Division of STD Prevention

Program Development & Quality Improvement Branch (PDQIB)

PS19-1901 | STD Prevention and Control for Health Departments (STD PCHD)

Work Plan Template User Guide

Last Modified: June 8, 2018

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Part I: Introduction

About this Guide

This guide provides an orientation to two work plan templates developed as part of **CDC-RFA-PS19-1901, STD Prevention and Control for Health Departments (STD PCHD).** Award applicants are encouraged to use these templates for submitting required work plan information as part of their application. These templates are two Excel-based workbooks, pictured below:

5 Year Plan

Year 1 Work Plan

Work Plan Template Contents

There are two template *workbooks*. Each workbook contains multiple *worksheets*, where applicants can enter information. Their contents are described in the table below.

Template	Worksheet	Worksheet Description
STD PCHD 5 Year Plan	PCHD 5 Year Plan Home Page	Coversheet with instructions for navigating and completing the PCHD 5 Year Plan as well as links to relevant documents and Points of Contact. Applicants will 1) select their organization's name from the Project Area drop-down list and 2) fill in the submission date.
	PCHD 5 Year Plan	Worksheet to collect information on the applicant's programmatic capacity, strengths, challenges, planned changes, and priorities during the five year period of performance of the award.
STD PCHD Year 1 Work Plan	PCHD Year 1 Work Plan Home Page	Coversheet with instructions for navigating and completing the PCHD 2019 Year 1 Work Plan as well as links to relevant documents and Points of Contact. Applicants will 1) select their organization's name from the Project Area drop-down list and 2) fill in the submission date.
	Program Context & Partnerships	Worksheet to collect information on the applicant's context, cross-cutting issues and partners related to work plan activities during PCHD Year 1.
	Strategy Area Work Plan Worksheets	Worksheets to collect information on specific objectives, activities, and measures to indicate the achievement of PCHD Year 1 strategies.

Note: All strategies outlined in the templates are <u>required</u> by all applicants. Applicants can request to opt out of selected required activities by providing a strong justification, which must be based on program priorities, resources, and/or policies.

Part II: STD PCHD 5 Year Plan

Navigating the 5 Year Plan Workbook

The PCHD 5 Year Plan template contains two different worksheets. Think of these worksheets as individual pages of the template. You can navigate between the two worksheets by using the tabs at the bottom of the Excel-based template.

Click on the **navigation tabs** at the bottom of the PCHD 5 Year Plan template to navigate between worksheets.

Populating the PCHD 5 Year Plan Home Page (1/2)

The PCHD 5 Year Plan Home Page is the first section in the PCHD 5 Year Plan template. Applicants will select the appropriate response from the "Choose your Project Area" drop-down list at the top of the PCHD 5 Year Plan Home Page.
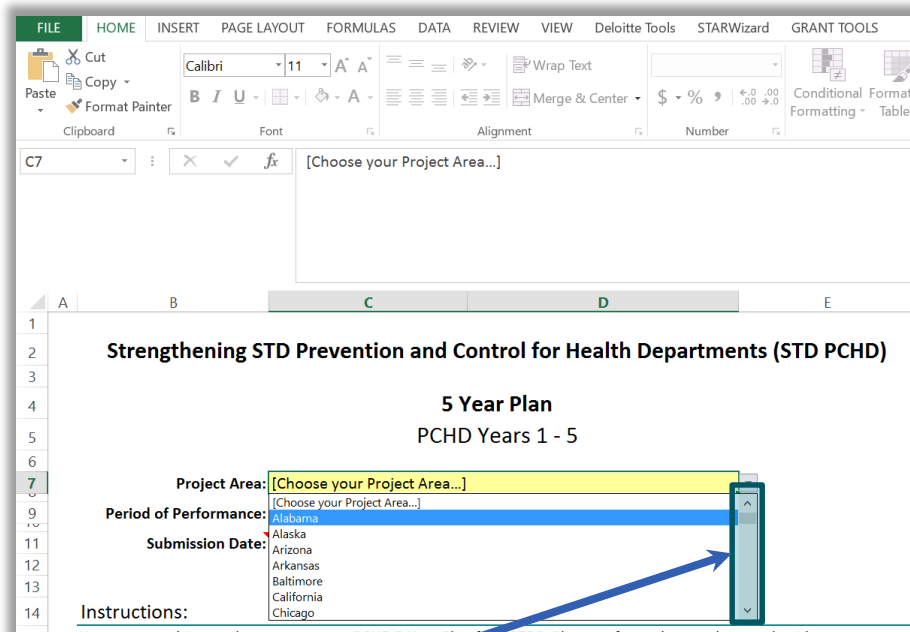
Step 1: Click the ▾ to the right of the yellow cell that says [Choose your Project Area…].

