

Comprehensive Management System (CMS) TRACS Job Aid

Last Updated 11/9/2021

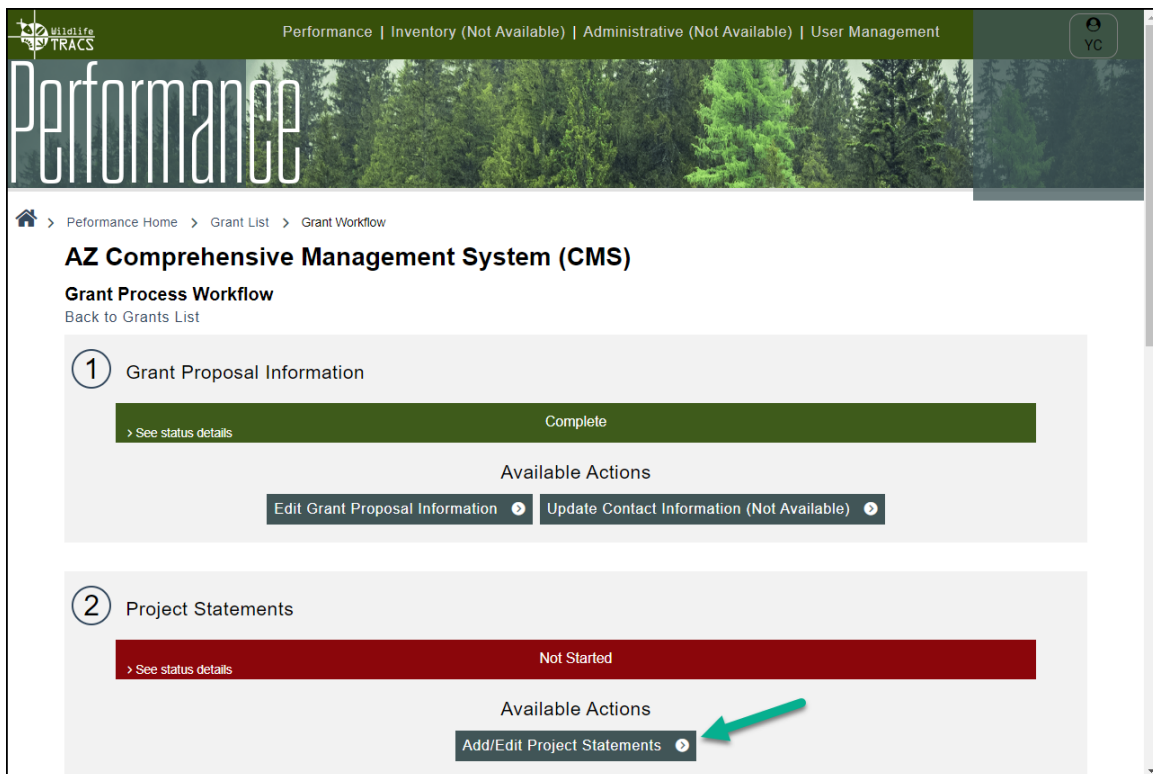
This job aid provides information on the steps that are unique to entering a Comprehensive Management System (CMS) grant into TRACS.

1. The 'Performance Data Editor' role is responsible for entering the grant information into TRACS.
 - Enter the Grant Proposal following the same steps as any other grant type (refer to "Lesson 2b: Enter Grant Proposal" for more details).
 - CMS states (Arizona, Ohio, Tennessee, Wisconsin and Wyoming) will have an additional question: **"Are the activities under this grant Comprehensive Management System (CMS) or project-based?"**

