Comprehensive Management System (CMS) TRACS Job Aid

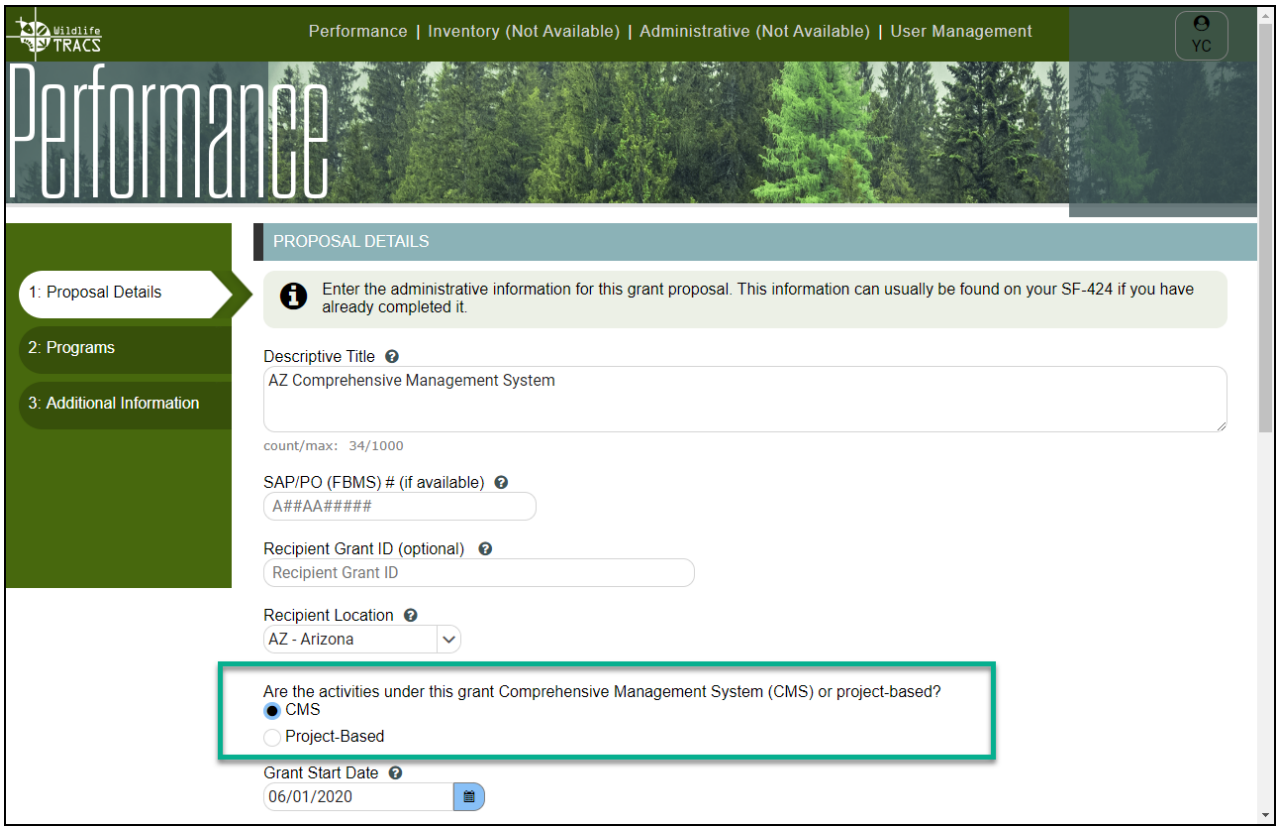
Last Updated 11/9/2021

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

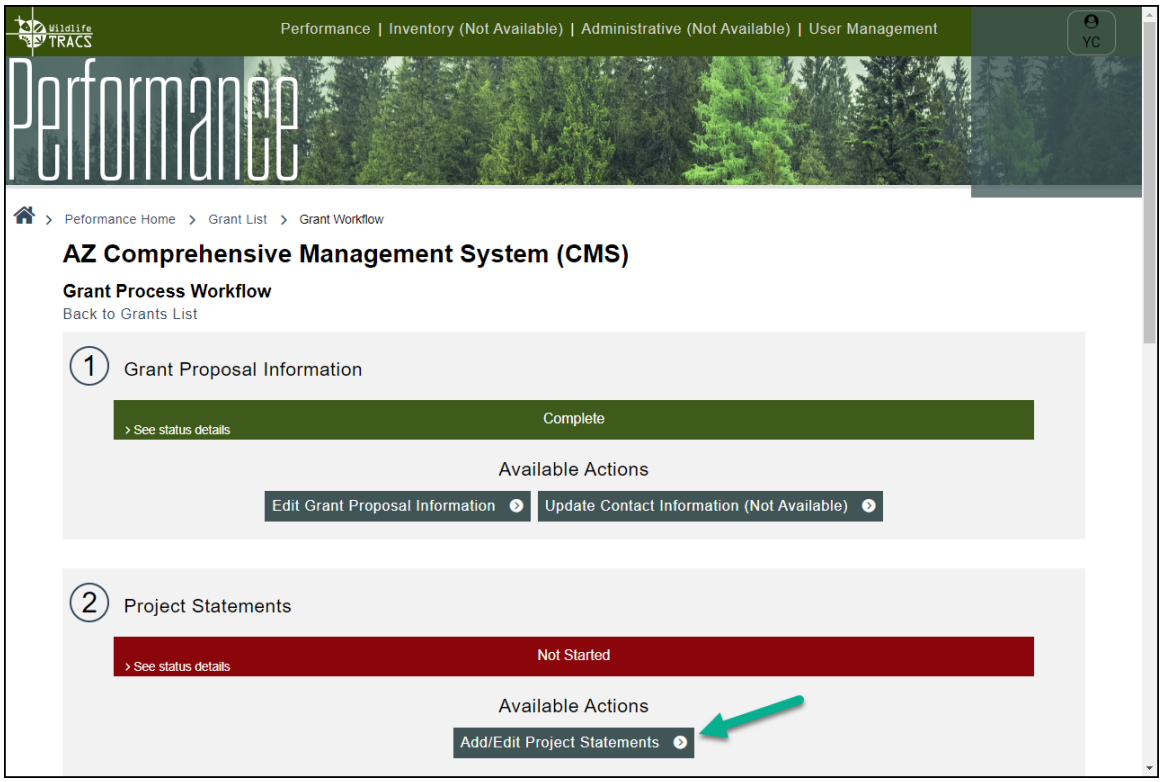
1. The 'Performance Data Editor' role is responsible for entering the grant information into TRACS.

