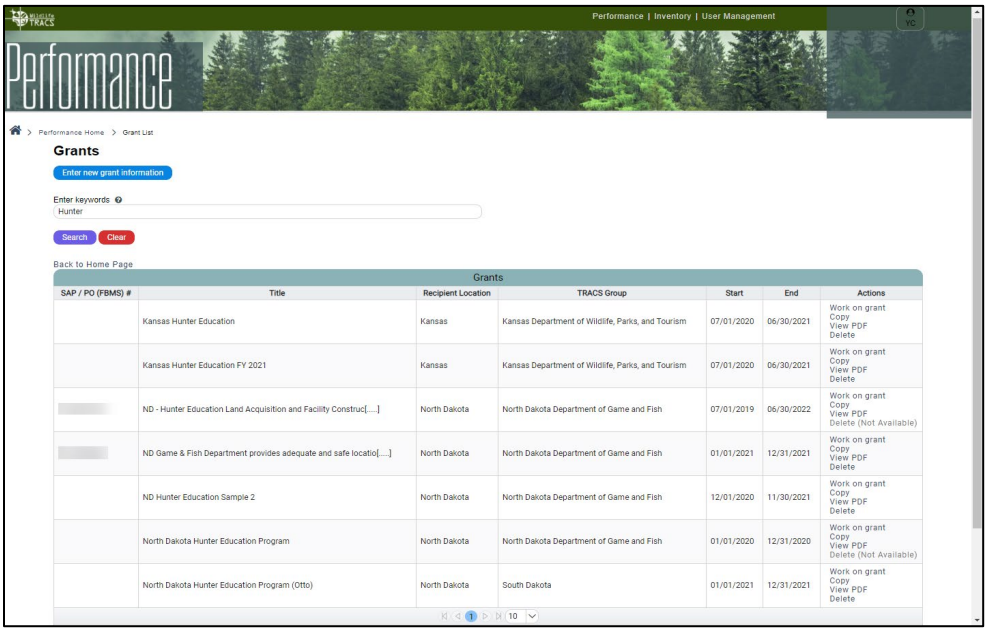


3. The Grant List page opens displaying the grants on the Grants List Table. You will only see grants specific to your assigned group(s). To search for an existing grant entered into TRACS, enter keywords into the search box and click "Search" to filter the list.

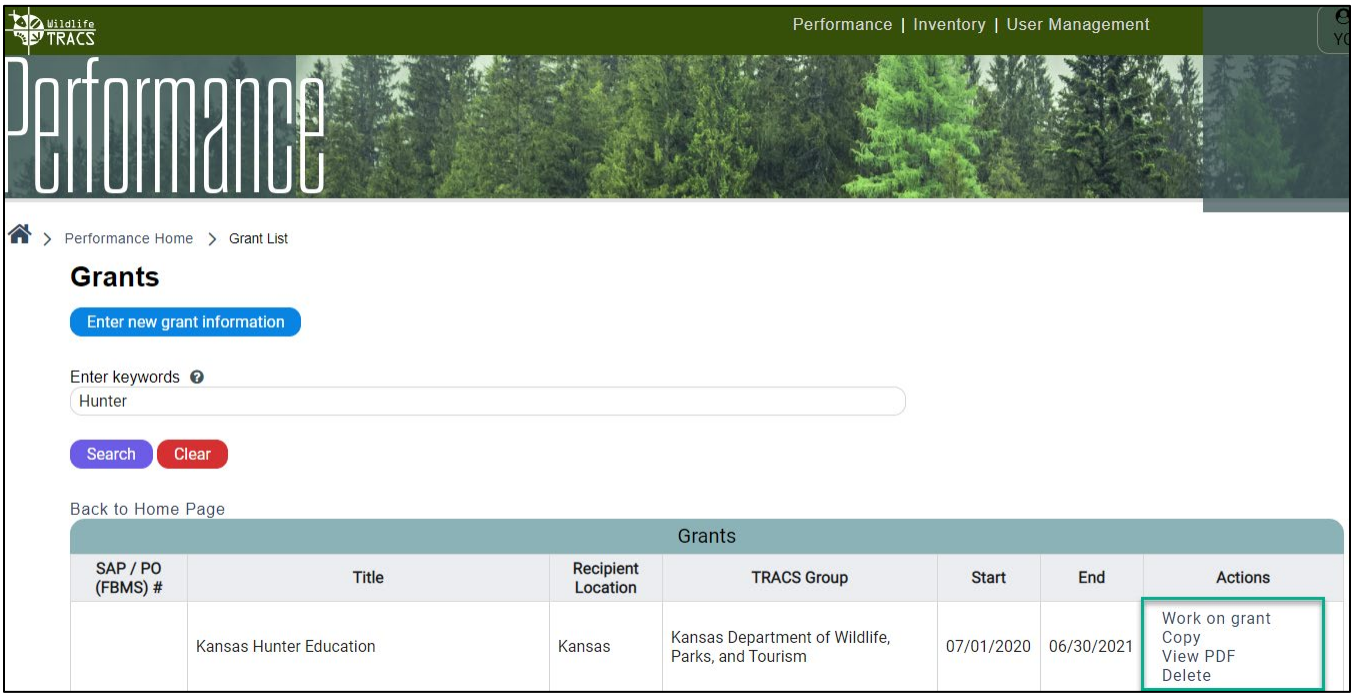
Best Practice Tip: Before entering new grant information, search for the grant proposal to make sure it has not been previously entered.

- Enter the search parameters by key words in the grant title by entering the first 3 characters or by entering part of the SAP/PO (FBMS)#. Click "Clear" to refresh the page and to show all grants.

- To sort the results, click on the column headers (SAP/PO FBMS #, Title, Recipient Location, Group, Start and End Dates). For example, click on the column header for Title to sort the list alphabetically A-Z or click on it a second time to reverse sort the list Z-A. Click on the arrows at the bottom of the grants box to open additional pages of results.



4. Once the grant is located, use the actions on the right side to work with the grant. Click "Work on Grant" or "View PDF" to review the grant information.

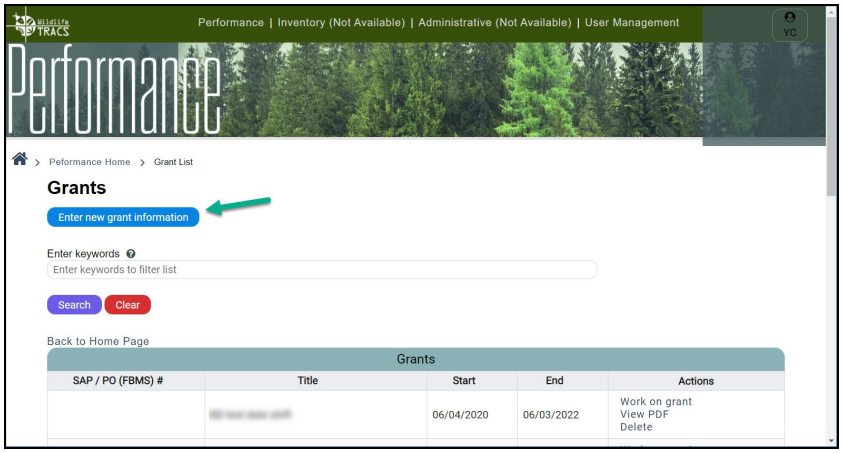


- Only users with the 'Performance Data Editor' role for the group assigned with the grant will have the options to delete or copy the grant. For more information on the 'Copy' option, visit [Lesson 2e: Copy Forward].

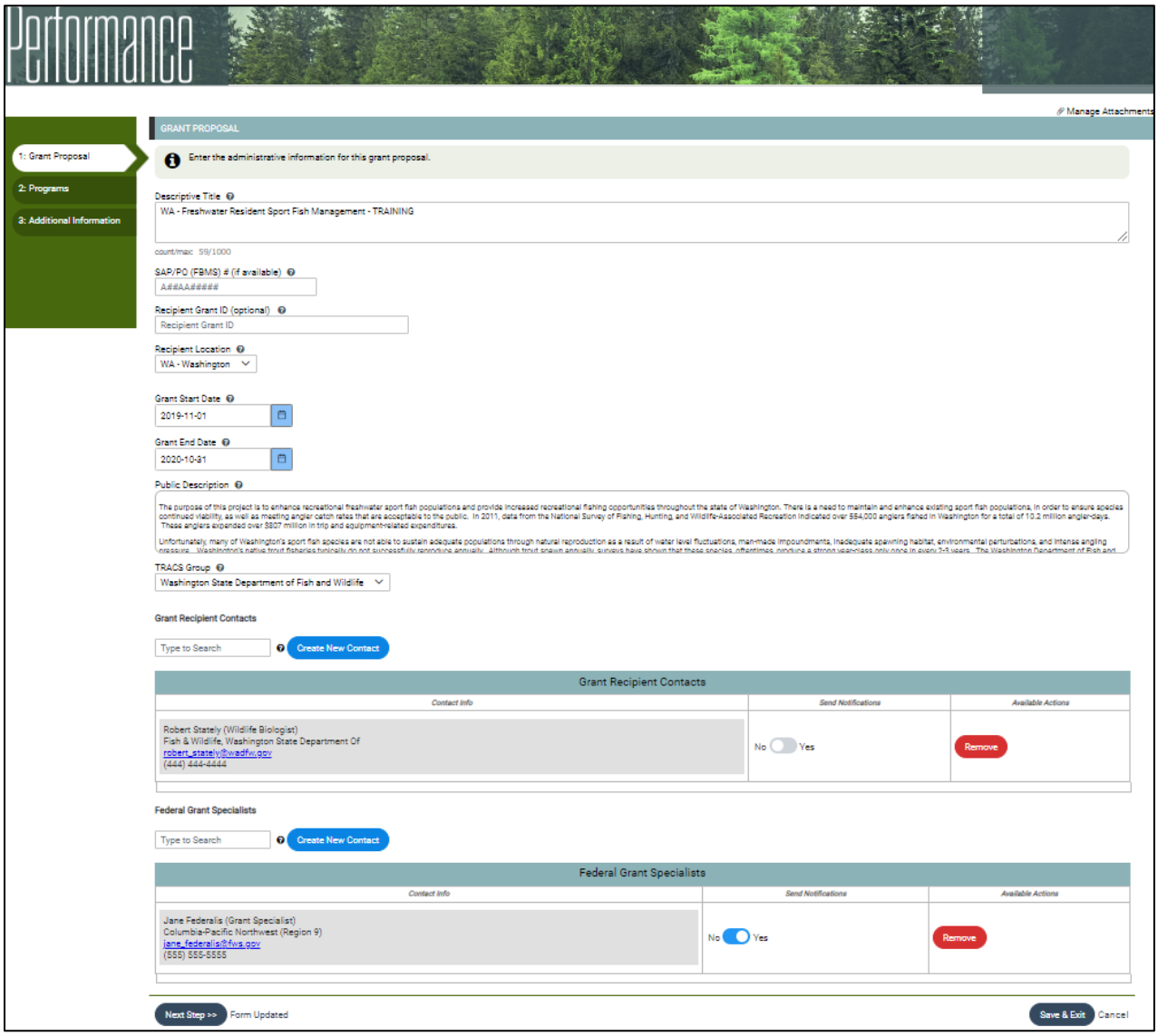
- Note: The delete option will not be available once the grant has started the project statement approvals process. Use delete with caution as this operation cannot be undone, however a pop-up box will appear asking the user to confirm or cancel the delete.

Steps to Enter a Grant Proposal

1. To enter a new grant proposal, click the "Enter new grant information" button.



2. The tabs on the left display the pages to complete this workflow, starting with the Grant Proposal page.



3. Fill out the **Grant Proposal** page:

    a. **Descriptive Title:** Enter a descriptive title used to identify and search for the grant proposal.

SF-424 Crosswalk: The Descriptive Title of the Grant is located on the SF-424 in box 15 "Descriptive Title of Applicant's Project".

Best Practice Tips:

- In order to make searching for a grant in TRACS easier, we recommend using the following **standardized grant naming convention** when writing the descriptive title. Enter the same title on the SF-424 (Descriptive Title of Applicant's Project).
- Two-letter abbreviation for your state or insular area, followed by a dash, then a short descriptive title. e.g. "WA - Sport Fish Stocking and Fish Hatchery Operations & Maintenance". Make sure to name the grant title CONSISTENTLY across all grant paperwork and programs.
- Multi-state projects should identify the lead state or region, or may opt for an alternate identification. Other optional identifiers may be added to the title as preferred, such as Fiscal Year (FY), grant program, and/or state or insular area grant identifier, etc. The system only searches keywords found in the descriptive title so add any identifiers that would be relevant to the search into the title.

Note: When the FBMS award is linked to the grant in TRACS, the title of the grant entered into FBMS will replace this descriptive title.

    b. If available, fill out the **SAP/PO (FBMS) number**. Enter the federal award identifier associated with the grant (FBMS SAP/PO number, e.g. F12FA00001).

SF-424 Crosswalk: Most applications will not know the FBMS number at the time of submission of data in TRACS, however if it is known, it will be located on the SF-424 in 5b "Federal Award Identifier".

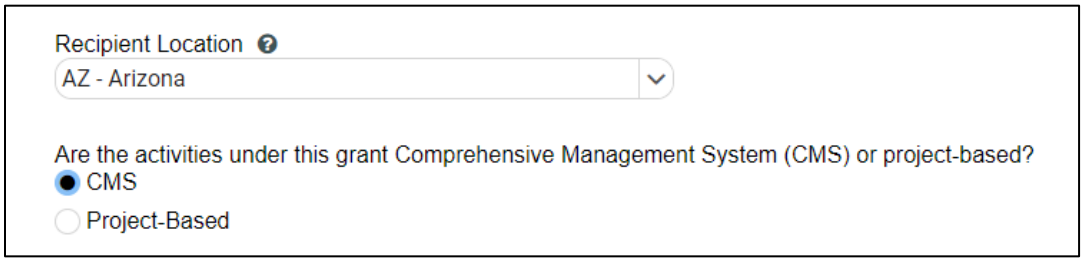
    c. **Recipient Grant ID (optional)**: Enter the recipient's non-federal grant identifier (e.g. state or country specific ID). Also, enter the recipient grant ID in the Descriptive Title if you plan to search by it.

SF-424 Crosswalk: The Recipient Grant ID is optional but may be located on the SF-424 in box 4 "Applicant Identifier".

d. **Recipient Location**: Select from the drop down the main location (state or insular area) associated with the primary or lead recipient of this grant.

SF-424 Crosswalk: The Recipient Location is located on the SF-424 in box 8 "Applicant Information" which lists the applicant (agency/organization) address or box 14 "Areas Affected by Project (Cities, Counties, States, etc.)"

i. If a CMS state is selected (AZ, OH, TN, WI, or WY), answer the question "**Are the activities under this grant Comprehensive Management System (CMS) or project-based**?"



e. Enter the **Grant Start and End Dates**: Select the date from the calendar or type the date into the field formatted YYYY-MM-DD. Note: Later, when the FBMS award is linked to the grant in TRACS, the start and end dates will be updated to the FBMS award grant dates.

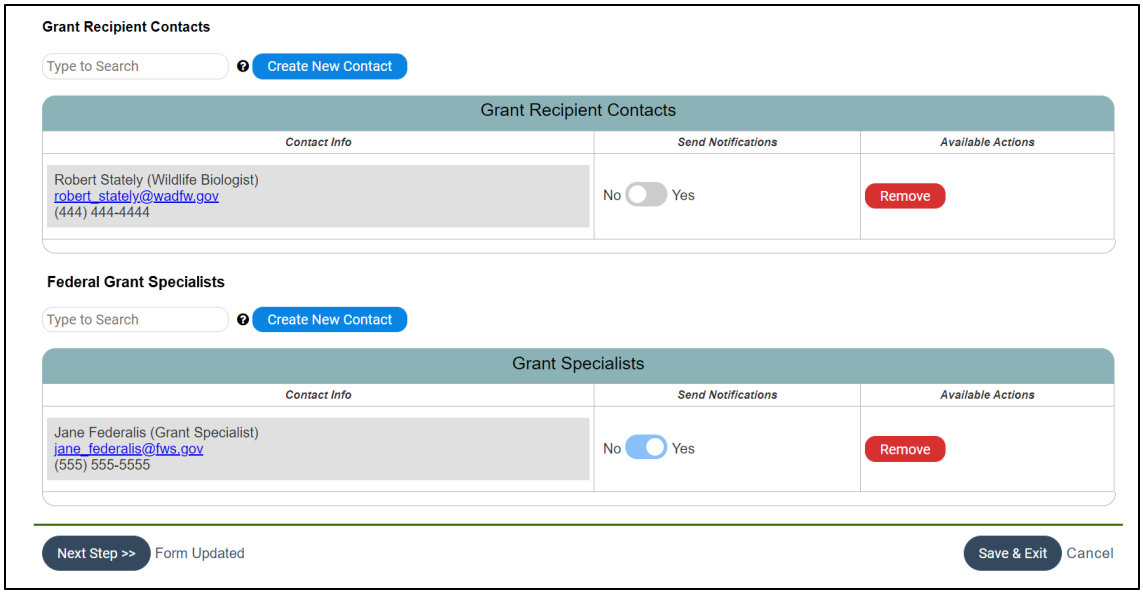
SF-424 Crosswalk: The Grant Start and End Dates are located on the SF-424 in box 17 "Proposed Project Start and End Dates".

f. **Public Description**: Click on "Add Public Description" to open the text editor box. Copy and paste as needed.

Best Practice Tip: The Public Description will be visible to the public and should be written as a brief abstract that describes the grant funded activities using common terms/language and acronyms spelled out. Do not include personally identifiable, sensitive, or proprietary information. Good sources of information for this field include the components of the Project Statement, including the "Need", "Purpose", and "Expected Results & Benefits" sections.

g. **TRACS Group**: Select the group, which is the primary agency, department or division responsible for the grant proposal at the most specific level. If you have access to only one group, the application will default to show that group here.

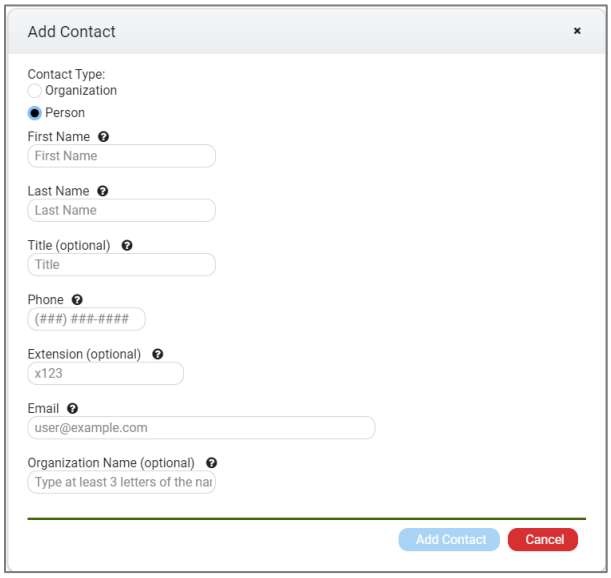
h. **Contacts:** List as many contacts as needed.
   i. **Grant Recipient Contacts**: Identify the primary grant recipient contact(s).
   ii. **Federal Grant Specialists:** Identify the primary federal grant specialist(s).

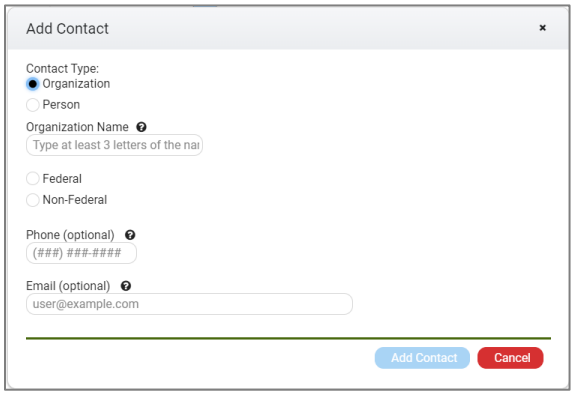


- Enter the search parameters by First and Last Name or Business Email Address.

Best Practice Tip: Always search for an existing contact record before creating a new one. Try searching by email address and alternate names or spelling variations (such as Bob/Robert, previous maiden or married names, etc.)

- If the contact is not found, click "Create a New Contact". Select the contact type as either Organization or Person. Fill out the required fields including business email and phone number (no personal information), then click "Add Contact".





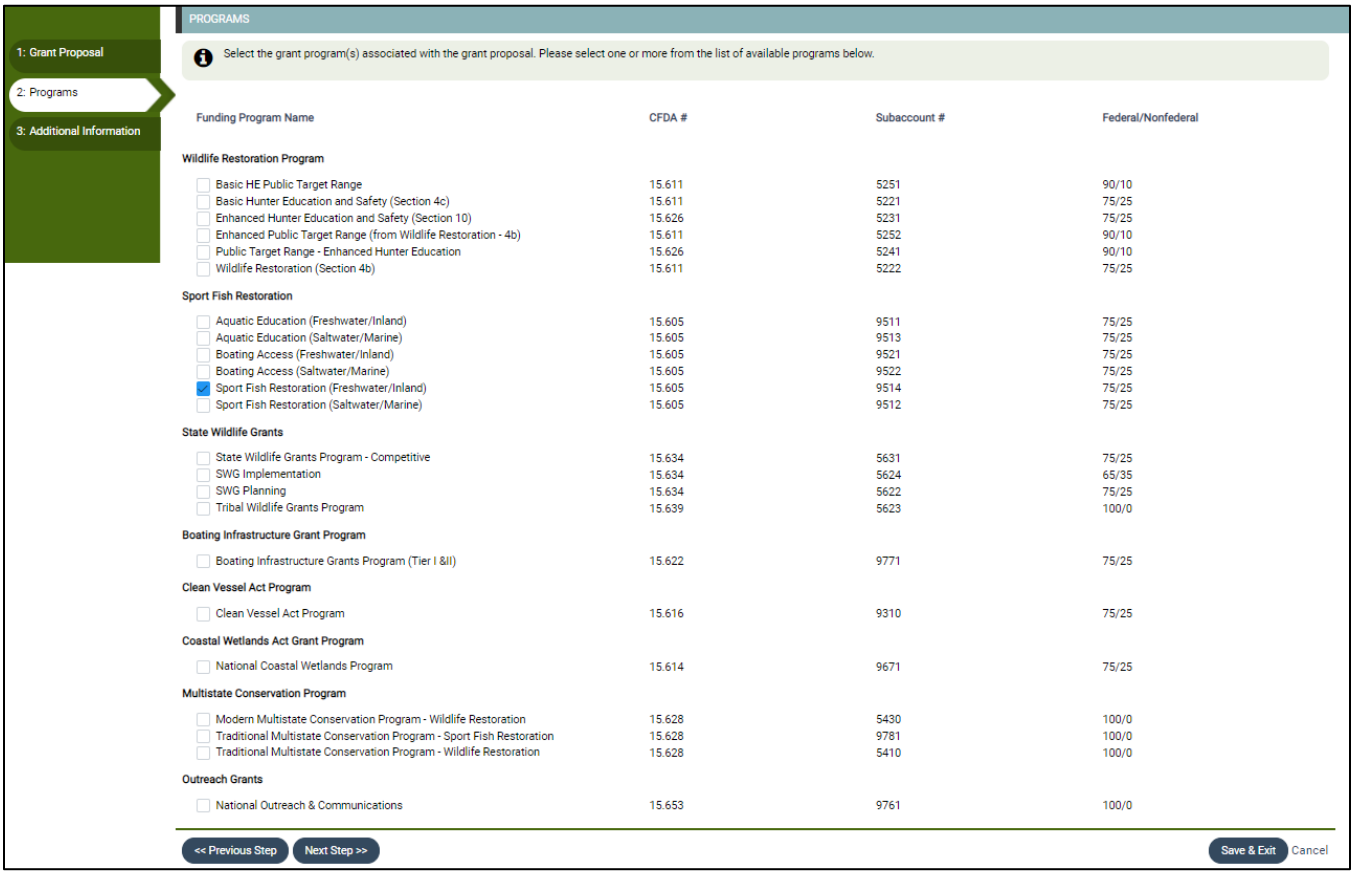
- The contact will display in the box. If applicable, select to send the contact notifications by sliding the bar from No to Yes. If yes is selected, the user will receive system-generated email updates regarding workflow transitions and approvals.

