2021 WSFR National Virtual Federal Aid Coordinators Meeting Questions and Answers (Q&A)

Topic/Speaker: TRACS: Introduction, Objective Translation, and Learning Opportunities - Yonah Cohen and Meg Druyor, WSFR Program Accomplishment Reporting Branch

TRACS Login

1. **Lainie Berry: If we registered in previous versions of TRACS do we need to register again?**

   Yes, even if you had a login account for the previous version of TRACS you will still need to register for the new version of TRACS that was released in June of 2020.

2. **Kate Brown: Do we register on the portal or do we contact our Federal Coordinator?**

   All users must register for an account and be approved by their organization's user administrator. Open TRACS here: https://tracs.fws.gov/login. Non-federal users select the 'sign-in with Login.gov', and click the 'Create an account' button. For additional instructions view Lesson 1c Register for TRACS in the WSFR Training Portal.

3. **Robin Kolton: Do we have to register again if we are currently using TRACS?**

   No, if you have a current log in to TRACS you do not need to register again. If you need assistance with logging in, contact the TRACS Help Desk at tracs-helpdesk@fws.gov or call 1-844-408-7227.

WSFR Training Portal

1. **Glenn Therres: Do you need to login to access the eLearning courses or can any of our staff access it?**

   No, you do not need a login to access the WSFR Training Portal. All content on the WSFR training portal is accessible as a guest. If the 'log in' screen opens, click the green 'log in as guest' button.

2. **Nick Wallover: Can someone share the link to the Word document and other guides that we can use to prepare proposals to be translated into TRACS?**

   Lainie Berry: Is there a Word template available for the performance report?

   Yes, Word templates are available for the Grant Proposal & Project Statement(s), the Performance Report and the Performance Questionnaire. A template is available for the CMS (Comprehensive Management Grant) Grant Proposal and Project Statement as well. The templates are available to be downloaded from the TRACS Resources and Job

Aids page in the 'Grant Translation Templates' section (located below the Matrix toolbox).

Grant Solutions

1. **Linda Eastwood: Can you clarify for me how TRACS and Grant Solution will or won't work together.**

   Linda Eastwood: What about Clean Water Vessel [CVA] grants and Boat Infrastructure grants [BIG]... Which do you use TRACS or GrantSolutions or both?

   Paul Dwyer: Can you explain the need for TRAC's when Grant Solutions has PPR's and grant applications?

   Kate Brown: So we still have to use both [TRACS and GrantSolutions] for all proposals?

   TRACS and GrantSolutions are two separate systems and both are required for all WSFR grant programs (including CVA and BIG). TRACS is the Service's electronic performance reporting system and was designed to standardize WSFR grant performance metrics in order to report nationally significant accomplishments more efficiently. GrantSolutions is the Department of the Interior (DOI) financial management software platform that all bureaus (including the U.S. Fish and Wildlife Service) use to award, manage, and closeout grants and cooperative agreements. GrantSolutions is the actual system that applicants use to formally apply for grants and cooperative agreements.

   Information must be entered into TRACS in order for it to serve as the performance reporting system on behalf of the WSFR-administered grant programs. As part of entering information in TRACS, it will produce/generate a Grant Proposal PDF with project statement(s) included, that State fish and wildlife agencies may download and use to include as part of their complete application package when they formally apply for financial assistance in GrantSolutions.

   For performance reporting, once the State fish and wildlife agencies enters information in TRACS, the system will produce a pdf performance report that can then be downloaded and attached as a performance report in GrantSolutions. This will formally satisfy the performance reporting requirements under the grant award. In both TRACS and GrantSolutions, the recipient must wait until the grant has been formally approved in each system before they may begin working on any performance reporting.

   We encourage State agency staff to discuss with their WSFR Regional Office about any Best Management Practices as to when it is most efficient to do what work in each system.