    - Enter the Grant Proposal following the same steps as any other grant type (refer to "Lesson 2b: Enter Grant Proposal" for more details).

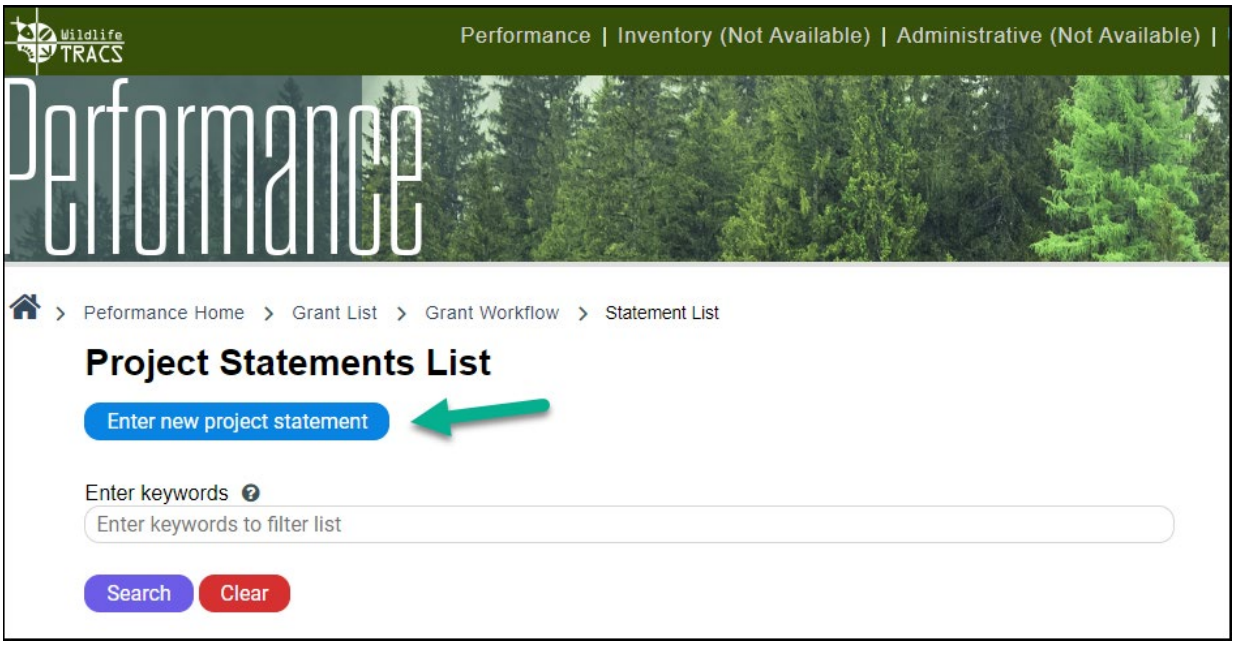
    - CMS states (Arizona, Ohio, Tennessee, Wisconsin and Wyoming) will have an additional question: "**Are the activities under this grant Comprehensive Management System (CMS) or project-based?**"



