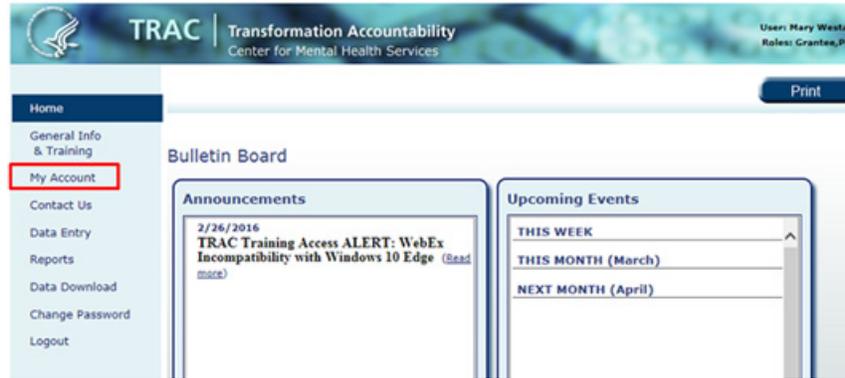


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## TRAC Tip Sheet: Approving New Accounts in TRAC

### Guidance for Grant Project Directors (or Alternate Project Directors)

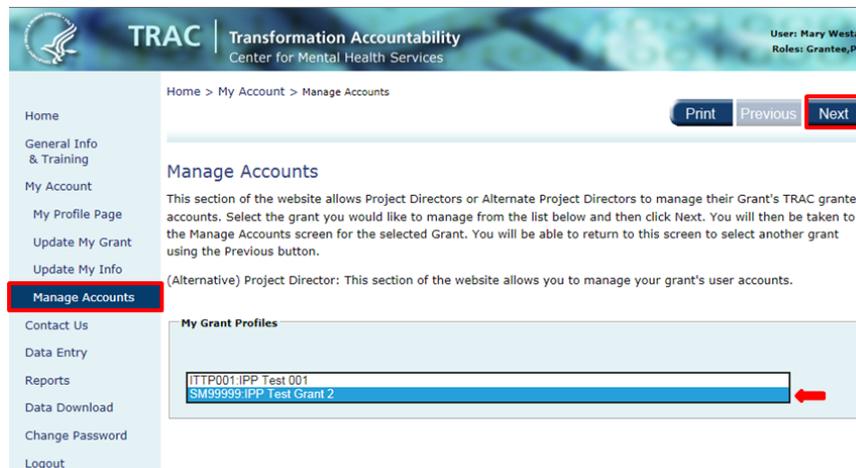
- 1) Once a grantee staff signs up for access to the TRAC system, the Project Director or Alternate Project Director will need to approve the request before the new user can become active. To do this, first sign into the TRAC system and click on the “My Account” link.



- 2) The “My Profile Page” will open. If the PD/APD has access to multiple grants the grant selection page will open first. You do not need to select a grant at this point.



- 3) Click on “Manage Accounts”, and the select grant page will open if you have access to multiple grants. Select a grant if applicable.



- 4) The “Manage Accounts” page will display “My Grant Information”, “Requests for Access”, “Current Users”, and “Inactive Users”.

The screenshot shows the TRAC Manage Accounts page. The left sidebar contains navigation links: Home, General Info & Training, My Account, My Profile Page, Update My Grant, Update My Info, Manage Accounts (highlighted), Contact Us, Data Entry, Reports, Data Download, Change Password, and Logout. The main content area has a breadcrumb trail: Home > My Account > Manage Accounts. Below this are buttons for Print, Previous, and Next. A red box highlights the 'Manage Accounts' section header. Below it is a description: '(Alternative) Project Director: This section of the website allows you to manage your grant's user accounts.' A second red box highlights the 'My Grant's Information' section, which contains the following details:

Grant Program:	IPP Test (IPPT)
Organization Name:	Westat Test
Grant Cohort:	IPPTADB
Grant Title:	IPP Test Grant 2
Grant ID:	SM99999
CMHS Government Project Officer:	GPO Test TA
Grant Start Date:	8/1/2011
Grant End Date:	4/30/2016
TRAC Inactive Date:	2/10/2017
Technical Assistant(TA) Center Name:	Training Support and Advocacy Center (TSAC) for P&As operated by the National Disability Rights Network
Grant Security Key:	33eb7e4ae43f9873d9c84c0f07b05594

