

Transformation Accountability (TRAC)
Center for Mental Health Services

TRAC User Sign Up Process Guide

For Grantees and GPOs



May 2014

Version 1

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TRAC USER ACCOUNTS

Users have the ability to create, update, and deactivate accounts within the TRAC system. Below we review the step by step instructions by user role in the following order:

- Grantee's Request for New User Access – (page 2)
- Project Director or Alternate Project Director (PD or APD) Approval, Disapproval, Reactivation, and Inactivation – (page 6)

Important Note on Access:

These instructions review obtaining **Grantee or Alternate Project Director** access. For **Project Director access**, you must contact TRAC Help directly and request a *New Project Director Access* form.

SECTION 1: REQUEST FOR NEW ACCOUNTS IN TRAC

Guidance for Grantees and Alternate Project Directors

Gaining access to TRAC is a multiple step process. It involves both the prospective user and the current Project Director or Alternate Project Director of the grant. If you are new to TRAC and looking for Grantee or Alternate Project Director access to the system, you will need to follow the below steps to create a user account.

Grantee Account Creation

Step 1: You will require your grant’s unique Grant Security Key and Grant ID to begin the account creation process. As a security measure, only the Project Director or Alternate Project Director (PD or APD) has access to this information for each grant.

- **Grant Security Key:** Found on the PD or APD’s *My Profile Page* or the *Manage Accounts* page. See sample Grant Security Key below.

| | |
|---------------------|----------------------------------|
| Grant Security Key: | 33eb7e4ae43f9873d9c84c0f07b05594 |
|---------------------|----------------------------------|

- **Grant ID:** Your Grant ID will begin with the letters “SM” and will contain 5 numeric digits.

| | |
|-----------|---------|
| Grant ID: | SM99999 |
|-----------|---------|

Step 2: Once you have obtained the Grant Security Key and the Grant ID from the PD or APD, click on the *Sign Up* link on from the menu on the left side of the screen. This will take you to the *Sign Up* page.



Step 3: On the *Sign Up* page, click either the “CMHS Grantees: Click *here*” link or on *Grantee Sign Up*. This will take you to the *Grantee Sign up Form*.



Step 4: On the *Grantee Sign Up Form* page enter the Grant ID and Grant Security Key and click on the *Lookup* button.

Your Grant Number, Project Director, Grant Title, Organization, Organization’s City (Org City), and Organization’s home state (Org State) will automatically populate based on the information you enter.

| Grant Number | Project Director | Grant Title | Organization | Org City | Org State |
|--------------|------------------|------------------|--------------|-----------|-----------|
| SM99999 | Westat ProjectD | IPP Test Grant 2 | Westat Test | Rockville | MD |

Step 5: Next, on the same screen, enter your contact information in the open text fields and click *Submit*. If you find you have entered incorrect information, click *Cancel*. This will clear the fields and you will be able to re-enter the information.

If you have multiple grants, you will go through this process for each grant.

Sign Up

Grantee Sign Up Form

Enter your Grant ID and Security Key and then click Lookup.

Grant ID: Grant Security Key:

Review to confirm you have entered the correct Grant ID. Repeat these steps if access to another grant is needed.

| Grant Number | Project Director | Grant Title | Organization | Org City | Org State |
|--------------|------------------|------------------|--------------|-----------|-----------|
| SM99999 | Westat ProjectD | IPP Test Grant 2 | Westat Test | Rockville | MD |

Enter contact information below and click **Submit**

First Name:

Last Name:

Email Address:

Confirm Email Address:

Phone # 1: Area Code Number Ext

Phone # 2: Area Code Number Ext

Phone # 3: Area Code Number Ext

Subscribe to Listserv:

Step 6: Once you have successfully submitted your information, you will receive the below confirmation message and an e-mail confirmation of the request.

Home > Sign Up > Grantee Sign Up > Grantee Sign Up Complete

Grantee Sign Up Complete

Your request has been successfully submitted. You will receive an email confirmation shortly. If you have any questions, please contact the TRAC Help Desk at 1-888-219-0238.