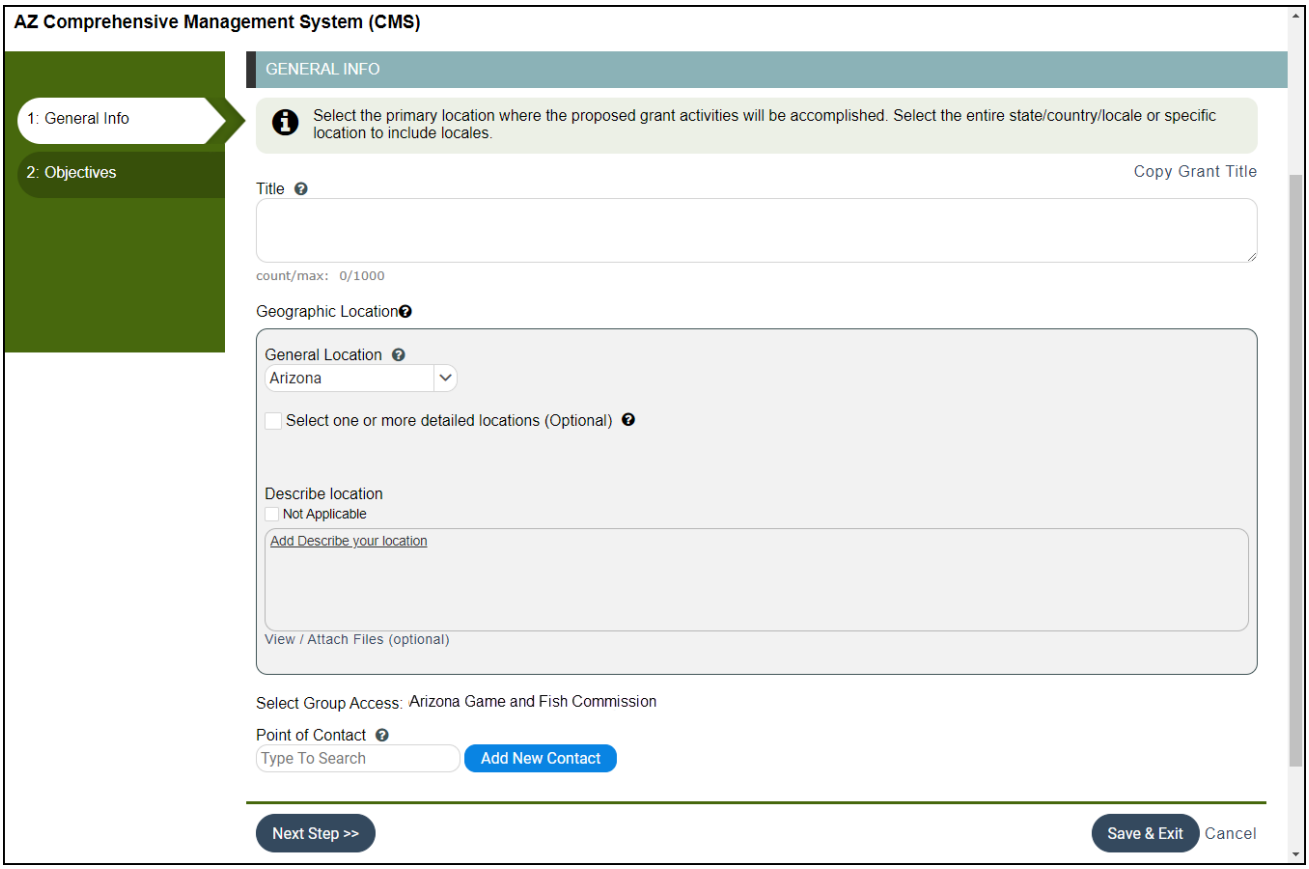
2. After completing the grant proposal, the grant workflow page opens. Click on "Add/Edit Project Statements".



3. Click "Enter new project statement".



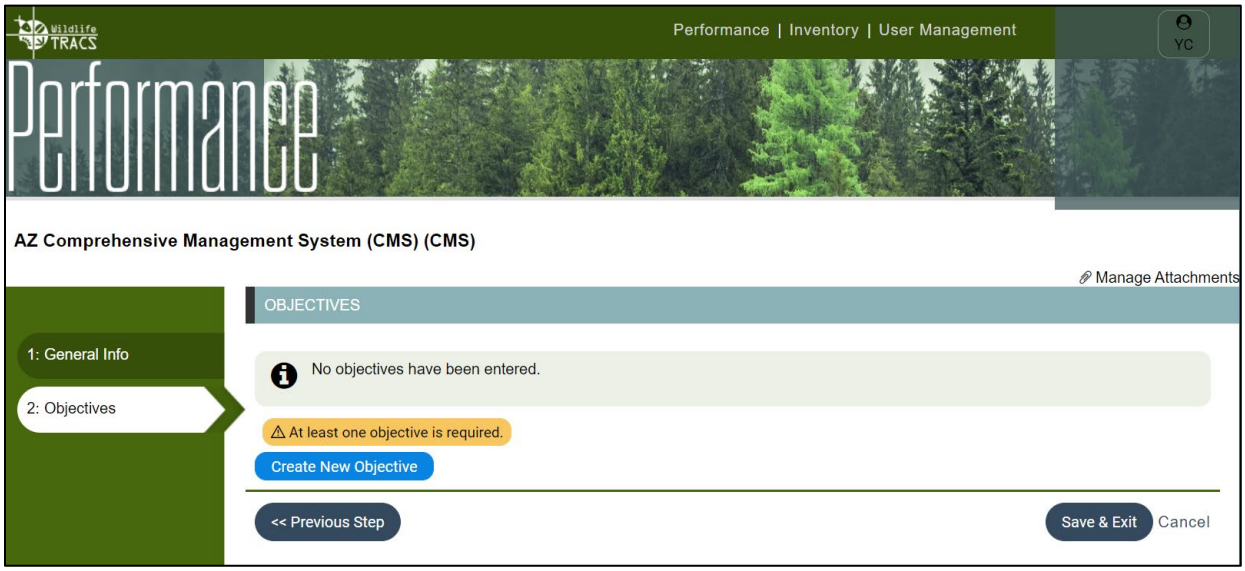
4. In TRACS the following form is required for each project statement in a CMS grant. Fill out the **General Info** page.



