

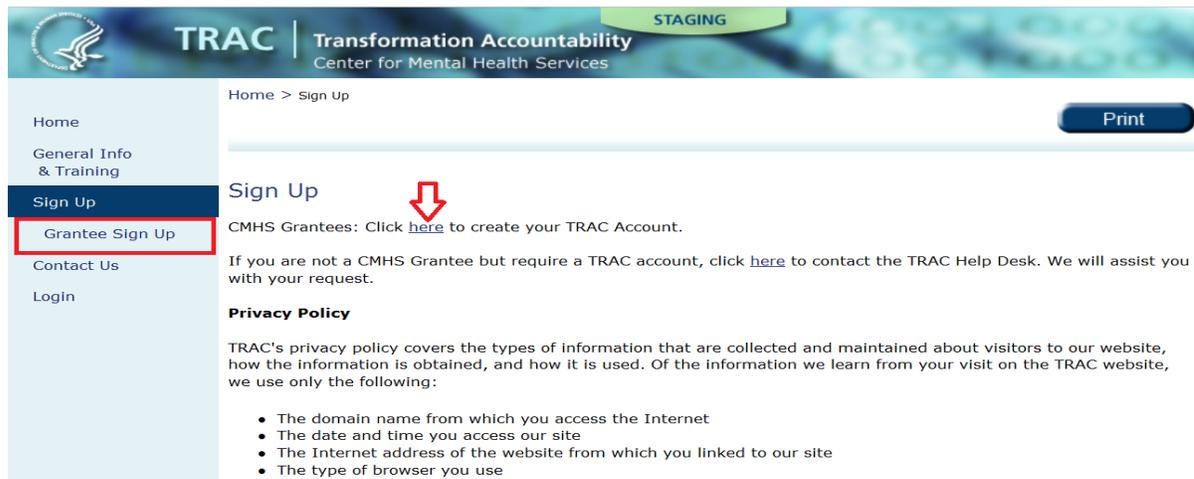
TRAC Tip Sheet: Getting Signed Up in TRAC Guidance for New Grant Staff

- 1) Contact the Project Director or Alternate Project Director to obtain the Grant Security Key and the Grant ID. Only users with these two roles will be able to access the information that is located on the My Profile Page or the Manage Accounts screen on the TRAC website. Please see images below.

- 2) Once you have this information from the Project Director or Alternate Project Director click on the “Sign Up” link found on the TRAC homepage to apply for access to the TRAC system.



- 3) Click the “here” link to begin signing up for your TRAC Account. You can also click on the “Grantee Sign Up” link directly below “Sign Up”.



- 4) Enter the “Grant ID” and “Grant Security Key” and click the “Lookup” button. The Grant Number, Project Director, Grant Title, Organization, Org City and Org State will then prefill in the table below. Repeat this process for each grant for which you are requesting access.

General Info & Training
Sign Up
Grantee Sign Up
Contact Us
Login
Reports
Data Download
Change Password
Logout

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:

- 5) Enter all user information and review the entries. If everything is correct click the “Submit” button. If the information is incorrect click “Cancel”. The fields will be cleared and you will be able to enter the information again. Note: You only have to enter your user information once.

Sign Up
Grantee Sign Up
Contact Us
Login
Reports
Data Download
Change Password
Logout

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:

- 6) You will receive a message at the top of the screen indicating the Sign Up was successful. An email will be sent to the Project Director and Alternate Project Director with information regarding the request.

The screenshot displays a web interface with a light blue sidebar on the left containing navigation links: Home, General Info & Training, My Account, Contact Us, Admin, Data Entry, Reports, Data Download, Change Password, and Logout. The main content area has a breadcrumb trail: Home > Sign Up > Grantee Sign Up > Grantee Sign Up Complete. A blue 'Print' button is located in the top right corner. The central message, 'Grantee Sign Up Complete', is enclosed in a red rectangular box. Below this, a confirmation message reads: '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.' A blue 'Finish' button is positioned in the bottom right corner of the message box.

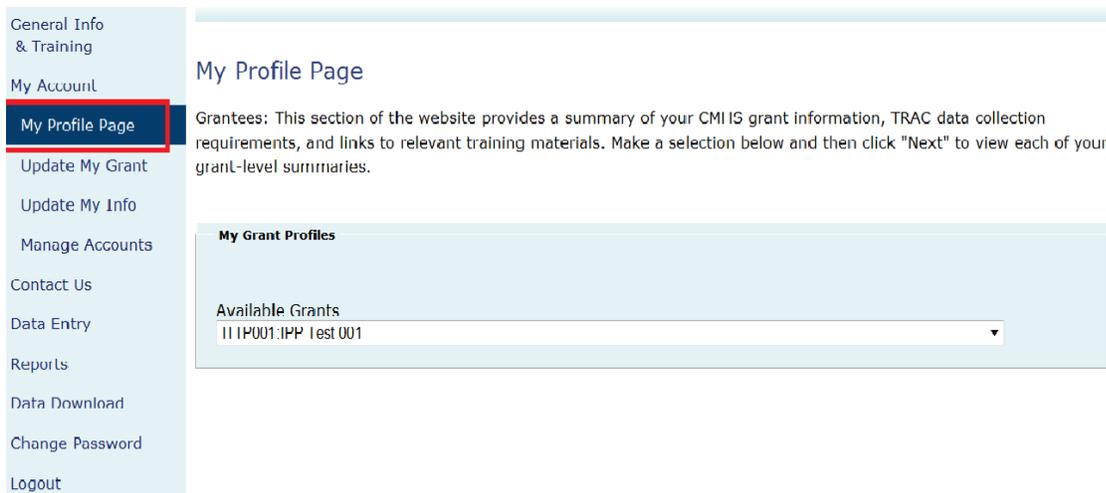
- 7) Click the “Grantee Sign Up” tab to return to the Sign Up page.