Below this is the 'Requests for Access' section, highlighted with a red box. It contains a table with the following data:

Name	Email	User Roles	Action	Comments
New Grantee	NewGrantee@example.org	Alt PD	<input type="radio"/> Approve <input type="radio"/> Disapprove	

Below that is the 'Current Users' section, highlighted with a red box. It contains a table with the following data:

Name	Email	User Roles	Action	Comments
Joe Westat	testwestat@example.org	Grantee User	<input type="checkbox"/> Inactivate	

Below that is the 'Inactive Users' section, highlighted with a red box. It contains a table with the following data:

Name	Email	User Roles	Action	Comments
Donald Example	donaldexample@example.org	Alt PD	<input type="checkbox"/> Reactivate	

At the bottom right of the main content area are 'Submit' and 'Cancel' buttons.

- 5) Under the “Requests for Access” Section, click on the dropdown arrow and select a “User Role” to be assigned to the new user.

This screenshot is similar to the previous one, but the 'Requests for Access' section is highlighted with a red box, and the 'User Roles' dropdown menu is open, showing two options: 'Alt PD' and 'Grantee User'. The 'Grantee User' option is highlighted in blue. The rest of the page content is the same as in the previous screenshot.

- 6) To approve or disapprove the request click on the “Approve” or “Disapprove” radio button under the Action column and click “Submit”.

TRAC | Transformation Accountability  
Center for Mental Health Services

User: Mary Westat  
Roles: Grantee, PD

Home > My Account > Manage Accounts

Print Previous Next

### Manage Accounts

(Alternative) Project Director: This section of the website allows you to manage your grant's user accounts.

**My Grant's Information**

Grant Program: IPP Test (IPPT)  
 Organization Name: Westat Test  
 Grant Cohort: IPPTADB  
 Grant Title: IPP Test Grant 2  
 Grant ID: SM99999  
 CMHS Government Project Officer: GPO Test TA  
 Grant Start Date: 8/1/2011 Grant End Date: 4/30/2016  
 TRAC Inactive Date: 2/10/2017  
 Technical Assistant(TA) Center Name: Training Support and Advocacy Center (TSAC) for P&As operated by the National Disability Rights Network  
 Grant Security Key: 33eb7e4ae43f9873d9c84c0f07b05594

**Requests for Access**

Name	Email	User Roles	Action	Comments
New Grantee	NewGrantee@example.org	Grantee User	<input checked="" type="radio"/> Approve <input type="radio"/> Disapprove	

**Current Users**

Name	Email	User Roles	Action	Comments
Joe Westat	testwestat@example.org	Grantee User	<input type="checkbox"/> Inactivate	

**Inactive Users**

Name	Email	User Roles	Action	Comments
Donald Example	donaexample@example.org	Alt PD	<input type="checkbox"/> Reactivate	

Submit Cancel

Note: Once the request is approved, the grantee will receive emails containing their login information and a temporary password, and a link to the TRAC website.

- 7) If disapproving, enter the reason for the disapproval in the comments box and then click “Submit”.

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Center for Mental Health Services

User: Mary Westat  
Roles: Grantee, PD

Home > My Account > Manage Accounts

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### Manage Accounts

(Alternative) Project Director: This section of the website allows you to manage your grant's user accounts.

**My Grant's Information**

Grant Program: IPP Test (IPPT)  
 Organization Name: Westat Test  
 Grant Cohort: IPPTADB  
 Grant Title: IPP Test Grant 2  
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 CMHS Government Project Officer: GPO Test TA  
 Grant Start Date: 8/1/2011 Grant End Date: 4/30/2016  
 TRAC Inactive Date: 2/10/2017  
 Technical Assistant(TA) Center Name: Training Support and Advocacy Center (TSAC) for P&As operated by the National Disability Rights Network  
 Grant Security Key: 33eb7e4ae43f9873d9c84c0f07b05594