An e-mail alert will be sent to the Project Director and Alternate Project Director asking them to either approve or disapprove the request. They will be asked to log-in to the TRAC system and approve the new request for access. Once the request has been approved, you will receive the below email with log-in information and temporary password.

Dear Grantee name:

Your request for access to TRAC for Grant (Grant ID and Name) has been approved. Use your existing username (insert username) and password to access this grant. Below is the link to the TRAC website. If you have any questions or issues accessing TRAC, please contact the TRAC Help Desk at trachelp@westat.com or 1-888-219-0238.

Thank you,

TRAC Help

SECTION 2: APPROVING NEW ACCOUNTS IN TRAC

Guidance for Grant Project Directors and Alternate Project Directors

This section will review the Project Director or Alternate Project Director's (PD or APD) role in account creation and deactivation for new users.

Below are step by step instructions on how to:

- Approve or Disapprove a New Request
- Reactivate a User
- Deactivate a User
- View Summary of Users

User Approval and Activation:

Grant ID and Security Key

PDs and APDs are asked to provide the Grant ID and Security Key to the grantee as a security measure. The Grant ID and Security Key can be found on the *My Profile Page* or the *Manage My Accounts page*. Prospective users will need this information to submit the request and begin the account creation process.

The screenshot displays the 'Manage Accounts' interface. On the left is a navigation menu with 'My Account' and 'Manage Accounts' highlighted. The main content area is titled 'Manage Accounts' and contains 'My Grant's Information' with 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: TA GPO
- Grant Start Date: 8/1/2011
- Grant End Date: 4/30/2014
- TRAC Inactive Date: 6/1/2014
- 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 the information are two tables:

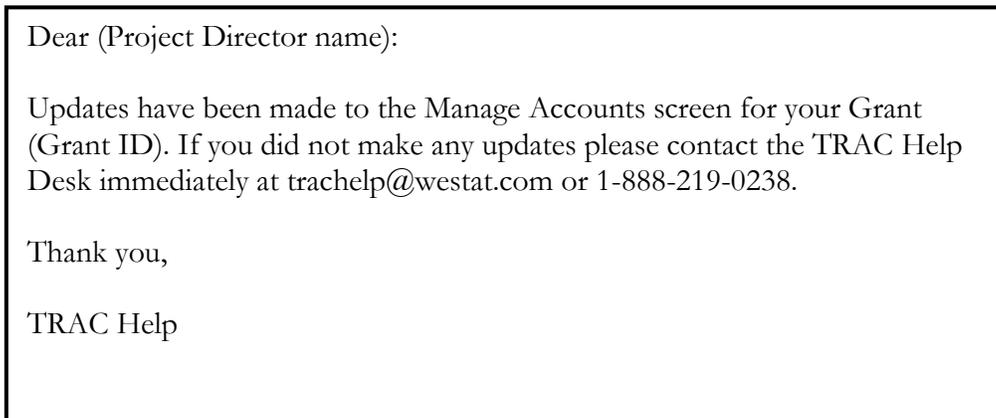
| Requests for Access | | | | |
|---------------------|-------|------------|--------|----------|
| Name | Email | User Roles | Action | Comments |
| | | | | |

| Current Users | | | | |
|---------------|-----------------------------------|------------|-------------------------------------|----------|
| Name | Email | User Roles | Action | Comments |
| Mary Westat | 6820_Mary_Westat_APD@fakemail.com | All PD | <input type="checkbox"/> Inactivate | |

At the bottom, there is a section for 'Inactive Users' which is currently empty.

Email Alert to Access

Once a grantee has successfully submitted the request for access, you will need to approve their account in the TRAC system. Once you have completed these steps, the new user will gain access. Project Directors and Alternate Project Directors will receive the below e-mail alert signaling them to update the Manage Accounts screen in the TRAC system to begin the process.