Lainie Berry: Since there is also a submission/approval process for proposals and amendments in Grant Solutions, and a submission process for reports in Grant Solutions, what is our workflow? Do we enter everything into TRACS first, then get the approval there, then generate the PDF in TRACS and submit that to Grant Solutions for approval there?

Formal grant approval occurs in GrantSolutions, not TRACS. Approval in TRACS is WSFR's concurrence that the project statement(s) entered in TRACS matches the official approved project statement(s) in GrantSolutions. The recommended best practice is to use TRACS upfront during the grant application process to generate the grant proposal PDF (which includes all project statements) to be uploaded into Grant Solutions. The Grant Proposal PDF generated from TRACS is complete and utilize the standardized objectives for performance reporting.

Please visit the TRACS and Grant Solutions Best Practice Guidelines and FAQs page for additional information and workflow diagrams.

2. **Lainie Berry What about for competitive grants such as competitive SWG? For those it doesn't make sense to enter it into TRACS first.**

   When applying for discretionary, competitive grants, applicants may choose to enter their grant/project statement information into TRACS prior to formally applying in GrantSolutions, or applicants may choose to wait to enter their grant/project statement information into TRACS once their application has been approved for funding. Both options work.

   WSFR has developed workflow diagrams that walk applicants through the benefits/cons of entering information first into TRACS vs entering information into TRACS after the formal approval of the application. Please visit the TRACS and Grant Solutions Best Practice Guidelines and FAQs page for additional information and workflow diagrams.

   We encourage applicants to read the competitive program's Notice of Funding Opportunity for any specific requirements that may come into play. We also encourage applicants to contact their WSFR Regional Office for guidance and suggestions about when to enter information in TRACS.

Data Entry

1. **Kate Brown: So we use the matrix every time we draft a proposal?**

   Yes, the WSFR program has adopted the use of Standard Objectives that must be used for all WSFR-funded activities. If your application uses alternative or incomplete objectives, you will be unable to enter those objectives in TRACS or complete your performance reports. Use the TRACS Performance Matrix and related tools to develop TRACS-ready objectives. View the Matrix Toolbox on the TRACS Resources and Job Aids page.

2. **Lainie Berry: What do we need to get approved in TRACS? Initial proposal, amendments?**

   TRACS has an approvals workflow for project statements, project statement amendments, performance reports, facility records and adjustments, and real property records and adjustments. To learn more, visit [Course 3 Approvals, Amendments and Award].

3. **Kate Brown: If our federal coordinator has been entering our proposals into TRACS in the past, can we carry over those proposals to our next one as we build it?**

   Grants that have been entered into the new TRACS system (launched June 2020) are available to be copied forward. For more information, view [Lesson 2e Copy Forward].

4. **Joanne Goodwin: If we don't have to enter the number of events, how did that objective have a number in it?**

   All objectives in TRACS have a required unit of measure based on the activity selected. For example, with the strategy "Training and Education" and the objective "Conduct Training Events", TRACS will ask you to select the type of training events (considered the Activity tag), such as 'Hunter Education Events'. The unit of measure is required for the planned number of hunter education training events.

5. **Andrew Barrett: Why wouldn't the unit of measure entry be on the Activity tag 1 page?**

   The unit of measure is entered on the 'Activities' page in the Objective entry workflow in TRACS. For more information, view [Lesson 2c Enter Objectives].

6. **Brenda Bowers: What type of quantifiable information is required in the approach? My question specifically is what type of quantifiable information is REQUIRED in the APPROACH?**

   The approach section is meant to provide a highly detailed, narrative description of the specific activities that will be performed as part of fulfilling the grant objective(s). The applicant should clearly describe all of the methods that will be implemented. The approach section is where the applicant provides detail to demonstrate that they have a planned approach, appropriate procedures, and accepted principles of fish and wildlife conservation and management, research, or education in order to fulfill the grant objectives.

   Quantifiable information may be necessary to include as part of this description (i.e. number of surveys/samples planned, number of fish species reared/stocked, number of education training events, etc).

   If you are unsure as to how much detail to put into the approach section, please contact your WSFR Regional Office staff for guidance.