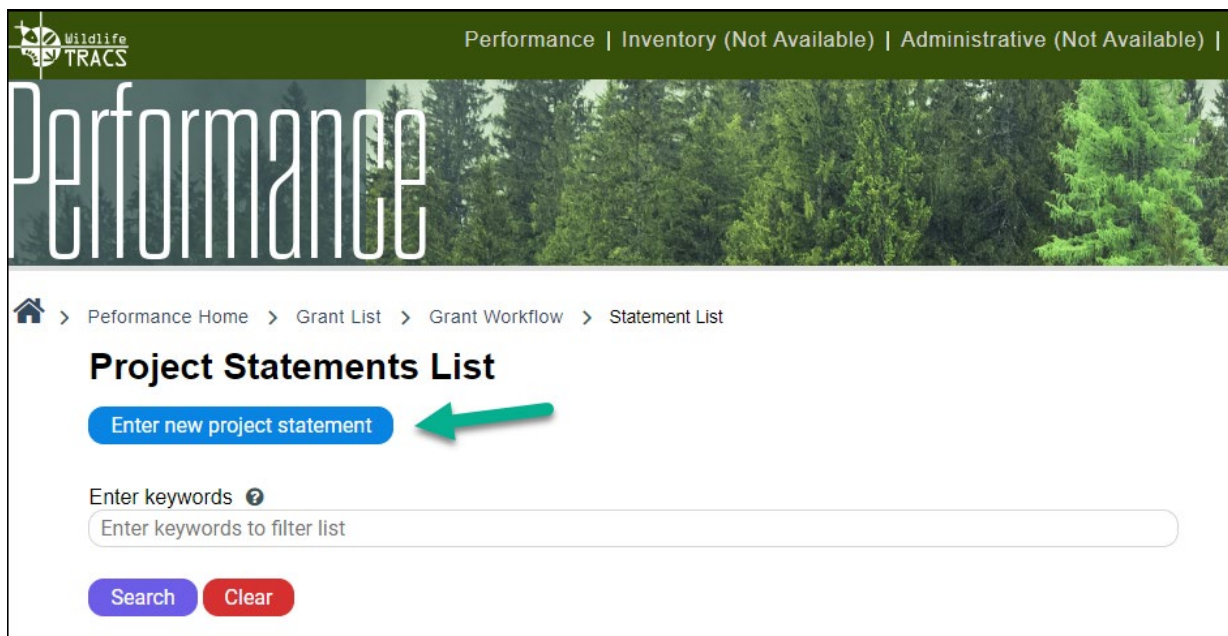
The screenshot shows the TRACS Performance section. The top navigation bar includes links for Performance, Inventory (Not Available), Administrative (Not Available), and User Management. The main header area displays the word 'Performance' over a background image of trees. On the left, a sidebar contains three menu items: '1: Proposal Details' (highlighted), '2: Programs', and '3: Additional Information'. The main content area is titled 'PROPOSAL DETAILS' and contains a form with the following fields:

- Descriptive Title**: A text input field containing 'AZ Comprehensive Management System'. Below the field, it says 'count/max: 34/1000'.
- SAP/PO (FBMS) # (if available)**: A text input field containing 'A##AA####'.
- Recipient Grant ID (optional)**: A text input field containing 'Recipient Grant ID'.
- Recipient Location**: A dropdown menu with 'AZ - Arizona' selected.
- Are the activities under this grant Comprehensive Management System (CMS) or project-based?**: A radio button question. The 'CMS' option is selected, and the 'Project-Based' option is unselected.
- Grant Start Date**: A date input field containing '06/01/2020'.

2. After completing the grant proposal, the grant workflow page opens. Click on "Add/Edit Project Statements".



3. Click "Enter new project statement".



4. In TRACS the following form is required for each project statement in a CMS grant. Fill out the **General Info** page.

The screenshot shows the 'AZ Comprehensive Management System (CMS)' interface. On the left is a green sidebar with two buttons: '1: General Info' (highlighted) and '2: Objectives'. The main content area is titled 'GENERAL INFO' and contains the following fields and instructions:

- Instruction:** Select the primary location where the proposed grant activities will be accomplished. Select the entire state/country/locale or specific location to include locales.
- Title:** A text input field with a character count 'count/max: 0/1000' and a 'Copy Grant Title' link.
- Geographic Location:** A section containing:
 - General Location:** A dropdown menu currently showing 'Arizona'.
 - Select one or more detailed locations (Optional):** A checkbox.
 - Describe location:** A section with a 'Not Applicable' checkbox and a text area with the placeholder 'Add Describe your location'.
 - View / Attach Files (optional):** A link.
- Select Group Access:** A dropdown menu showing 'Arizona Game and Fish Commission'.
- Point of Contact:** A search field with the placeholder 'Type To Search' and an 'Add New Contact' button.