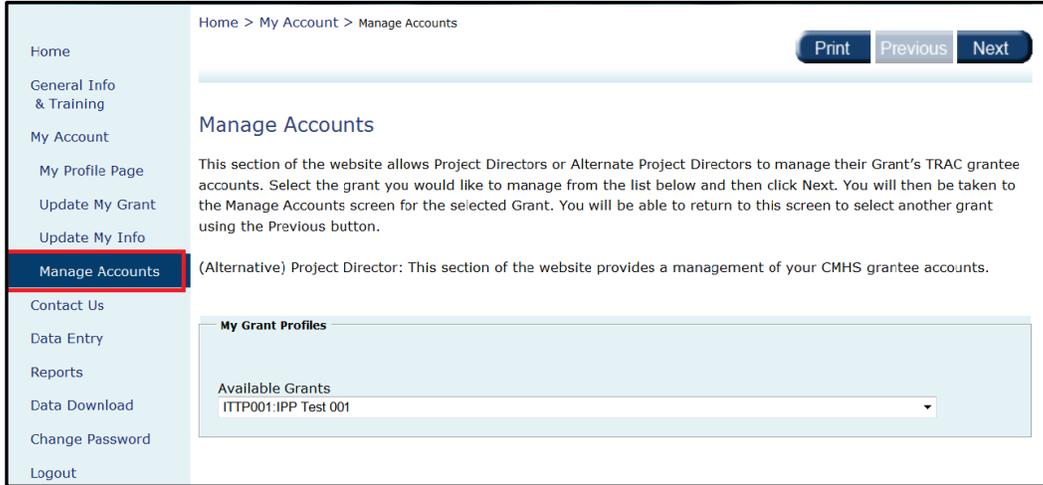


Accessing TRAC for Approval or Disapproval

Step 1: To begin, sign into the TRAC system and click on the *My Account* link.



Step 2: Once you have clicked on the *My Account* tab, the *Manage Accounts* tab will display on the menu. Next, click on *Manage Accounts* link. Users with access to multiple grants will have to choose a grant to display. If you have access to one grant, you will automatically move to the *Manage Accounts* page.



The *Manage Accounts* page will provide grant information and tables separated by user status. Below is the information displayed for the selected grant:

- My Grant Information
- Requests for Access
- Current Users
- Inactive Users



Step 3: Under the *Requests for Access* table, the new user's name will appear. Under the *User Type* column, use the dropdown list to select a user type to be assigned to the new user.

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 End Date (9/30/2011). Below this is the 'Requests for Access' table:

| Name | Email | User Roles | Action | Comments |
|------------|-------------------------|------------------------|---|----------|
| John Smith | John.Smith@fakemail.com | Grantee User Alt PD | <input type="radio"/> Approve <input type="radio"/> Disapprove | |
| Jack Smith | Jack.Smith@fakemail.com | Grantee User Alt PD | <input type="radio"/> Approve <input type="radio"/> Disapprove | |

Below the table are sections for 'Current Users' and 'Inactive Users', each with a table header. At the bottom right are 'Submit' and 'Cancel' buttons.

Step 4: Next, the below screen will allow for approval or disapproval of users. To approve the new user, under the *Action* column click the *Approve* radio button and click *Submit*.

This screenshot is similar to the previous one, but the 'Approve' radio button in the 'Action' column for John Smith is now selected. The 'User Roles' dropdown is also visible, showing 'Grantee User' and 'Alt PD' options.

| Name | Email | User Roles | Action | Comments |
|------------|-------------------------|------------------------|--|----------|
| John Smith | John.Smith@fakemail.com | Grantee User Alt PD | <input checked="" type="radio"/> Approve <input type="radio"/> Disapprove | |
| Jack Smith | Jack.Smith@fakemail.com | Alt PD | <input type="radio"/> Approve <input type="radio"/> Disapprove | |

The 'Submit' and 'Cancel' buttons remain at the bottom right.

Step 5: After clicking **Submit** the below message box will appear. Click **OK** on the below pop-up message to complete the request.

The screenshot shows the TRAC 'Manage Accounts' page. A modal dialog box titled 'Message from webpage' is centered on the screen, asking 'Are you sure you want to submit your data?' with 'OK' and 'Cancel' buttons. The background page displays 'My Grant's Information' and three tables: 'Requests for Access', 'Current Users', and 'Inactive Users'. The 'Requests for Access' table lists John Smith and Jack Smith. The 'Current Users' and 'Inactive Users' tables are currently empty.

