TRACS Matrix Changes and Legacy Objectives Job Aid
Updated 03/08/2024

The TRACS Performance Matrix lists the standardized strategies, objectives and activities that meet grant requirements. Applicants should refer to the Performance Matrix and related tools to determine what strategy-objective-activity combination(s) should be selected for their objectives and the reportable metrics that will be required during performance reporting.

It is important to note that the matrix and related tools are updated periodically under the direction of the TRACS Working Group, so it is best to access the Matrix and related tools via the training portal here: https://wsfrtraining.fws.gov/mod/page/view.php?id=216&forceview=1

Please ensure you have the latest version of the Matrix to reference and review the Matrix Revision Log to see the list of changes and revisions.

The Working Group approved changes to strategies, objectives and/or activities (including tag 1s or 2s) are reflected in TRACS for <u>new</u> projects entered in the system. Objectives that were entered prior to Matrix changes remain <u>as is</u> for reporting, unless the user decides to edit them (which may require rescinding approvals or an amendment for the applicable project statements).

Option 1: Report on the legacy objectives

Legacy objectives are not changed in the system to match the current Matrix, so they are tagged with "(legacy)" at the activity level.

Performance Report Summary Page displays the tag "legacy" for activities entered prior to the Matrix changes to this objective type.

Legacy objectives do not need to be updated to match the Matrix changes unless otherwise specified. Reporting will reflect the old version of the Matrix. Please consult with your Regional Office grant specialists and/or TRACS Working Group members for guidance.

Note that this option has the potential for some data loss for national reporting rollups and data calls. Legacy objectives may not be included in national rollup reports using the updated Matrix format since the data may not be specific enough to meet the reporting criteria.

Option 2: Update the objectives at the project statement level

The Performance Data Editor may choose to update their legacy objectives to match the current Matrix so that the changes are reflected in the performance report(s).

1. To edit the objectives, the project statement must have the status of "Statements Awaiting Completion" or "Awaiting Non-Federal Review and Submission". If the project statement has the status of "Final Approved" or "Awaiting Federal Approval", the Federal Approval will need to rescind approvals, or the amendment process may be used.

   - For instructions on how to rescind approvals or enter an amendment, refer to TRACS eLearning Course 3: https://wsfrtraining.fws.gov/course/view.php?id=14.

   - Note that if the performance reporting process has been started, additional steps will be needed to clear the report in order to make changes at the project statement level - review the TRACS Amendment after Reporting Started Job Aid.

2. Once the project statement has the status of "Statements Awaiting Completion" or "Awaiting Non-Federal Review and Submission", the Performance Data Editor will edit the project statement and open page 3: Objectives, then select 'Edit' for the applicable objective(s).

3. When editing an objective, tab '1: Create Objective' will have the strategy and objective greyed out until the activities are removed. Select "Next Step".

4. On tab '2: Add Activities', make a note of the legacy activities displayed and then select "Delete" for each activity and confirm the deletion by typing "DELETE" in the pop-up screen.

5. Once the activities have been deleted, select "Previous Step".

6. Update the objective name, strategy and/or objective as needed. Then select "Next Step".

7. Select "Add Activity" to re-enter the activity information.

8. The Activity Tags page will display the current Matrix options. Add the tag(s) that apply and enter the unit of measure and any additional required information.

9. Review and edit the approach if needed, then continue to update any other activities and objectives as needed.

10. The project statement will need to go through the approvals process again with approval by the Non-federal and Federal approvers. Review Lesson 3a: Project Statement Approvals for more information.

If you need assistance, please contact the TRACS Help Desk by email at tracs-helpdesk@fws.gov or call 1-844-408-7227.