

Welcome and thank you for attending today's question & answer session on your annual goals and budget information.

Before we begin, I'd like to explain that only one person from each grant will need to fill out the Annual Goals form. This person should be the Project Director or someone the Project Director designates. If you are not the person who is filling out the Annual Goals form for your grant you do not need to attend this session.

In today's Q & A, we will be going over TRAC Annual Goals and Budget information. You should already have received the AG guide as an attachment in the training registration email. In addition these materials, and the slides I am presenting are also located on the TRAC website.



Objective

At the end of today's session, you will know more about:

- TRAC Annual Goals and Budget Information: Reporting activities
- Completing the Annual Goals and Budget Information: Reporting forms in TRAC

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At the end of today's session, you will know more about:

- The TRAC Annual Goals and Budget Information Reporting activities.
- Completing the Annual Goals and Budget Information Reporting forms in the TRAC system.



Key Definitions

For reference, you can find key definitions for TRAC by referring to the following training guides:

- NOMs Client-level Measures “Services Activities”:
 - ✓ Question-by-Question Instruction Guide
- IPP Activities:
 - ✓ Overview of Indicators Guide
 - ✓ TRAC System Overview and How to Enter Results Guide

All guides can be found on the TRAC website at:
<https://www.cmhs-gpra.samhsa.gov/index.htm> > General Info & Training

The purpose of this session is to review the process for setting your annual goals and estimating your budget information, and how to enter them into the TRAC system, not to provide you with definitions of NOMs Client-level Measures “Services Activities”, or specific IPP Indicators. We want to utilize our time as efficiently as possible, and would like to keep discussions to the TRAC Annual Goals and Budget Information Reporting activities.

If you have questions regarding definitions of NOMs Client-Level Measures “Services Activities” or specific IPP Indicators, please refer to the guides listed on this slide.

For Services Activities definitions (for example – consumer, episode of care) - Please refer to the Question-by-Question Instruction Guide.

For IPP definitions (for example – specific IPP indicators) - Please refer to the Overview of Indicators and TRAC System Overview and How to Enter Results Guides.

All Guides can be found on the TRAC website under the General Info & Training tab, under Services Training and IPP Training.



Refresher Trainings

For other questions about TRAC, please register for refresher trainings when offered:

- Client-level Measures “Services Activities” (refresher trainings)
- Infrastructure Development, Prevention & Mental Health Promotion “IPP” (Q&A sessions)
- Annual Goals and Budget Information (Q&A sessions)

Training dates and registration information are announced via the TRAC Help Desk

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If you have other questions about TRAC, please register for a refresher training or view the e-training videos posted on the TRAC website. We offer refresher trainings throughout the year for the Services Activities, IPP, and Annual Goals and Budget Information modules.

- Services Activities refresher trainings will cover data collection, definitions, data entry, and reports.
- IPP Q&A sessions will cover an overview of data collection and results reporting, and will cover definitions of key terms.

Training dates and registration directions are always announced thru email notifications from the TRAC Help Desk.