At the bottom of the form are two buttons: 'Next Step >>' and 'Save & Exit' (with a 'Cancel' link next to it).

- Title:** Enter the Project Statement Title. Use the "Copy Grant Title" link in the upper right if applicable.
- General Location:** Select the primary state or territory from the drop down list.
- Select one of more detailed locations (optional):** If applicable, check this box to select more detailed locations, such as specific Counties, Wildlife Management Areas (WMAs), etc.
- Describe your location** (optional)
- 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. the state agency and/or division). If you have access to only one group, the application will default to show that group here.
- 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 Business Email Address or click Add Contact if needed.
- Click "Next Step".

5. Enter the objectives for the project statement. For each objective, click "Create New Objective."



Best Practice Tip: TRACS provides grant applicants/recipients with a list of "standard objectives" that streamline performance reporting, increase transparency and demonstrate national accomplishments of the WSFR-administered financial assistance programs. These standard objectives are classified into 14 distinct categories known as "Strategies". Each Strategy has one or more standard objectives, which include a unit of measure, a target date and one or more activity tags that further define the objective. For some activities, the system asks for the target species or target habitat type(s), real property and/or facilities information. Refer to the [TRACS Performance Matrix](#) to select the standardized strategies, objectives and activities for your grant.

The screenshot shows the TRACS Performance page. The top navigation bar includes "Performance | Inventory | User Management" and a user profile icon labeled "YC". The main header area features the word "Performance" in large white letters over a background image of evergreen trees. Below this, the text "AZ Comprehensive Management System (CMS) (CMS)" is displayed. On the left, a green sidebar contains a navigation menu with "1: General Info" and "2: Objectives". The "2: Objectives" tab is active. The main content area is titled "OBJECTIVES" and shows a message: "No objectives have been entered." Below this message is a yellow warning box stating "At least one objective is required." and a blue button labeled "Create New Objective". At the bottom of the form, there are three buttons: "<< Previous Step", "Save & Exit", and "Cancel".

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

This screenshot shows the "1: Create Objective" sub-tab within the "2: Objectives" section. The sidebar on the left now highlights "1: Create Objective" under the "2: Objectives" tab. The main content area provides instructions: "Provide a descriptive title for the objective, select a strategy from the drop down list, then select a predefined objective, and fill in the target date for the objective. If applicable identify one or more Recruitment, Retention, and Reactivation Target for the objective. Visit the [TRACS Resources and Jobs Aids page](#) to view/download the Performance Matrix." The form fields include: "Title" (with a question mark icon) containing the text "Stock 4 million fish by 02/28/2021."; "Strategy" (dropdown menu) set to "Species Stocking"; "Objective" (dropdown menu) set to "Stock fish or wildlife"; "Target Date" (calendar icon) set to "02/28/2021"; and a checkbox labeled "Pertains to R3 (recruitment, retention, reactivation)?" which is currently unchecked. At the bottom, there are three buttons: "Next Step >>" (which also says "Form Updated"), "Finish Objective", and "Cancel".

- 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.

- 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**.



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)**".
- f. Then click "Next Step".
7. Tab "2: Add Activities" opens. Click "**Add an Activity**".