**Requests for Access**

Name	Email	User Roles	Action	Comments
New Grantee	NewGrantee@example.org	Grantee User	<input type="radio"/> Approve <input checked="" type="radio"/> Disapprove	Enter the reason for disapproval

**Current Users**

Name	Email	User Roles	Action	Comments
Joe Westat	testwestat@example.org	Grantee User	<input type="checkbox"/> Inactivate	

**Inactive Users**

Name	Email	User Roles	Action	Comments
Donald Example	donaexample@example.org	Alt PD	<input type="checkbox"/> Reactivate	

Submit Cancel

8) After clicking “Submit” a message box will appear. Click “OK” to continue.

The screenshot shows the TRAC 'Manage Accounts' page. A modal dialog box titled 'Message from webpage' is displayed in the center, asking 'Are you sure you want to submit your data?'. The 'OK' button in the dialog is highlighted with a red rectangle. The background page shows 'My Grant's Information' and two tables: 'Requests for Access' and 'Current Users'.

Note: The approved users will move from the “Requests for Access” table to “Current Users” table.

This screenshot shows the TRAC 'Manage Accounts' page with a red arrow pointing from the 'Requests for Access' table to the 'Current Users' table. The 'Requests for Access' table is empty. The 'Current Users' table contains two entries: 'Joe Westat' and 'New Grantee'. The 'Inactive Users' table contains one entry: 'Donald Example'.

Requests for Access				
Name	Email	User Roles	Action	Comments

Current Users				
Name	Email	User Roles	Action	Comments
Joe Westat	testwestat@example.org	Grantee User	<input type="checkbox"/> Inactivate	
New Grantee	NewGrantee@example.org	Grantee User	<input type="checkbox"/> Inactivate	

Inactive Users				
Name	Email	User Roles	Action	Comments
Donald Example	donaldexample@example.org	Alt PD	<input type="checkbox"/> Reactivate	

- 9) To **inactivate a user**, click the “Inactivate” box under the Action column. Enter any comments in the “Comment” box and then click “Submit.”

The screenshot shows the TRAC 'Manage Accounts' page. The 'My Grant's Information' section includes details like Grant Program (IPP Test (IPPT)), Organization Name (Westat Test), and Grant ID (SM99999). Below this is a table for 'Current Users' with columns for Name, Email, User Roles, Action, and Comments. The row for 'Joe Westat' has 'Grantee User' in the User Roles column, a checked 'Inactivate' checkbox in the Action column, and 'Enter any comments' in the Comments column. A 'Submit' button is located at the bottom right of the page.

- 10) A message box will appear to confirm the action. Click “OK” to confirm.

This screenshot shows the same TRAC 'Manage Accounts' page as above, but with a confirmation dialog box overlaid in the center. The dialog box has a question mark icon and the text 'Are you sure you want to submit your data?'. It contains two buttons: 'OK' and 'Cancel'. The 'OK' button is highlighted with a red box. The background page content is partially obscured by the dialog box.

Note: The inactivated user will move to the “Inactive Users” table and their account will be disabled.

**TRAC | Transformation Accountability**  
Center for Mental Health Services

User: Mary Westat  
Roles: Grantee, PD

Home > My Account > Manage Accounts

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### Manage Accounts

(Alternative) Project Director: This section of the website allows you to manage your grant's user accounts.

**My Grant's Information**

Grant Program:	IPP Test (IPPT)
Organization Name:	Westat Test
Grant Cohort:	IPPTADB
Grant Title:	IPP Test Grant 2
Grant ID:	SM99999
CMHS Government Project Officer:	GPO Test TA
Grant Start Date:	8/1/2011
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TRAC Inactive Date:	2/10/2017
Technical Assistant(TA) Center Name:	Training Support and Advocacy Center (TSAC) for P&As operated by the National Disability Rights Network
Grant Security Key:	33eb7e4ae43f9873d9c84c0f7b05594

**Requests for Access**

Name	Email	User Roles	Action	Comments
New Grantee	NewGrantee@example.org	Grantee User	<input type="checkbox"/> Inactivate	

**Current Users**

Name	Email	User Roles	Action	Comments
New Grantee	NewGrantee@example.org	Grantee User	<input type="checkbox"/> Inactivate	

**Inactive Users**

Name	Email	User Roles	Action	Comments
Joe Westat	testwestat@example.org	Grantee User	<input type="checkbox"/> Reactivate	Enter any comments

11) To reactivate a user, click on the “Reactivate” box in the Action column and click the “Submit” button.