Step 6: The approved users will move from the **Requests for Access** table to the **Current Users** table. Once the request is approved, the grantee will receive an e-mail containing their log-in information and a temporary password.

The screenshot shows the TRAC 'Manage Accounts' page after the request is approved. The 'Requests for Access' table is now empty. The 'Current Users' table now contains two entries: John Smith (Email: John.Smith@fakemail.com, User Roles: Grantee User) and Jack Smith (Email: Jack.Smith@fakemail.com, User Roles: Alt PD). Both users have an 'Inactivate' checkbox. The 'Inactive Users' table remains empty.

Step 7: If you need to disapprove a request, click *Disapprove* under the *Action* column and enter the reason for the disapproval in the *Comments* section.

The screenshot shows the TRAC (Transformation Accountability Center for Mental Health Services) 'Manage Accounts' page. The page includes a navigation menu on the left, a breadcrumb trail, and a 'My Grant's Information' section. The main content area features a 'Requests for Access' table with columns for Name, Email, User Roles, Action, and Comments. In the 'Action' column for John Smith, the 'Disapprove' radio button is selected, and the 'Comments' field contains the text 'Enter reason for disapproval'. Below the table are sections for 'Current Users' and 'Inactive Users', each with a table structure. At the bottom right, there are 'Submit' and 'Cancel' buttons.

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: | TA GPO |
| Grant Start Date: | 8/1/2011 |
| Grant End Date: | 9/30/2011 |
| TRAC Inactive Date: | 10/30/2011 |
| Technical Assistant(TA) Center Name: | N/A |

Requests for Access

| Name | Email | User Roles | Action | Comments |
|------------|-------------------------|--------------|--|------------------------------|
| John Smith | John.Smith@fakemail.com | Grantee User | <input type="radio"/> Approve <input checked="" type="radio"/> Disapprove | Enter reason for disapproval |
| Jack Smith | Jack.Smith@fakemail.com | Alt PD | <input checked="" type="radio"/> Approve <input type="radio"/> Disapprove | |

Current Users

| Name | Email | User Roles | Action | Comments |
|------|-------|------------|--------|----------|
| | | | | |

Inactive Users

| Name | Email | User Roles | Action | Comments |
|------|-------|------------|--------|----------|
| | | | | |

Deactivation and Reactivation

From the *Manage Accounts* page, the PD and APD have the ability to deactivate and reactivate users.

User Deactivation

Step 1: To deactivate a user, under the *Current Users* table find the new user's name. Under the corresponding *Action* column, click on *Inactivate*. Enter any comments in the *Comment* section and then click *Submit*.

Requests for Access

The screenshot shows the TRAC 'Manage Accounts' page. The 'Current Users' table has the following data:

| Name | Email | User Roles | Action | Comments |
|------------|-------------------------|--------------|--|----------|
| John Smith | John.Smith@fakemail.com | Grantee User | <input checked="" type="checkbox"/> Inactivate | |
| Jack Smith | Jack.Smith@fakemail.com | Alt PD | <input type="checkbox"/> Inactivate | |

The 'Inactivate' button for Jack Smith is highlighted with a red box.

Step 2: Click *OK* on the below pop-up message. The inactivated user be moved to the *Inactive Users* table and their account will be disabled.

The screenshot shows the same TRAC 'Manage Accounts' page as above, but with a confirmation dialog box overlaid. The dialog box contains the text: 'Are you sure you want to submit your data?' with 'OK' and 'Cancel' buttons. The 'Inactivate' button for Jack Smith in the 'Current Users' table is still visible and highlighted.

User Reactivation

Step 1: To reactivate a user, find the user in the **Inactive Users** table. Under the **Action** column and click on **Reactivate**, to reinstate access.