- Note: If the contact information needs to be updated, contact the TRACS Help Desk at tracs-helpdesk@fws.gov or call 1-844-40-TRACS (1-844-408-7227).

4. After entering all of the contacts, click "Next Step" at the bottom.

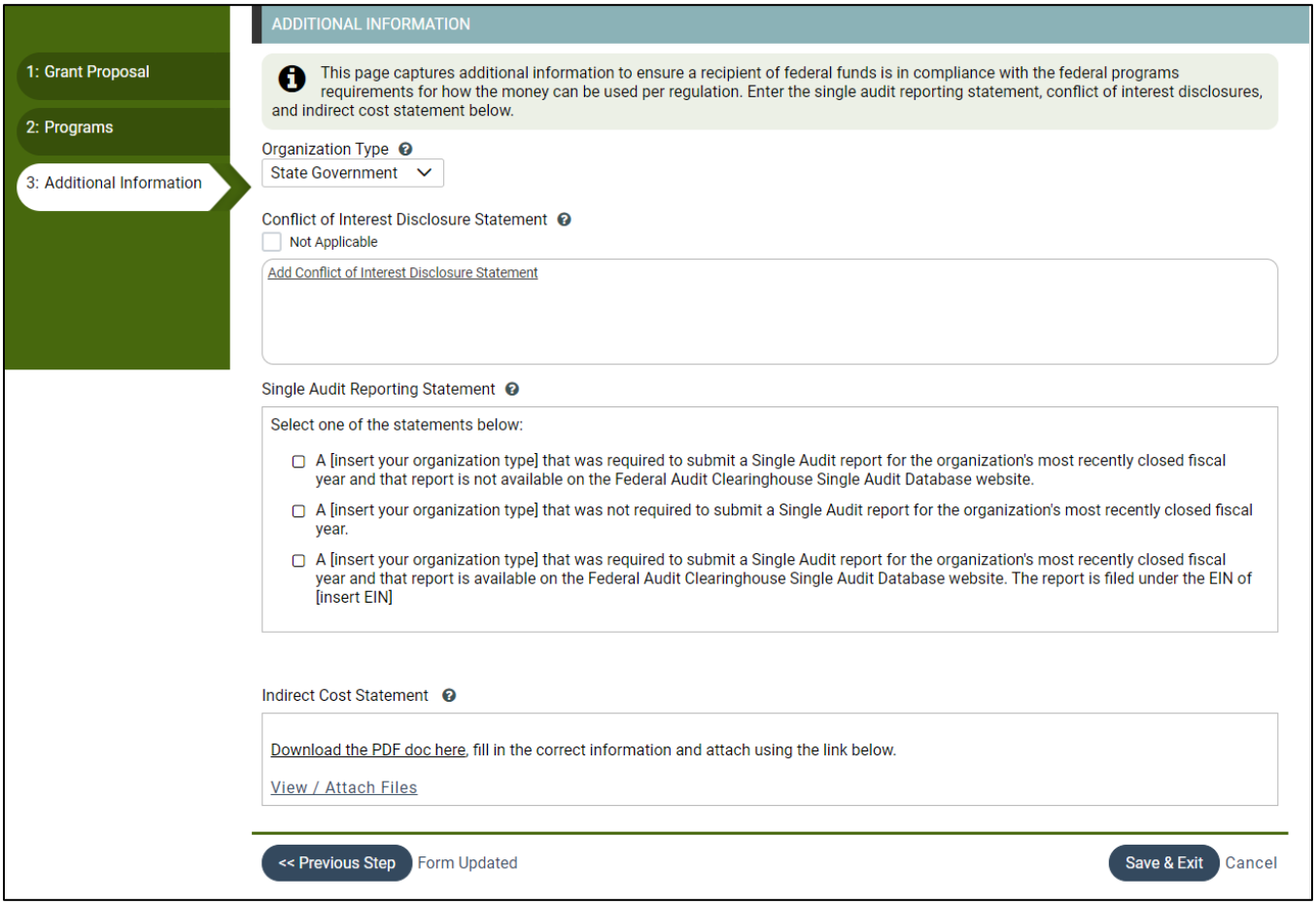
5. Fill out the **Programs** page. Select the grant program(s). Then, click "Next Step".

> **SF-424 Crosswalk:** The Program(s) are located on the SF-424 in box 11 "Catalog of Federal Domestic Assistance Number and Title" and 12 "Funding Opportunity Number and Title". Note: TRACS may have more specific options available.



Funding Program Name	CFDA #	Subaccount #	Federal/Nonfederal
Wildlife Restoration Program			
Basic HE Public Target Range	15.611	5251	90/10
Basic Hunter Education and Safety (Section 4c)	15.611	5221	75/25
Enhanced Hunter Education and Safety (Section 10)	15.626	5231	75/25
Enhanced Public Target Range (from Wildlife Restoration - 4b)	15.611	5252	90/10
Public Target Range - Enhanced Hunter Education	15.626	5241	90/10
Wildlife Restoration (Section 4b)	15.611	5222	75/25
Sport Fish Restoration			
Aquatic Education (Freshwater/Inland)	15.605	9511	75/25
Aquatic Education (Saltwater/Marine)	15.605	9513	75/25
Boating Access (Freshwater/Inland)	15.605	9521	75/25
Boating Access (Saltwater/Marine)	15.605	9522	75/25
Sport Fish Restoration (Freshwater/Inland)	15.605	9514	75/25
Sport Fish Restoration (Saltwater/Marine)	15.605	9512	75/25
State Wildlife Grants			
State Wildlife Grants Program - Competitive	15.634	5631	75/25
SWG Implementation	15.634	5624	65/35
SWG Planning	15.634	5622	75/25
Tribal Wildlife Grants Program	15.639	5623	100/0
Boating Infrastructure Grant Program			
Boating Infrastructure Grants Program (Tier I &II)	15.622	9771	75/25
Clean Vessel Act Program			
Clean Vessel Act Program	15.616	9310	75/25
Coastal Wetlands Act Grant Program			
National Coastal Wetlands Program	15.614	9671	75/25
Multistate Conservation Program			
Modern Multistate Conservation Program - Wildlife Restoration	15.628	5430	100/0
Traditional Multistate Conservation Program - Sport Fish Restoration	15.628	9781	100/0
Traditional Multistate Conservation Program - Wildlife Restoration	15.628	5410	100/0
Outreach Grants			
National Outreach & Communications	15.653	9761	100/0

6. Fill out the **Additional Information** page. This page captures additional information to ensure a recipient of federal funds is in compliance with federal program requirements.



a. Select the **Organization Type** (State Government, U.S. Territory or Possession, City or Township Government, Institution of Higher Education, Nonprofit, etc.)

SF-424 Crosswalk: The Organization Type is located on the SF-424 in box 9 "Type of Applicant".

b. **Conflict of Interest Disclosure:** Click in the text box to add a conflict of interest disclosure statement or check the box for "Not Applicable".

SF-424 Crosswalk: The Conflict of Interest Disclosure is attached if applicable as part of the grant application. Submitting the Conflict of Interest Disclosure on a TRACS-generated Grant Proposal satisfies this requirement.

Best Practice Tip: For data integrity, check the "Not Applicable" box if appropriate rather than entering a statement to the same affect.

c. **Single Audit Reporting Statement:** Select the statement that applies.

Single Audit Reporting Statement

Select one of the statements below:

- ☐ A [insert your organization type] that was required to submit a Single Audit report for the organization's most recently closed fiscal year and that report is not available on the Federal Audit Clearinghouse Single Audit Database website.
- ☐ A [insert your organization type] that was not required to submit a Single Audit report for the organization's most recently closed fiscal year.
- ☐ A [insert your organization type] that was required to submit a Single Audit report for the organization's most recently closed fiscal year and that report is available on the Federal Audit Clearinghouse Single Audit Database website. The report is filed under the EIN of [insert EIN]

Best Practice Tips:

- The Single Audit Act requires States, Local, and Tribal governments, nonprofit organizations, colleges, universities and hospitals that expend $750,000 or more in Federal grant funds to obtain an annual audit in accordance with the Single Audit Act Amendments of 1996.

- Entities expending less than $750,000 in a year, non-U.S. based and for-profit grantees are exempt from the Single Audit Act but must make records available for review or audit by Federal agencies or pass-through entities. These audits rarely reached WSFR programs.

i. If applicable, complete the EIN (Employer Identification Number).

Single Audit Reporting Statement

EIN

##-#######

We are:

☑ A Non-domestic (non-US) Entity that was required to submit a Single Audit report for the organization's most recently closed fiscal year and that report is available on the Federal Audit Clearinghouse Single Audit Database website. The report is filed under the EIN of [insert EIN]

Clear Selection

SF-424 Crosswalk: The EIN is located on the SF-424 in box 8b "Employer/Taxpayer Identification Number (EIN/TIN)".

d. **Indirect Cost Statement:**

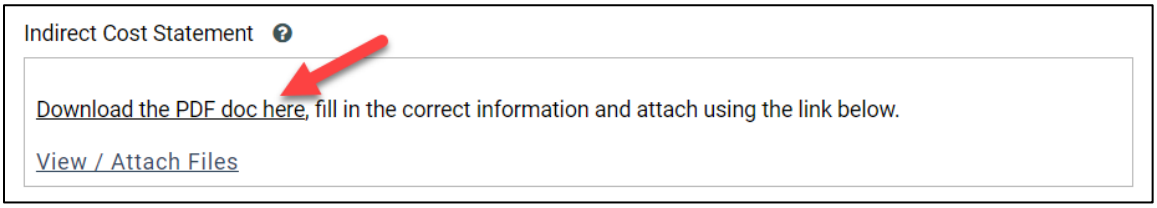
Best Practice Tips:

A commonly selected option is to check the top box "A copy of our most recently approved rate agreement/certificate is attached, or on file with the WSFR regional office".

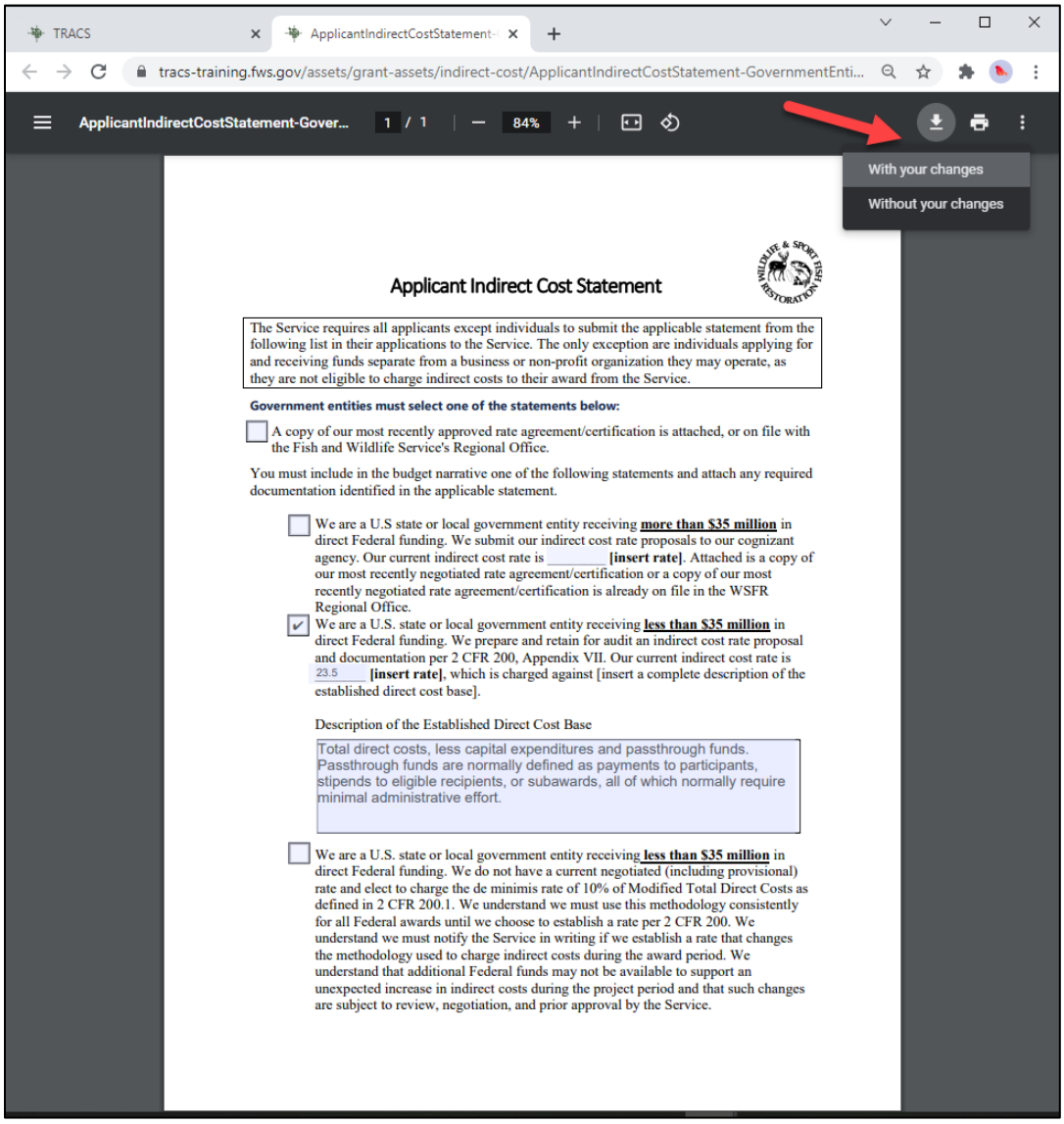
If applicable, enter the indirect cost rate if applicate (up to 2 decimal places, i.e. 5.25%)

For more information about Indirect Costs, visit the FA Guidance Indirect Costs page.

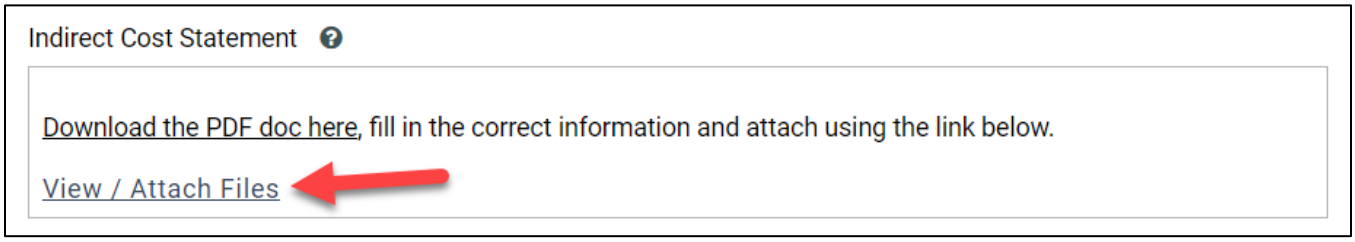
i. Select the "Download the PDF doc here" link to download the blank indirect cost form appropriate for your organization type (note: government entities will download the government specific form and non-government entities will download the form for all other organizations).



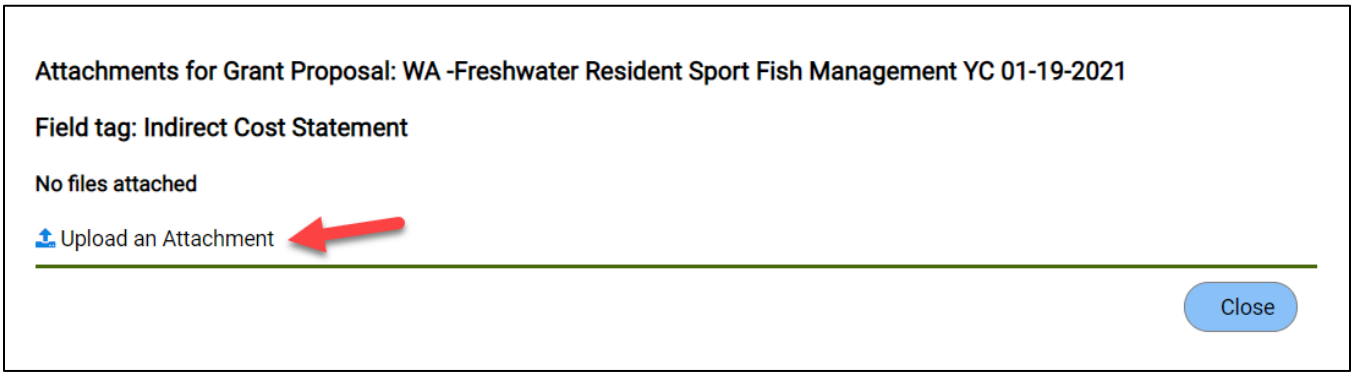
ii. Open the PDF and fill in the correct information. Save the file with a name that is easily identifiable (tip: add the name of the grant, e.g. "Indirect Cost Statement WA Sportfish Grant FY21"). If you fill out the form on the PDF tab that opens in your browser, click the download icon and select to download "with your changes". Save the file to your computer so you can easily find it.



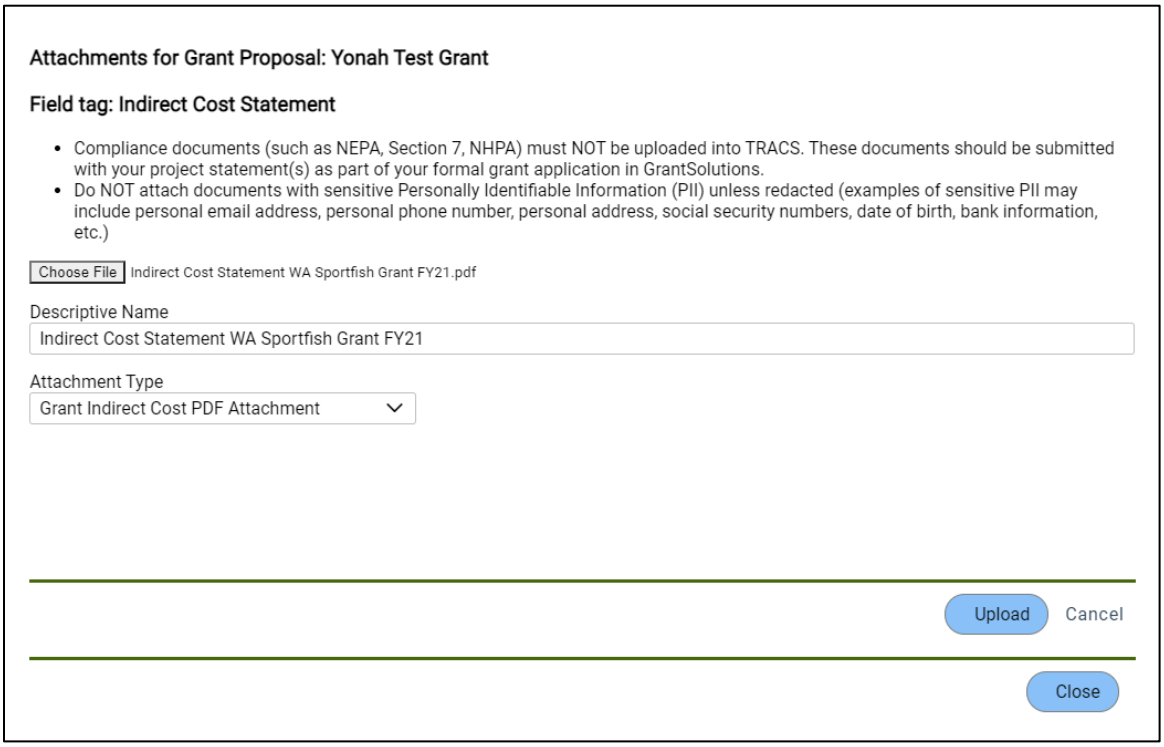
iii. Upload the completed PDF using the "View/Attach Files" link in TRACS.



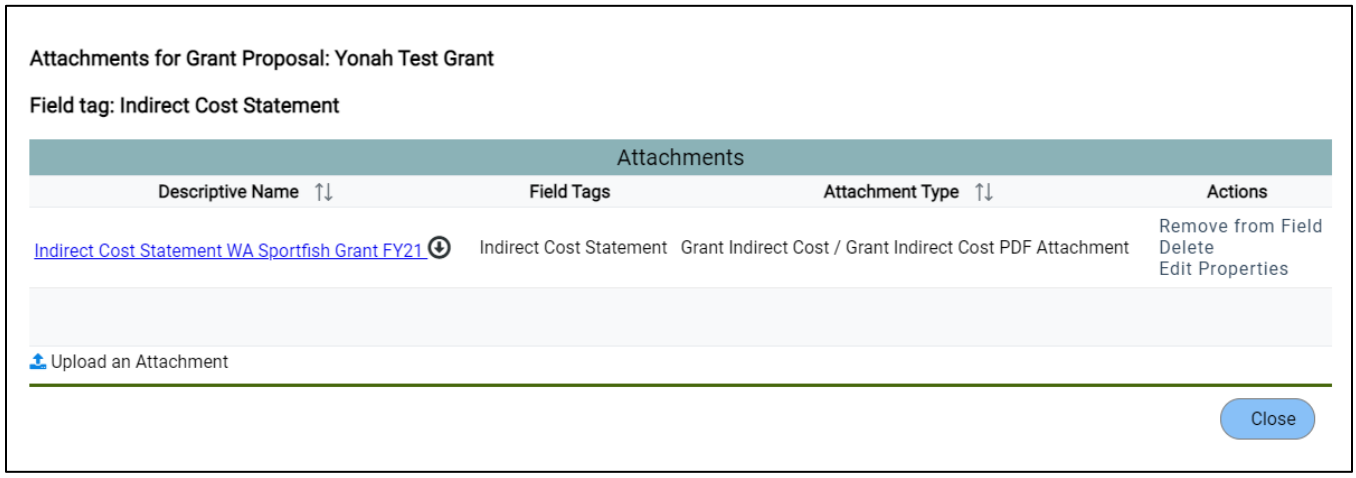
iv. The Attachments pop-up window opens. Select the "Upload an Attachment" link.