7. **Joanne Goodwin: Is a survey considered one outing, or the entire season of surveying for a specific species?**

   Kyle Welsh (WSFR Regional Office): It will be variable depending on project. Feel free to circle back with me or your grant specialist after this if you want.

   Ryan Oster (WSFR Training Branch): This answer depends on the project and your specific experimental design. Please reach out to your WSFR Regional Office staff and they should be able to assist you.

8. **Kate Brown: What if your activity isn't listed? I manage CVA, and we do a lot of outreach and education that includes multiple different things such as marina outreach days, advertising, direct outreach. None of these are listed. Also - our proposal will have multiple different strategies. How do we build that?**

   The Performance Matrix includes all kinds of activities that should encompass all types of grant-funded work. We recommend that you use the search (CTRL+F) to look for keywords in the Performance Matrix that might fit. For example, the activities you mentioned may fit under the strategy of "Outreach/Communication" rather than "Training and Education". There are 3 objective options under this strategy: 'Inform/communicate with individuals', 'Participate in or sponsor events', and 'Produce products'. Consult with your WSFR Regional Office staff for additional guidance.

9. **Denise Elowsky: Do we need reiterate everything in the [objective] title since it is also covered in the drop downs?**

   The objective title may be formatted however you choose, however the best practice recommendation is to enter the objective title as "Action verb + unit of measure + target date.", e.g. "Stock 10 million fish by Dec. 31, 2022." Use the Performance Matrix to find the suggested standardized objective title format for your selected strategy. The objective title should help to distinguish between objectives on the 'list of objectives' and in the performance report.

10. **Larry Riley: So a project can have multiple objectives?**

    Each project statement can have as many objectives as needed to achieve the goals of the grant.

11. **Kate Brown: If it takes multiple days to create a proposal, do you have the option to save what you have entered before you submit it?**

    Yes, you have the option to work on your grant proposal and project statement(s) in TRACS over multiple days and save as you go before you submit it for approval.

12. **Kate Brown: In general, we have an introduction paragraph that demonstrates need in our proposal. Is there a place to put this in TRACS?**

    Yes, the introduction paragraph would be a great fit for the 'Public Description' narrative field in the Grant Proposal and/or the 'Need Statement' in the Project Statement.

13. **Lainie Berry: Is everything we enter into TRACS publicly available?**

    No, only limited fields will be displayed to the public. The TRACS Public Viewer website (release date TBD) will display portions of the data to the general public and key stakeholders such as industry, congressional and local government entities. The TRACS Working Group will be carefully vetting which data fields may or may not be displayed on the Public Viewer.

14. **Joanne Goodwin: Do we get to see a view of the whole proposal once we've finished?**

    Yes the Grant Proposal (with all project statements) is available to download as a PDF from TRACS.

<u>Narrative Fields and Attachments</u>

1. **Kate Brown: Why wouldn't the compliance letters for SHPO, NEPA, Section 7 and CZMA be uploaded to TRACS as attachments?**

   Compliance documents are NOT to be uploaded into TRACS. They are required to be uploaded into GrantSolutions as part of the official award management record.

2. **Denise Elowsky: Are there any limitations on what type of documents that can be added to tracs?**

   Attachments are used to upload supporting documentation, such as images, photos, tables, research data, reports, etc. Attachments should not replace the text in a field! The narrative fields in TRACS should be concise but may reference additional supporting attachments. TRACS supports all file types for attachment (PDF, Word, Excel, PPT, image files, etc.) however, the system may time out trying to upload files larger than 50 MB. If you need assistance uploading an attachment, please contact the TRACS Help Desk.

3. **Kate Brown: Can you include a table in Word [in the narrative field]?**

   Denise Elowsky: Oh so you can enter tables right into the dialogue [narrative field] box?

   Yes, a table may be pasted into a narrative field or may also be created directly in the narrative field.