Step 2: Use ▾ ▲ to scroll up and down the list to find the appropriate response for your organization.

Step 3: Click on the Project Area name to select

Step 4: Click outside the [Choose your Project Area…] cell to stop editing.

Populating the PCHD 5 Year Plan Home Page (2/2)

Applicants will populate the worksheet with the Submission Date.
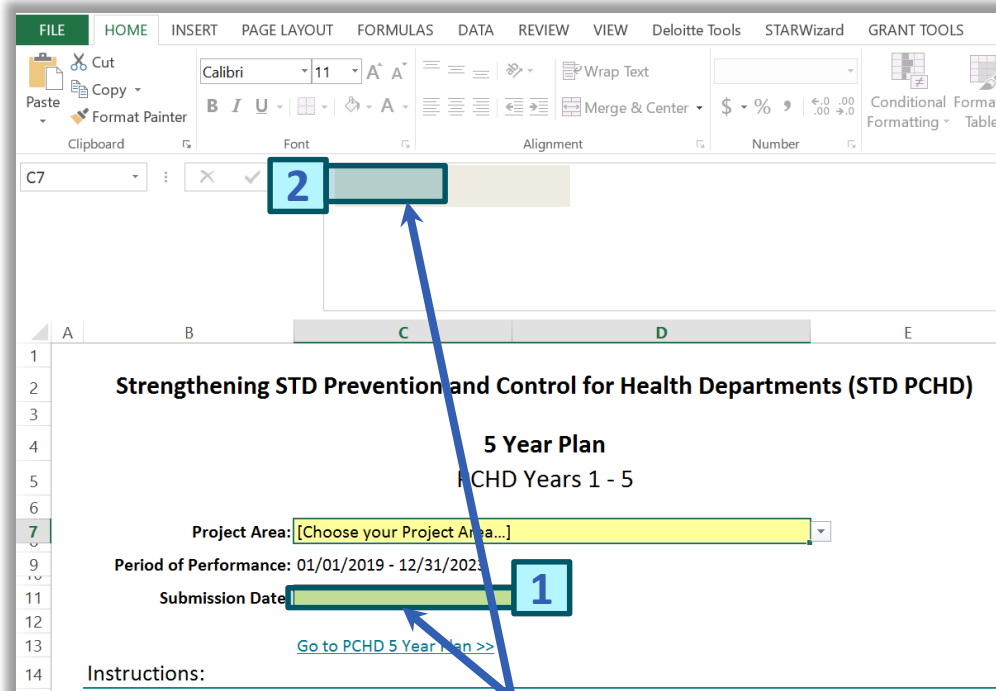
Step 1: Click on the yellow cell to the right of **Submission Date**.

Step 2: Begin typing the date of the Submission Date, using the MM/DD/YYYY format (e.g., 10/01/2018). You will notice that the space above the worksheet will populate with the date range you enter.

Navigating the PCHD 5 Year Plan Worksheet

The PCHD 5 Year Plan worksheet is broken into five color-coded sections for each strategy area. To navigate back to the top of the 5 Year Plan, click the "Back to Top" link.

