



TRAC

Transformation Accountability
Center for Mental Health Services

Transformation Accountability (TRAC) Center for Mental Health Services

Annual Goals and Budget Information Review Process

Training Presentation for CMHS Staff

Version 1
March 2011



Objectives

By the end of this presentation, you should:

- Understand the revision process
- Be able to navigate through the GPO Approval screen
- Know how to review grantee Annual Goals & Budget Information



Agenda

- Overview of the TRAC Annual Goals & Budget Information
- Accessing the TRAC System
- Reviewing Annual Goals
- Reviewing Budget Information
- The Revision Process
- Accessing the TRAC Help Desk
- Questions & Answers



Overview

- Purpose
- General Process
 - ✓ Grants awarded on or after 7/1/10 report Annual Goals & Budget information for all years of grant
 - ✓ Grants awarded before 7/1/10 report Annual Goals & Budget information for all years of grant that include July 2010 or later



What are TRAC Annual Goals?

- Grantees are asked to set goals
 - ✓ For all grant years
 - ✓ Specific to TRAC activities
 - ✓ Limited to relevant TRAC modules (IPP and/or NOMs Client-level Measures (Services Activities))
 - ✓ Grantees are encouraged to use pre-approved goals, if applicable



What is TRAC Budget Information?

- Grantees enter budget information for all grant years
- Grantees enter budget information of the following TRAC activities as applicable
 - ✓ NOMs Client-level Measures (Services) Provision
 - ✓ Infrastructure Development Activities
 - ✓ Data Collection, Evaluation, and Performance Measurement and Assessment
 - ✓ Mental Illness Prevention and Mental Health Promotion Activities
 - ✓ Grant Administration
 - ✓ Technical Assistance (TA)



Accessing TRAC

- Web-based system:
 - ✓ <https://www.cmhs-gpra.samhsa.gov/>
- TRAC Help Desk creates user accounts
- TRAC Help Desk offers ongoing assistance



Public vs. Password-Protected Sections

- Public section
 - ✓ Does not require a password
 - ✓ Contains general information about GPRA law and TRAC activities.
- Password-protected section
 - ✓ Requires a password
 - ✓ Is used by grantees to access Annual Goals and Budget Information
- Use privacy practices
 - ✓ Do not post usernames or passwords where others may view them
 - ✓ Do not share usernames and passwords



System Demonstration

- A sharing application will now be used. Once the application is downloaded, the TRAC homepage should appear on your screen.
- If you are not able to view the sharing application, please refer to the screenshots provided in the training slides.



Find Grant Screen



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Development

User: [redacted]
Roles: GPO, Government Project Officer IPP

Home > Data Entry > Annual Goals & Budget

Find Grant

Available Programs

- Child Mental Health Initiative
- Circles of Care
- Earmark- IPP
- Garrett Lee Smith Campus Suicide Prevention C

Selected Programs

> <

GrantID:

Organization Name:

City:

State:

Annual Goal Status:

Find

- Home
- General Information
- TRAC Information
- Contact Us
- Data Entry
- Annual Goals & Budget**
- IPP
- Reports
- Change Password
- Logout



Find Grant Screen

Home > Data Entry > Annual Goals & Budget

Find Grant

Available Programs

Child Mental Health Initiative
Earmark- IPP

Selected Programs

Statewide Family Networks

>
<

GrantID:

Organization Name:

City:

State:

Annual Goal Status:

[Find](#)

	Program	GrantID	Organization Name	City/State/Zip	Status
Select	SFN	A123	Grantee A	Little Rock/Arkansas/72204	Incomplete
Select	SFN	B456	Grantee B	McHenry/Illinois/60051	Ready For Approval
Select	SFN	E645	Grantee E	Lake Oswego/Oregon/97035	Approved
Select	SFN	F897	Grantee F	Bismarck/North Dakota/58504	Update and Resubmit for Approval
Select	SFN	G988	Grantee G	Columbia/Maryland/21044	No Data Entered
Select	SFN	H741	Grantee H	Boston/Massachusetts/02108	No Data Entered



Reviewing Goals and Budget Information



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STAGING

User: _____
Roles: Government Project Officer IPP

Home > Data Entry > Annual Goals & Budget > GPO Approval

Print
Cancel
Save
Previous
Next

Grant #: _____

Save and Quit
Submit To Trac

GPO Approval

Instructions:

Please review all Goals and Budget information submitted by your grantee. Note: Grantees can submit any number, including 0, or no data (shown as blank) as goals.