4. **Denise Elowsky: Can you do images [in a narrative field]?**

   No, images may not be added directly to a narrative field, however they can be added as attachments.

5. **Larry Riley: What about 'hot links' [in a narrative field]?**

   Links to webpages may be added in a narrative field. The links will display in the PDF.

6. **Lia McLaughlin: Are attachments included in the pdf of performance reports?**

   A table of attachments is included in the PDF of the grant proposal and performance reports. The table includes links to the attachments, which are stored in TRACS and will open in an internet browser page or download the attachment.

Species

1. **Paul Murakawa: What if the species name changes and the name in TRACS is the "old" name?**

   TRACS uses standard species databases including the Integrated Taxonomic Information System (ITIS) and the Marine Species Database, derived from the "7th Edition Names of Fishes" book published by the American Fisheries Society. The ITIS search is dynamic and retrieves results in real-time. If species information needs to be updated in ITIS, please contact ITIS directly (more information available on the ITIS Data Submission Requirements page).

   If a custom species name needs to be updated, contact the TRACS Help Desk at tracs-helpdesk@fws.gov or call 1-844-408-7227.

2. **Larry Riley: So hybrid species might be in the 'search custom species'? Or in ITIS?**

   The Integrated Taxonomic Information System (ITIS) may contain commonly known hybrid species so always search ITIS first when adding species, then search the 'Marine Species Database', then use the 'Search Custom Species'. Always search all databases before adding a new custom/hybrid species in TRACS. For more information, view Lesson 5a Enter Species Information in the WSFR Training Portal.

3. **Laura Ruman: what if there's not a target species, such as a general fish population survey?**

   For certain activities, the identification of target species is required. The recipient should identify the main, primary target species that would be benefitted from the conservation actions. In the case of general fish population surveys, there is a specific reason why the state fish and wildlife agency is prioritizing to implement such activities. Contact your WSFR regional office for additional guidance if needed.

4. **Julia Geschke: It would be helpful if an N/A button could be added for the targeted species list. There are other occasions, like for some land acquisitions, where there are no targeted species in mind.**

   Target species is not required for Real Property Acquisition and will be removed for that strategy in an upcoming sprint. For the aforementioned reasons, species benefit is one of several potential Acquisition Purposes identified in the real property module. In the meantime, please work with your WSFR regional office to determine which target species should be entered for strategies that require target species.

5. **Stephanie Cunningham: Can you create a custom species list? With multi species activities, are we required to list all species? Ex. an offshore trawl with 50+ species.**

   Activities that require the identification of species should include the main, primary target species that would be benefitted from the conservation actions.

   Dan Hogan (PAR Branch Manager): The capability to build your own re-usable species list that can be applied to different objectives within the grant, or future grants, is functionality that is planned for future development.

6. **Denise Elowsky: Is this [species] information that can be copied forward year to year so once you enter it one year it will fill for the next year?**

   The 'Copy Forward' functionality gives users the option to copy an existing grant and corresponding project statements to a new grant in TRACS. All species will be copied forward from the original project statement(s) that were selected on the copy page. For more information, view Lesson 2e Copy Forward on the WSFR Training Portal.

7. **Amy Silvano Clarity - you can carry forward lists year to year on each grant, but will you be able to "carry" species list over to a different grant project statement? Basically different project statements to another?**

   Lia McLaughlin: Can you copy species [listed in] one objective or activity to another in the same proposal?

   The ability to "carry" species lists from one objective, activity or project statement to another within the same grant is not currently available. See the note from Dan Hogan in question 5.

8. **Rose Stefani Will the copy forward feature exist for Performance Reports, to carry forward an extensive [species] list?**

   Yes, the species that were entered in the project statement will display in the corresponding performance report.

Check out the WSFR Training Portal at https://wsfrtraining.fws.gov/ to view the latest TRACS webinar schedule and register for a session, view the eLearning courses, videos, resources and job aids.

If you would like to schedule a custom webinar training session for your team, please email the training coordinator at yonah_cohen@fws.gov.

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