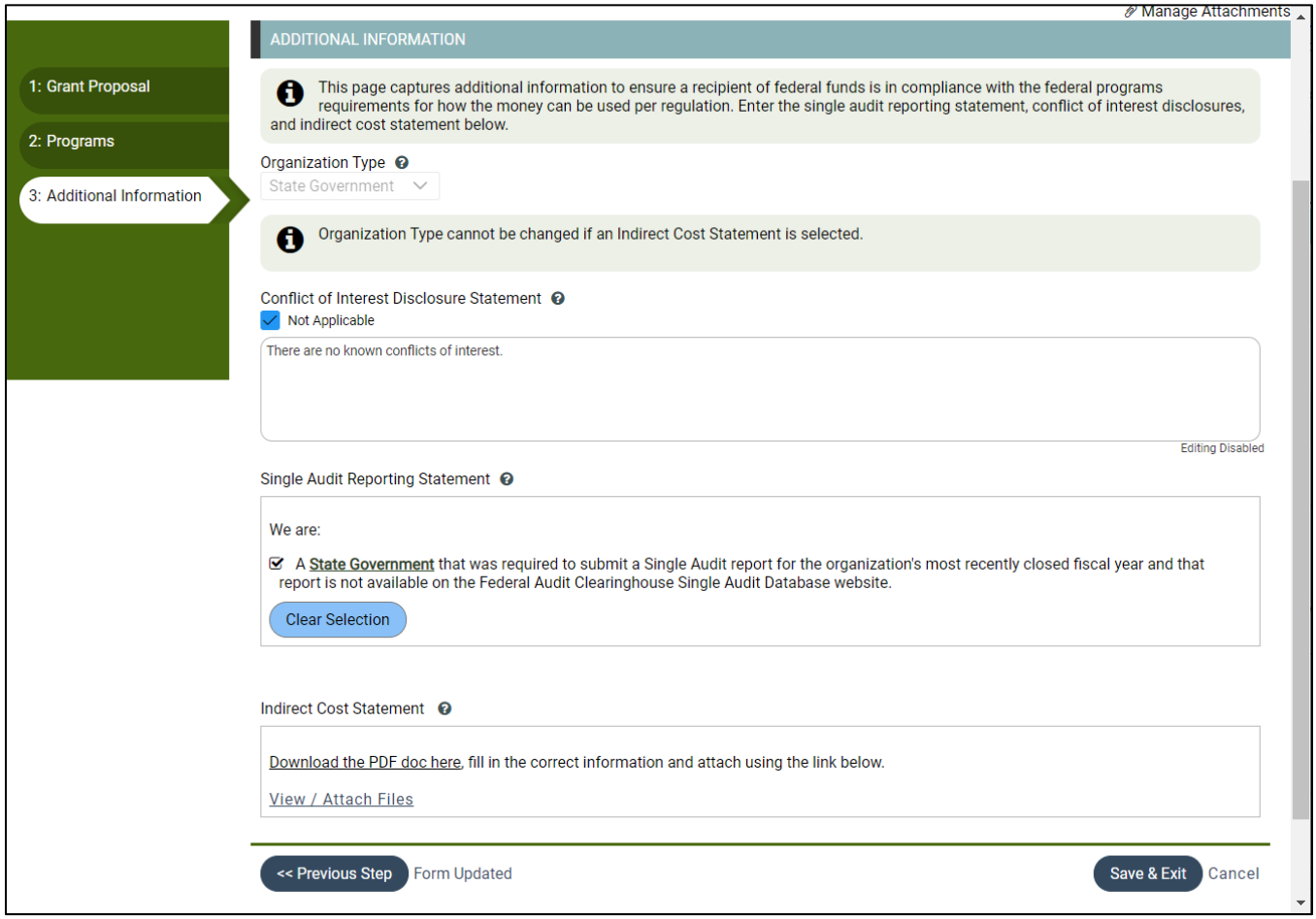
v. Select "Choose File" to upload the file from your computer. The file name will appear to the right of the "Choose File" box.
   1. Update the Descriptive Name if needed
   2. Select the Attachment Type as "Grant Indirect Cost PDF Attachment".
   3. Click the "Upload" button. Do NOT click "close" until the upload is complete.



vi. The attachment will display in the table. In the actions column on the right, select "Edit Properties" or "Delete" if needed. Click on the filename with the arrow icon to download the file if needed. Click "Close".

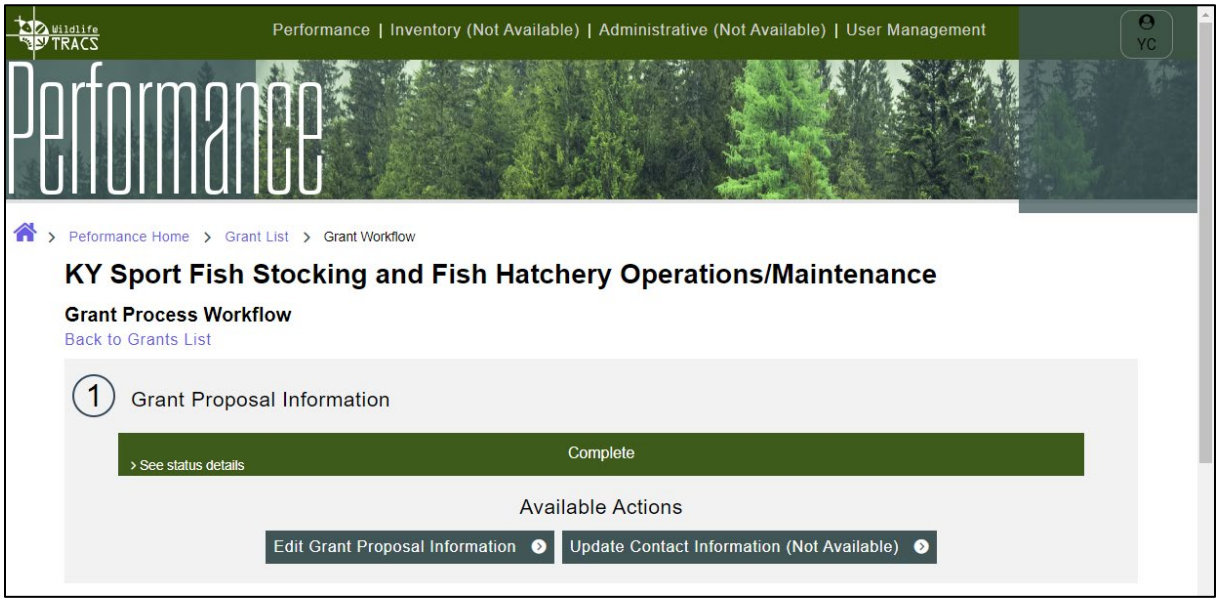


- Click "Save & Exit" at the bottom of the page to close the grant proposal.

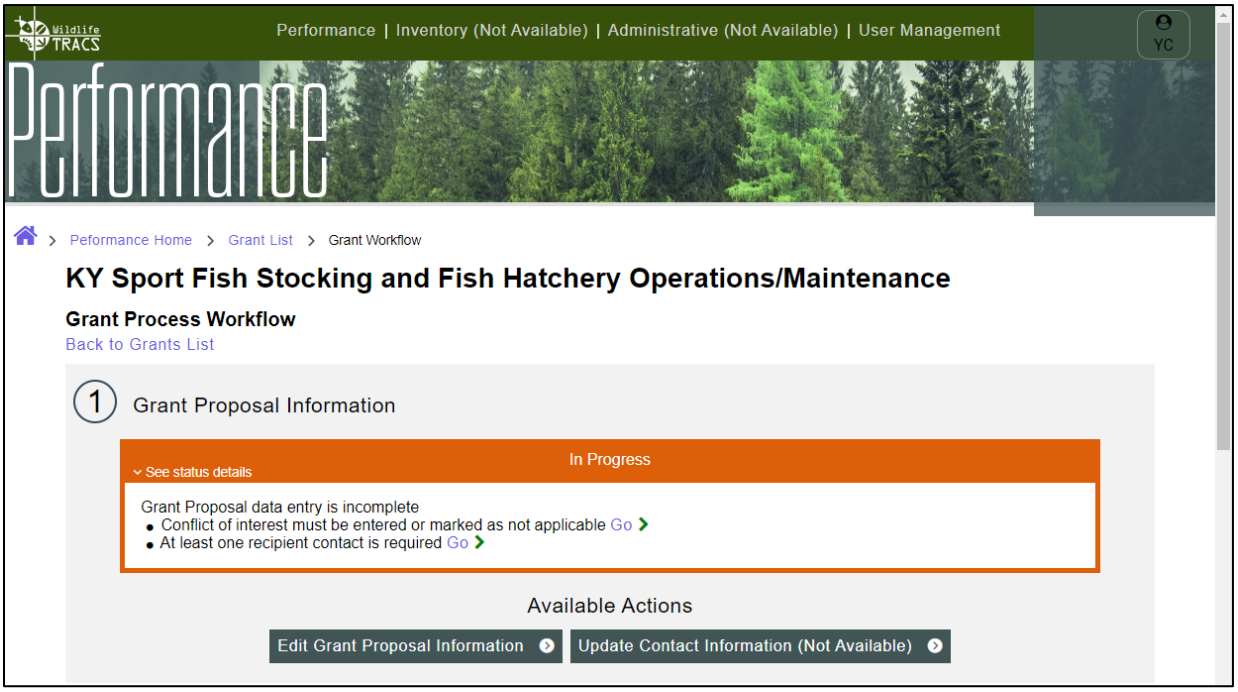


5. The grant workflow page opens. This is the homepage for the grant.

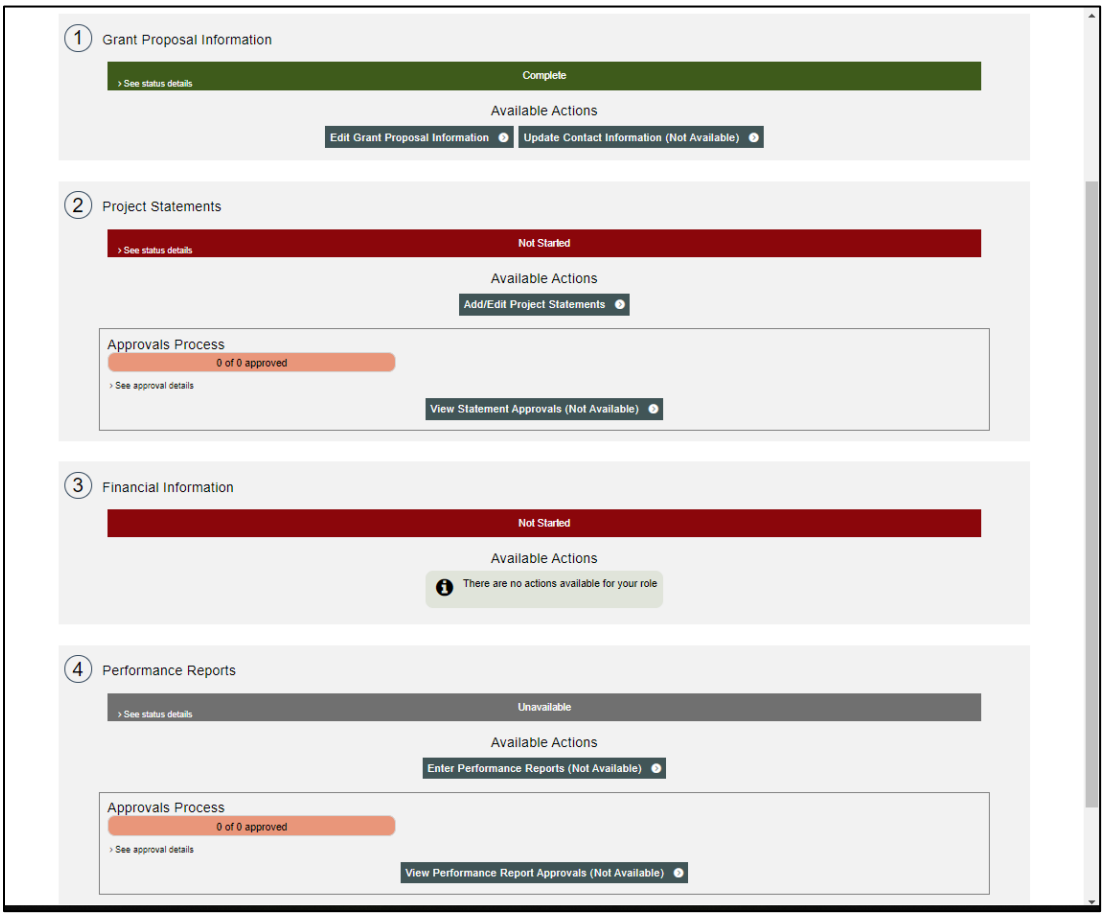
   Step 1: Grant Proposal displays in green as "complete". You can edit it by clicking on "Edit Grant Proposal Information". Note: the "Update Contact Information" option is only available after the grant has been approved.



The Status bar will display in orange as "In Progress" if any required fields are missing. Click on "See Status Details" to expand the window and see the missing items. The "Go" link(s) will open the corresponding page to fix any missing items.



Further down the page, you will see the rest of the steps required to complete the grant workflow in TRACS including "Step 2: Project Statements", "Step 3: Financial Information", and "Step 4: Performance Reports". The status displays in red if that step has not yet been started. The status displays in orange if it is in progress and green when complete.



Lesson 2b: Create Project Statement

By the end of this lesson, learners will be able to:

1. Describe the required elements of the project statement.
2. Demonstrate how to start entering a project statement.
3. Identify the difference between need and purpose.

Project Statement Overview and Required Elements

The project statement is one of the required documents (perhaps the most important document) to be included in an application for Wildlife and Sport Fish Restoration program funding. Other WSFR-administered programs also require a project statement, but sometimes refer to it by other means (i.e. project narrative or proposal). The project statement is the heart and soul of your grant application. It helps to identify a conservation issue, problem, or opportunity that must be addressed, as well as, the actions that your agency/organization will implement to help resolve the issue, problem, or opportunity. A project statement is required for each distinct project funded in a grant.

There is no standard format that all applicants must use for their project statements. However, there are certain required elements that must be included for a complete project statement.

Project statements generated in TRACS contain the 13 required elements of the Project Statement per 50 CFR 80.82. These elements include:

1. Need
2. Purpose and Objectives
3. Results or benefits expected
4. Approach
5. Useful life
6. Geographic location
7. Principal investigator for research projects
8. Program income
9. Budget narrative
10. Multipurpose projects
11. Relationships with other grants
12. Timeline
13. General

Comprehensive Management System (CMS): Project statements are not required for those States applying for a CMS grant (see 50 CFR 80.81). However, in TRACS a short version of the Project Statement is required for CMS grants to set the stage for reporting.

Best Practice Tips:

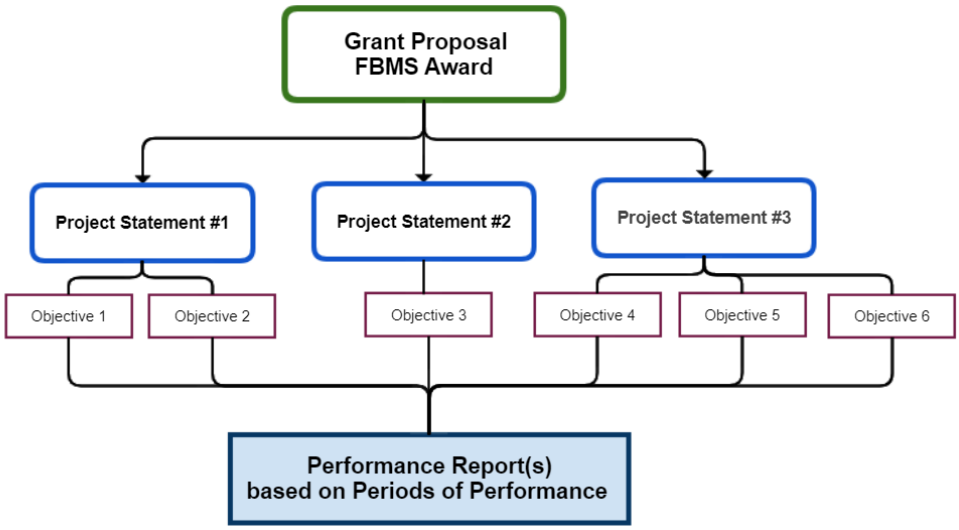
- Projects are approvable for funding if they qualify as "Substantial in Character and Design" (see 50 CFR 80.56). Projects must: (1) describe a "Need" that is consistent with the purpose of the Act; (2) state a "Purpose" and set "Objectives" both of which must relate back to the "Need"; (3) use sound, scientific principles, approaches, and techniques; and (4) be cost effective. TRACS helps to connect the dots by laying out a well-organized and complete project statement with specific and quantified objectives based on standardized and approved metrics.

- A high-quality project statement is concise but complete, as well as easy to read so anyone can understand it. Write professionally by double checking grammar, spelling, sentence structure and avoid using jargon unless useful and necessary.

- Applicants may use their own format for the project statement/narrative that is submitted with the grant application; however, it is **highly recommended to use the TRACS system to generate the Project Statement and submit it as part of the grant application** during the pre-award phase. This will ensure that the project statement utilizes the standardized objectives, strategies and activities that set the stage to meet all reporting requirements. **All information should be entered into TRACS no later than 60-days post-award approval.** In order to enter performance reports, the grant proposal and project statements must be entered and approved in TRACS, and the federal approver must attach the FBMS award to the grant in TRACS. Since this process can take some time, it is recommended to use TRACS upfront as part of the pre-award stage to prevent delays in the performance reporting phase.

- It is more time and cost effective to enter and submit the Grant Proposal and Project Statement(s) in TRACS as part of the grant approval process. The TRACS-generated Grant Proposal and Project Statement are well organized and complete, increasing both efficiency and quality.

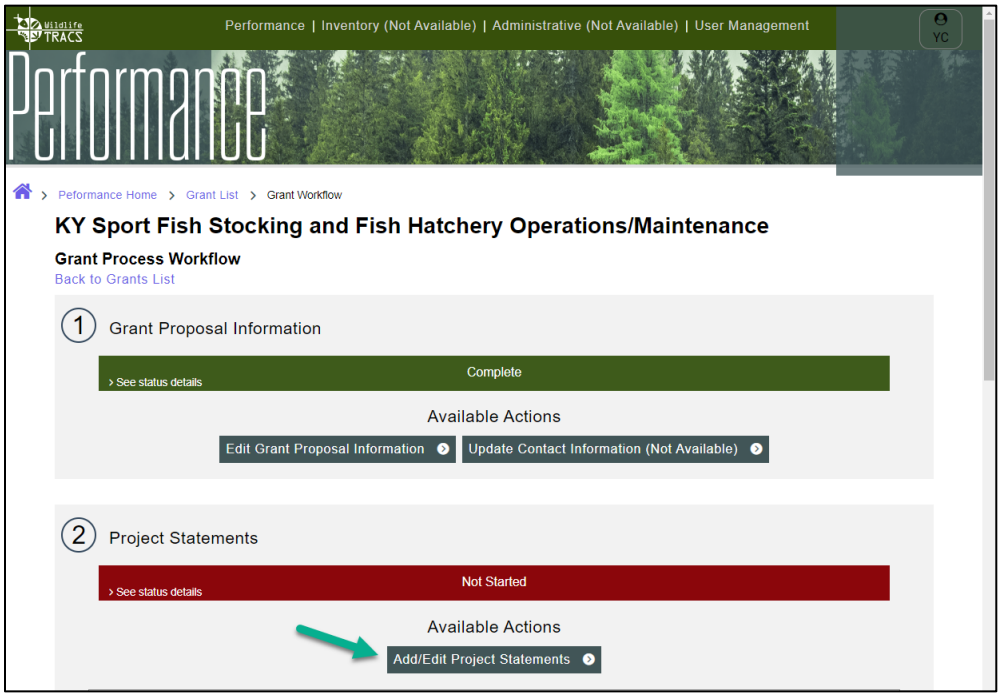
- In TRACS, a grant proposal is linked to one FBMS award, but may have one or more project statements. Each project statement must go through a separate approval workflow in TRACS. Performance reports bundle together all of the objectives across project statements and approvals are required for each period of performance.



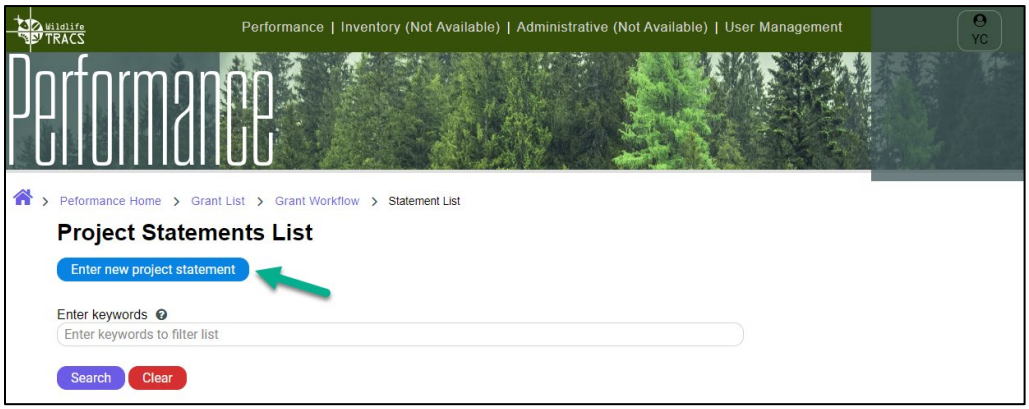
Steps to Enter a Project Statement

1. Navigate to the Grant Workflow page.
    a. If you are starting from the login point, click on the Performance Module to open the Dashboard page.
        i. Your grant should appear in the Recent Activities list and in the Reports, such as "My open grants". Select the grant from the list to open the Grant Workflow page.
        ii. Alternately, click on "Grants" from the Dashboard and then search for the grants by keywords in the title (or if entered, the SAP/PO FBMS #). Once you find the grant, click "Work on Grant" to open the Grant Workflow page.
    b. If you have just completed the Grant Proposal, you will still be on the Grant Workflow page.