For each section below select one of the following:

- 1) "I Agree with All..." to agree with all goals for that specific section. All data fields in that section will be marked as agreed with (approved)
- OR -
- 2) "I Disagree with All ..." to disagree with all goals the grantee submitted for that specific section. All data fields in that section will be marked as disagreed.
- OR -
- 3) The "Agree" or "Disagree" radio buttons to agree or disagree with specific goals. Note: this method requires you to indicate agree or disagree for every goal within that specific section.

Then select one of the following to end your review:

- "Save and Quit" to save your data and exit the Annual Goals and Budget information form.
- "Submit to TRAC" to submit your completed review to TRAC.

Note: Once "Submit to TRAC" is selected, the form will be locked and a notification email will be sent to the grantee informing them that either (A) you have agreed with all their goals or (B) certain goals need revision/review. If you need the form to be unlocked, please contact the TRAC Helpdesk.



NOMs Client-level Measures Services Activities Goals

Services

	Previous Year	Current Year		Next Year		Cumulative
Grant Year	(9/30/2009 - 9/29/2010)	(9/30/2010 - 9/29/2011)	(9/30/2011 - 9/29/2012)	(9/30/2012 - 9/29/2013)		
Example Grantee (9/30/2009 - 9/29/2013)	<input type="text" value="62"/> <input type="radio"/> Agree <input type="radio"/> Disagree	<input type="text" value="200"/> <input type="radio"/> Agree <input type="radio"/> Disagree	<input type="text" value="200"/> <input type="radio"/> Agree <input type="radio"/> Disagree	<input type="text" value="200"/> <input type="radio"/> Agree <input type="radio"/> Disagree	<input type="text" value="662"/> <input type="radio"/> Agree <input type="radio"/> Disagree	