The screenshot displays the Wildlife TRACS Performance interface. At the top, there's a navigation bar with 'Performance | Inventory | User Management' and a user profile icon labeled 'YC'. Below this is a large banner with the word 'Performance' and a forest background. The main content area is titled 'AZ Comprehensive Management System (CMS) (CMS)' and includes a 'Manage Attachments' link. A left sidebar shows a progress indicator with three steps: '1: General Info', '2: Objectives' (which is highlighted), and '3: Add Approach'. Under '2: Objectives', there are three sub-steps: '1: Create Objective', '2: Add Activities' (which is highlighted), and '3: Add Approach'. The main content area for '2: Add Activities' has a title bar 'OBJECTIVES' with a 'Manage Objective Attachments' link. Below this, an information box states: 'Select one or more predefined activities associated with the objective by clicking on the "Add another Activity" button. An activity is a specific descriptor of an action used for grant performance reporting needs.' A 'List of Activities' section follows, showing a message: 'No activities have been entered.' Below this is a yellow warning box: 'At least one activity is required'. There is a blue 'Add an Activity' button. At the bottom, there are navigation buttons: '<< Previous Step', 'Next Step >>', 'Finish Objective', and 'Cancel'.

- **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.

Select one or more predefined activities associated with the objective by clicking on the "Add another Activity" button. An activity is a specific descriptor of an action used for grant performance reporting needs.

Activity Tag Production and stocking for recreation or subsistence purposes

of Individuals
4000000

Principal Investigator (optional)
Type to Search

Identify Targeted Species

Type to Search Custom Species

Species	Source	Target Number	Actions
rainbow trout; steelhead; redband trout (Oncorhynchus mykiss)	ITIS	1000000	
cutthroat trout (Oncorhynchus clarkii)	ITIS	1000000	
brook trout; charr; salter; sea trout; coaster brook trout; aurora trout (Salvelinus fontinalis)	ITIS	1000000	
brown trout (Salmo trutta)	ITIS	1000000	

This activity will require number of individuals by target species in performance reports.

Updated

- 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.



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

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



Best Practice Tip: Note that TRACS does not allow commas in the number field, so make sure to double check that you have entered the correct number of digits.

- 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.

- Some activities also have additional requirements 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”.
- Click “Add Activity to the List” and the list will display.

OBJECTIVES

Select one or more predefined activities associated with the objective by clicking on the "Add another Activity" button. An activity is a specific descriptor of an action used for grant performance reporting needs.

List of Activities

Activity	Activity Tag 2	Details	Validation	Actions
Production and stocking for recreation or subsistence purposes		Output: 4000000 Individuals Targeted Species: <ul style="list-style-type: none"> 1000000-Oncorhynchus mykiss 1000000-Oncorhynchus clarkii 1000000-Salvelinus fontinalis 1000000-Salmo trutta 	● All Data Entered	Edit Activity Remove

⚠ At least one activity is required

Add another Activity

<< Previous Step Next Step >> Form Updated Finish Objective Cancel

8. Click “Add another Activity” to repeat the process and add more activities to the objective as needed. Then, click “Next Step”.
9. 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.**

OBJECTIVES

Enter the Approach for the Objective.

Approach Narrative

Hatchery staff maintain on-site brood stock of native trout species Columbia River Redband Trout (*Oncorhynchus mykiss gairdneri*). For Coastal Cutthroat Trout (*Oncorhynchus clarkii clarkii*) brood fish will be collected from wild stocks. Fish will be collected using boat mounted DC electrofishing or gillnets once surface water temperatures reach 35-40F (typically mid/late February). Once collected, brood fish will be placed onto hauling trucks and immediately transported to their respective hatcheries where they will be quarantined and treated (salt) to minimize mortality and prevent disease or parasite outbreaks. Fish will be artificially inseminated using the "dn" method (Diner et al. 1989). Human chorionic gonadotropin (HCG) may be used to help induce spawning (injections will follow prior accepted View / Attach Files (optional))

⚠ Approach is required

<< Previous Step Form Updated Finish Objective Cancel

10. Click “Finish Objective” to close the Objective workflow and return to the Objectives main page.

11. The objective will display in the list. Note: 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.

Wildlife TRACS Performance | Inventory | User Management

Performance

AZ Comprehensive Management System (CMS) (CMS)

Manage Attachments

OBJECTIVES

List of Objectives

Objective	Strategy	Target End Date	Validation	Actions
Stock 4 million fish by 02/28/2021.	Species Stocking	2/28/21	All Data Entered	Edit See Activities Remove

At least one objective is required.