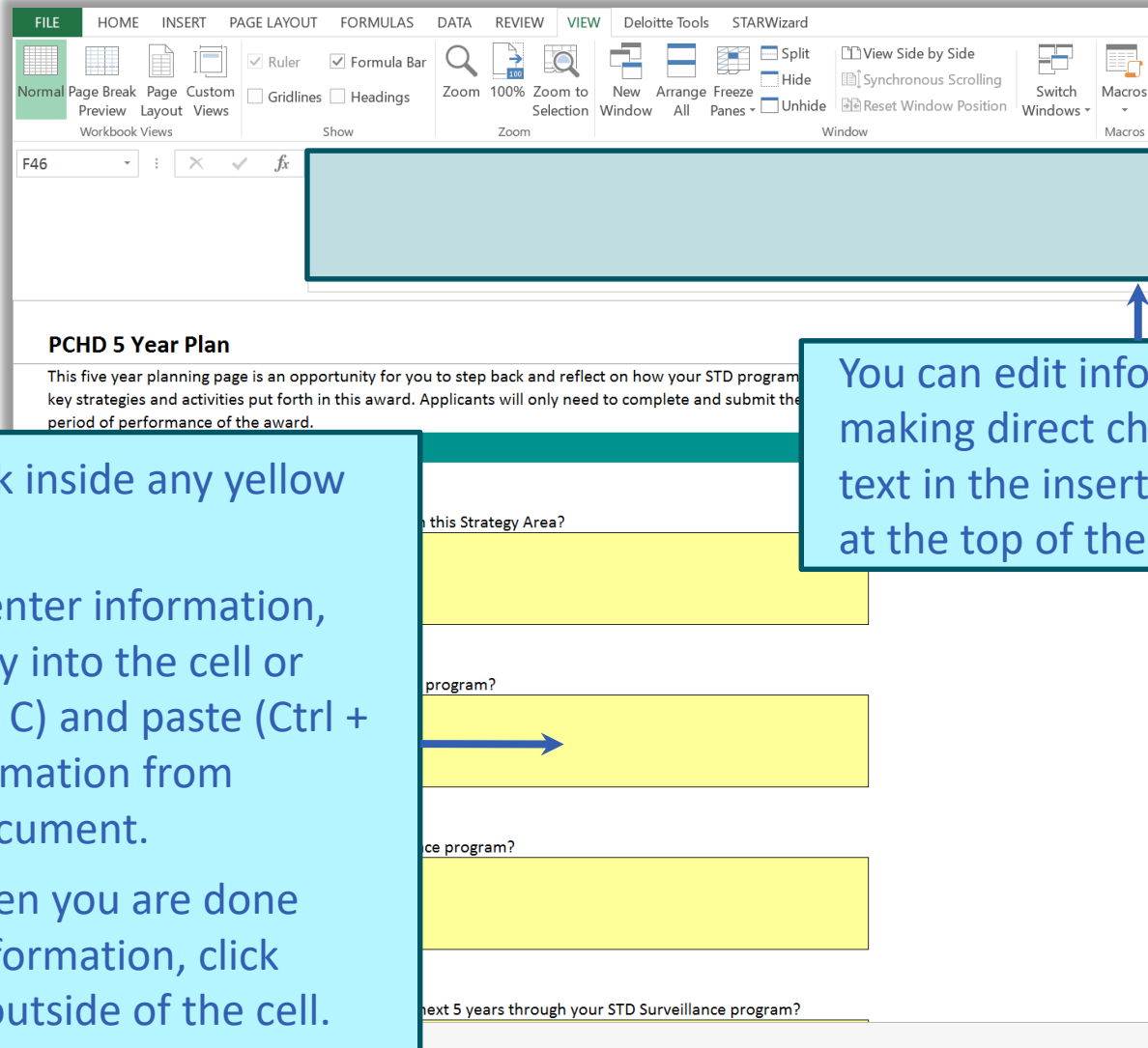Click the "Back to Top" link to return to the top of the worksheet.

Populating the PCHD 5 Year Plan Worksheet (1/2)

To fill out the PCHD 5 Year Plan worksheet, click on the tab labeled "PCHD 5 Year Plan" and click inside any of the yellow cells to begin entering or editing text.

Step 1: Click inside any yellow cell.

Step 2: To enter information, type directly into the cell or copy (Ctrl + C) and paste (Ctrl + V) the information from another document.