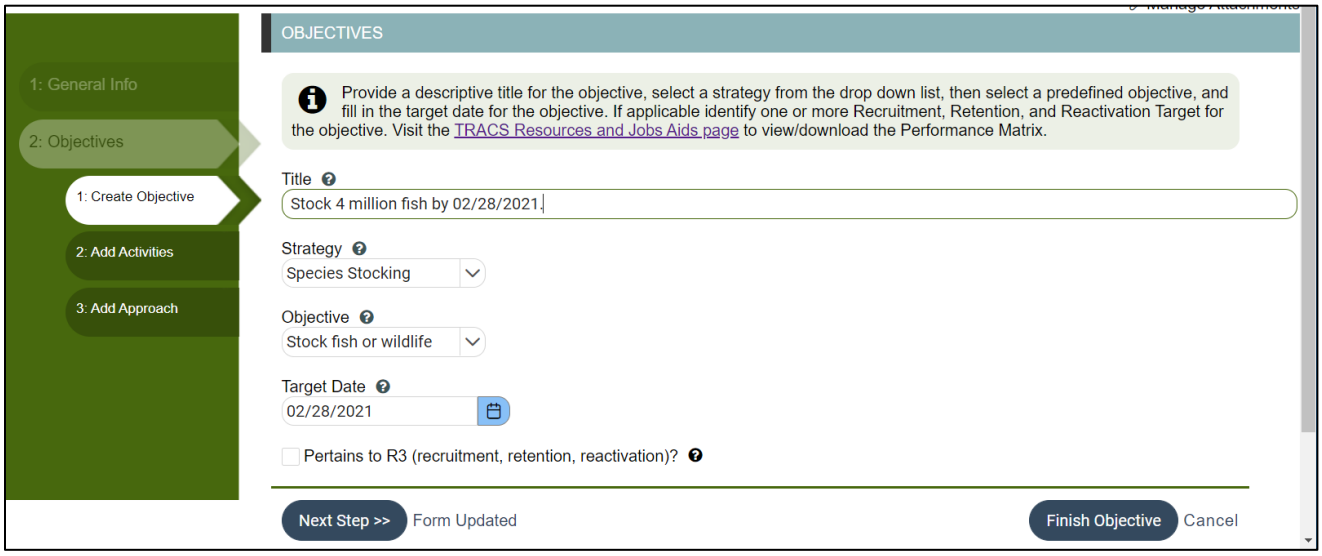
a. **Title**: Enter the Project Statement Title. Use the "Copy Grant Title" link in the upper right if applicable.
b. **General Location**: Select the primary state or territory from the drop down list.
c. **Select one of more detailed locations (optional)**: If applicable, check this box to select more detailed locations, such as specific Counties, Wildlife Management Areas (WMAs), etc.
d. **Describe your location** (optional)
e. **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.
f. **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.
g. 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.



6. 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.

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.

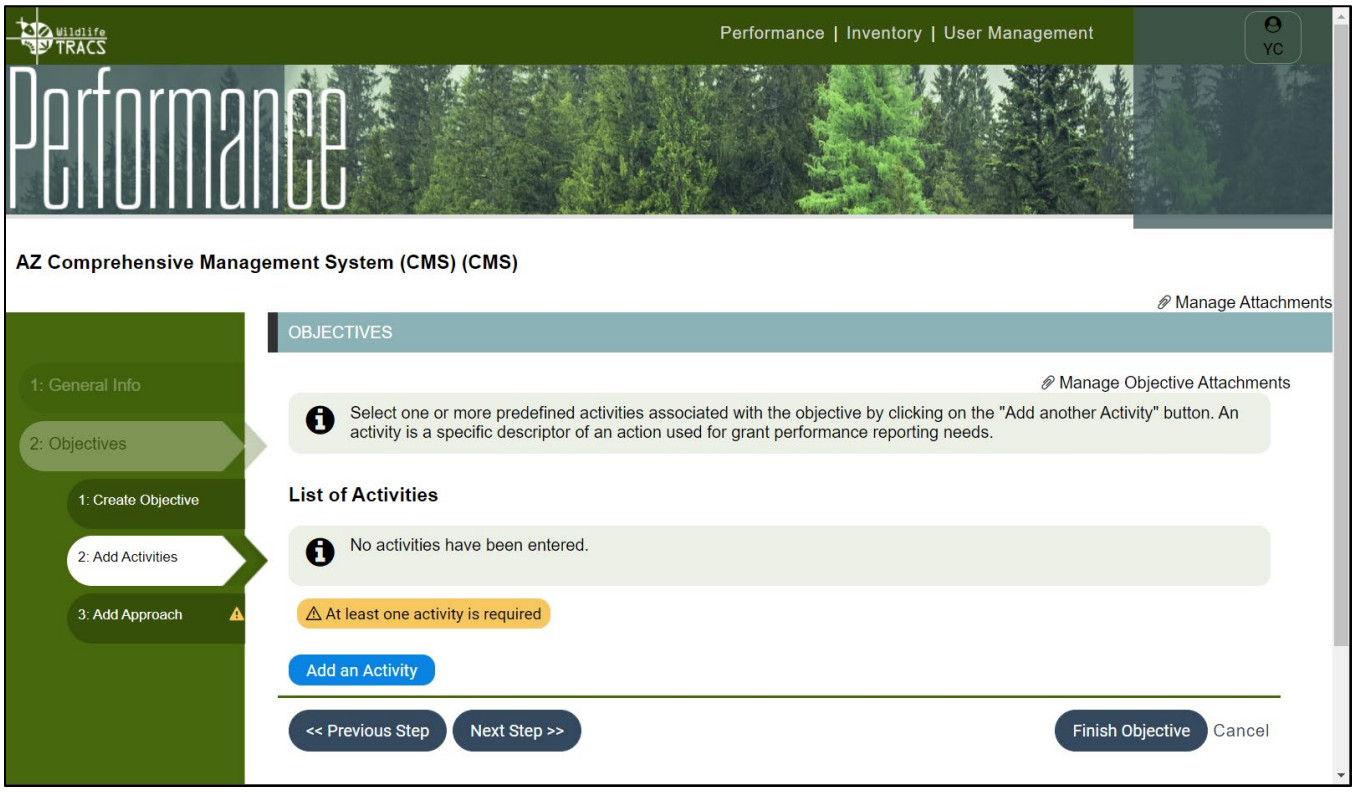
d. Enter the **Target Date**.

> **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.