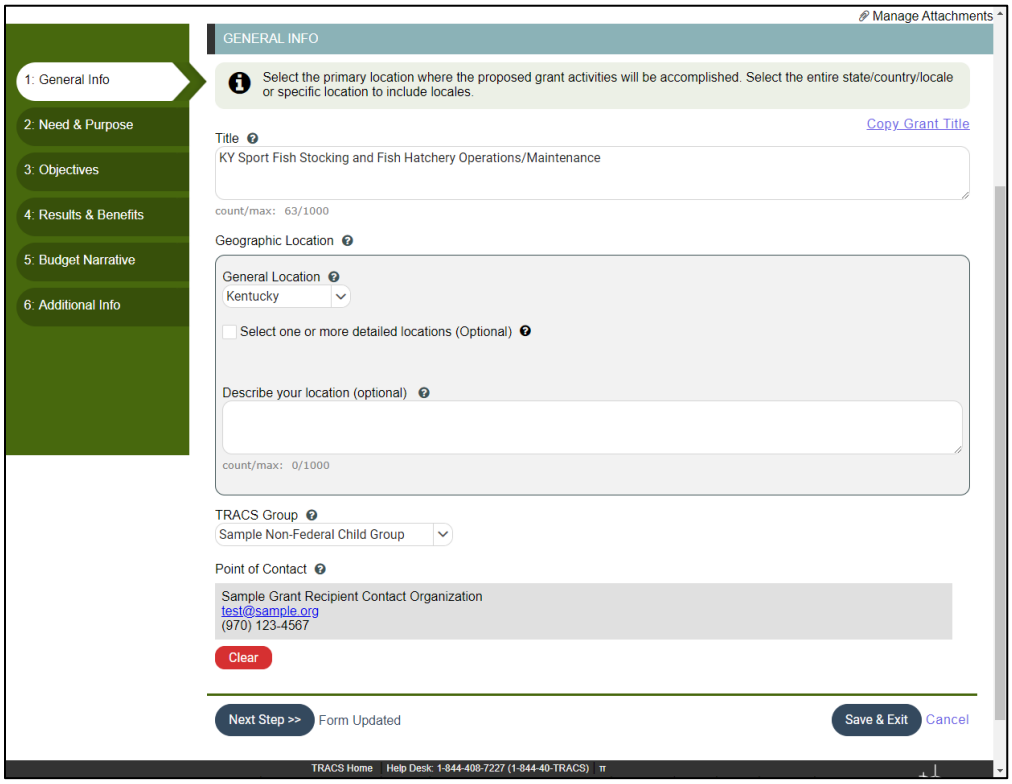
2. On the Grant Workflow page, click "Add/Edit Project Statement". Note: Only users with the "Performance Data Editor" role for the group associated with the grant will have this option.



3. Click on the "Enter new project statement" button.



4. Fill out the **General Info** page.



a. **Title**: Enter the Project Statement Title. Use the "Copy Grant Title" link in the upper right if applicable.

b. **General Location**: Select the primary state or insular area from the drop-down list.

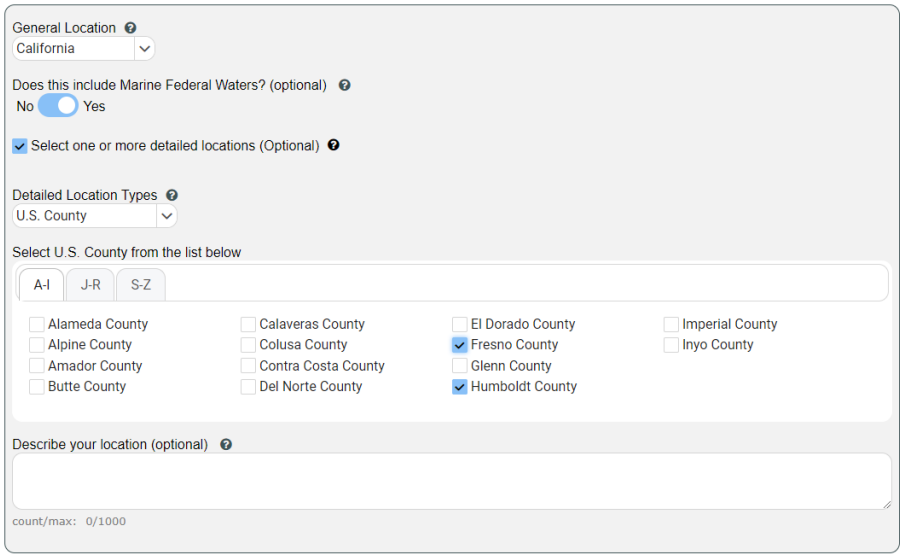
c. **Select one of more detailed locations (optional)**: If applicable, check this box to select more detailed locations, such as specific U.S. Counties, U.S. Wildlife Management Areas (WMAs), etc.

Best Practice Tip: There is no need to select more detailed locations if the project is at the statewide level (this is the default).

d. Coastal states will also need to answer the question "**Does this include Marine Federal Waters**?"

Best Practice Tip: Marine Federal Waters per the U.S. Exclusive Economic Zone (EEC) extends Federal jurisdiction beyond the U.S. coastline, including the Great Lakes, to manage the natural resources (including marine fisheries). The outer limit of this boundary is 200 nautical miles. The inner limit of this boundary is 3 nautical miles from shore, except for Texas, western Florida, and Puerto Rico, where the inner limit is 9 nautical miles. Please contact your WSFR Regional Office if you are unsure as to whether or not your project will occur in marine federal waters.

e. **Describe your location** (optional)



f. **TRACS Group** should default based on the group associated at the grant proposal level. Select the group, which is the primary agency responsible for the grant proposal at the most specific level (e.g. state, agency, division or other group). If you have access to only one group, the application will default to show that group here.

g. **Point of Contact**: Identify the primary single point of contact for the grant activities in this performance report (this may be the same person listed as the grant recipient in the Grant Proposal or may be another staff member). Enter the search parameters by First and Last Name or Email Address or click Add Contact if needed.

h. Click "Next Step".

5. Fill out the **Need & Purpose** page.

   a. **Need**: Enter the Need Statement. Copy and paste as needed.

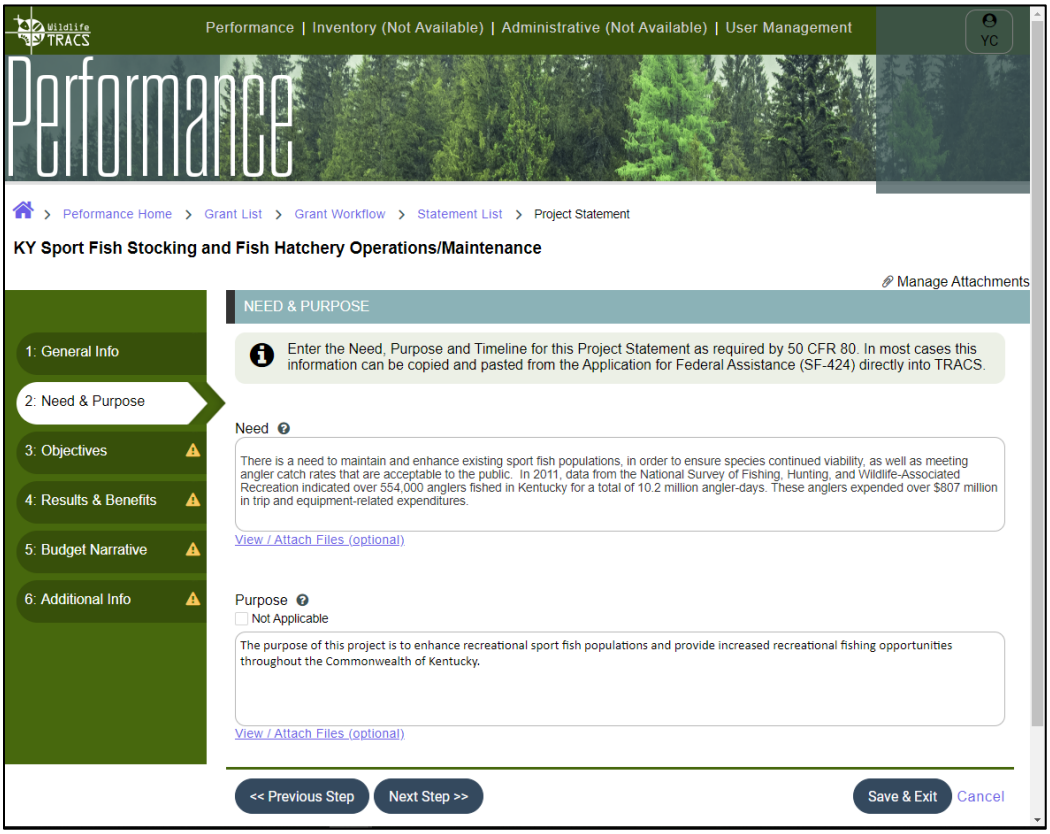
Best Practice Tip: The Need Statement should explain why the proposed activities are necessary by identifying the conservation issue, problem or opportunity and provide supporting evidence, such as referencing public surveys, research data showing population metrics, harvest data, participation use surveys, license data, hunter/angler/boater surveys, etc. It is your statutory responsibility to address the need. WSFR must ensure that the need/purpose is consistent with the eligibility criteria for grant-funded activities in the program's regulations. While not a regulatory requirement, it is also a best practice to state the null alternative by articulating the negative result of taking no action.

b. **Purpose**: Enter the Purpose. Copy and paste as needed.

Best Practice Tips: The Purpose states the desired outcome of the project by describing the benefits to users, habitat and/or species and the expected results/outcomes from resolving a conservation need.

This field is required per regulation for most grant programs, so **do <u>not</u> select "Not Applicable"** - the exception is for grants that may not require this information.

6. Then, click "Next Step".



Lesson 2c: Enter Objectives

By the end of this lesson, learners will be able to:

1. Describe the standardized naming convention for an objective.
2. Identify the required steps to enter an objective.

Visit **Lesson 1b** for more information on the components of TRACS-formatted objectives and the tools used to build them.

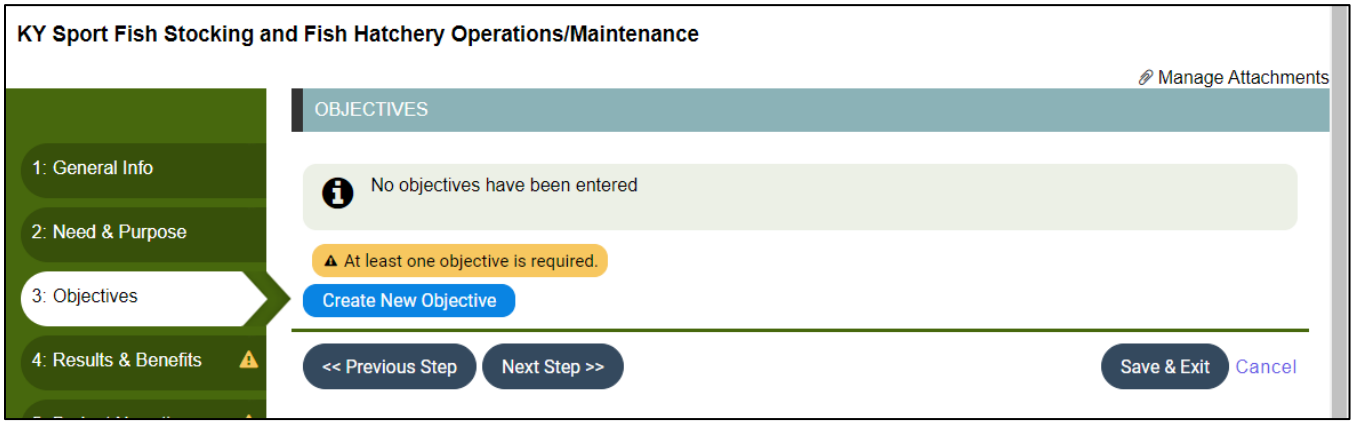
Refer to the Performance Matrix and Strategy Fact Sheets, helpful reference guides for each strategy, located on the WSFR Training Portal at:
https://wsfrtraining.fws.gov/mod/page/view.php?id=216&forceview=1

Best Practice Tip: For the strategy of Training/Education, the best practice recommendation is to create two objectives, one to track the number of events and one to track the number of students. These metrics are important for tracking training and education for the program.

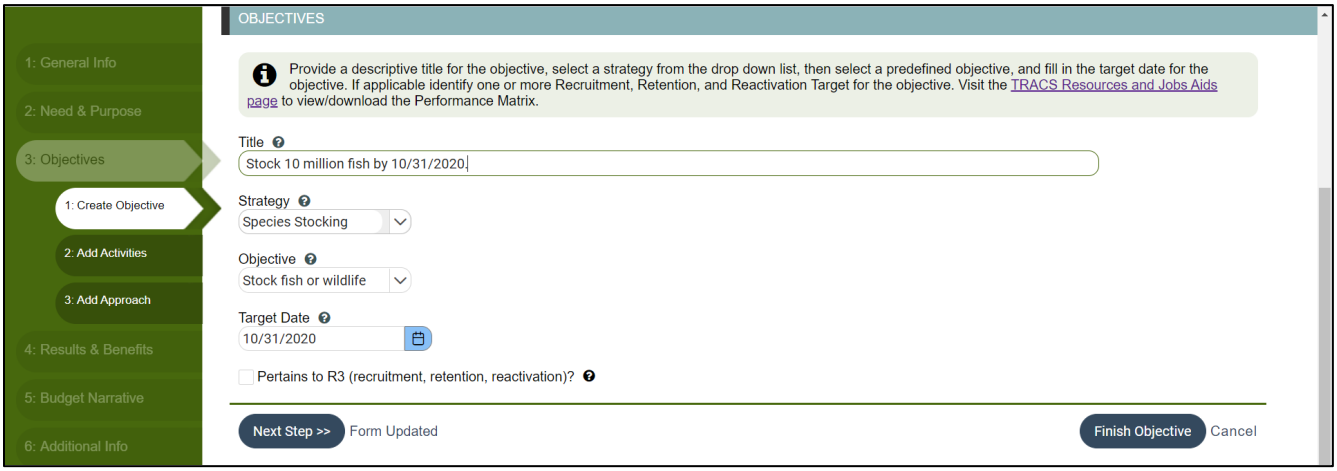
Steps to Enter Objectives

1. Navigate to the Objectives page.
    a. If you are starting from the login point, click on the Performance Module to open the Dashboard page.
        i. Your grant should appear in the Recent Activities list and in the Reports, such as "My open grants". Select the grant from the list to open the Grant Workflow page, then click "Add/Edit Project Statements". Click "Edit Statement".
        ii. Alternately, select "Grants" from the Dashboard and then search for the grants by keywords in the title (or if entered, the SAP/PO FBMS #). Once you find the grant, click "Work on Grant" to open the Grant Workflow page, then click "Add/Edit Project Statements". Click "Edit Statement".
    b. If you have just started the Project Statement and completed the Need & Purpose page, you will now be on the Objectives page.

2. On the Objectives page, click "Create New Objective".



3. The Objectives workflow opens with sub-tabs to complete, beginning with tab 1: Create Objective.



a. Enter the Objective **Title** using the standardized format for an objective.

> **Best Practice Tip:** The format of the standardized objective title in TRACS is "Action verb + unit of measure + target date.", e.g. "Stock 10 million fish by Dec. 31, 2021." Use the Performance Matrix to find the standardized objective title format for your selected strategy. The Performance matrix is available on the TRACS Resources and Job Aids page and the link is available in the box at the top of the 'Create Objective' page.

b. Select the **Strategy** for this objective from the drop down list.

c. Select a predefined **Objective** from the drop down list based on the strategy you selected.

d. Enter the **Target Date**. The target date will default to the end date of the grant and may be changed to earlier if needed. Select the date from the calendar or type the date into the field formatted YYYY-MM-DD.

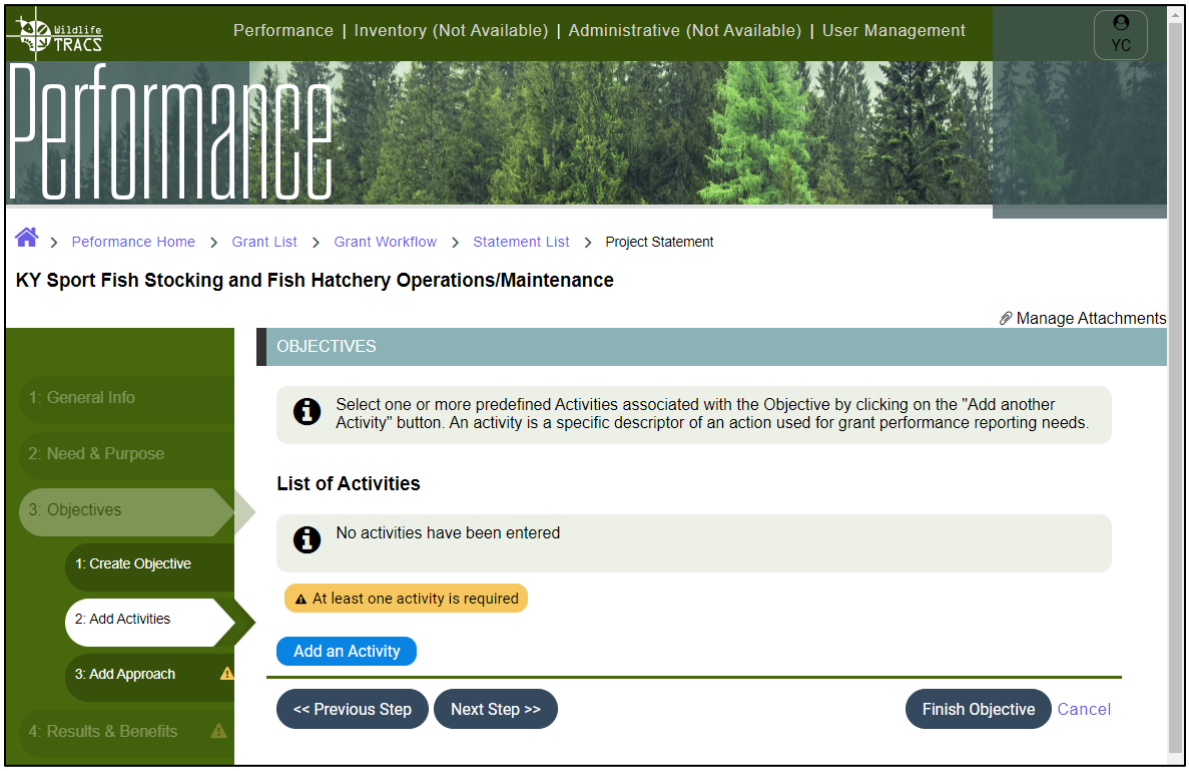
> **Best Practice Tip:** The target date is the deadline when you plan to complete this objective and must match the grant end date or be within the overall grant start and end dates. The target date usually matches the grant end date.

e. If applicable, check the box "**Pertains to R3 (recruitment, retention, or reactivation)**".

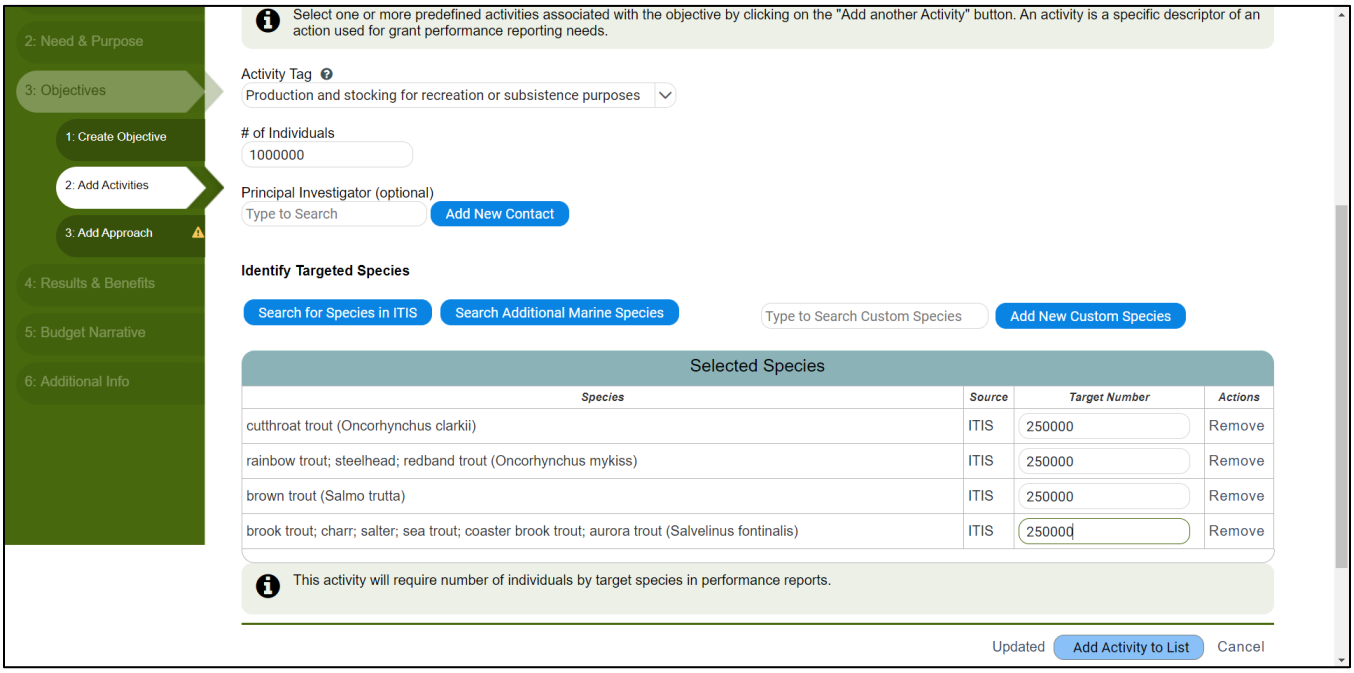
> **Best Practice Tip:** The program has not defined which objectives pertain to R3. Contact your WSFR regional office for guidance.

f. Then click "Next Step".

4. Tab "2: Add Activities" opens. Click "**Add an Activity**".

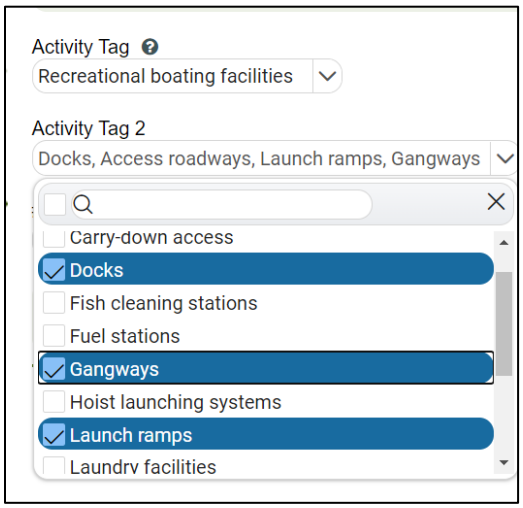


a. **Activity Tag**: Select an activity tag (level 1 on the Matrix) from the drop down list. An activity is a specific descriptor that further defines the strategy.



b. Activity Tag 2 (if applicable): Click on the drop-down menu and check the box next to all of the activity tag 2s that apply. For example, if the activity tag 1 is "Recreational Boating Facilities", then a list of components or amenities at that facility are available to select from the Activity 2 menu, such as restrooms, docks, fish cleaning stations, etc.