Step 3: When you are done entering information, click anywhere outside of the cell.

You can edit information by making direct changes to the text in the insert function bar at the top of the worksheet

Populating the PCHD 5 Year Plan Worksheet (2/2)

To fill in the Program Priorities table, select the appropriate response from Importance and Implementation drop-down lists. If needed, use the comments section to provide additional information to CDC.

Scroll over cells with 🔻 for additional guidance

Step 1: Click inside any yellow cell from the Program Priorities table.

Step 2: Select the appropriate response for the Rating and Priority questions.

Step 3: If needed, use the comments section to provide additional information to CDC.

Part III: STD PCHD Year 1 Work Plan

Navigating the PCHD Year 1 Work Plan (1/2)

In addition to navigation tabs, all PCHD Year 1 Work Plan include hyperlinked buttons that allow users to navigate quickly from worksheet to worksheet.

Navigating the PCHD Year 1 Work Plan (2/2)

Click on the button that corresponds to the specific worksheet you would like to view or edit. You know you are on the desired worksheet when the selected button changes color.

Click the **buttons** to navigate to different sections. The section you are currently in will turn color to match its strategy area.

Populating the PCHD Year 1 Home Page

Similar to the PCHD 5 Year Plan Home Page, applicants must populate the PCHD Year 1 Home Page with the NOFO and work plan information listed below.

Step 1: Select the Project Area for your organization from the drop-down menu (click here for detailed instructions).

Step 2: Enter the **Submission Date** (click here for detailed instructions).

Populating the Program Context & Partners Worksheet (1/3)

The Program Context & Partners worksheet is broken into five color-coded sections for each strategy area. To navigate back to the top of the Program Context & Partners worksheet, click the "Back to Top" link.

Click the "Back to Top" link to return to the top of the worksheet.

Populating the Program Context & Partners Worksheet (2/3)

To fill out the Program Context & Partners worksheet, click on the [tab](#) labeled "Program Context & Partners " and click inside any of the yellow cells to begin entering or editing text.

You can edit information by making direct changes to the text in the insert function bar at the top of the worksheet

ORMULAS   DATA   REVIEW   VIEW   Deloitte Tools   STARWizard

Show/Hide Comment
Show All Comments
Show Ink

Protect and Share Workbook
Allow Users to Edit Ranges
Track Changes

Protect Sheet   Protect Workbook   Share Workbook

Start Inking

Comments   Changes   Ink

	Disease Investigation and Intervention	Screening, Diagnosis, and Treatment	Prevention and Policy	Data Use and Utilization
	genital Syphilis	STD Specialty Care		
	Outbreak	EPT	Gonorrhea & Syphilis T	
erse Outcomes	Partner Services for Women	Priority Pop. Screening &		
Partners Syphilis	Partner Services for MSM			

PCHD Year 1: Strategy Area Context and Partnerships

Disease Investigation and Intervention

Strategy Area Point of Contact (if different from Principal Investigator)

Strategy Area Context
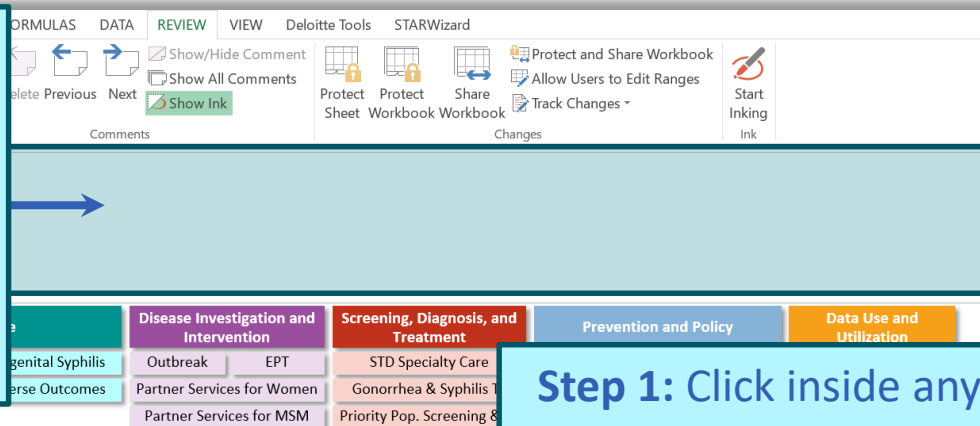Use the space below to describe any contextual factors, cross-cutting issues, changes, or priorities that im...