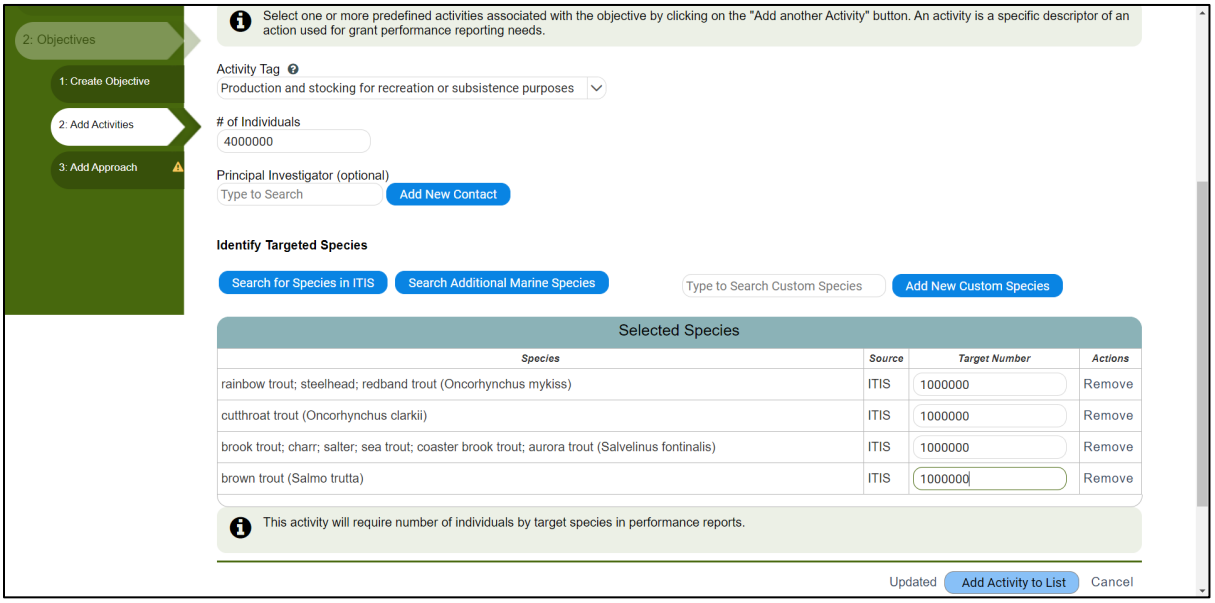
e. If applicable, check the box "**Pertains to R3 (recruitment, retention, or reactivation)**".

f. Then click "Next Step".

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



- **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.



- 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.

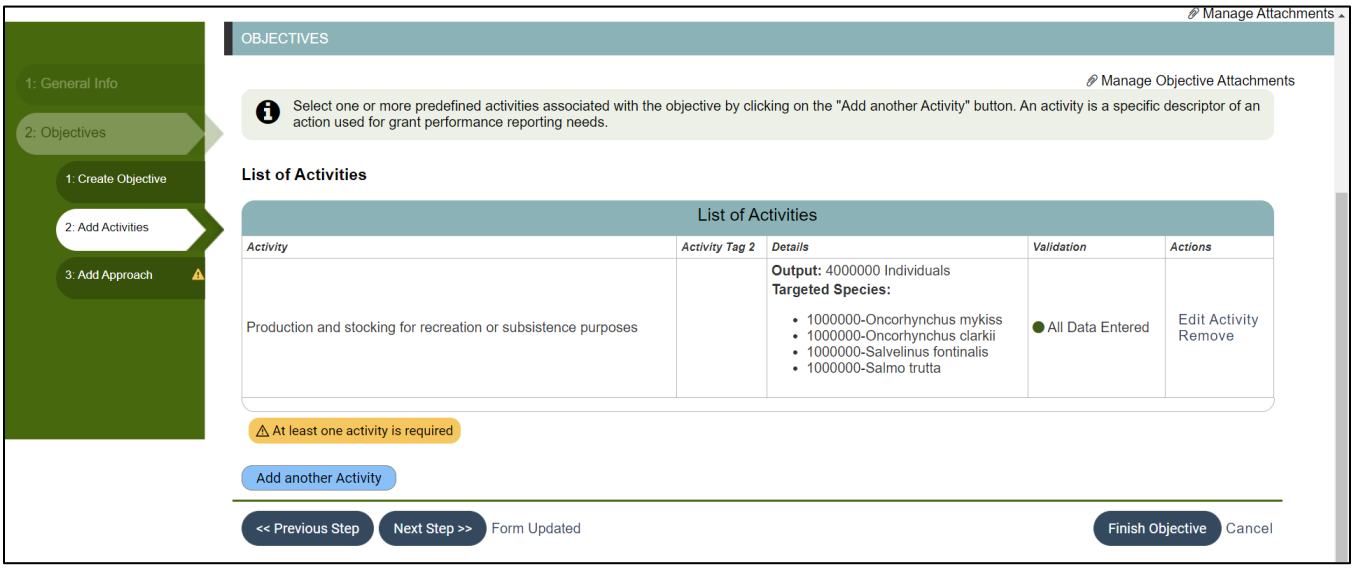
Best Practice Tip: Note that TRACS does not allow commas in the number field, so make sure to double check that you have entered the correct number of digits.

- 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 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".