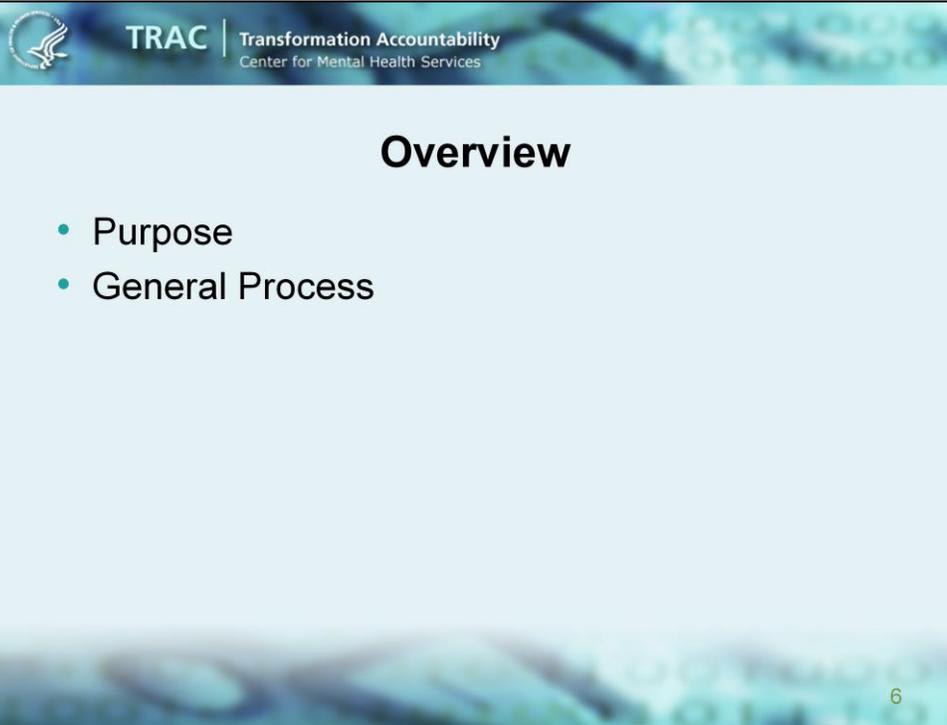


Agenda

- Overview of the TRAC Annual Goals
- Setting your annual goals & estimating your budget information
- Accessing the TRAC System
- Entering your annual goals
- Entering your budget information
- Updating your annual goals and budget information
- How to access the TRAC Help Desk
- Questions & Answers

In today's Q&A session, we will be discussing an overview of the TRAC Annual Goals and Setting your Annual Goals and estimating your Budget Information.

I will also be presenting a live demonstration of how to enter your annual goals and budget information directly into the TRAC system.



You have described to CMHS what you plan to work on in your grant application and work plans, and you have been reporting on what you have accomplished to your Project Officer in quarterly or annual reports, or in continuation applications. Those descriptions have mostly been written narratives. The purpose of the TRAC Annual Goals and Budget Information system is to summarize those narratives with quantitative data. It does not replace those other reports.

One important point I want to highlight is that the TRAC Annual goals and Budget Information system is NOT asking you to add new activities -- It *quantifies what you were already planning* to accomplish with your SAMHSA grant or contract.

Your annual goals and budget information estimates will appear in various TRAC reports and will be used by your government project officer (GPO) and CMHS for performance management and oversight.

General Process – You will be entering in annual goals and budget information estimates for your grant directly into the TRAC system. To fill out the Annual Goals and Budget information forms, you will need to project your performance goals and budget information expenditures for all your grant years.

First I'm going to present what the TRAC Annual Goals are, and provide some direction on how to set goals, and then I will present the Budget Information and provide some direction on how to estimate budget information.



What are TRAC Annual Goals?

- Specific to TRAC
- Limited to relevant TRAC activities
Please note: You don't need to choose your relevant activities.
The system will customize what you see.
- Use pre-approved goals, if applicable

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Each CMHS grant is required to set annual goals for what they intend to achieve for all their grant years. The goals are specific to TRAC – you only need to set goals for items that you report on for TRAC, based on whether your grant funds IPP activities, services activities, or both. Grants that engage in IPP activities will be required to estimate annual goals for their required IPP indicators.

If CMHS has already approved your goals, you should enter them as approved without making any changes. However, we will be asking you to set goal allocations by your grant year. If CMHS has approved an overall cumulative goal, you will also need to estimate goals for all future grant years.



How to set your TRAC Annual Goals

- Review existing plans and reports such as:
 - ✓ Requirements for grant program
 - ✓ Grant Application
 - ✓ Notice of Grant Award
 - ✓ Work plans
 - ✓ Annual reports
- Identify the goals you need to set by:
 - ✓ Logging into TRAC and going to the Annual Goals & Budget Information section
- Set a numeric or percentage goal for each item, based on your plans

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Refer to Section B of the Annual Goals and Budget Information Guide for Grantees for more details about how to set your annual goals.

The first step is to review your existing plans. You need to base your goals on all existing plans for your grant, including the requirements for your grant program, the activities you proposed in your application, and the requirements in your Notice of Grant Award. As I mentioned, the purpose of this activity is to summarize those plans with numbers, not to change those plans.

Next, you need to identify the goals you are required to set. This is based on the TRAC data you submit. If you submit services data, you will need to set a services goal. If you submit IPP data, you will set IPP goals for every IPP indicator you report on. If you are unsure, a quick way to find this out is to log into the TRAC system then going to the Annual Goals and Budget information section. It will only list those items that are required for your grant, and you can print these for reference if you need to.

Finally, you will need to set a numeric goal for each required item. Sometimes this is a number, sometimes it is a percentage. You have already been trained on definitions for the items you report on, for both services and IPP activities. Your goals should conform to those definitions.