Use the space below to describe any major risks associated with implementation of the objectives under this Year 1.

Scroll over cells with ◤ for additional guidance

Step 1: Click inside any yellow cell.

Step 2: To enter information, type directly into the cell or copy (Ctrl + C) and paste (Ctrl + V) the information from another document.

Step 3: When you are done entering information, click anywhere outside of the cell.

Populating the Program Context & Partners Worksheet (3/3)

To fill in the Partnerships table, select the appropriate response from Partner Type and New Partnership drop-down lists. Briefly describe each partner in the Partner Details field.

Step 1: Click inside any yellow cell from the Partnerships table.

Step 2: Select the appropriate response from the Partner Type and New Partnership drop-down lists.

Step 3: Describe each partner in the Brief Partner Details field.

Populating the Strategy Area Year 1 Work Plans

To fill out the work plans for the individual strategies, click on one of the strategy tabs and click inside any of the yellow cells to begin entering or editing text.

Step 1: Click inside any yellow cell.

Step 2: To enter information, type directly into the cell or copy (Ctrl + C) and paste (Ctrl + V) the information from another document.

Step 3: When you are done entering information, click anywhere outside of the cell.

Adding Objectives to Strategy Area Work Plans

To add an objective to your work plan, click "Create Objective" link. Clicking the link automatically generates another set of cells for annual objectives, baseline measurements, and accompanying activities. Clicking the link again hides the objective.

Click "Create Objective" to add space for up to 3 objectives per substrategy.

Part IV: Saving and Submitting Your Work

Saving Your Progress

As you go through the work plan template, make sure to save your progress frequently. There are a few different options for saving progress.
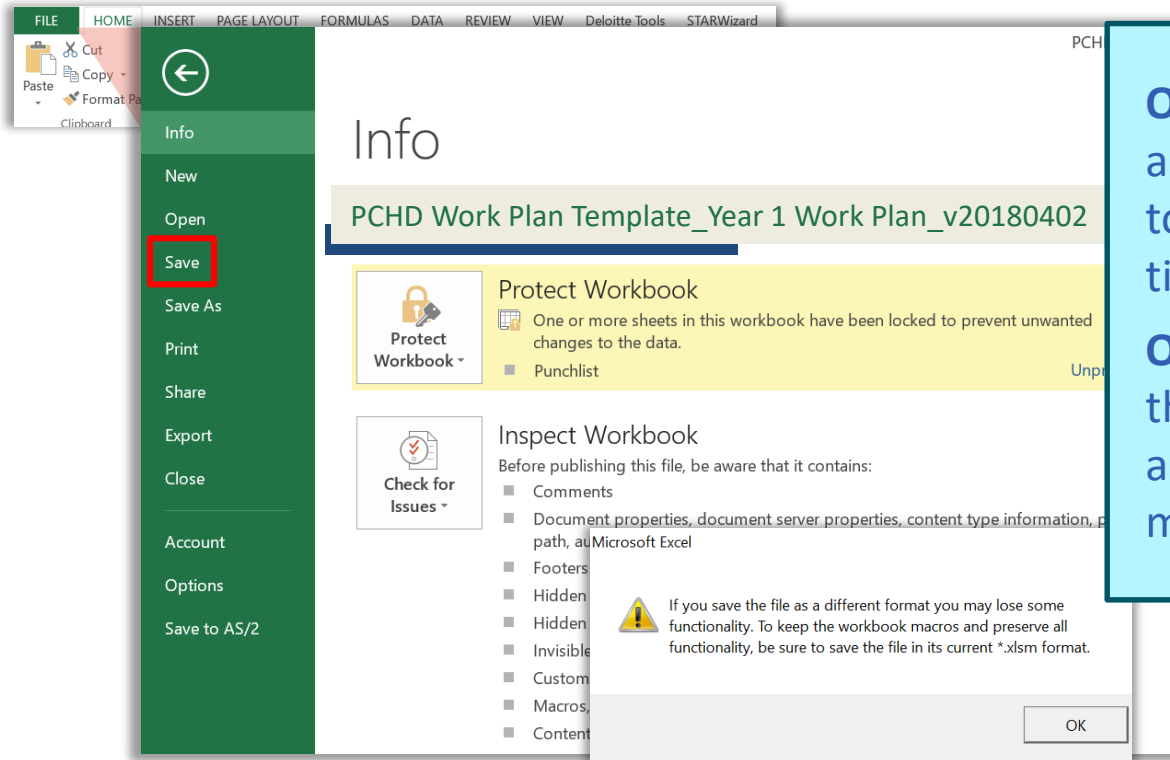
Option 1: Hold down Ctrl and hit S on the keyboard to save progress at any time.