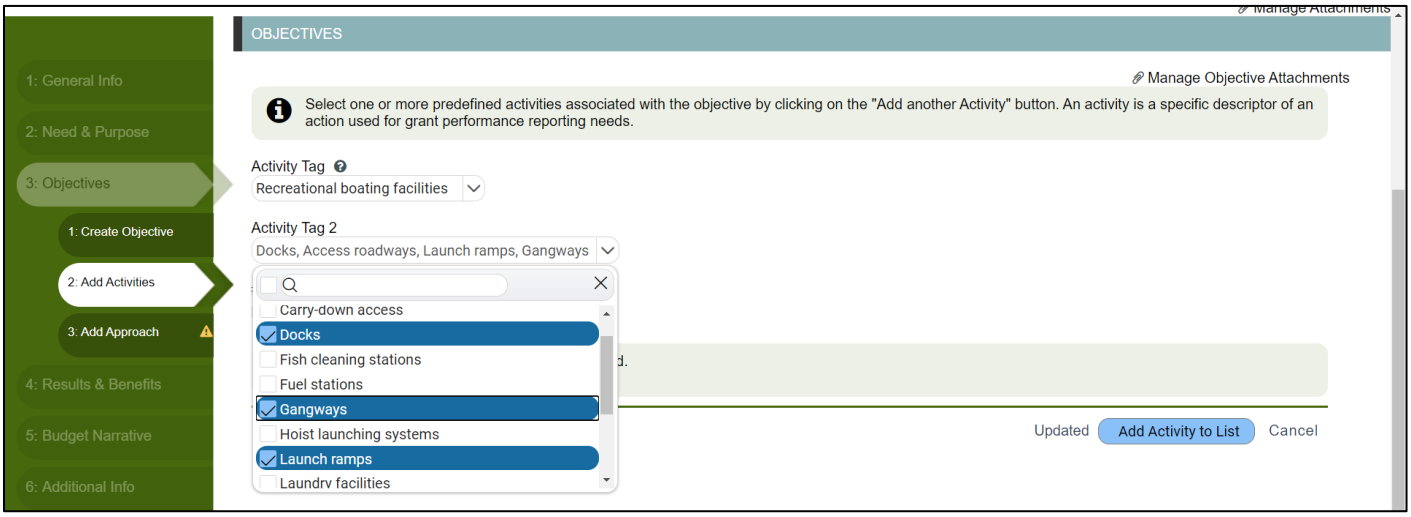
To filter the activity tag 2 list, type into the search box. To check all boxes, click the check mark next to the search box.

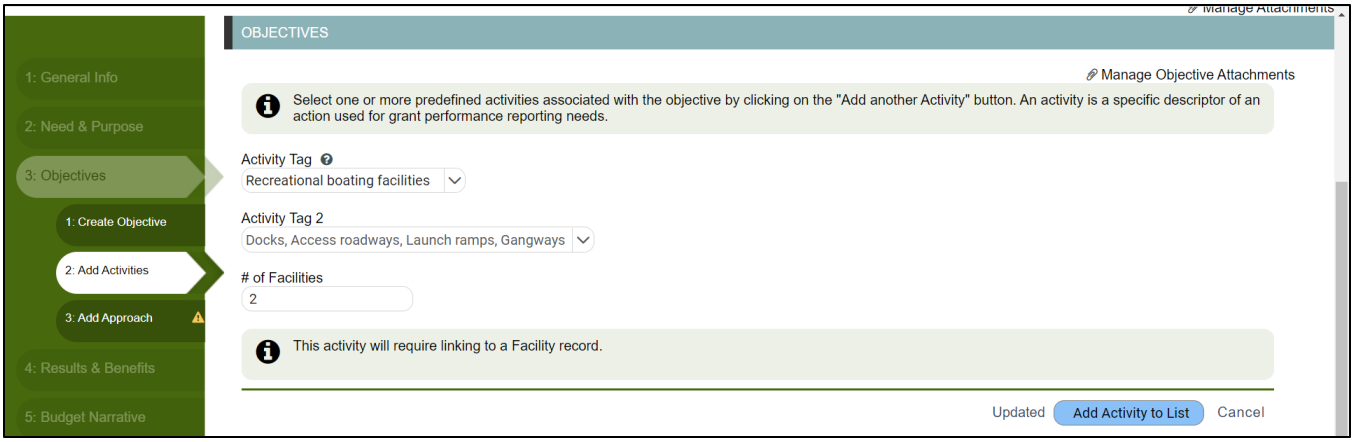


Best Practice Tip: TRACS requires at least one activity tag level 1, and depending on the tag, additional details may be required in the form of activity tag level 2. The unit of measure is only required for the Activity Tag 1 level.

Strategies that may have Activity Tag 2s (depending on the Tag 1) include:

- Facilities/Areas Construction, Renovation or Acquisition
- Facilities/Areas Operations and Maintenance (O&M)
- Training and Education





c. The activity tag 1 defines specific outputs (units of measures) for the objective. Fill out the **unit of measure** that displays.

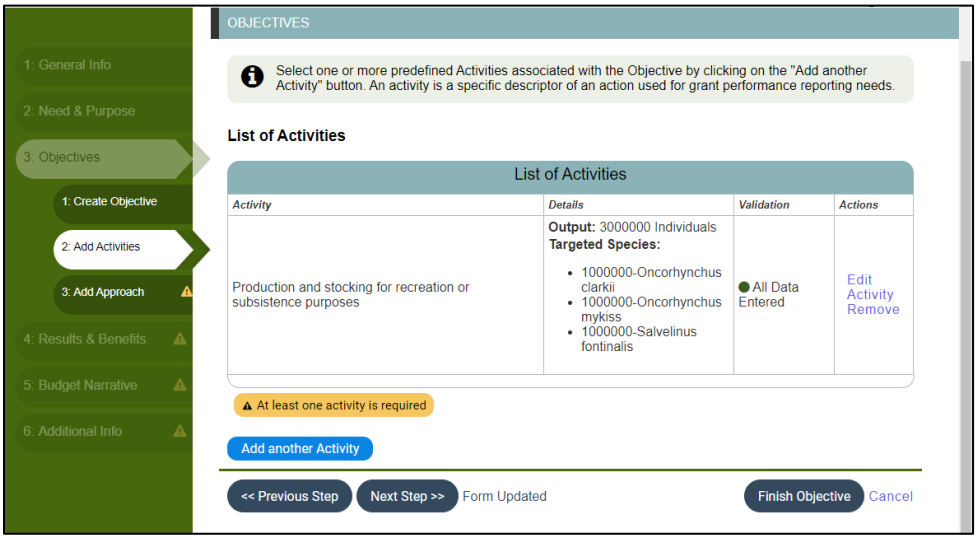
Best Practice Tip: Make sure to double check that you have entered the correct number of digits.

d. Enter the **Principal Investigator** if applicable (research only).

Best Practice Tip: The Principal Investigator (PI) is the lead researcher for a research-based project, such as a field or laboratory study. Enter the search parameters by First and Last Name or Email Address or click Add Contact if needed.

e. Some activities also have additional requirements such as such as identifying target species and habitat(s). For more information on how to enter species and habitat(s), see "Course 5: Species and Habitat".

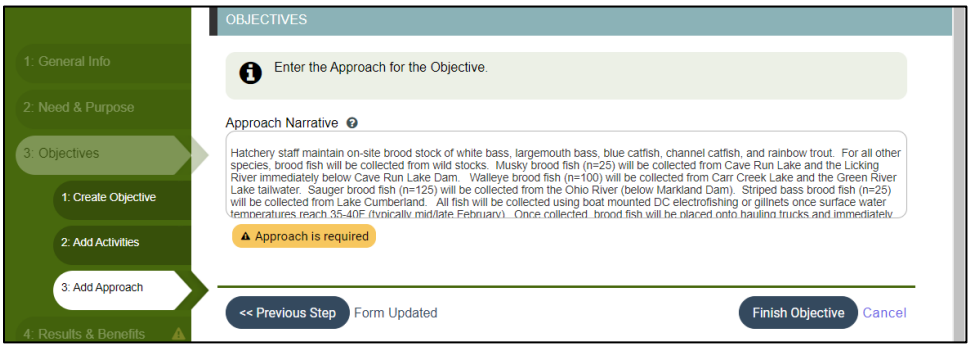
f. Click "Add Activity to the List" and the list will display.



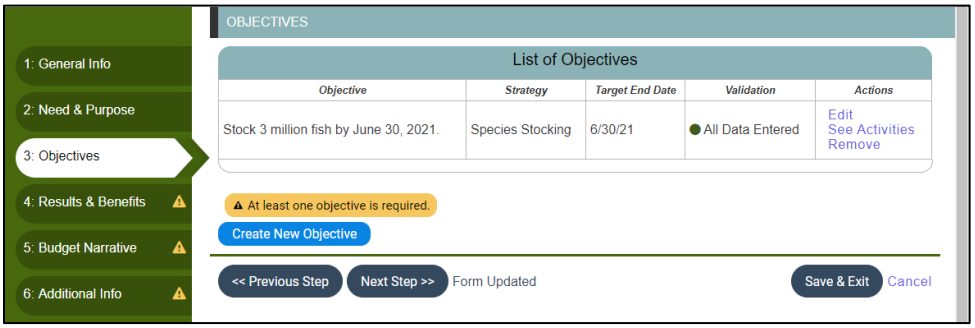
5. Click "Add another Activity" to repeat the process and add more activities to the objective as needed. Then, click "Next Step".

6. The Approach tab opens. Enter or copy/paste the **Approach** for this objective.

> **Best Practice Tip:** The approach describes the specific conservation actions or efforts necessary to accomplish the objective. The approach answers the question "how" the objective will be accomplished by describing the actual work that will be done. This information must demonstrate that the agency will use sound design, appropriate procedures, and accepted fish and wildlife conservation, management, or research principles. **A separate approach is required for each objective in TRACS.**



7. Click "Finish Objective" to close the Objective workflow and return to the Objectives main page. The objective will display in the list.



8. If any items are missing, the validation column will display the number of missing items. Click on it to see a pop-up box with the missing item(s) details. The "Go" link(s) will open the corresponding page.

9. Continue to add objectives as needed by clicking "Create New Objective" and repeating the workflow steps (1-8). Then select "Next Step".

Lesson 2d: Complete Project Statement

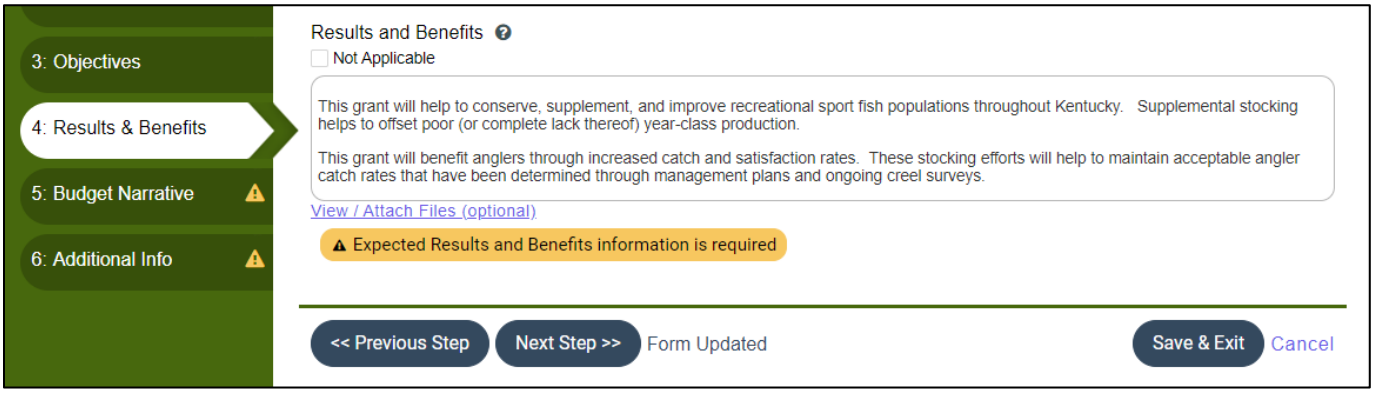
By the end of this lesson, learners will be able to:

1. Identify the steps required to complete the project statement.
2. Describe how to view and correct validation errors in your project statement.

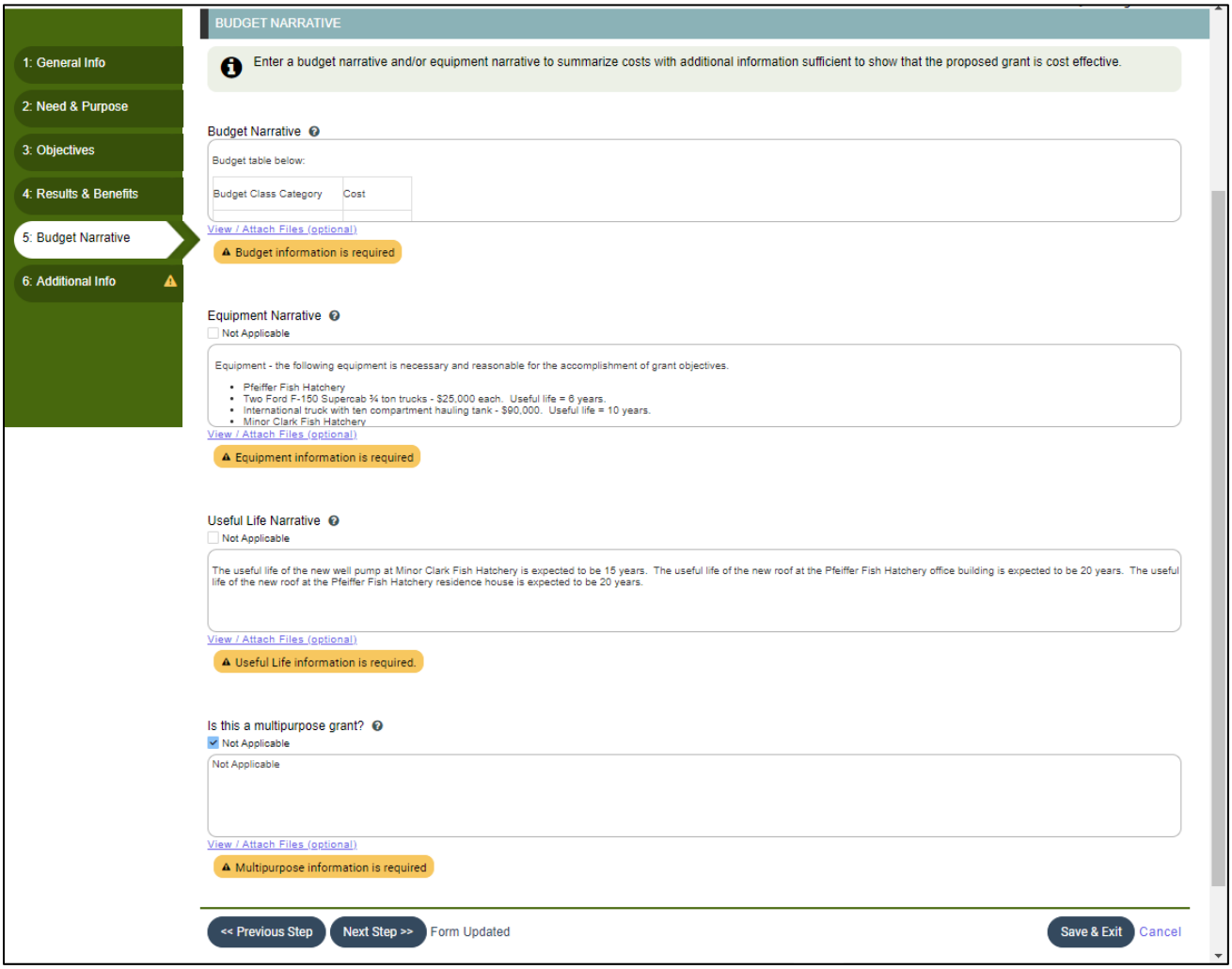
1. Navigate to the Results & Benefits page.
    a. If you are starting from the login point, click on the Performance Module to open the Dashboard page.
        i. Your grant should appear in the Recent Activities list and in the Reports, such as "My open grants". Click the grant from the list to open the Grant Workflow page, then click "Add/Edit Project Statements". Click "Edit Statement".
        ii. Alternately, click "Grants" from the Dashboard and then search for the grants by keywords in the title (or if entered, the SAP/PO FBMS #). Once you find the grant, click "Work on Grant" to open the Grant Workflow page, then click "Add/Edit Project Statements". Click "Edit Statement".
    b. If you have just completed the Need & Purpose, you will be on the Results & Benefits page.

2. Enter the **Results and Benefits**. Then, click "Next Step".

Best Practice Tip: The Results and Benefits describes the benefits to users, economy, society, resource, habitat and/or species and the expected results/outcomes from resolving a conservation need. Select "Not Applicable" if this is not a required element for a project statement based on the funding program.



3. On the **Budget Narrative** form, enter the following:



a. **Budget Narrative**: Copy/paste text and tables (and upload an attachment as needed). Note: If you are trying to copy and paste an Excel table embedded in a Word document, you will need to double-click on the embedded table from the Word document to open the Excel version prior to copying and pasting into TRACS.

Best Practice Tip: In the Budget Narrative explain and justify all requested budget items/costs. Demonstrate a clear connection between costs and the proposed project activities. Describe resources you used to develop cost estimates for your project. Provide costs by project and subaccount with additional information sufficient to show that the project is cost effective. Describe any item that requires WSFR's approval under the applicable Federal cost principles and estimate its cost.

b. **Equipment Narrative**: Enter an equipment narrative (if applicable).

Best Practice Tip: Equipment means tangible personal property (including information technology systems) having a useful life of more than one year and a per-unit acquisition cost, which equals or exceeds the lesser of the capitalization level established by the non-Federal entity for financial statement purposes, or $5,000.

c. **Useful Life Narrative**: Enter the useful life (if applicable).

Best Practice Tip: Useful life is the total number of years and months during which federally funded structures and capital improvements are capable of fulfilling their intended purpose with adequate, routine maintenance.

Propose a useful life for each capital improvement, and reference the method used to determine the useful life of a capital improvement. Please note that useful life determinations apply to capital improvements, not to equipment.

For Wildlife Restoration funds (also known as Pittman-Robertson or PR funds) and Sport Fish Restoration funds (also known as Dingell-Johnson or DJ funds), capital improvements means:

1. A structure that costs at least $25,000 to build, acquire, or install; or the alteration or repair of a structure or the replacement of a structural component, if it increases the structure's useful life by at least 10 years or its market value by at least $25,000.

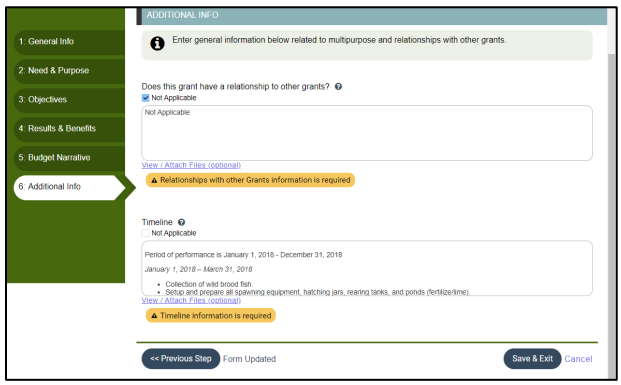
2. An agency may use its own definition of capital improvement if its definition includes all capital improvements as defined here. (50 CFR 80.2)

Other WSFR-administered programs may have their own specific definition for capital improvements.

d. **Is this a multipurpose grant?** Select "Not applicable" or enter an explanation of how this grant is multi-purpose. A multi-purpose grant is defined as a grant that carries out the purpose of a single grant program and also carries either the purpose of another grant program, or an activity unrelated to the grant.
e. Click "Next Step".

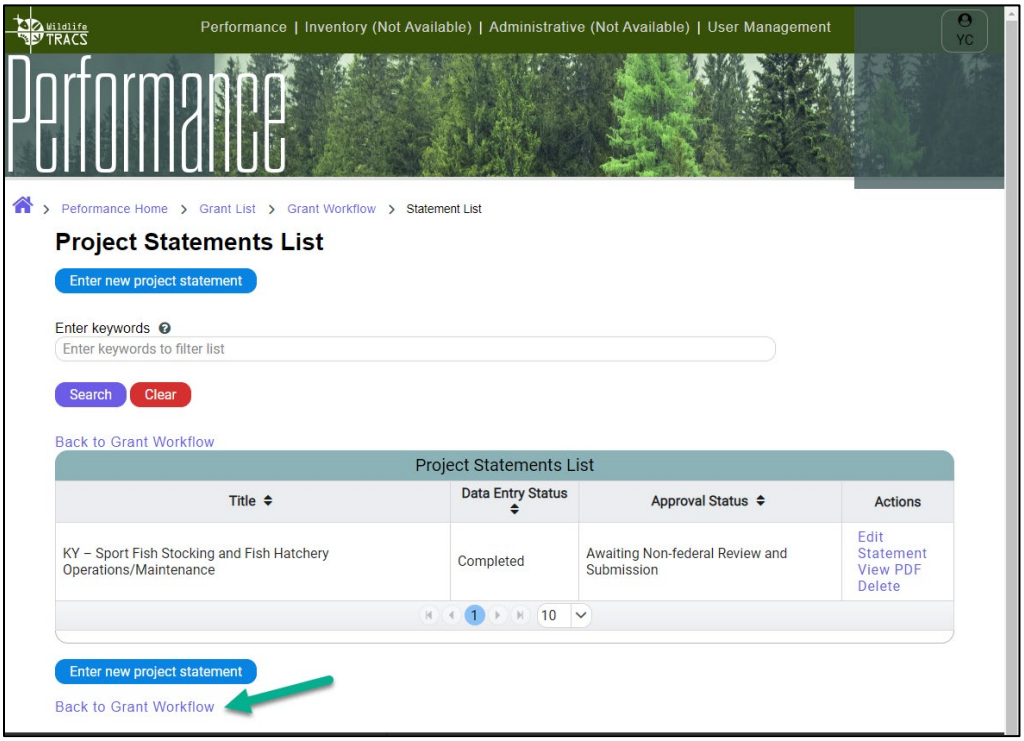
4. On the **Additional Info** form, enter the following:
   a. **Does this grant have a relationship to other grants?** Select "Not Applicable" or enter a description of the relationship between this grant and other work funded by other Federal grants that are planned, anticipated, or underway.

   b. **Timeline:** Enter the timeline (if applicable), which is an estimated schedule of significant milestones in completing the proposed activities.

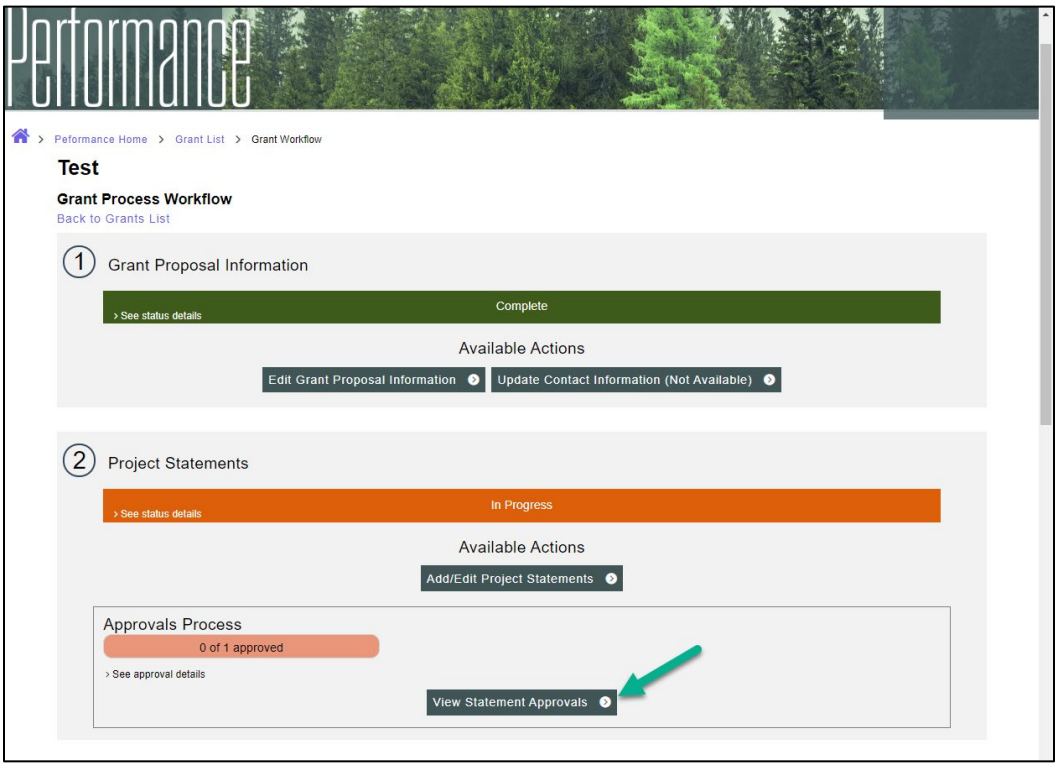


   c. Click "Save & Exit".