Again - if you have questions about those definitions, please register for one of the refresher trainings I described earlier or view the e-trainings on the TRAC website.

The next topic I'm presenting is Budget Information, and I will provide some direction on how to estimate your budget information.



TRAC Budget Information

Report by Grant Years

- Client-level Measures “Services Activities”
- Infrastructure Development activities
- Data Collection, Evaluation, and Performance Measurement and Assessment
- Mental Health Prevention and Mental Health Promotion activities
- Grant Administration
- Technical Assistance

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You will be reporting budget information for each of your grant years. Please report your total budget amount per grant year, and then estimate how your total budget fits into the categories listed on this slide.

You can enter budget information for any of the activities listed on this slide, even if your grant is not required to report TRAC data for an activity. For example, if your grant spends a substantial amount on screening, but does not report on the screening indicator for IPP, you should still report the percentage or dollar amount spent on screening in the total for Mental Health Prevention and Mental Health Promotion Activities. Any activities that you perform in your grant that are consistent with the definitions in the IPP or Services guides can be counted toward your budget information. If your grant does not do one or more of the activities listed on the slide, you should enter 0.

I would like to review these budget information categories in a little more detail before I start the system demonstration. Full definitions of these categories can be found in the Annual Goals and Budget Information Guide for Grantees.

Service Provision: this is the budget category for activities you undertake to provide treatment to consumers. Activities that are consistent with Service Provision, even if you are not required to report data on Service Activities into TRAC should be recorded here.

Infrastructure Development: this is the budget category for activities you are doing to build infrastructure to prevent mental illness and promote mental health. Activities which are consistent with any of the TRAC infrastructure indicators count as infrastructure activities, even if you are not required to report data on infrastructure indicators into TRAC for your program.

Data Collection, Evaluation, & Performance Measurement & Assessment: this is the budget category for the time and resources you spend collecting and reporting TRAC data, as well as any other time or resources you expend to collect and utilize data to demonstrate or improve the effectiveness of your project.

Mental Illness Prevention and Mental Health Promotion Activities: this is the budget category for activities to accomplish prevention and promotion goals consistent with your TRAC IPP indicators. Activities which are consistent with any of the TRAC Prevention and Promotion indicators count as activities, even if you are not required to report data on prevention and promotion indicators into TRAC for your program.

Grant Administration: this is the budget category for general activities required for the overall management and administration of the project.

Technical Assistance: This is only applicable to grants (or contracts) that provide technical assistance to other entities. Although in some cases grantees use grant funds to purchase technical assistance, those funds should *not* be counted as technical assistance dollars for TRAC cost estimating purposes; instead, use of grant funds to purchase technical assistance should be counted under the category to which the technical assistance applies (i.e. technical assistance regarding how to satisfy evaluation requirements would count under the evaluation category).



How to Estimate your Budget Information

- Approximate percentages or dollar amounts
- Your award amount per grant year may include activities not being reported on for TRAC

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When estimating your budget information, CMHS is looking for the big picture, not specific line items. Consider what *approximate* percentage or dollar amount of the grant is expected to be expended for each of the categories. You can enter percentages *or* dollar amounts; you do *not* need to enter both.

As I mentioned in the previous slide, you should include budget information regarding all activities that account for a considerable portion of your budget, even those *not* being reported on for TRAC. This will allow your GPO and other CMHS staff to have a more accurate picture of how you anticipate your budget will be spent.

One last thing to note: although you will be asked to estimate your budget allocations now for future grant years, you will have the opportunity to review these estimates in the future and revise them if necessary. Your GPO will always have to approve them.



Accessing TRAC

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

TRAC is a web-based system that is accessed using the internet

- The TRAC help desk sets up user accounts based on information we receive from the grant information form.

To access TRAC, we recommend that you use Internet Explorer (version 9.0 or 10.0). Other browsers are not currently supported.