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, 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.



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

Home > My Account > Manage Accounts

Print Previous Next

Manage Accounts

This section of the website allows Project Directors or Alternate Project Directors to manage their Grant’s TRAC grantee accounts. Select the grant you would like to manage from the list below and then click Next. You will then be taken to the Manage Accounts screen for the selected Grant. You will be able to return to this screen to select another grant using the Previous button.

(Alternative) Project Director: This section of the website provides a management of your CMHS grantee accounts.

My Grant Profiles

Available Grants
ITTP001:IPP Test 001

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

Manage Accounts

My Grant's Information

Grant Program: IPP Test (IPPT)
 Organization Name: Westat Test
 Grant Cohort: IPPTADE
 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

Requests for Access

Name	Email	User Roles	Action	Comments
Test1 Test2	sixit@fake.email.com	Alt PD	<input type="radio"/> Approve <input type="radio"/> Disapprove	

Current Users

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

Inactive Users

Name	Email	User Roles	Action	Comments
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- 5) Under the “Requests for New Accounts” Section, click on the dropdown arrow and select a “User Role” to be assigned to the new user.

Home > My Account Information > Manage Accounts Page

Print Previous Next

Manage 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:	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 New Accounts

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	

Current Users

Name	Email	User Roles	Action	Comments
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Inactive Users

Name	Email	User Roles	Action	Comments
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Submit Cancel

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

Home > My Account Information > Manage Accounts Page

Print Previous Next

Manage 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:	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 New Accounts

Name	Email	User Roles	Action	Comments
John Smith	John.Smith@fakemail.com	Grantee User	<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	

Current Users

Name	Email	User Roles	Action	Comments
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Inactive Users

Name	Email	User Roles	Action	Comments
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Submit Cancel

Note: Once the request is approved, the grantee will receive an email containing their login information and temporary password.

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

TRAC | Transformation Accountability
Center for Mental Health Services

User: Westat ProjectD
Roles: PD

Home > My Account Information > Manage Accounts Page

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Manage 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: 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 New Accounts

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
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Inactive Users

Name	Email	User Roles	Action	Comments
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Submit Cancel

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

TRAC | Transformation Accountability
Center for Mental Health Services

User: Westat ProjectD
Roles: PD

Home > My Account Information > Manage Accounts Page

Print Previous Next

Manage 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: 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 New Accounts

Name	Email	User Roles	Action	Comments
John Smith	John.Smith@fakemail.com	Grantee User	<input type="radio"/> Approve <input checked="" type="radio"/> Disapprove	
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
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Inactive Users

Name	Email	User Roles	Action	Comments
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Submit Cancel

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

TRAC | Transformation Accountability
Center for Mental Health Services

STAGING

User: Westat ProjectD
Roles: PD

Home > My Account Information > Manage Accounts Page

Print Previous Next

Manage 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:	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 New Accounts

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
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Submit Cancel

- 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 user is logged in as 'Westat ProjectD' with the role 'PD'. The page displays 'My Grant's Information' and three tables: 'Requests for New Accounts', 'Current Users', and 'Inactive Users'. In the 'Current Users' table, the 'Action' column for John Smith has a red box around the 'Inactivate' button, which is being clicked by a mouse cursor.

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	

- 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. The dialog box, titled 'Message from webpage', contains the question 'Are you sure you want to submit your data?' and has 'OK' and 'Cancel' buttons. The mouse cursor is pointing at the 'OK' button. The 'Inactivate' button for John Smith in the 'Current Users' table is still visible behind the dialog.

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

Manage 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:	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			

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	Alt PD	<input type="checkbox"/> Inactivate	

Inactive Users

Name	Email	User Roles	Action	Comments

Submit Cancel

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

Manage 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:	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 New Accounts

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 Use	<input checked="" type="checkbox"/> Reactivate	

Submit Cancel

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

The screenshot shows the TRAC 'Manage Accounts' page. A modal dialog box titled 'Message from webpage' is open, asking 'Are you sure you want to submit your data?' with 'OK' and 'Cancel' buttons. The background page shows the 'My Grant's Information' section with details like Grant Program (IPP Test (IPPT)), Organization Name (Westat Test), and Grant End Date (9/30/2011). Below this are tables for 'Requests for New Accounts', 'Current Users', and 'Inactive Users'. The 'Current Users' table lists Jack Smith. The 'Inactive Users' table lists John Smith with a 'Reactivate' checkbox checked. 'Submit' and 'Cancel' buttons are at the bottom right.

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

This screenshot shows the TRAC 'Manage Accounts' page after the reactivation. The 'Current Users' table now includes John Smith, who was previously in the 'Inactive Users' table. The 'Inactive Users' table is now empty. The 'Current Users' table has columns for Name, Email, User Roles, Action, and Comments. John Smith's user role is 'Grantee User' and there is an 'Inactivate' checkbox. Jack Smith's user role is 'Alt PD'. The 'Submit' and 'Cancel' buttons remain at the bottom right.

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.

& Training

My Account

My Profile Page

Update My Grant

Update My Info

Manage Accounts

Contact Us

Data Entry

Reports

Data Download

Change Password

Logout

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:	TA GPO
Grant Start Date:	8/1/2011
Grant End Date:	4/30/2014
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