TRACS "Copy Forward" Fields Job Aid

SUMMARY: The "Copy Forward" functionality gives users the option to copy an existing grant and corresponding project statements to a new grant in TRACS. Copying a grant will be a time saver for users who enter 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.

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.

Below is a list of the fields that will copy and the fields that will not copy.

Fields that copy ✓	Fields that do NOT copy ✗
Grant proposal • Grant Descriptive Name (inserts "Copy of" at the start) • Recipient Location • Public Description • TRACS Group • Grant Recipient Contact(s) • Grant Specialist Contact(s) • Program(s) • Organization Type • Conflict of Interest Disclosure • Single Audit Reporting Statement (including EIN)	Grant proposal • Federal Award Number • Recipient Grant ID • Grant Start and End Dates • Indirect Cost Rate • Indirect Cost Statement • No Attachments will be copied

Select which project statement(s) to copy forward
 	
Copied project statements will include:
• Project Statement Name (inserts "Copy of" at start)
• Geographic Location - including General Location, Detailed Location (such as counties or Wildlife Management Areas) and Description of Location
• TRACS Group
• Point of Contact
• Need
• Purpose
• Objectives with:
  ○ Objective Name (inserts "Copy of" at the start)
  ○ Strategy and Standard Objective
  ○ Pertains to R3
  ○ Activities and tags
  ○ Principal Investigator
  ○ Target Species and Habitat(s)
  ○ Approach Narrative
• Results & Benefits
• Budget Narrative
• Equipment Narrative
• Useful Life Narrative
• Multipurpose Grant
• Relationship to Other Grants
• Timeline
	Select which project statement(s) to copy forward
	
	Copied project statements will NOT include:
	• Items in the objectives that do not copy:
	  ○ Target Date
	  ○ Activity Unit of Measure Number
	  ○ Target Number by Species or Habitat
	• No Attachments will be copied