TRAC

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Center for Mental Health Services

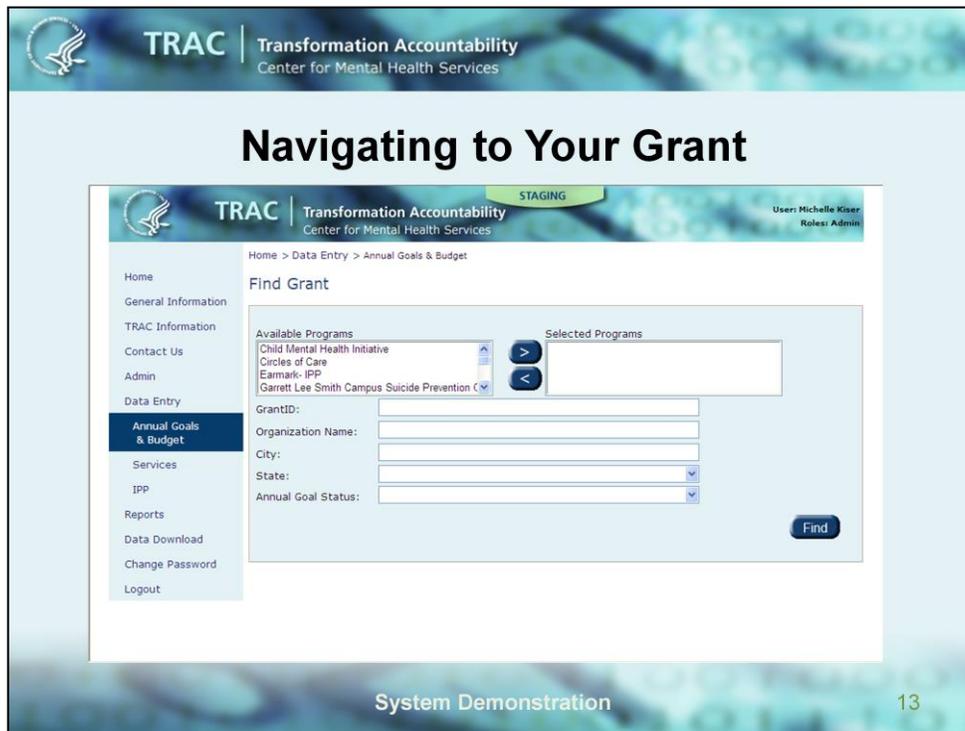
Public vs. Password-Protected Sections

- Public section does not require a password and contains general information about GPRAMA law and TRAC activities
- Password-protected section requires a password and is used by grantees to:
 - ✓ Access Annual Goals and Budget Information
- Use privacy practices
 - ✓ Do not post user IDs or passwords where others may view them
 - ✓ Do not share usernames and passwords

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When accessing the TRAC website, there are separate sections:

1. The public section of the website is open to anyone on the web. This section contains information on: GPRA Law, and other TRAC activities
2. The password-protected section of the website is only open to those CMHS staff and grantees that have usernames and passwords. You need to be logged into the TRAC system to access the Annual Goals and Budget Information forms.



Most users have access to one grant. Those users will skip this Find Grant screen. If you have access to more than one grant, you will have to use the find grant screen to select a grant where you can enter your data. I have access to more than one grant.

The TRAC system is displaying the available programs for my grants in the drop-down box.

Once you have selected the appropriate program click the Find button to display the list grants.

You may also search grants by:

Grant ID

Organization Name

City

State

I am going to select a grant that has both Services and IPP activities to report on and then hit the select button.

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NOMs Client-level Measures “Services Activities” Goals

- Enter # of estimated consumers to be served
- Enter cumulative unduplicated # of consumers to be served

STAGING

Home > Data Entry > Annual Goals & Budget > Services

Print Cancel Save Previous Next

Grant #:

Services

Instructions:
For your current grant year and all future grant years, please enter the goal for the number of consumers to be served, then the unduplicated cumulative goal of consumers to be served during the grant performance period. Once complete, please select "Save" to save the data; select "Next" to go to the next screen.

Cumulative Goal: This is the unduplicated goal of all consumers for the total grant period. This is different than adding up all the annual goals of each grant year, since that figure may contain duplicated consumers.

Grant Year	Previous Year		Current Year		Next Year	Cumulative
	(10/1/2010 - 9/30/2011)	(10/1/2011 - 9/30/2012)	(10/1/2012 - 9/30/2013)	(10/1/2013 - 9/30/2014)	(10/1/2014 - 9/29/2015)	
Training Grant (10/1/2010 - 9/29/2015)	100	380	500	600	520	2100

System Demonstration

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The sample grant I am using is required to submit goals on services activities. So that is the first data entry screen we see. The TRAC System will display each grant year in the grant's performance period.

For every grant year, please enter the number of consumers that you plan to serve.

