TRACS Quick Reference Guide

Course 2: Grant Proposal and Project Statement **Lesson 2a: Enter a Grant Proposal**	
Step	**Action**
Steps to Search for a Grant in TRACS	
1	After logging into TRACS, select 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	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. • 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	Tabs on the left display the pages to complete the 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 box 15]. The standardized naming convention is: Two-letter abbreviation for your state/territory, followed by a dash, then a short descriptive title (optional: add other identifiers such as Fiscal Year, Recipient Grant ID, etc.). Ex. WA - Sport Fish Stocking and Fish Hatchery Operations/Maintenance FY2020 SF-70A 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. **SAP/PO (FBMS) # (Optional)** [SF-424 box 5b] c. **Recipient Grant ID (Optional)** [SF-424 box 4] d. **Recipient Grant Location:** select the state/territory associated with the primary or lead recipient of this grant. [SF-424 box 8 or 14] • 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. **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 box 17] f. **Public Description:** 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 or department 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:** • **Grant Recipient Contacts:** Identify the primary grant recipient contact(s). • **Federal Grant Specialists:** Identify the primary federal grant specialist(s). Enter the search parameters by First and Last Name or Business Email Address. Always search for an existing contact record before creating a new one. 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". 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). [SF-424 box 11 & 12] Then, select "**Next Step**".

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** as listed on the SF424 (State Government, U.S. Territory or Possession, etc.) [SF-424 box 9] 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". c. **Single Audit Reporting Statement:** Select the statement that applies. If applicable, complete the **EIN** (Employer Identification Number) [SF-424 box 8b] d. **Indirect Cost Statement**: 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). i. 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. ii. Upload the completed PDF using the "View/Attach Files" link in TRACS. iii. The Attachments pop-up window opens. Select the "Upload an Attachment" link. iv. Select "Choose File" to upload the file from your computer. The file name will appear to the right of the "Choose File" box. • Update the Descriptive Name if needed • Select the Attachment Type as "Grant Indirect Cost PDF Attachment". • Click the "Upload" button. Do NOT click "close" until the upload is complete. v. 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". e. Select "**Save & Exit**" to close the grant proposal.
7	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.