I Agree with All Services Goals

I Disagree with All Services Goals



Infrastructure Development Goals

Categories & Indicators	Previous Year	Current Year		Next Year	
	(9/30/2009 9/29/2010)	(9/30/2010 9/29/2011)	(9/30/2011 9/29/2012)	(9/30/2011 9/29/2012)	(9/30/2012 9/29/2013)
Policy Development					
PD1 - The number of policy changes completed as a result of the grant.	0 <input type="radio"/> Agree <input type="radio"/> Disagree	<input checked="" type="checkbox"/>			
Workforce Development					
WD1 - The number of organizations or communities implementing mental health-related training programs as a result of the grant.	1 <input type="radio"/> Agree <input type="radio"/> Disagree	2 <input type="radio"/> Agree <input type="radio"/> Disagree	2 <input type="radio"/> Agree <input type="radio"/> Disagree	2 <input type="radio"/> Agree <input type="radio"/> Disagree	<input checked="" type="checkbox"/>
WD2 - The number of people in the mental health and related workforce trained in mental health-related practices/activities that are consistent with the goals of the grant.	59 <input type="radio"/> Agree <input type="radio"/> Disagree	40 <input type="radio"/> Agree <input type="radio"/> Disagree	10 <input type="radio"/> Agree <input type="radio"/> Disagree	10 <input type="radio"/> Agree <input type="radio"/> Disagree	<input checked="" type="checkbox"/>
Financing					
F1 - The amount of additional funding obtained for specific mental health-related practices/activities that are consistent with the goals of the grant.	37000 <input type="radio"/> Agree <input type="radio"/> Disagree	20000 <input type="radio"/> Agree <input type="radio"/> Disagree	40000 <input type="radio"/> Agree <input type="radio"/> Disagree	50000 <input type="radio"/> Agree <input type="radio"/> Disagree	<input checked="" type="checkbox"/>
F2 - The number of financing policy changes completed as a result of the grant.	0 <input type="radio"/> Agree <input type="radio"/> Disagree	0 <input type="radio"/> Agree <input type="radio"/> Disagree	0 <input type="radio"/> Agree <input type="radio"/> Disagree	1 <input type="radio"/> Agree <input type="radio"/> Disagree	<input checked="" type="checkbox"/>
F3 - The amount of pooled, blended, or braided funding used for mental health-related practices/activities that are consistent with the goals of the grant.	33372 <input type="radio"/> Agree <input type="radio"/> Disagree	50000 <input type="radio"/> Agree <input type="radio"/> Disagree	54000 <input type="radio"/> Agree <input type="radio"/> Disagree	50000 <input type="radio"/> Agree <input type="radio"/> Disagree	<input checked="" type="checkbox"/>
Organizational Change					
OC1 - The number of organizational changes made to support improvement of mental health-related practices/activities that are consistent with the goals of the grant.	3 <input type="radio"/> Agree <input type="radio"/> Disagree	4 <input type="radio"/> Agree <input type="radio"/> Disagree	2 <input type="radio"/> Agree <input type="radio"/> Disagree	2 <input type="radio"/> Agree <input type="radio"/> Disagree	<input checked="" type="checkbox"/>
Accountability					
A1 - The number of organizations making changes to accountability mechanisms in order to improve mental health-related practices/activities that are consistent with the goals of the grant.	1 <input type="radio"/> Agree <input type="radio"/> Disagree	2 <input type="radio"/> Agree <input type="radio"/> Disagree	2 <input type="radio"/> Agree <input type="radio"/> Disagree	2 <input type="radio"/> Agree <input type="radio"/> Disagree	<input checked="" type="checkbox"/>
A2 - The number of organizations that regularly obtain, analyze, and use mental health-related data as a result of the grant.	2 <input type="radio"/> Agree <input type="radio"/> Disagree	<input checked="" type="checkbox"/>			
A3 - The number of communities that establish management information/information technology system links across multiple agencies in order to share service population and service delivery data as a result of the grant.	1 <input type="radio"/> Agree <input type="radio"/> Disagree	<input checked="" type="checkbox"/>			
A4 - The number and percentage of work group/advisory group/council members who are consumers/family members.	0 % <input type="radio"/> Agree <input type="radio"/> Disagree	25 % <input type="radio"/> Agree <input type="radio"/> Disagree	50 % <input type="radio"/> Agree <input type="radio"/> Disagree	50 % <input type="radio"/> Agree <input type="radio"/> Disagree	<input checked="" type="checkbox"/>

I Agree with All Infrastructure Goals I Disagree with All Infrastructure Goals



Prevention & Mental Health Promotion Goals

Prevention and Mental Health Promotion Indicators

Categories & Indicators	Previous Year	Current Year	Next Year	
	(9/30/2009 - 9/29/2010)	(9/30/2010 - 9/29/2011)	(9/30/2011 - 9/29/2012)	(9/30/2012 - 9/29/2013)
Awareness				
AW1 - The <u>number of individuals</u> exposed to mental health awareness messages.	200 <input type="radio"/> Agree <input type="radio"/> Disagree	500 <input type="radio"/> Agree <input type="radio"/> Disagree	500 <input type="radio"/> Agree <input type="radio"/> Disagree	500 <input type="radio"/> Agree <input type="radio"/> Disagree
Screening				
S1 - The <u>number of individuals</u> screened for mental health or related interventions.	69 <input type="radio"/> Agree <input type="radio"/> Disagree	200 <input type="radio"/> Agree <input type="radio"/> Disagree	200 <input type="radio"/> Agree <input type="radio"/> Disagree	200 <input type="radio"/> Agree <input type="radio"/> Disagree
Outreach				
O1 - The <u>number of individuals</u> contacted through program outreach efforts.	1000 <input type="radio"/> Agree <input type="radio"/> Disagree			
O2 - The total <u>number of contacts</u> made through program outreach efforts.	200 <input type="radio"/> Agree <input type="radio"/> Disagree	400 <input type="radio"/> Agree <input type="radio"/> Disagree	400 <input type="radio"/> Agree <input type="radio"/> Disagree	400 <input type="radio"/> Agree <input type="radio"/> Disagree
Referral				
R1 - The <u>number of individuals</u> referred to mental health or related services.	180 <input type="radio"/> Agree <input type="radio"/> Disagree	400 <input type="radio"/> Agree <input type="radio"/> Disagree	400 <input type="radio"/> Agree <input type="radio"/> Disagree	400 <input type="radio"/> Agree <input type="radio"/> Disagree
Access				
AC1 - The <u>number and percentage of individuals</u> receiving mental health or related services after referral.	38 % <input type="radio"/> Agree <input type="radio"/> Disagree	50 % <input type="radio"/> Agree <input type="radio"/> Disagree	50 % <input type="radio"/> Agree <input type="radio"/> Disagree	50 % <input type="radio"/> Agree <input type="radio"/> Disagree