The screenshot shows the TRAC 'Manage Accounts' page. At the top, it says 'STAGING' and 'User: Westat ProjectID Roles: PD'. The page has a left sidebar with navigation options like 'Home', 'General Info & Training', 'My Account', 'Manage Accounts', 'Sign Up', 'Contact Us', 'Data Entry', 'Reports', 'Data Download', 'Change Password', and 'Logout'. The main content area is titled 'Manage Accounts' and includes 'My Grant's Information' and three tables: 'Requests for Access', 'Current Users', and 'Inactive Users'. A red box highlights the 'Reactivate' button in the 'Action' column of the 'Inactive Users' table for John Smith.

| 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: | TA GPO | | | | |
| Grant Start Date: | 8/1/2011 | Grant End Date: | 9/30/2011 | | |
| TRAC Inactive Date: | 10/30/2011 | | | | |
| Technical Assistant(TA) Center Name: | N/A | | | | |

| Requests for Access | | | | | |
|-----------------------|-------------------------|--------------|--|----------|--|
| Name | Email | User Roles | Action | Comments | |
| Current Users | | | | | |
| Name | Email | User Roles | Action | Comments | |
| Jack Smith | Jack.Smith@fakemail.com | Alt PD | <input type="checkbox"/> Inactivate | | |
| Inactive Users | | | | | |
| Name | Email | User Roles | Action | Comments | |
| John Smith | John.Smith@fakemail.com | Grantee User | <input checked="" type="checkbox"/> Reactivate | | |

Step 2: Click **OK** to confirm on the pop up message that appears. The reactivated user will be moved back to the **Current Users** table as seen below.

The screenshot shows the TRAC 'Manage Accounts' page after reactivation. The 'Current Users' table now includes John Smith, and the 'Inactive Users' table is empty. The 'Reactivate' button is no longer visible for John Smith.

| 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: | TA GPO | | | | |
| Grant Start Date: | 8/1/2011 | Grant End Date: | 9/30/2011 | | |
| TRAC Inactive Date: | 10/30/2011 | | | | |
| Technical Assistant(TA) Center Name: | N/A | | | | |

| Requests for Access | | | | | |
|-----------------------|-------------------------|--------------|-------------------------------------|----------|--|
| Name | Email | User Roles | Action | Comments | |
| Current Users | | | | | |
| Name | Email | User Roles | Action | Comments | |
| John Smith | John.Smith@fakemail.com | Grantee User | <input type="checkbox"/> Inactivate | | |
| Jack Smith | Jack.Smith@fakemail.com | Alt PD | <input type="checkbox"/> Inactivate | | |
| Inactive Users | | | | | |
| Name | Email | User Roles | Action | Comments | |

Summary of Users

For a quick summary of all current users, return to the *My Profile Page* located on the left hand menu. New users will be listed under the *Staff with access to TRAC* section.

| | |
|------------------------|---|
| & Training | My Profile Page |
| My Account | |
| My Profile Page | 1. My Grant's Information |
| Update My Grant | Grant Program: IPP Test (IPPT) |
| Update My Info | Organization Name: Westat Test |
| Manage Accounts | Grant Cohort: IPPTADB |
| Contact Us | Grant Title: IPP Test Grant 2 |
| Data Entry | Grant ID: SM99999 |
| Reports | CMHS Government Project Officer: TA GPO |
| Data Download | Grant Start Date: 8/1/2011 |
| Change Password | Grant End Date: 4/30/2014 |
| Logout | TRAC Inactive Date: 6/1/2014 <i>NOTE: This is the "grace period" at the end of your grant that you have to complete data entry.</i> |
| | 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: David Rockwell, 4185_David_Rockwell_PD@fakemail.com |
| | Grantee Alternative Project Director(s): Mary Westat, 6820_Mary_Westat_APD@fakemail.com |
| | Other Grantee Staff with access to TRAC: None Assigned |

SECTION 3: NOTES FOR NEW USERS

- Once a user account is created, the new user will be able to access the TRAC system to begin data entry and will begin to receive important system alerts via e-mail. However, they should expect up to one to two day delay on the Reports section of TRAC.
- Users requesting access to newly awarded grants will not be given access to TRAC until you have completed your first Webinar training. These instructions are specific to existing grants, newly awarded grants are handled separately by in house staff.
- The email alerts are sent as soon as any updates are made in the TRAC system. If you didn't receive an email alert immediately, be sure to check your junk mail folder.
- For current users with active accounts, the Sign Up link does not appear if you are signed into the TRAC system. This is important for current users who are helping prospective users gain access.