Create New Objective

<< Previous Step Form Updated Save & Exit Cancel

TRACS Home | Help Desk: 1-844-408-7227 (1-844-40-TRACS)
U.S. Fish and Wildlife Service Home Page | Department of the Interior | USA.gov | About the U.S. Fish and Wildlife Service | Accessibility | Privacy | Notices | Disclaimer | FOIA

12. Continue to add objectives as needed by clicking "Create New Objective" and repeating the workflow steps (5-11). Then click "Save & Exit".

Wildlife TRACS Performance | Inventory (Not Available) | Administrative (Not Available) | User Management

Performance

AZ Comprehensive Management System (CMS)

Manage Attachments

OBJECTIVES

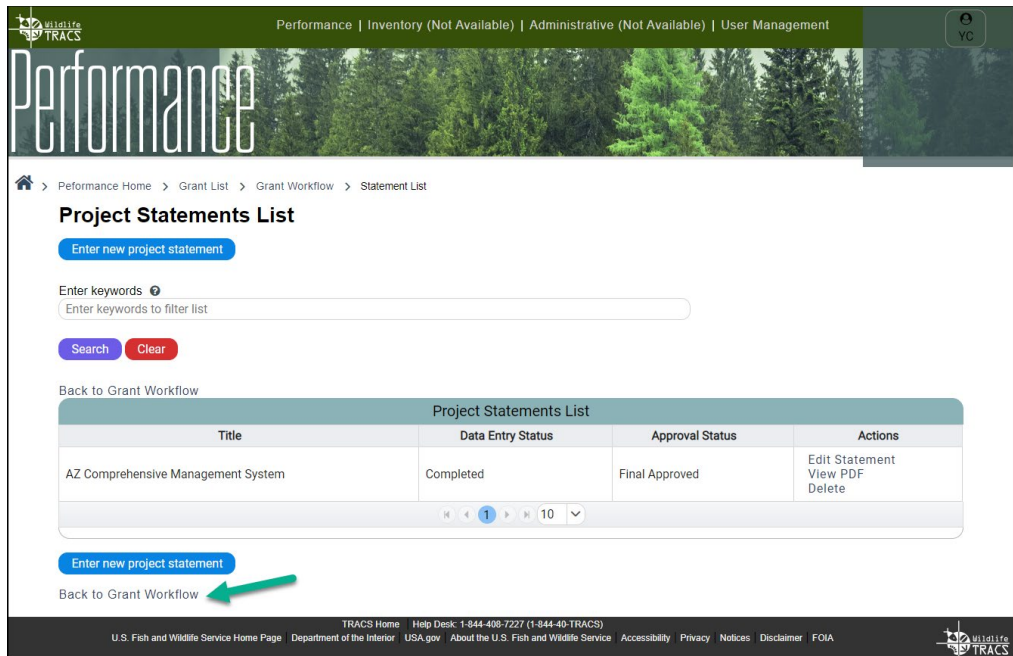
List of Objectives

Objective	Strategy	Target End Date	Validation	Actions
Coordinate and administer the CMS grant by 06/30/2021.	Coordination and Administration	6/30/21	All Data Entered	Edit See Activities Remove