Each Annual Goal must be an integer b/w 0 and 1,000,000.

Each Percentage must be an integer b/w 0 and 100 (some IPP indicator data, or budget information data).

If your grant runs for one or two years, and has a few additional days at the end of a year that run into the following year, you should include your goal in the year it mainly occurs in and put a '0' for the year that contains just the few additional days.

If you anticipate that some consumers will be served in multiple years, you should count them in each relevant year. For example:

- A grant that plans to serve the same 10 consumers every year for 5 years would enter 10 for all 5 grant years.

- A grant that plans to serve 10 different consumers every year for 5 years would enter 10 for all 5 grant years.

In addition to entering annual services goals, you will also need to enter the cumulative unduplicated number of consumers to be served during the entire performance period of your grant. This means that if you plan to serve the same consumers in different years, you would count them only once in your cumulative total. For example:

- A grant that plans to serve the same 10 consumers every year for 5 years would enter 10 for its cumulative total.
- A grant that plans to serve 10 different consumers every year for 5 years would enter 50 for its cumulative total.

You will notice that my sample grant has 5 grant years for their performance period. If your grant has more than 5 years, click on the hyperlinks above the form labeled Previous Year, Current Year, and Next Year to navigate to the other years.

After you have entered your services goals, click the Save button at the top of the screen. If you do not click the Save button, your goals will not be saved in the system. Click on the Next button to move to the next applicable screen.

If you need to finish entering goal information at a later date, when you hit the save button, it will save everything you have currently entered, and you may log back into the TRAC system to view and edit your goals. However, you should enter a 0 if you think your grant will not serve any consumers in a given grant year; after you submit your data as final for approval, data fields that are left blank will be interpreted as missing data regardless of whether it is intentionally left blank or not.

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IPP Goals

- Infrastructure Development activities
- Prevention & Mental Health Promotion activities

Infrastructure Indicators

Instructions: For your current grant year and all future grant years, please enter a goal for each indicator that you will collect during the grant performance period. Once complete, please select "Save" to save the data then "Next" to go to the next screen.

Categories & Indicators	Previous Year					Next Year				
	(10/1/2010 9/30/2011)	(10/1/2011 9/30/2012)	(10/1/2012 9/30/2013)	(10/1/2013 9/30/2014)	(10/1/2014 9/30/2015)	(10/1/2010 9/30/2011)	(10/1/2011 9/30/2012)	(10/1/2012 9/30/2013)	(10/1/2013 9/30/2014)	(10/1/2014 9/30/2015)
Workforce Development WD1 - The number of organizations or communities implementing mental health-related training programs as a result of the grant.	16	20	12	8	4					
Organizational Change OCI - The number of organizational changes made to support improvement of mental health-related practices/activities that are consistent with the goals of the grant.	8	5	5	5	3					
Partnership/Collaboration PCI - The number of organizations that entered into formal written inter-organizational agreements (e.g., MOUs/MOAs) to improve mental health-related practices/activities that are consistent with the goals of the grant.	20	12	8	5	4					
Type/Targets of Practices T2 - The number of programs/organizations/communities that implemented evidence-based mental health-related practices/activities as a result of the grant.	16	18	16	8	4					

System Demonstration 15

As a reminder, the grantee I am inputting data for participates in both Services and IPP activities, and that is why we see this screen for IPP goals. If your grant only participates in Services activities, you would not see this first IPP screen, and would be brought immediately to the next data entry screen.

The TRAC system will display the Infrastructure Categories and Indicators and the Prevention and Mental Health Promotion Categories and Indicators that apply to your grant.