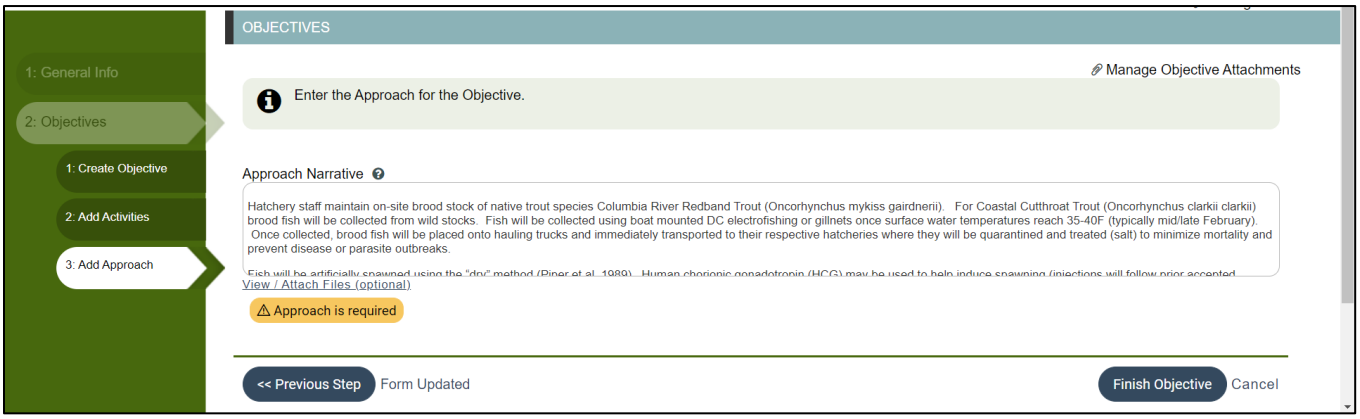
- Click "Add Activity to the List" and the list will display.



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

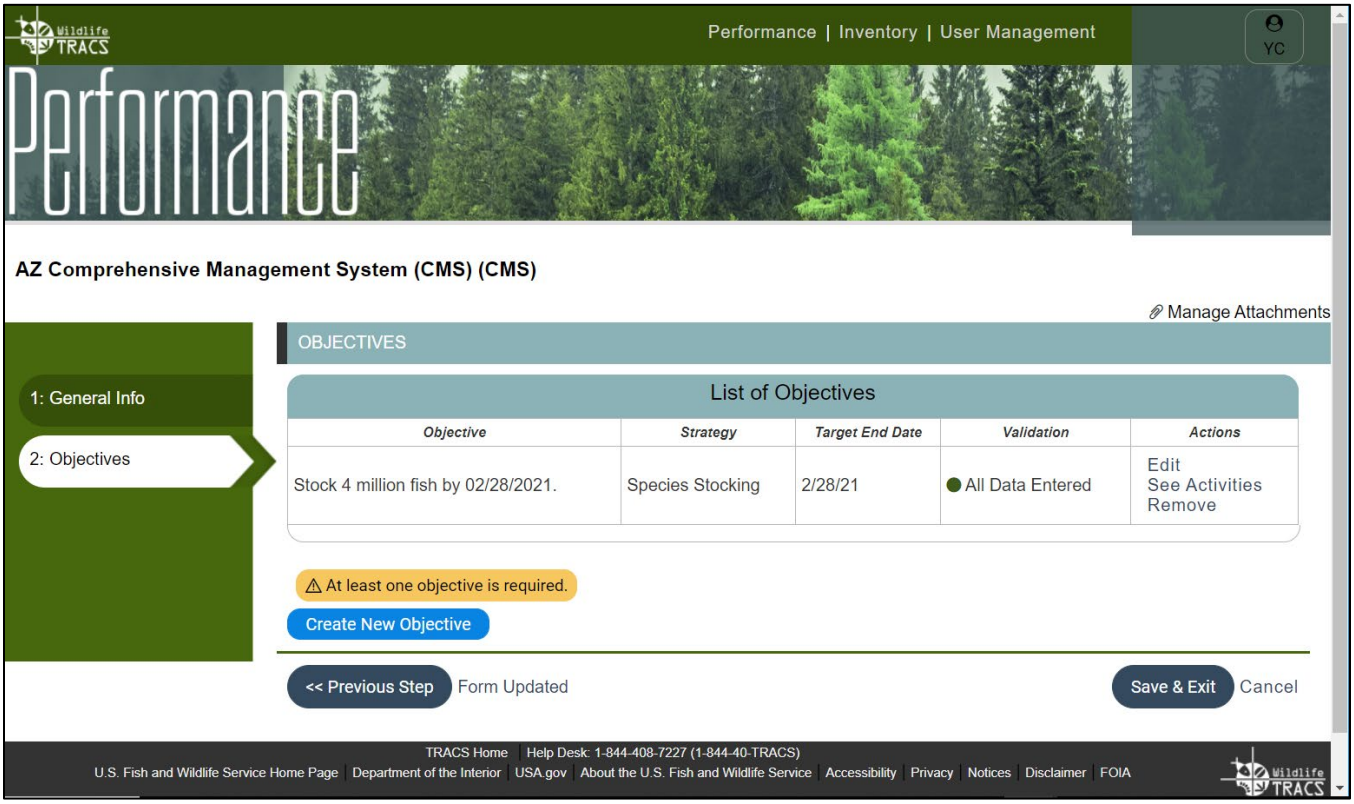
9. The Approach tab opens. Enter or copy/paste the **Approach** for this objective.