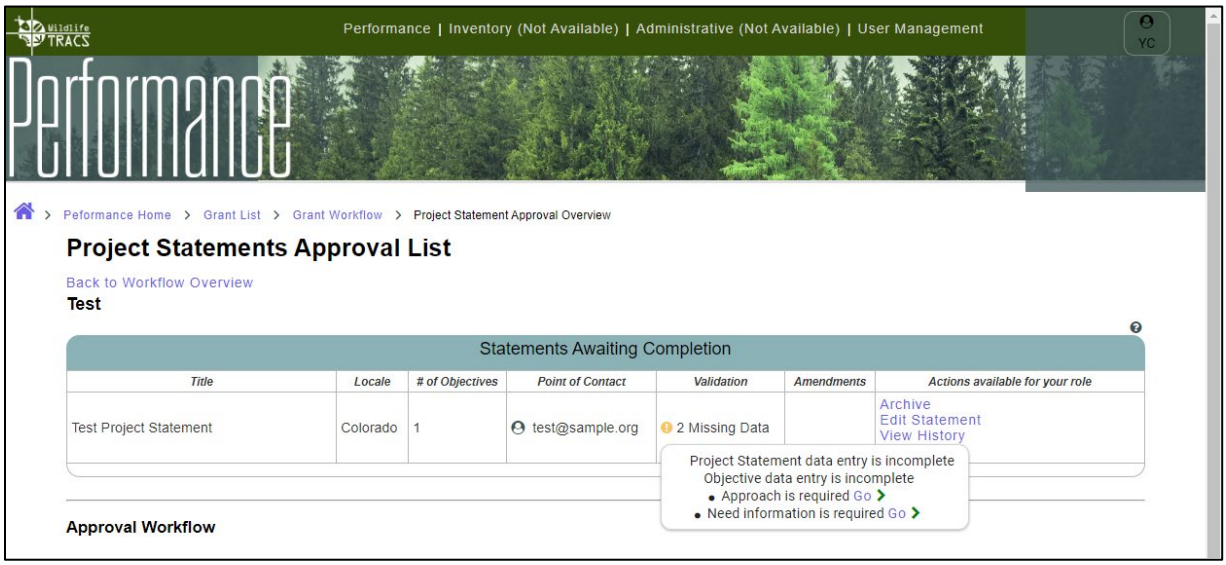
5. The Project Statement list opens. Click "Back to Grant Workflow".



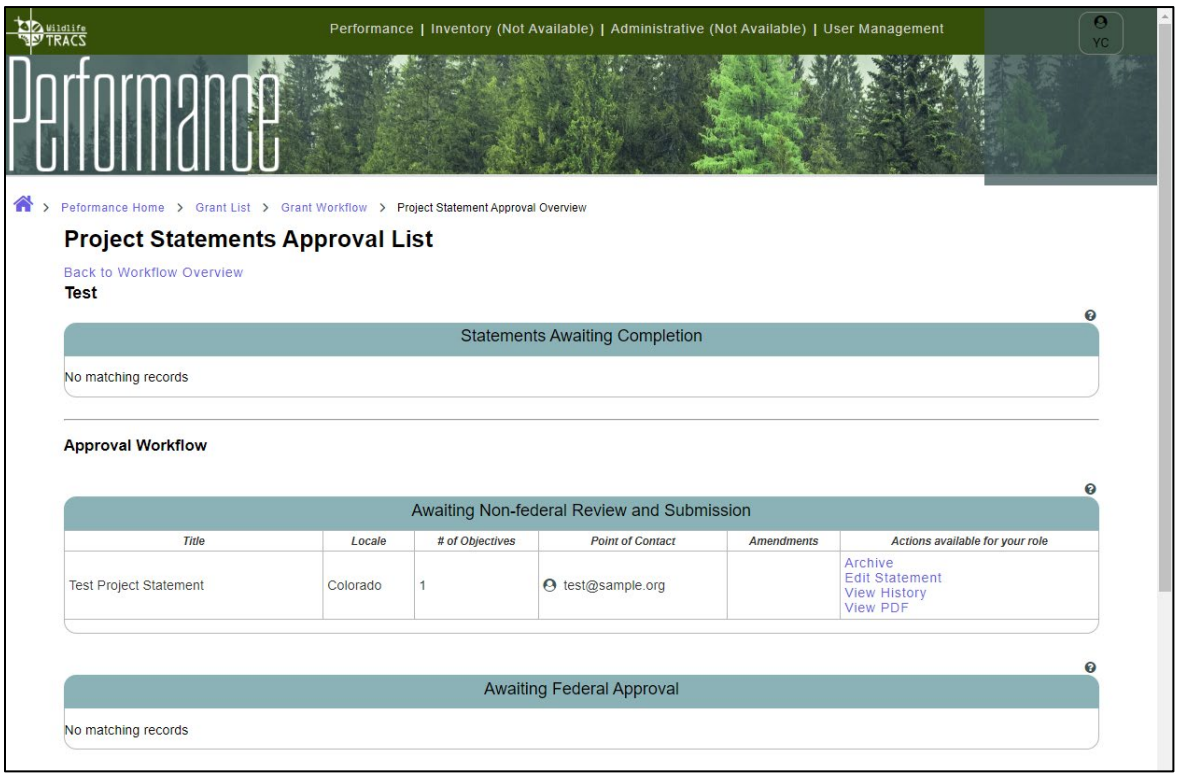
6. The grant workflow page will display.
   a. The Status bar will display in orange as "In Progress" if any required fields are missing. (Note clicking on the "See Status Details" will not display the validation errors as it does for the grant proposal – instead follow the next steps to see the missing data). Click "View Statement Approvals".



b. If any items are missing, the project statement(s) will display in the "Statements Awaiting Completion" section. The validation column will display the number of missing items. Click on it to see a pop-up box with the missing item(s) details. The "Go" link(s) will open the corresponding page.

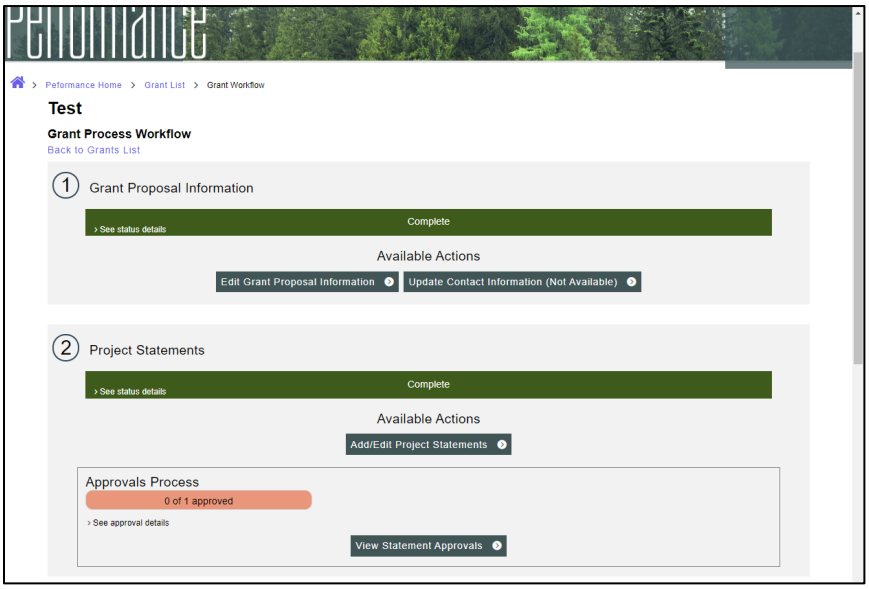


7. Once all of the required fields have been entered, the statement will automatically display with the "Awaiting Non-Federal Review and Submission" status.
   a. Click on "View PDF" to print the PDF to be included in your grant application packet. Click on "Back to Workflow Overview" in the upper left.



   b. On the Grant Workflow page, the status bar will automatically change to green and display "Complete". If the grant has additional project statements, select "Add/Edit Project

Statements" and repeat the steps to add another project statement (refer to Lessons 2b-2d). Each project statement will go through the approval process (refer to Course 3: Approvals, Amendment and Award).



Lesson 2e: Copy Forward

By the end of this lesson, learners will be able to:

1. Describe the steps required to copy forward a grant and project statement(s).
2. Identify the items that will be copied and will not be copied.

The "Copy Forward" functionality gives users the option to copy an existing grant and corresponding project statements to a new grant in TRACS.

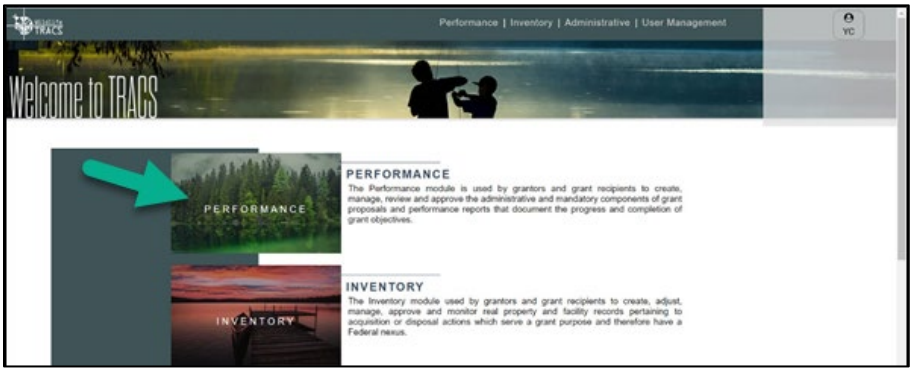
Best Practice Tip: Copying a grant will be a time saver for users who will be entering grants that share most of the same information. Some information will need to be re-entered and all information should be reviewed. Note: Project Statement Approvals, FBMS link and Performance Reports will not copy forward.

Only users with the 'Performance Data Editor' role for the group assigned to the grant will have the option to copy it forward.

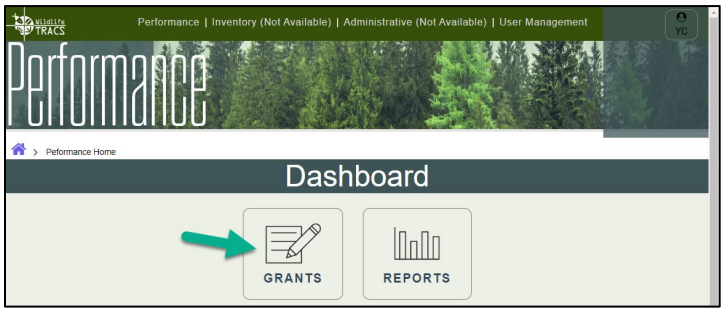
Review the TRACS Copy Forward Fields Job Aid for more details on the fields that will and will not copy forward.

Note: Due to the structural differences between a CMS and project-based grant, it is not possible to switch between them in the copy forward functionality. A CMS grant cannot be copied as a project-based grant or vice versa.

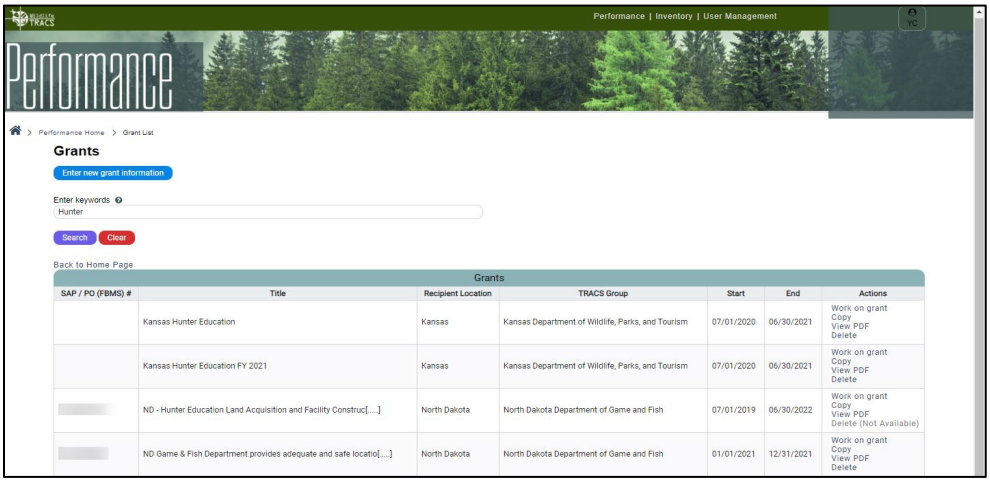
1. After logging into TRACS, the home page will display. Click on the "**Performance**" module.



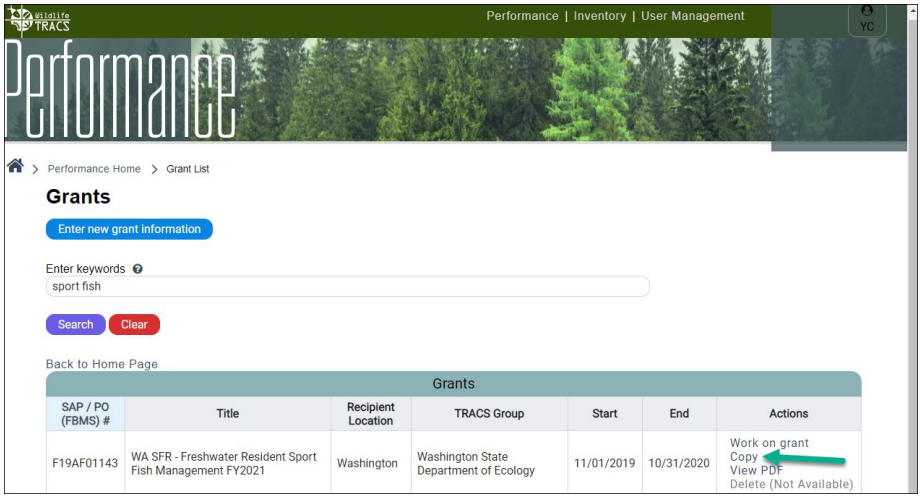
2. Click on the "**Grants**" icon.



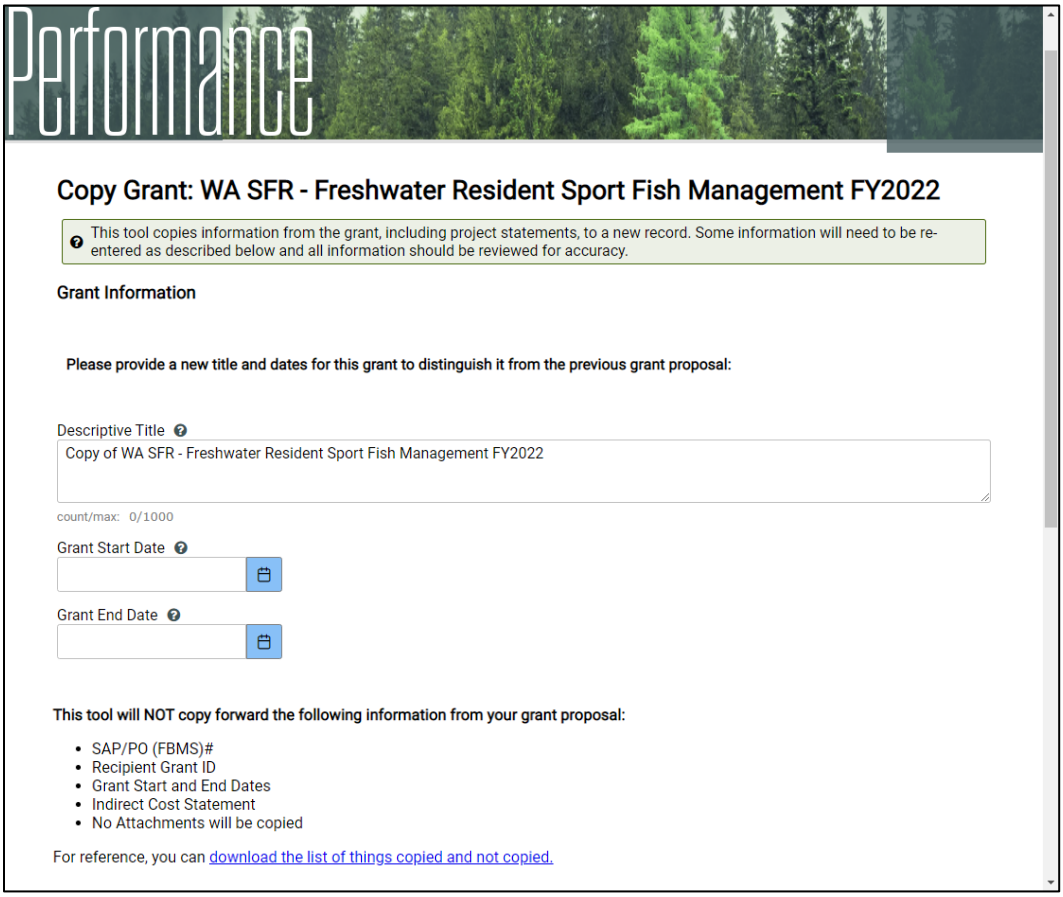
3. The Grant List page opens displaying the grants on the Grants List Table. You will only see grants specific to your assigned group(s). Search for the existing grant entered into TRACS by entering keywords into the search box and click "**Search**".
   - Enter the search parameters by key words in the grant title by entering the first 3 characters or by entering part of the SAP/PO (FBMS)#. Click "Clear" to refresh the page and to show all grants.
   - To sort the results, click on the column headers (SAP/PO FBMS #, Title, Recipient Location, Group, Start and End Dates). For example, click on the column header for Title to sort the list alphabetically A-Z or click on it a second time to reverse sort the list Z-A. Click on the arrows at the bottom of the grants box to open additional pages of results.



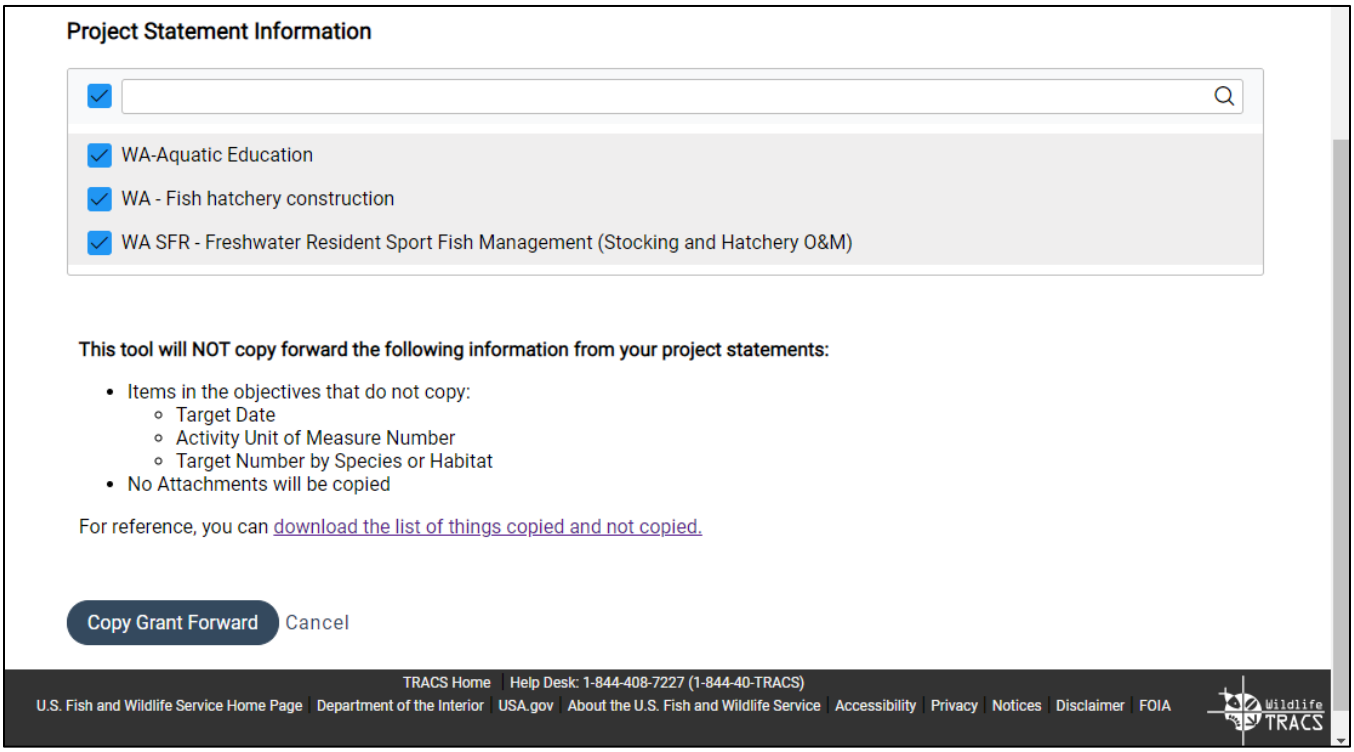
4. Once the grant is located, use the actions on the right side to work with the grant. Click "Work on Grant" or "View PDF" to review the grant information if needed. Then click "**Copy**" to begin the copy forward process. Only users with the 'Performance Data Editor' role for the group assigned with the grant will have the options to copy the grant.



5. The Copy Grant page opens.
   - The Grant's Descriptive Title is "Copy of..." preceding the original grant title. Edit the title for this grant to distinguish it from the previous grant and remove "Copy of".
   - Enter the new grant start and end dates. Select the date from the calendar or type the date into the field formatted YYYY-MM-DD.