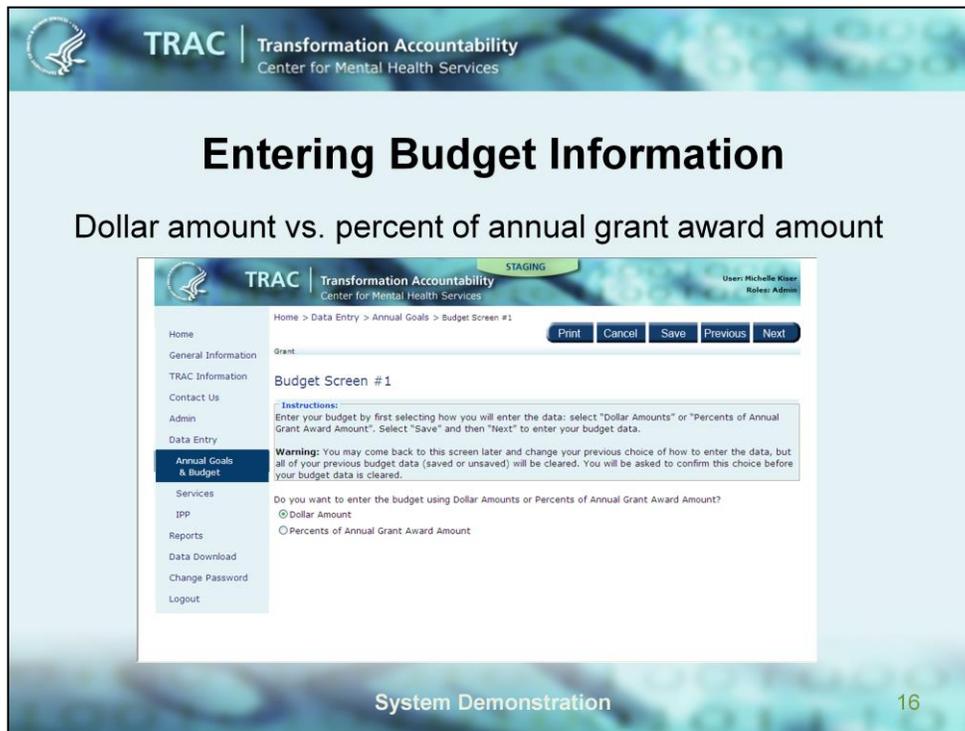
You will enter goal information for each grant year of your performance period for each indicator (either as an integer, or a percentage depending on the indicator).

After you have entered your infrastructure goals, click the Save button at the top of the screen. If you do not click the Save button, your goals will not be saved in the system. Click the Next button at the top of the screen to move to the next applicable screen.

If you need to finish entering goal information at a later date, when you hit the save button, it will save everything you have currently entered, and you may log back into the TRAC system to view and edit your goals. However, you should enter a 0 if you think your grant will not conduct one of the activities in a given grant year; after you submit your data as final for approval, data fields

that are left blank will be interpreted as missing data regardless of whether it is intentionally left blank or not.

If your grant participates in Prevention & Mental Health Promotion Activities, you will be taken to that next data entry screen. My sample grant does, and we can see that screen here. If your grant does not participate in Mental Health Promotion Activities, you are taken immediately to the next data entry screen, and this screen is bypassed.



The next screen you are brought to is the budget information screen after viewing or entering data in the annual goals screen(s). You first need to indicate how you will enter your data. You can select either “Dollar Amount” or “Percents of Annual Grant Award Amount”.

Warning: You may come back to this screen later and change your previous choice of how to enter the data, but all of your previous budget information data (saved or unsaved) will be cleared. You will be asked to confirm this choice before your budget information data is cleared. If you have already entered budget information into the TRAC system back in September, it was entered in dollar amounts. If you decide you would like to switch to percentages, your dollar amount data will be erased.

I am first selecting “Dollar Amount” for entering budget information for my sample grant.

I will come back and select “Percent of Annual Grant Award Amount” to show you that in the system as well.

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Entering Budget Information (Continued)

Home > Data Entry > Annual Goals & Budget > Budget Screen #2

Grant #:

Budget

Instructions:
You selected "Dollar amounts" as the method for entering your data. Enter the budget data for your current grant year, and if possible any future grant years. Enter whole dollar amounts using numbers only (with no commas, decimal points, or \$ signs). Complete the following steps:
1. Enter the grant's award amount for each year in the "Award Amount per Grant Year" row.
2. Enter the dollar amount for each category in the "Dollar Amount" rows.
3. Select "Save" to save the data.
4. Select "Next" to go to the Summary screen.

Note: You will receive an error message if the total amount you entered as your grant award (either the sum of all the "Award Amount per Grant Year" amounts entered or the sum of all "Sum of Dollar Amounts per Grant Year") exceeds the "Total Grant Award on Record" (in the TRAC system). The message will display the Total Grant Award on Record. If you think the "Total Grant Award on Record" amount is incorrect, please contact the TRAC helpdesk.