**TRAC | Transformation Accountability**  
Center for Mental Health Services

User: Mary Westat  
Roles: Grantee, PD

Home > My Account > Manage Accounts

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### Manage Accounts

(Alternative) Project Director: This section of the website allows you to manage your grant's user accounts.

**My Grant's Information**

Grant Program:	IPP Test (IPPT)
Organization Name:	Westat Test
Grant Cohort:	IPPTADB
Grant Title:	IPP Test Grant 2
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Grant Security Key:	33eb7e4ae43f9873d9c84c0f7b05594

**Requests for Access**

Name	Email	User Roles	Action	Comments
New Grantee	NewGrantee@example.org	Alt PD	<input type="radio"/> Approve <input type="radio"/> Disapprove	

**Current Users**

Name	Email	User Roles	Action	Comments
New Grantee	NewGrantee@example.org	Alt PD	<input type="radio"/> Approve <input type="radio"/> Disapprove	

**Inactive Users**

Name	Email	User Roles	Action	Comments
Joe Westat	testwestat@example.org	Grantee User	<input type="checkbox"/> Reactivate	Enter any comments
Donald Example	donaldexample@example.org	Alt PD	<input checked="" type="checkbox"/> Reactivate	

Submit Cancel

12) A message box will appear to confirm your selection. Click “OK” to confirm.

Note: The reactivated user will be moved back to the “Current Users” table.

Home > My Account > Manage Accounts

**Manage Accounts**  
(Alternative) Project Director: This section of the website allows you to manage your grant's user accounts.

**My Grant's Information**

Grant Program: IPP Test (IPPT)  
 Organization Name: Westat Test  
 Grant Cohort: IPPTADB  
 Grant Title: IPP Test Grant 2  
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 Grant Security Key: 33eb7e4ae43f9873d9c84c0f07b05594

**Requests for Access**

Name	Email	User Roles	Action	Comments
New Grantee	NewGrantee@example.org	Alt PD	<input type="radio"/> Approve <input type="radio"/> Disapprove	

**Current Users**

Name	Email	User Roles	Action	Comments
Donald Example	dona1dexample@example.org	Alt PD	<input type="checkbox"/> Inactivate	

**Inactive Users**

Name	Email	User Roles	Action	Comments
Joe Westat	testwestat@example.org	Grantee User	<input type="checkbox"/> Reactivate	Enter any comments

Submit Cancel

13) To double check that all staff has been added or removed correctly, click on the “My Profile Page” link from the menu. New users will be listed under the “Staff with access to TRAC” section.

Home > My Account > My Profile Page

**My Profile Page**

**1. My Grant's Information**

Grant Program: IPP Test (IPPT)  
 Organization Name: Westat Test  
 Grant Cohort: IPPTADB  
 Grant Title: IPP Test Grant 2  
 Grant ID: SM99999  
 CMHS Government Project Officer: GPO Test TA  
 Grant Start Date: 8/1/2011 Grant End Date: 4/30/2016  
 TRAC Inactive Date: 2/10/2017  
 NOTE: This is the "grace period" at the end of your grant that you have to complete data entry.  
 Technical Assistance(TA) Center Name: Training Support and Advocacy Center (TSAC) for P&As operated by the National Disability Rights Network  
 Grant Security Key: 33eb7e4ae43f9873d9c84c0f07b05594

**2. Staff with access to TRAC**

The people listed below currently have access to your grant's TRAC data. If you need to add or remove a TRAC user from your grant, please use the Manage Accounts screen.

Grantee Project Director: Mary Westat, MaryWestatExample@westat.com  
 Grantee Alternative Project Director(s): Donald Example, donaldexample@example.org  
 Other Grantee Staff with access to TRAC: Joe Westat, testwestat@example.org  
 New Grantee, NewGrantee@example.org