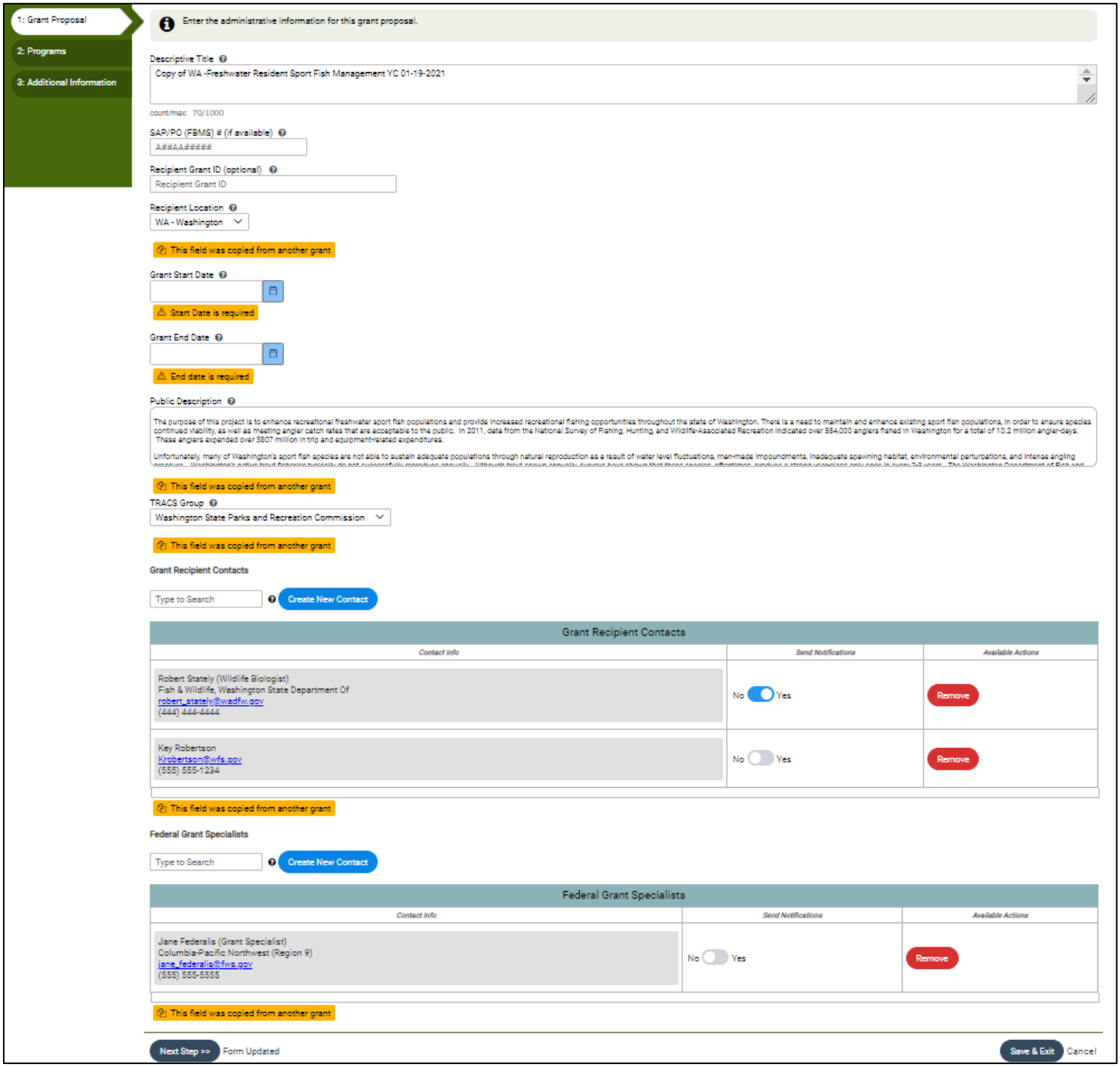


- In the Project Statement section, all Project Statements attached to the original grant will display. A search box is available. Check the box next to the search box to select all or check the individual project statement(s) to be copied forward.

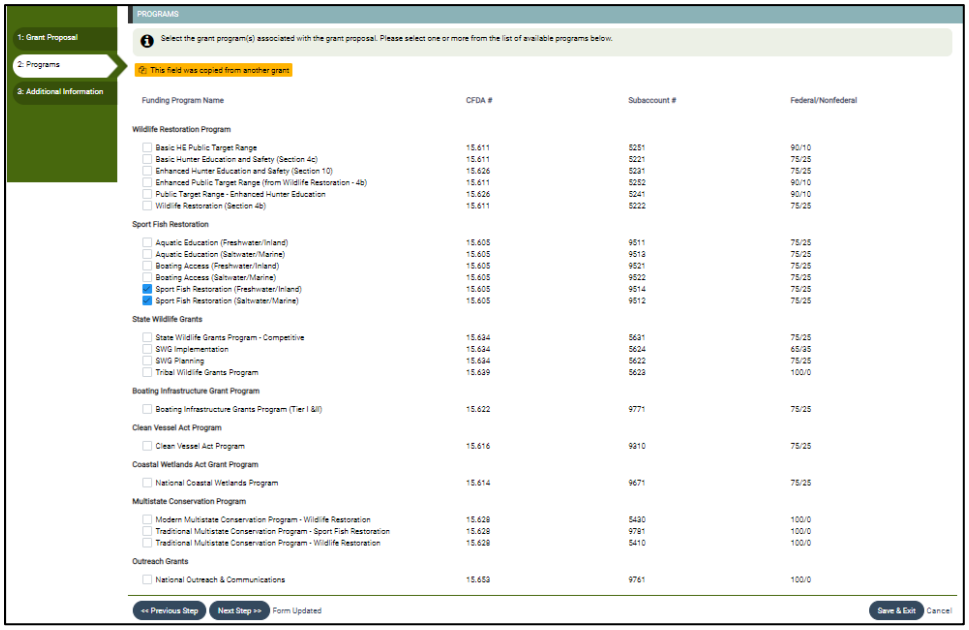


- Items that will NOT copy forward are listed on the page. For reference, you can download the list of things copied and not copied.
- Select "Copy Grant Forward" at the bottom of the page.

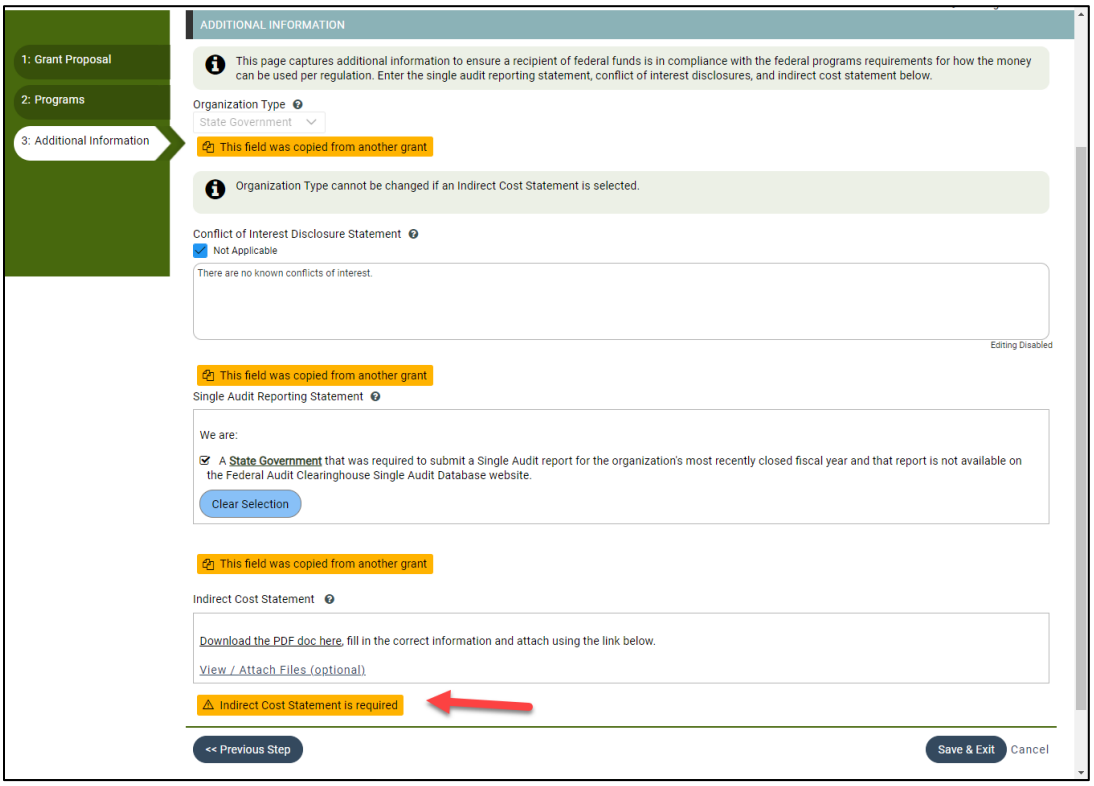
6. The Grant Proposal page opens.
    - Review and update the fields as needed. Note: Fields that were copied will display a yellow label "This field was copied from another grant".
    - Click "Next Step" at the bottom of the page.



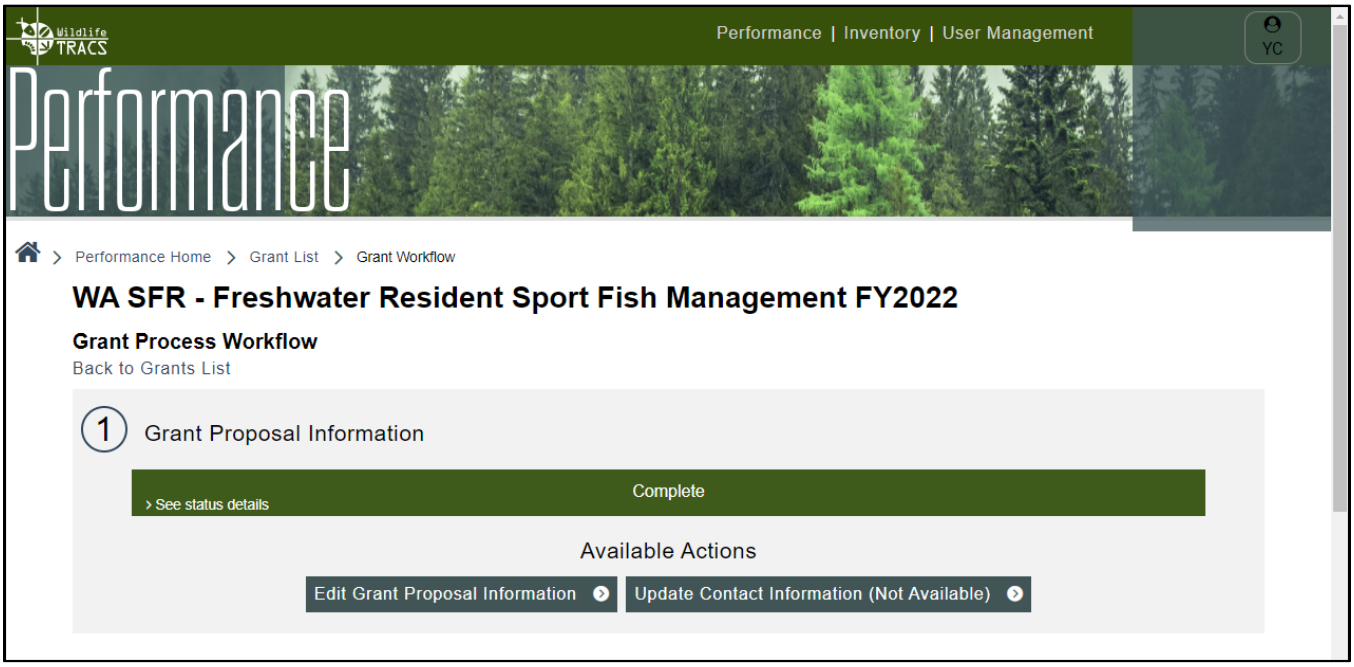
7. The Programs page opens with the program(s) copied from the original grant. Edit as needed, then click "Next Step" at the bottom of the page.



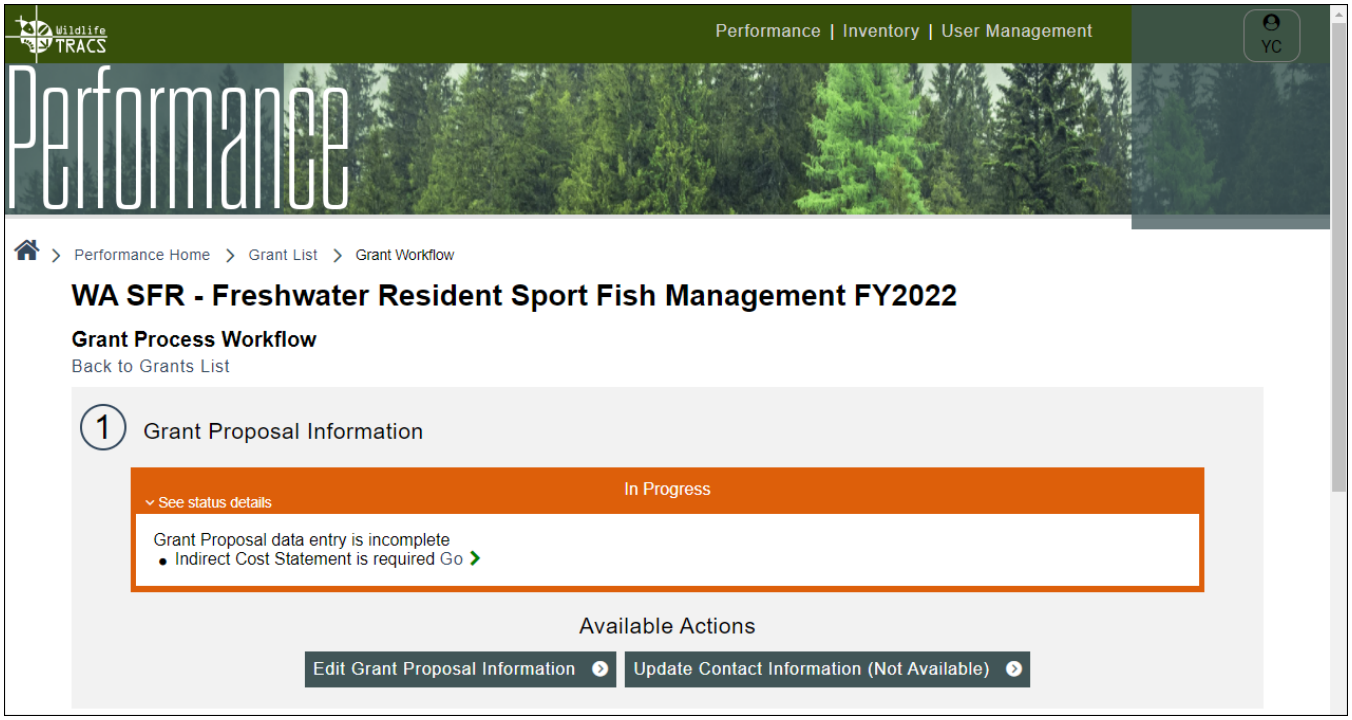
8. The Additional Information page opens.
   - Review and update the fields as needed. Note: Fields that were copied will display a yellow label "This field was copied from another grant".
   - The Indirect Cost Statement does not copy and will need to be downloaded, filled out and uploaded as an attachment.
   - Click "Save & Exit" at the bottom of the page.



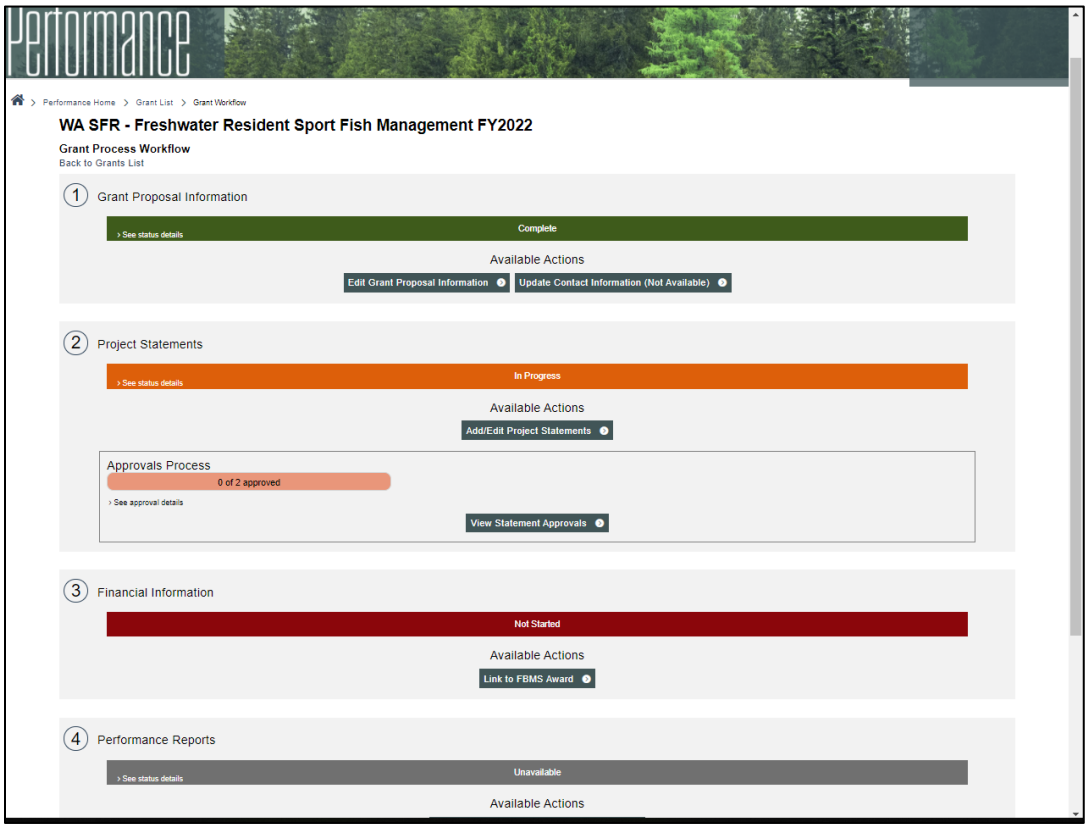
9. The Grant Process Workflow page opens.
    - Step 1: Grant Proposal displays in green as "complete". You can edit it by clicking on "Edit Grant Proposal Information". Note: the "Update Contact Information" button is only available after the grant has been approved.



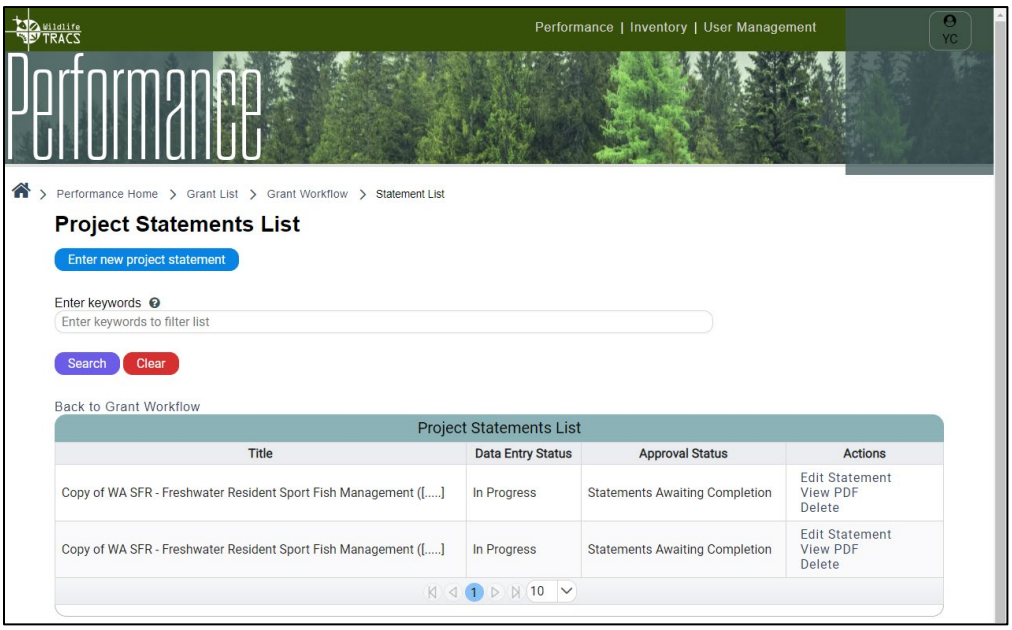
- The Status bar will display in orange as "In Progress" if any required fields are missing. Click on "See Status Details" to expand the window and see the missing items. The "Go" link(s) will open the corresponding page to fix any missing items.



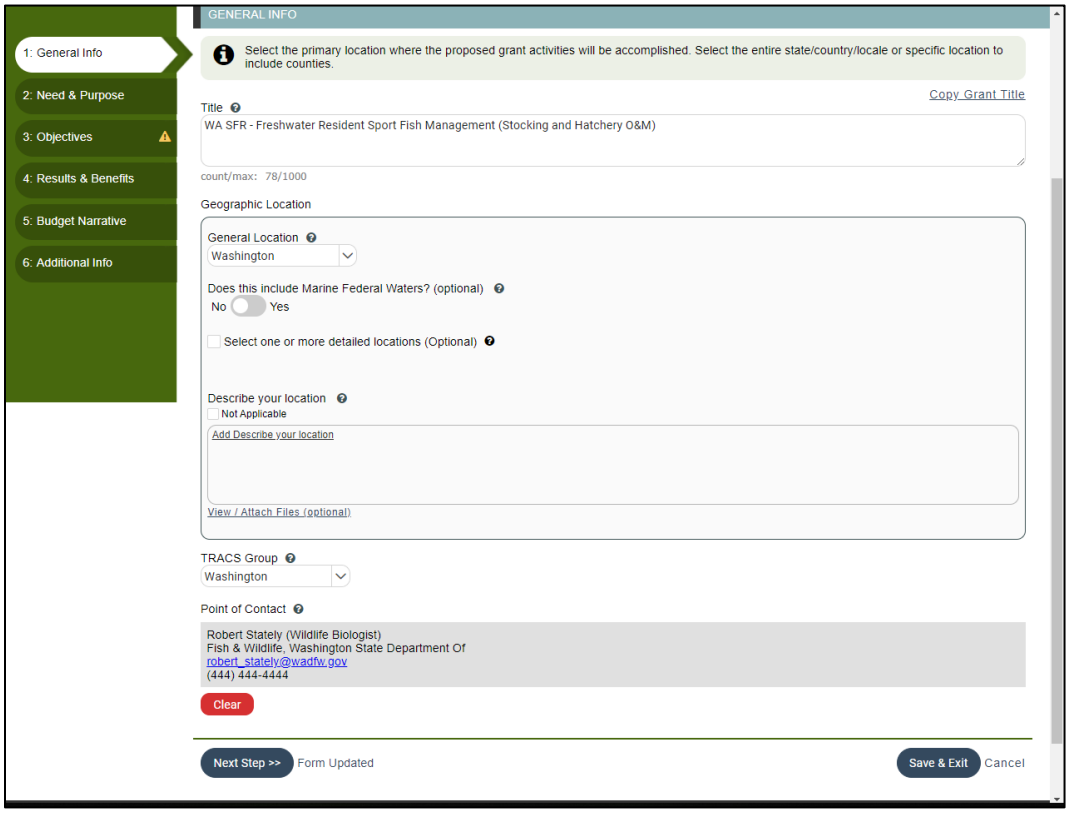
10. On this page, you will see the rest of the steps required to complete the grant. The status for Step 2: Project Statements displays in orange and "In Progress" if one or more project statements were copied (or in red and "Not Started" if none of the project statements were copied). Select "**Add/Edit Project Statements**".