Create New Objective

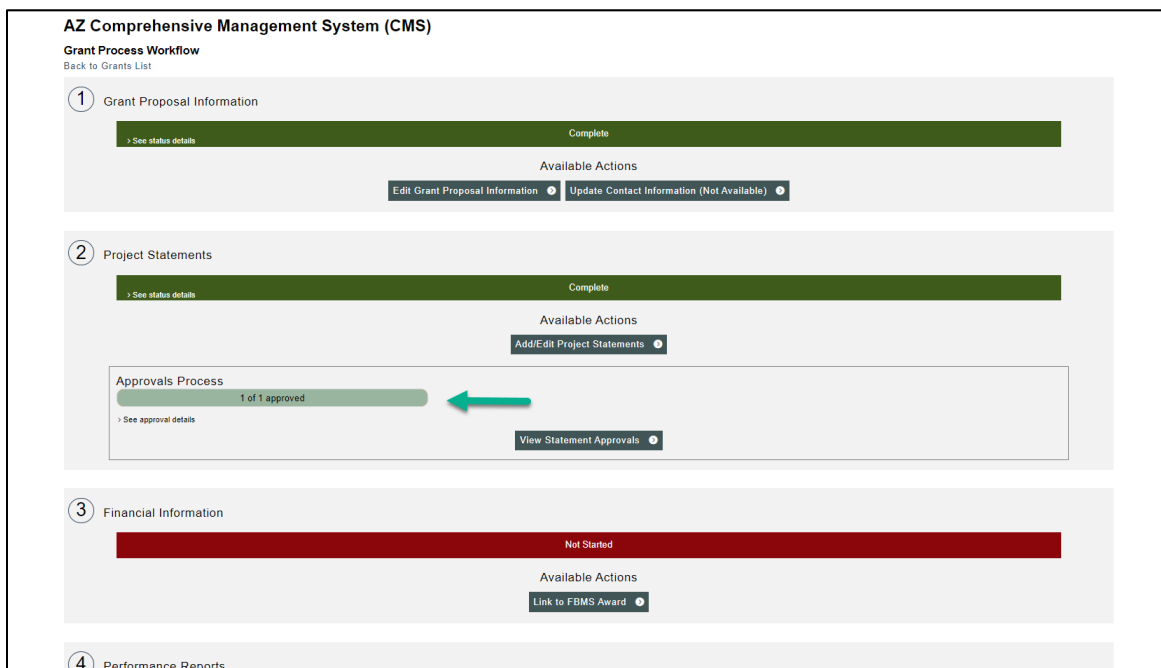
<< Previous Step Save & Exit Cancel

13. The Project Statement List page opens. To enter another project statement, repeat the process in steps 3-13. Then, click the "Back to Grant Workflow" link.



14. The grant workflow page opens.

Note: CMS project statement(s) do not need to go through the project statement approvals process. Once all of the information in the project statement is complete, the approvals process bar will display in green and "approved". All CMS project statements will automatically have the "final approved" status. Unlike a project-based grant, CMS project statements may still be edited with the "final approved status" until performance reporting data has been entered.



15. The "federal approver" role is responsible for completing "Step 3: Financial Information" by attaching the FBMS Award to the grant and completing the funding information.

16. Once the Financial Information has been entered, it will display in green as “Complete”. At that point, the “data editor” role can select “Enter Performance Reports”. Refer to “Lesson 4a: Enter Performance Report” for more details.

The screenshot shows the TRACS system interface. At the top, there's a section for 'Financial Information' which is marked 'Complete' with a green bar. Below it, an 'Available Actions' box states 'There are no actions available for your role'. The main section is 'Performance Reports', which is marked 'Not Started' with a red bar. Under 'Performance Reports', there's an 'Available Actions' list with a button 'Enter Performance Reports' highlighted by a green arrow. Below this, there's an 'Approvals Process' section showing '0 of 0 approved' and a 'View Performance Report Approvals (Not Available)' button. At the bottom, there's a 'Back to Grants List' link and a footer with various links and the TRACS logo.

- The Performance Report Questionnaire will have an additional question for CMS States to complete:

Q7 For CMS States only: If the grant is a CMS, has the state submitted an update report every 3 years detailing that the CMS components 1) inventory and scanning; 2) strategic plan; 3) operational plan; and 4) evaluation and control have been reviewed and summaries included which provide detailed review results and recommendations?

☒ Yes
☐ No

[Add Comments](#)

[View / Attach Files \(optional\)](#)

17. A performance report is required for each period of performance and bundles together all of the project statements. Each performance report will go through the approval process separately. Refer to “Lesson 4b: Performance Report Approvals” for more details.



Best Practice Tip: Use the Copy Forward function to copy a CMS grant in the future (see [Lesson 2e Copy Forward](#) for more information). 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.