

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

To sign up for a TRAC user account, follow the instructions below. New user accounts should be created by the individual who will be using the account. That is, the individual who's name and contact information will be associated with the account.

- 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 this information, which is located on the My Profile Page or the Manage Accounts screen on the TRAC website. Please see images below.

The screenshot shows the TRAC website 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: Westat Project' and 'Roles: PD'. Below the navigation bar is a breadcrumb trail: 'Home > My Account > My Profile Page'. On the left is a sidebar menu with options like 'Home', 'General Info & Training', 'My Account', 'My Profile Page' (highlighted with a red box), 'Update My Grant', 'Update My Info', 'Manage Accounts', 'Contact Us', 'Data Entry', 'Reports', 'Data Download', 'Change Password', and 'Logout'. The main content area is titled 'My Profile Page' and contains a section '1. 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
- 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 (highlighted with a red box)

The screenshot shows the TRAC website interface for the 'Manage Accounts' page. The sidebar menu on the left has 'Manage Accounts' highlighted with a red box. The main content area is titled 'Manage Accounts' and contains a section '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 (highlighted with a red box)

Below the grant 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	AR PD	<input type="checkbox"/> Inactivate	

Inactive Users

- 2) Once you have obtained the Grant Security Key and the Grant ID 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. **Note: The “Sign Up” link does not appear if you are signed into 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”.

Home > Sign Up

Home

General Info & Training

Sign Up

Grantee Sign Up

Contact Us

Login

STAGING

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Center for Mental Health Services

Print

Sign Up

CMHS Grantees: Click [here](#) to create your TRAC Account.

If you are not a CMHS Grantee but require a TRAC account, click [here](#) to contact the TRAC Help Desk. We will assist you with your request.

Privacy Policy

TRAC's privacy policy covers the types of information that are collected and maintained about visitors to our website, how the information is obtained, and how it is used. Of the information we learn from your visit on the TRAC website, we use only the following:

- The domain name from which you access the Internet
- The date and time you access our site
- The Internet address of the website from which you linked to our site
- The type of browser you use

- 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 Intro & 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. Fields in yellow are required fields. If the information is correct click the “Submit” button. If the information is incorrect click “Cancel”, and the fields will be cleared so that 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:

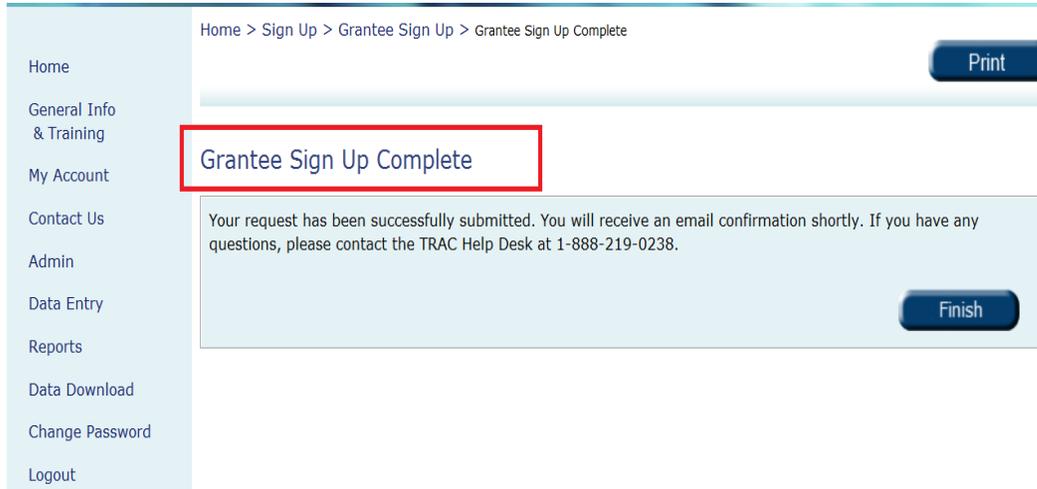
Phone #1: Area Code Number Ext

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 Project Director and Alternate Project Director will then need to log in and approve your request for access. See the next set of instructions for Project Director and Alternate Project Director.