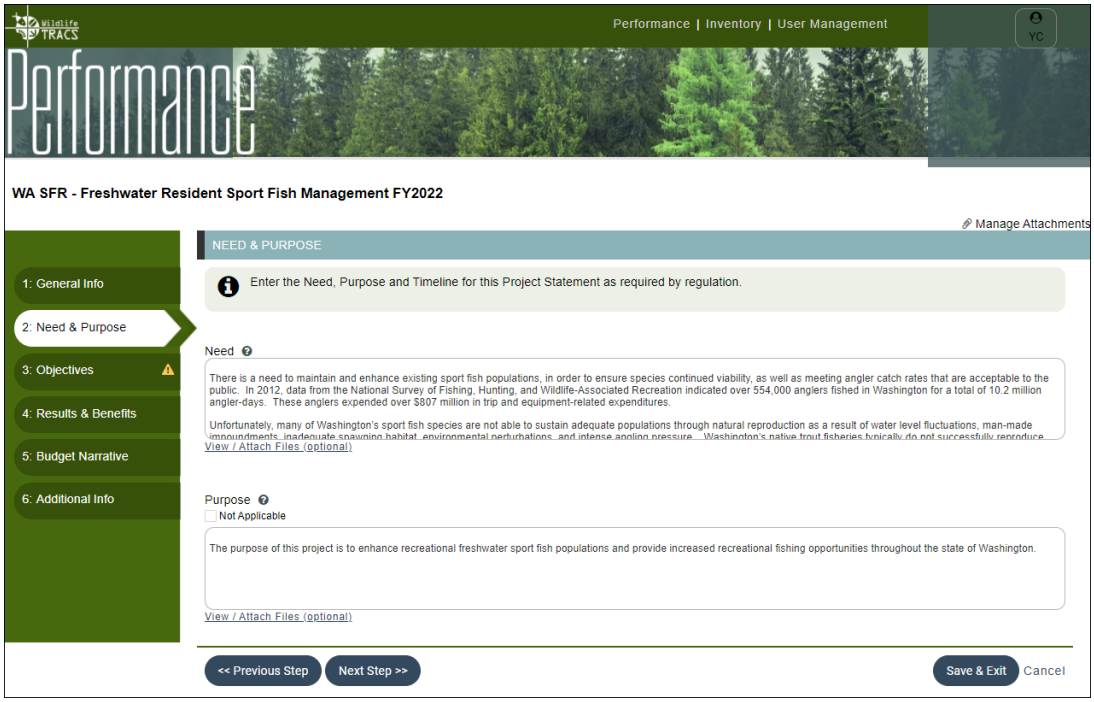
11. The Project Statement List page opens displaying all of the project statements attached to this grant. If the title is truncated, click on the dots at the end ([….]) to view the rest of the title. Each project statement will need to be reviewed and updated. Select a project statement and click "Edit Statement" in the actions on the right.



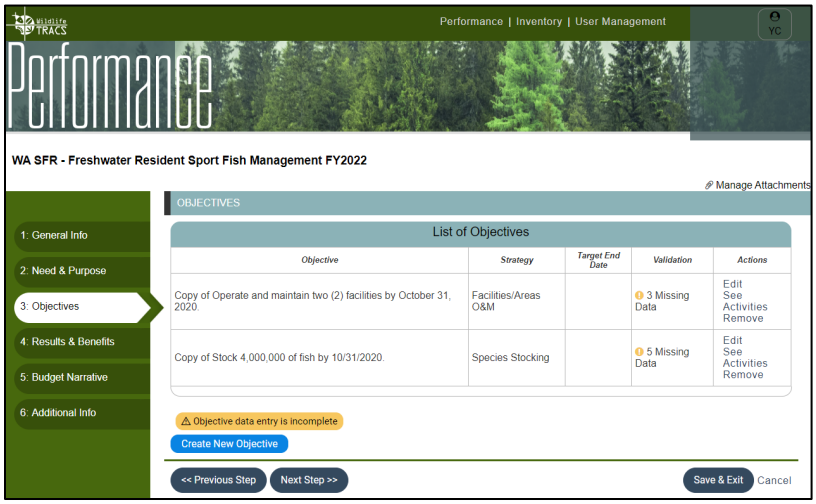
12. The General Info page opens.
    - The title of the project statement is "Copy of..." preceding the original project statement title. Edit the title for this project statement to distinguish it from others and remove "Copy of".
    - Review and update the fields as needed. Click "Next Step" at the bottom of the page.



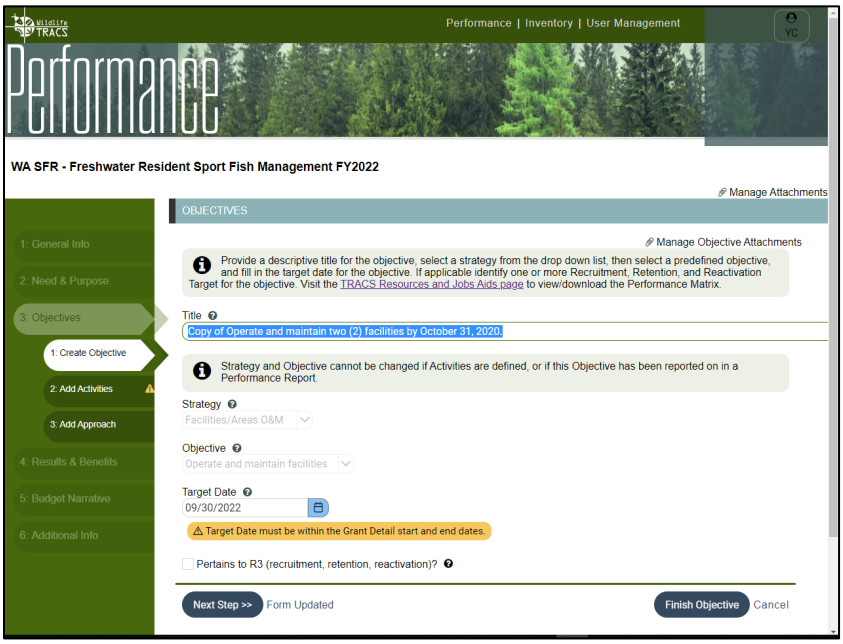
13. The Need and Purpose page opens. Review and update the fields as needed. Click "Next Step" at the bottom of the page.



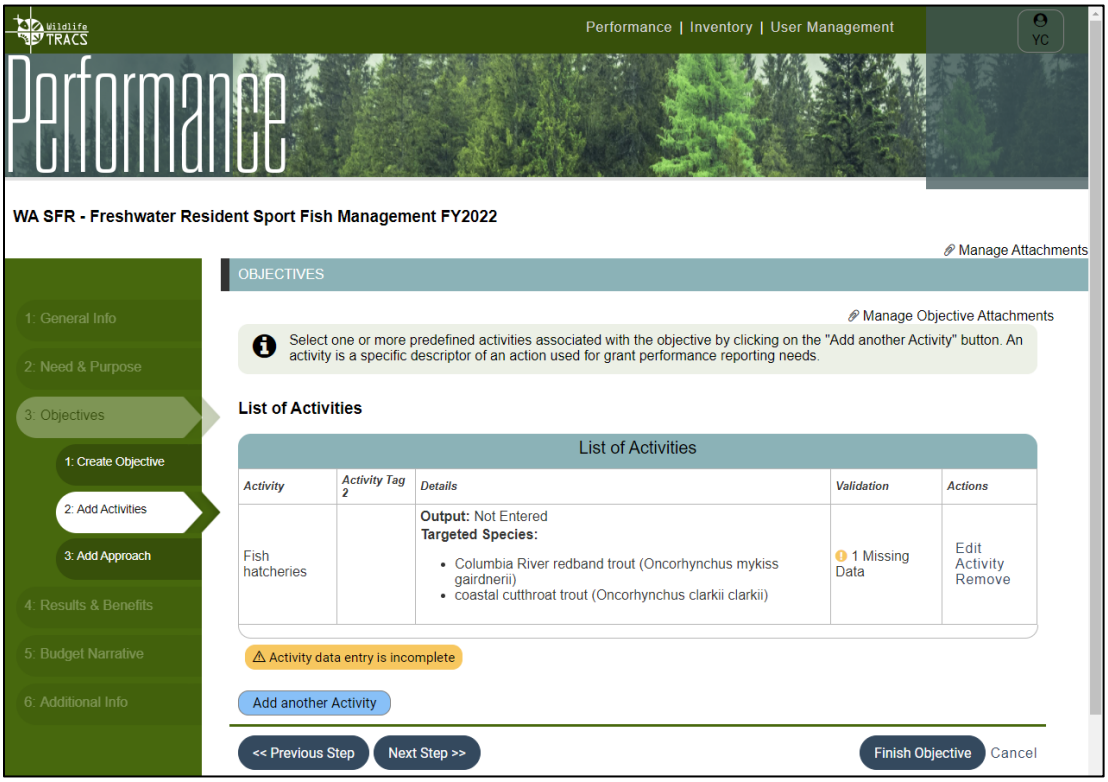
14. The Objectives page opens. The objectives from the original grant display, however they are missing some data. For each objective that will be used, select the "edit" link in the actions to the right.
    - To remove an existing objective, select the "Remove" link in the actions to the right.
    - To add additional objectives, select the "Create New Objective" button.



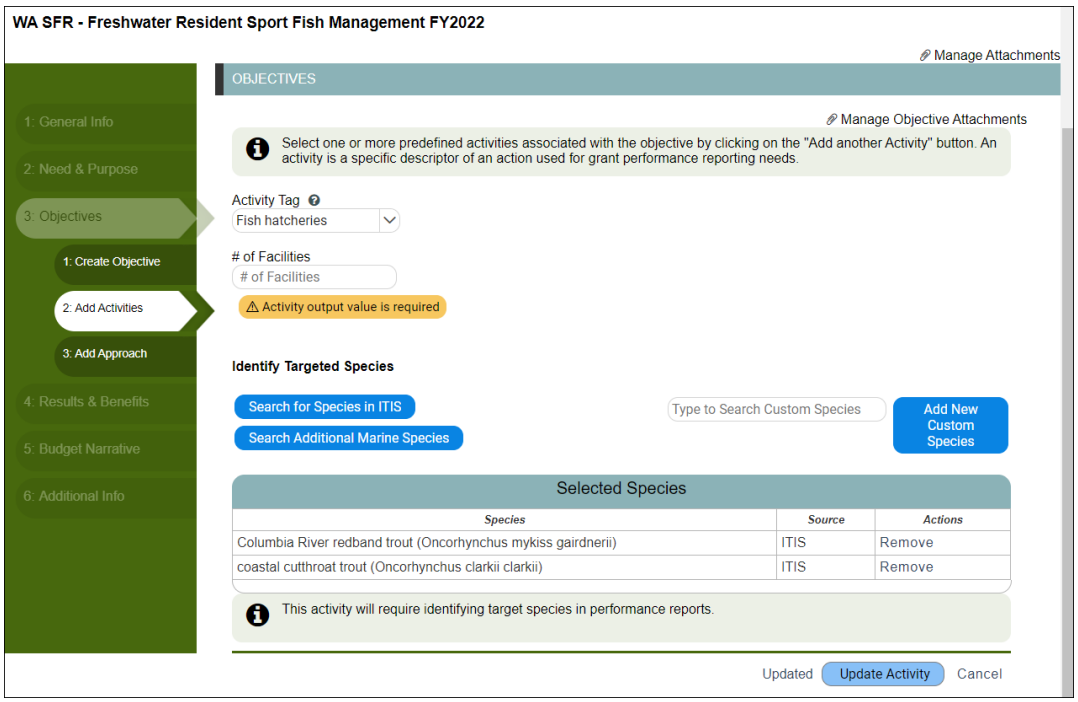
15. After selecting "edit", the Objectives workflow opens with sub-tabs, beginning with tab 1: Create Objective.
    a. The Objective title is "Copy of..." preceding the original objective title. Edit the title as needed including updating the date and unit of measure (if applicable) and remove "Copy of".
    b. Review and update the fields as needed. The Target Date will automatically update to the end date of the grant. Note: The Strategy and Objective fields are greyed out and cannot be changed if activities are defined. To edit them, you will first need to remove the activities from the next page.
    c. Click "Next Step" at the bottom of the page.



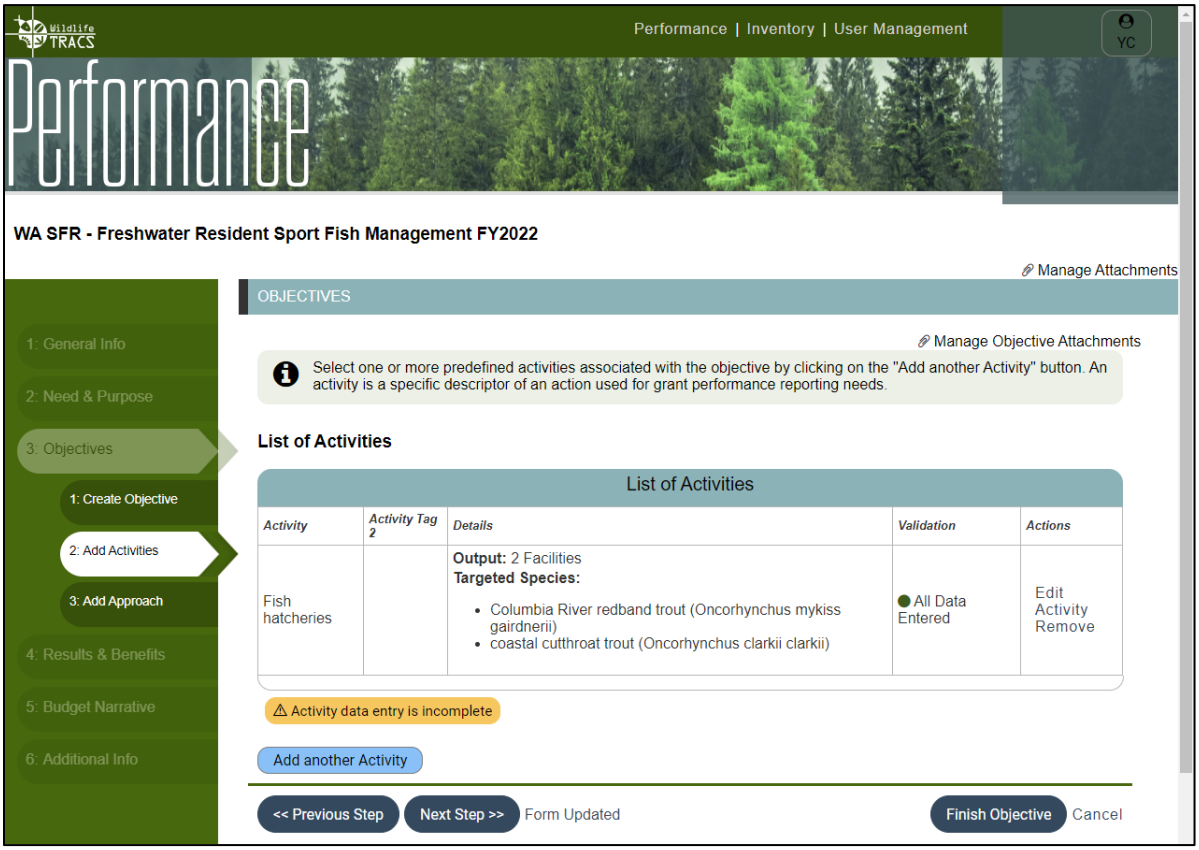
16. Tab "2: Add Activities" opens. The list of activities copied from the original objective will display. For each activity that will be used, select the "**edit**" link in the actions to the right.
    - To remove an existing activity, select the "Remove" link in the actions to the right.
    - To add additional activities, select the "Add an Activity" button.



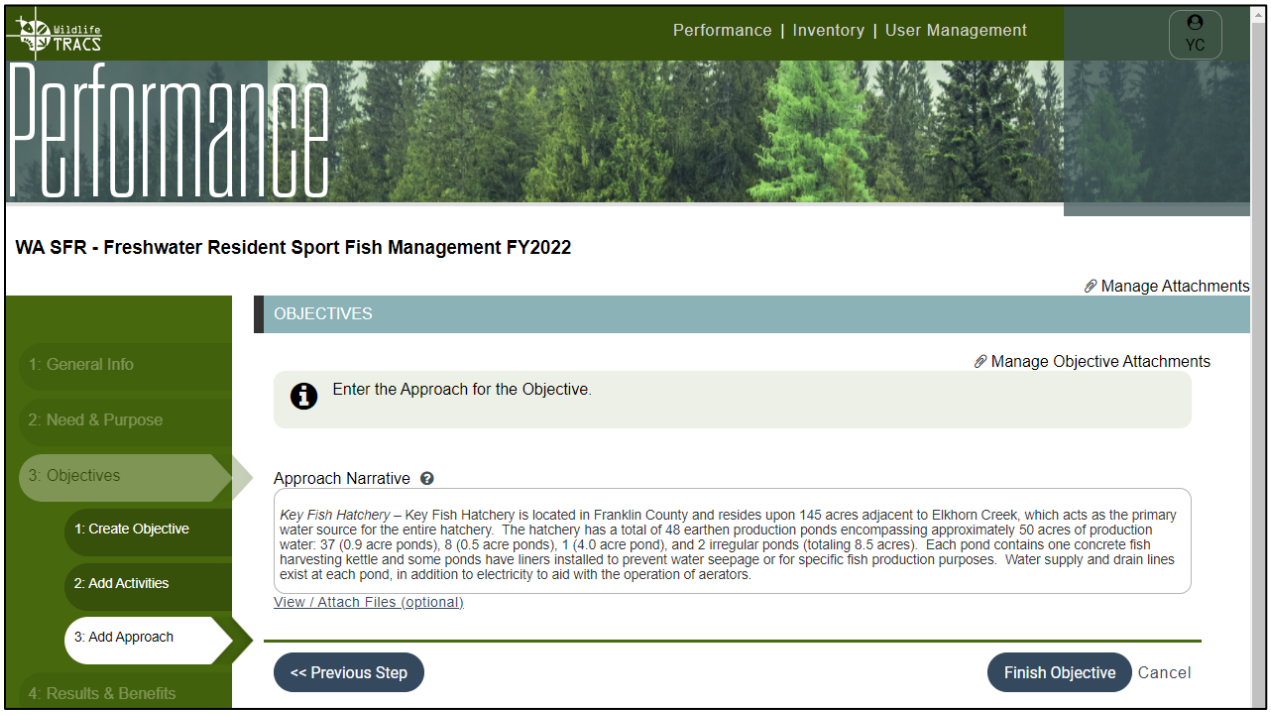
17. The activity tag page opens. The unit of measure does not copy forward, so enter the value. Review and update the fields as needed. Click "Update Activity" at the bottom of the page.



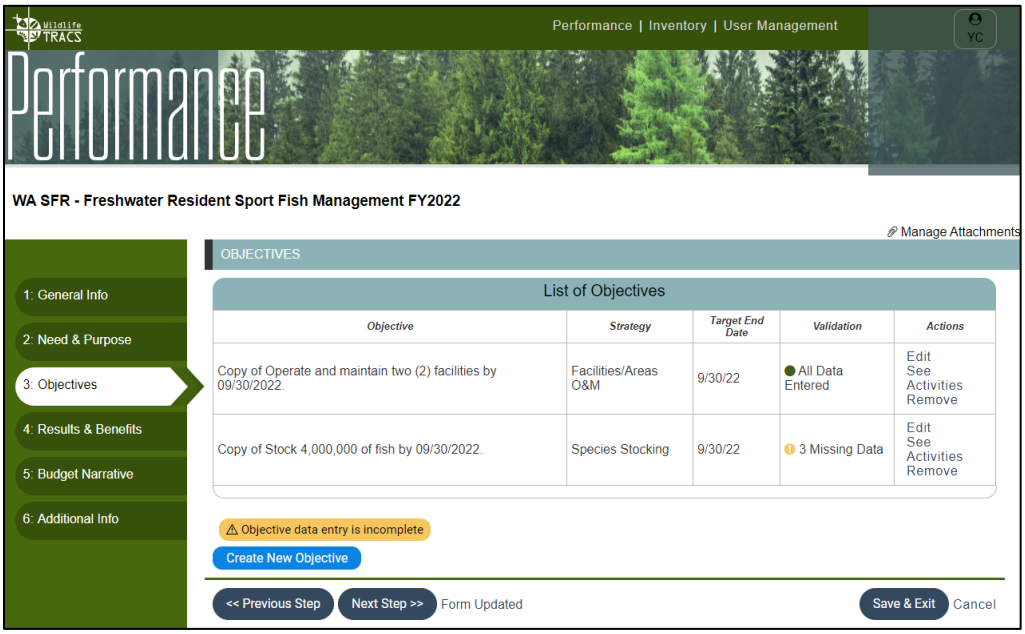
18. The List of Activities page opens. Edit another activity or click "Add another Activity" to add more activities to the objective as needed. Then, click "Next Step".



19. The Approach tab opens. Update the approach as needed, then select "Finish Objective".



20. The Objectives main page reopens. The objective will display in the list. The validation column should display with a green dot and "All Data Entered". If any items are missing, the number will be listed with a yellow warning.



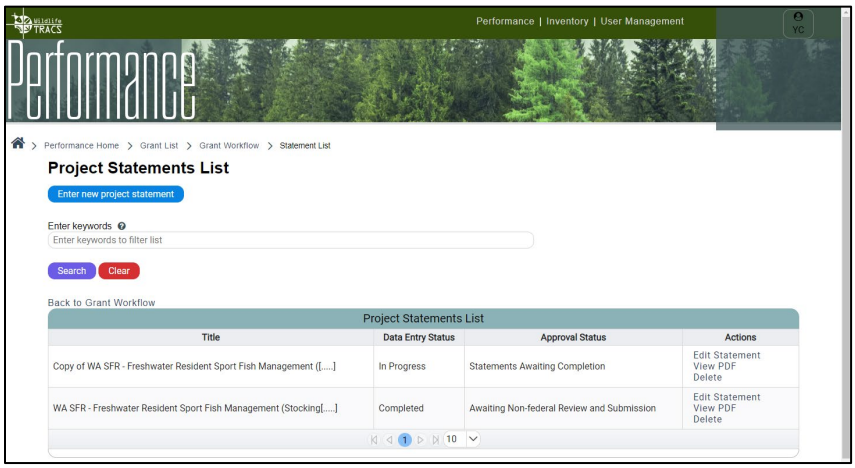
21. Continue to edit the objectives with missing information. Add objectives as needed by clicking "Create New Objective". Refer to [Lesson 2c Enter Objectives]() for more details. Then select "Next Step".

22. The Results & Benefits page opens. Update as needed then select "Next Step".

23. The Budget Narrative page opens. Update as needed then select "Next Step".

24. The Additional Info page opens. Update as needed then select "Save & Exit".

25. The Project Statement List page reopens.
    - If all of the fields for the project statement are complete, the data entry status column will display "Completed" and the approval status column will display "Awaiting Non-Federal Review and Submission".



- Repeat the steps 13-23 to update any other project statements. Each project statement will need to be reviewed and updated. Select a project statement and click "Edit Statement" in the actions on the right.
- If a project statement is no longer needed, select "Delete" in the actions on the right.
- If a new project statement needs to be added, select "Enter new project statement". View Lesson 2b Create Project Statement for more details.

26. Follow the rest of workflow steps as usual. View Course 3 Approvals, Amendment and Award for more details.