Budget Information

Budget Info

Category	Previous Year	Current Year	Next Year		
	(9/30/2009 - 9/29/2010)	(9/30/2010 - 9/29/2011)	(9/30/2011 - 9/29/2012)	(9/30/2012 - 9/29/2013)	(9/30/2013 - 9/29/2014)
Award Amount per Grant Year	170000 <input type="radio"/> Agree <input type="radio"/> Disagree				
Services Provision					
Dollar Amount	50000 <input type="radio"/> Agree <input type="radio"/> Disagree				
Infrastructure Development					
Dollar Amount	40000 <input type="radio"/> Agree <input type="radio"/> Disagree				
Data Collection, Evaluation, Performance Measurement and Assessment					
Dollar Amount	25000 <input type="radio"/> Agree <input type="radio"/> Disagree				
Mental Illness Prevention and Mental Health Promotion Activities					
Dollar Amount	40000 <input type="radio"/> Agree <input type="radio"/> Disagree				
Grant Administration					
Dollar Amount	15000 <input type="radio"/> Agree <input type="radio"/> Disagree				
Technical Assistance					
Dollar Amount	0 <input type="radio"/> Agree <input type="radio"/> Disagree				
Sum of Dollar Amounts per Grant Year	170000	170000	170000	170000	170000
Percentage of Award Amount Accounted for:	100%	100%	100%	100%	100%

I Agree with All Budget Info
 I Disagree with All Budget Info



Submit to TRAC

The screenshot shows the TRAC web application interface. At the top, there is a navigation bar with the TRAC logo, the text 'Transformation Accountability Center for Mental Health Services', a 'STAGING' indicator, and user information: 'User: [redacted]' and 'Roles: Government Project Officer IPP'. Below the navigation bar is a breadcrumb trail: 'Home > Data Entry > Annual Goals & Budget > GPO Approval'. To the right of the breadcrumb are buttons for 'Print', 'Cancel', 'Save', 'Previous', and 'Next'. On the left side, there is a vertical menu with options: 'Home', 'General Information', 'Contact Us', 'Data Entry', 'Annual Goals & Budget' (highlighted), 'IPP', 'Reports', 'Change Password', and 'Logout'. The main content area is titled 'GPO Approval' and contains a section for 'Instructions'. The instructions text reads: 'Please review all Goals and Budget information submitted by your grantee. Note: Grantees can submit any number, including 0, or no data (shown as blank) as goals. For each section below select one of the following: 1) "I Agree with All..." to agree with all goals for that specific section. All data fields in that section will be marked as agreed with (approved) - OR - 2) "I Disagree with All ..." to disagree with all goals the grantee submitted for that specific section. All data fields in that section will be marked as disagreed. - OR - 3) The "Agree" or "Disagree" radio buttons to agree or disagree with specific goals. Note: this method requires you to indicate agree or disagree for every goal within that specific section. Then select one of the following to end your review: • "Save and Quit" to save your data and exit the Annual Goals and Budget information form. • "Submit to TRAC" to submit your completed review to TRAC. Note: Once "Submit to TRAC" is selected, the form will be locked and a notification email will be sent to the grantee informing them that either (A) you have agreed with all their goals or (B) certain goals need revision/review. If you need the form to be unlocked, please contact the TRAC Helpdesk.'



Accessing Help

- Visit the TRAC website for more information at <https://www.cmhs-gpra.samhsa.gov/index/htm>
- Contact the TRAC Help Desk with questions
 - ✓ Phone: 1-888-219-0238
 - ✓ Email: TRACHELP@westat.com