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.**

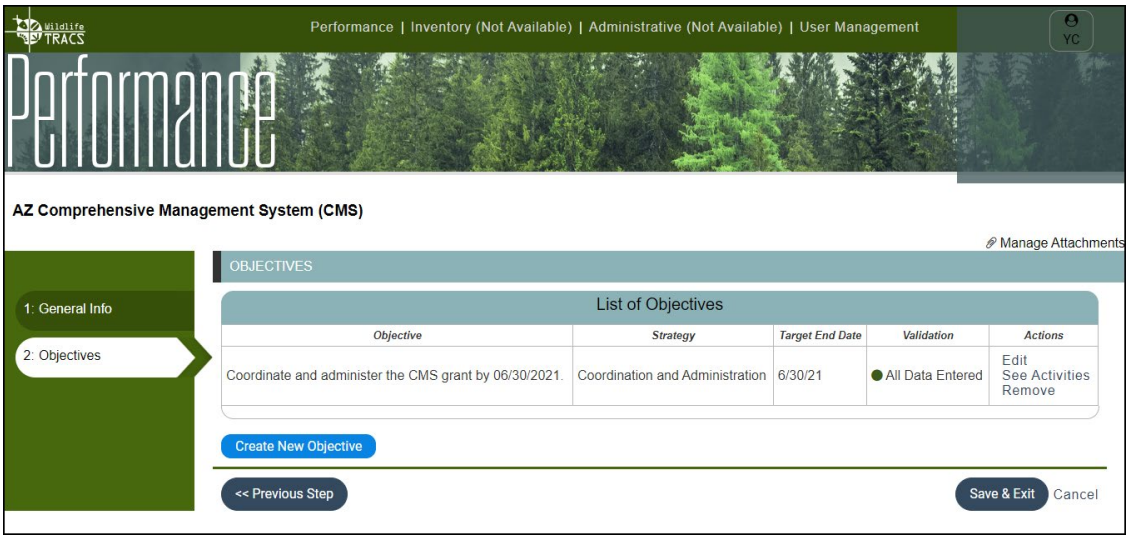


10. Click "Finish Objective" to close the Objective workflow and return to the Objectives main page.

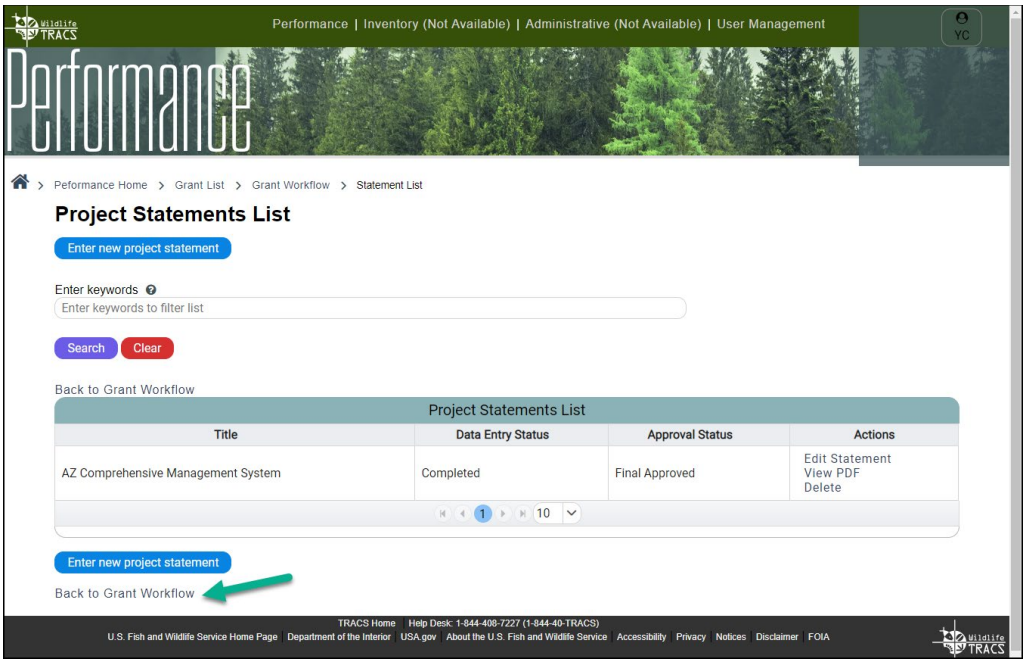
11. The objective will display in the list. Note: If any items are missing, the validation column will display the number of missing items. Click on it to see a pop-up box with the missing item(s) details. The "Go" link(s) will open the corresponding page.