Category	Previous Year	Current Year		Next Year
	(10/1/2008 - 9/30/2009)	(10/1/2009 - 9/30/2010)	(10/1/2010 - 9/30/2011)	(10/1/2011 - 9/30/2012)
Award Amount per Grant Year		\$154,000	\$144,000	\$138,000
Services Provision		\$55,000	\$20,000	\$8,100
Infrastructure Development		\$97,000	\$42,000	\$23,000
Data Collection, Evaluation, Performance Measurement and Assessment		\$10,000	\$10,000	\$30,000
Grant Administration		\$26,000	\$72,000	\$72,000
Technical Assistance		\$0	\$0	\$0
Sum of Dollar Amounts per Grant Year		\$154,000	\$144,000	\$138,000
Percentage of Award Amount accounted for:		100%	100%	100%

System Demonstration 17

Focusing on one grant year at a time, consider your activities within each category, and estimate the dollars per grant year that you plan to spend on each type of activity during each year. As a reminder, your budget information should be consistent with your application and notice of grant award.

As I mentioned before, CMHS is interested in the big picture of your budget information, not specifics. In entering your budget information estimates, consider what *approximate* percentage or dollar amount of the grant is being expended on each of the budget information categories.

Again, full definitions of these categories can be found in the AG Guide.

As a reminder, you may enter budget information in any category listed here even if your grant does not report this type data into TRAC. As I mentioned previously, if your grant does not participate in one of these activities, you may enter 0. You should enter budget information in the grant year when the funds will be spent.

If your grant participates in one of these activities but you do not have complete budget information at the time you are entering your data, you may leave the data field blank.

As the instruction on the screen indicates, you will complete the following steps:

- Enter the grant's award amount for each year in the "Award Amount per Grant Year" row **first**.
- Enter the dollar amount for each category in the "Dollar Amount" rows. Enter whole dollar amounts using numbers only.

Note that dollar amounts should include all direct costs plus indirect costs associated with an activity. Indirect costs are included if your organization has a negotiated indirect cost rate agreement as allowed in the agreement. It is okay to estimate the indirect costs.

I am going to enter in some sample budget data for my sample grant now. (enter in total first!).

After you have entered your budget information, click the Save button at the top of the screen. If you do not click the Save button, your budget information will not be saved in the system.

After you have hit the save button, the system will sum all of your dollar amounts in the "Sum of Dollar Amounts per Grant Year" row and calculate the "Percentage of Award Amount" row.

If the sum of all the "Award Amount per Grant Year" fields is less than the Total Grant Award on record, the TRAC system will display an alert message. To continue with your data entry click on the Next button again; you can proceed even if your numbers are less than the Total Grant Award. This is so you can go back and enter more budget information when you have it.

If one or more of your "Sum of Dollar Amounts per Grant Year" fields exceed the corresponding "Award per Grant Year" total you will receive an error message. Additionally, if the sum of all "Award Amount per Grant Year" exceeds the Total Grant Award the system will give you an error message. You will need to correct the error(s) before you can move to the next screen.

Are there any questions on this screen before I go back and demo the % of Annual Grant Award option?



I'm going to go back now, and demonstrate for you what the budget screen would look like if you select "Percent of Annual Grant Award Amount" instead of "Dollar Amounts".

We will select "Percent of Annual Grant Award Amount", and hit the next button to move to the next screen.

Again the same warning applies: You may come back to this screen later and change your previous choice of how to enter the data, but all of your previous budget information data (saved or unsaved) will be cleared.

The same screen will then appear with the same budget information categories, but with percentages for you to input.

Enter your budget for your current grant year and any future years. As the instruction on the screen directs, complete the following steps:

- Enter the grant's award amount for each year in the "Award Amount per Grant Year" row.
- Enter the percentage using numbers only and up to two decimal points for each category in the "Percent" rows.
- Click on the Save button to save your data.
- Click on the Next button to go to the Summary screen.

The system will calculate and the "Sum of Percents" row, and the "Sum of Dollar Amounts" row when you click on the Save button.



Once you have entered and saved all your annual goals and budget information, the system will take you to a screen that will summarize all the services, infrastructure development, and prevention and mental health promotion, and budget information goals you have entered as applicable. Please review the data for accuracy and then click the submit for approval button located at the top of the screen. This will alert the TRAC system that your data is complete, and ready for your to GPO review. Please note that you must have filled in all your goal and budget information for all your required grant years before hitting the submit for approval button.

If you are not ready to submit your data, you may hit the save and quit button and this will take you back to the main Data Entry screen.