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

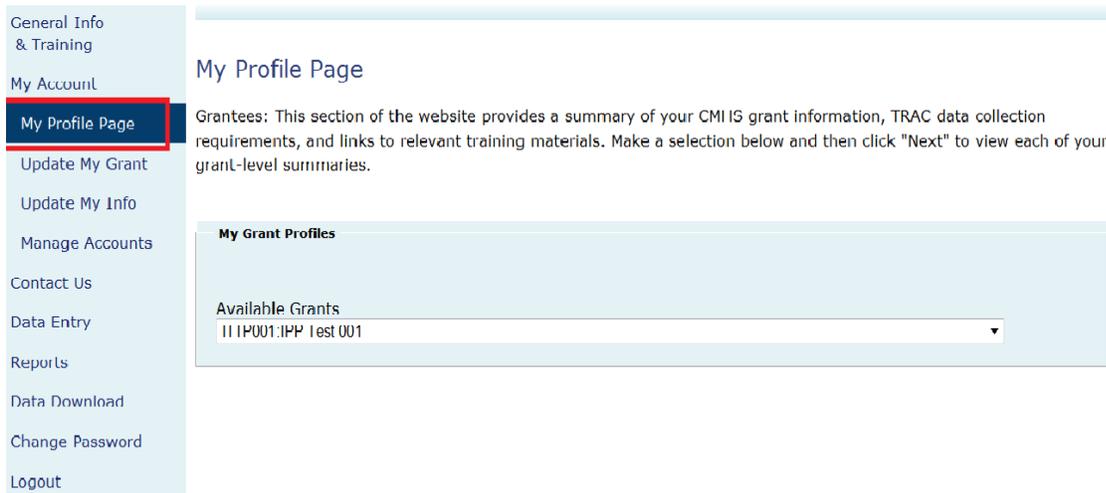
TRAC Tip Sheet: Approving New Accounts in TRAC

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, 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.



- 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 Access”, “Current Users”, and “Inactive Users”.

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
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 Access” Section, click on the dropdown arrow and select a “User Role” 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 structure including Name, Email, User Roles, Action, and Comments. 'Submit' and 'Cancel' buttons are at the bottom right.

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

This screenshot is similar to the previous one but highlights the 'Action' column in the 'Requests for Access' table. The radio buttons for 'Approve' and 'Disapprove' are now visible and selectable for both users.

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 checked="" type="radio"/> Approve <input type="radio"/> Disapprove	

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

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

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

The screenshot shows the TRAC web application interface. The header includes the TRAC logo and navigation links. The main content area is titled 'Manage Accounts' and contains a section for '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: 9/30/2011
- TRAC Inactive Date: 10/30/2011
- Technical Assistant(TA) Center Name: N/A

Below this is a table titled 'Requests for Access' with columns for Name, Email, User Roles, Action, and Comments. Two users are listed: John Smith and Jack Smith. For John Smith, the 'Disapprove' radio button is selected, and the 'Comments' field contains the text 'Enter reason for disapproval'. For Jack Smith, the 'Approve' radio button is selected. At the bottom of the table are 'Submit' and 'Cancel' buttons.

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

This screenshot is identical to the previous one, but with a confirmation dialog box overlaid on the 'Requests for Access' table. The dialog box is titled 'Message from webpage' and contains the question: 'Are you sure you want to submit your data?'. It has 'OK' and 'Cancel' buttons. The 'Disapprove' radio button for John Smith remains selected, and the 'Submit' button is highlighted.

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



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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 Access

Name	Email	User Roles	Action	Comments
Current Users				
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

Home

General Info & Training

My Account

My Profile Page

Update My Grant

Update My Info

Manage Accounts

Sign Up

Contact Us

Data Entry

Reports

Data Download

Change Password

Logout

- 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 a table of 'Current Users'. The 'Action' column for John Smith is highlighted with a red box, showing a checked 'Inactivate' button. Below the table are 'Submit' and 'Cancel' buttons.

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.

The screenshot shows the same TRAC 'Manage Accounts' page, but with a confirmation dialog box overlaid. The dialog box contains a question mark icon and the text 'Are you sure you want to submit your data?'. It has 'OK' and 'Cancel' buttons. The 'Inactivate' button for John Smith in the 'Current Users' table is still visible and checked.

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
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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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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 Access

Name	Email	User Roles	Action	Comments
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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	

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 is open in the center with the title 'Message from webpage' and the text 'Are you sure you want to submit your data?'. The dialog has 'OK' and 'Cancel' buttons. The background page shows the 'My Grant's Information' section with details like 'Grant Program: IPP Test (IPPT)' and 'Grant End Date: 9/30/2011'. Below this are tables for 'Requests for New', '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 of the page.

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

This screenshot shows the same TRAC 'Manage Accounts' page after the reactivation. The 'Current Users' table now contains two entries: John Smith (Email: John.Smith@fakemail.com, Role: Grantee User) and Jack Smith (Email: Jack.Smith@fakemail.com, Role: Alt PD). The 'Inactive Users' table is now empty. The 'Current Users' table header is highlighted with a red box. 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