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

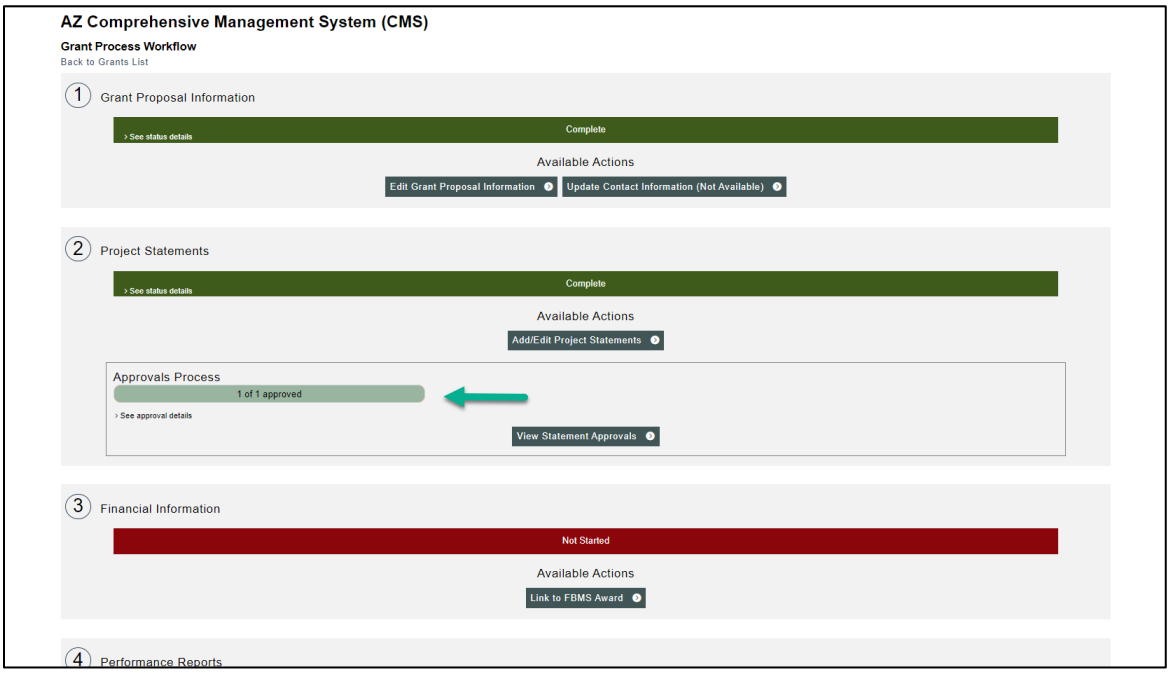


13. The Project Statement List page opens. To enter another project statement, repeat the process in steps 3-13. Then, click the "Back to Grant Workflow" link.



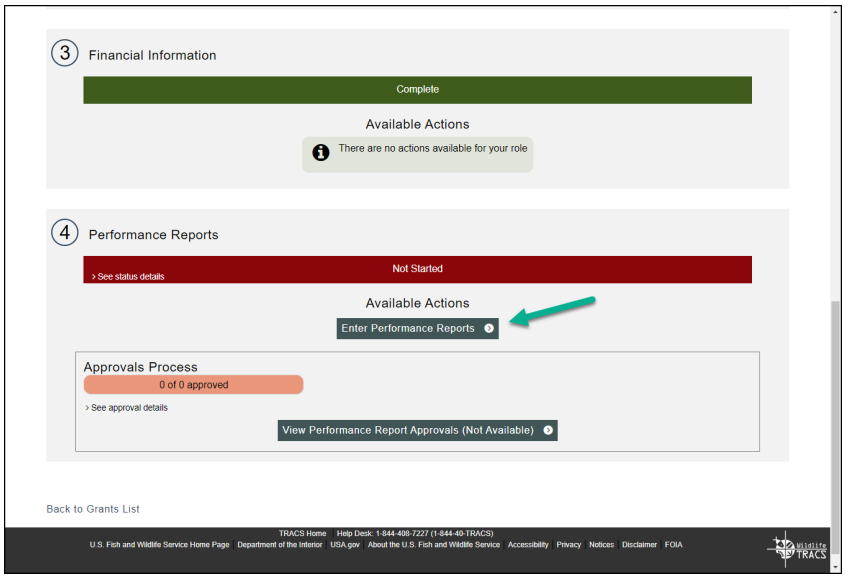
14. The grant workflow page opens.

    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.

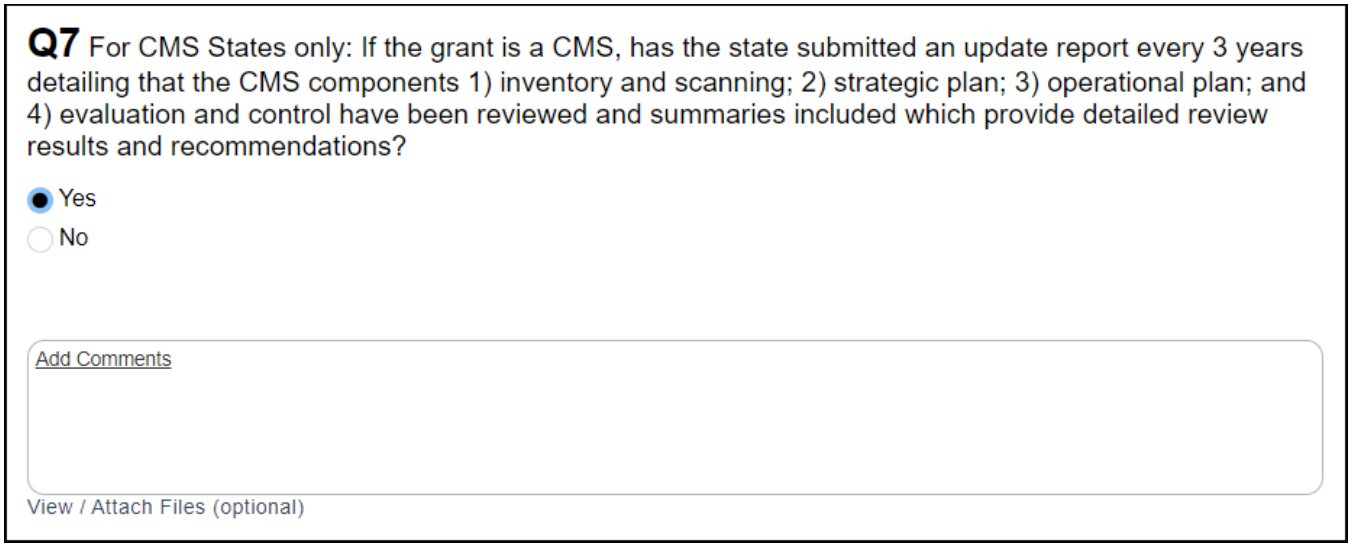


15. The "federal approver" role is responsible for completing "Step 3: Financial Information" by attaching the FBMS Award to the grant and completing the funding information.

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



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.