If your GPO has questions about your goals or budget information, they will send an email to you (the PD), and you will have to go back into the TRAC system to edit your goals and/or budget information, and submit again.

Annual Goals for the current year and all future years of your grant must be entered, along with your budget information within 90 days of your training. Again, you will only fill out the goals that are required by your grant program. It is okay to have a goal of zero if you think your grant will not serve any consumers in a given grant year or a goal of zero for a required IPP indicator with the approval of your GPO.

I'm now going to go back to the Find Grant screen and demonstrate how to update your goals and budget information once they have been submitted and reviewed by your GPO.

The screenshot displays the TRAC (Transformation Accountability Center for Mental Health Services) interface. The main heading is "Updating Annual Goals and Budget Information". The page is in a "STAGING" environment. The user is identified as "User: Naureen Kelly, Roles: Admin". The breadcrumb trail is "Home > Data Entry > Annual Goals & Budget > Infrastructure Indicators". The grant number is "Grant #: ITTP001". The page contains a navigation menu on the left with options like Home, General Info & Training, TRAC Information, Contact Us, Data Entry, Annual Goals & Budget (highlighted), Services, IPP, TA Survey, Reports, Data Download, Change Password, and Logout. The main content area includes instructions: "Updates are due by December 31, 2011." and a warning about unlocking data. A confirmation question asks if the user wants to unlock their current/future Annual Goals and Budget Information, with radio buttons for "No, I want to review my data" (read-only mode) and "Yes, unlock my Annual Goals and Budget Information". A "Cancel" button is also present.

Annually, you will have the opportunity to unlock and update your goals and budget information. If the information you have entered into the TRAC system under Annual Goals and Budget Information is in a status of “Update and Resubmit”, or “Approved”, you will be able to unlock the information for the current and future grant years to make revisions as necessary. The sample grant that I’m going to choose has a status of Update and Resubmit. I will now demonstrate how you will be able to unlock and update goals and budget information.

If your information is able to be unlocked you will see this screen. You may only unlock the information once a year during a designated timeframe.

If you are a new grantee or did not fully complete the Annual Goals and Budget Information process last year, you will **not** see this screen. Instead, you will be taken directly to the data entry screens where you can complete your edits or updates.

Please note that if you unlock your information, your GPO will have to review and approve it, even if you do not make revisions. We suggest that you first review your information and only unlock it if you need to make changes.

If you click “No, I want to review my data” you will be taken to the first data entry screen in a read-only mode.

The screenshot displays the TRAC (Transformation Accountability Center for Mental Health Services) web application. The main heading is "Updating Annual Goals and Budget Information (Continued)". The interface includes a navigation menu on the left with options like Home, General Info & Training, TRAC Information, Contact Us, Data Entry, Annual Goals & Budget (highlighted), and Services. The main content area shows a breadcrumb trail: Home > Data Entry > Annual Goals & Budget > Infrastructure Indicators. Below this, there are buttons for Print, Cancel, Save, Previous, and Next. A "Grant #: ITTP001" is displayed. The central focus is a "Warning" dialog box with the following text: "Warning: If you select 'YES', the current grant year and all future grant years will be unlocked for editing. You will need to click on 'Submit for Approval' which will require your GPO to review and approve all current and future budget information, whether or not changes are made. Choose 'Yes' only if changes are required." At the bottom of the dialog are "Yes" and "No" buttons. The page footer contains the text "System Demonstration" and the number "21".

If you click “Yes, unlock my Annual Goals and Budget Information”, you will be taken to this warning screen.

If you click “Yes” you will be taken to the data entry screens with the current and future year fields editable. Please note:

Any information that was set to “Disagree” by your GPO from previous years will be highlighted in yellow and editable.



How to Access TRAC

- Visit the TRAC website to view training guides and e-Trainings at:
 - ✓ <https://www.cmhs-gpra.samhsa.gov/index.htm> > General Info & Training > Annual Goals and Budget Training
- Contact TRAC Help Desk with your questions at:
 - ✓ Phone: 1-855-796-5777
 - ✓ Email: TRACHELP@westat.com

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The Annual Goals and Budget Information Guide for Grantees and this presentation can be found on the TRAC website. For your convenience, Annual Goals and Budget Information e-trainings are also available for your review on the TRAC website under General Info & Training, Annual Goals and Budget Training.

This concludes the Annual Goals and Budget Information Q&A training session.

If you have any other questions please contact the TRAC help desk.