Option 2: Click "File" at the top of the workbook and select "Save" from the menu on the left.

*If you are saving the file for the first time, Excel will prompt you to save it somewhere on your local computer. **Please save this file as a [ProjectAreaName]_5YearPlan_yy-mm-dd OR [ProjectAreaName]_WorkplanY1_yy-mm-dd AND as an .xlsm version.** (Note: you will see a warning message reminding you that if you change the format of the document, you may lose some of the functionality. Click "Ok" and save the file in your preferred location.)*

Consolidating Work Plan Templates (1/2)

If you created copies of the workplan template so multiple people could work on the file, you will need to consolidate their contributions into a final workbook before submitting.

To copy data from the source workplan, first select a contiguous region of yellow cells by clicking and dragging the mouse, then press Ctrl + C on the keyboard to copy the values.

Note - the locked template will not let you copy and paste entire sheets or multiple regions. This means that you will have to copy and paste three areas per objective: (1) the objective description, (2) baseline and target values, and (3) the activity/timeframe/output/assigned to table. If you try to copy a range larger than the yellow cells, you will receive an error message when you try to paste.

Consolidating Work Plan Templates (2/2)

Once you have copied the data, switch to the corresponding tab in the consolidated template, where you can paste the information into the final file.

To paste data, Click on the **upper left hand cell** of the region where you want to paste the data. Then press Ctrl + V on the keyboard to paste the data from the source workbook to the final workbook.

The data that you copied will then appear in the consolidated workbook.

Running Spell Check

As you go through the work plan template, make sure to run spell check frequently.

Click "Spell Check this Sheet" to run spell check on the current tab you are working on

Note: if you click "Cancel", you may not check all of the fields

Preparing Your Work Plan for Submission (1/2)

When you are finished with the work plan templates, you have multiple options to prepare them for submission. Option 1: You can use the "Save a copy to submit" button to save it as the appropriate file type for CDC. Before you submit, remember to run spell check.

Saving and Submitting Your Work:

Click "File" from the ribbon above and then "Save" from the menu. If this is your firs[t] be prompted to choose a location for where this file will be saved. **Please save this** "[ProjectAreaName]_5YearPlan_yy-mm-dd" and as an .xlsm version. (Note: you wi[ll] you that if you change the format of the document, you may lose some of the funct[ion] your preferred location.)

When you are finished with this document, there are two ways to package it for su[bmission] below, select a folder for where you would like the final file saved, and the file will b[e] generated filename. You will no longer be able to edit any text, but you will be able

Save a copy to submit

Option 2 - click "File" from the ribbon above and then "Save As" from the menu or u[se] or .xlsx file type from the "Save as type" drop-down menu. You will see a warning s[ign] cannot be saved in macro-free workbooks: VB project". Click "Yes" to save the file a[s] be able to edit light yellow cells, but a few features from this workbook will no long[er]

To submit this document, attach the file ending in .xls or .xlsx to your application fo[r]

Step 1: Click "Save a copy to submit" at the bottom of the Home Page

Step 2: Choose the appropriate location to save the file

The file will be saved with following naming convention:
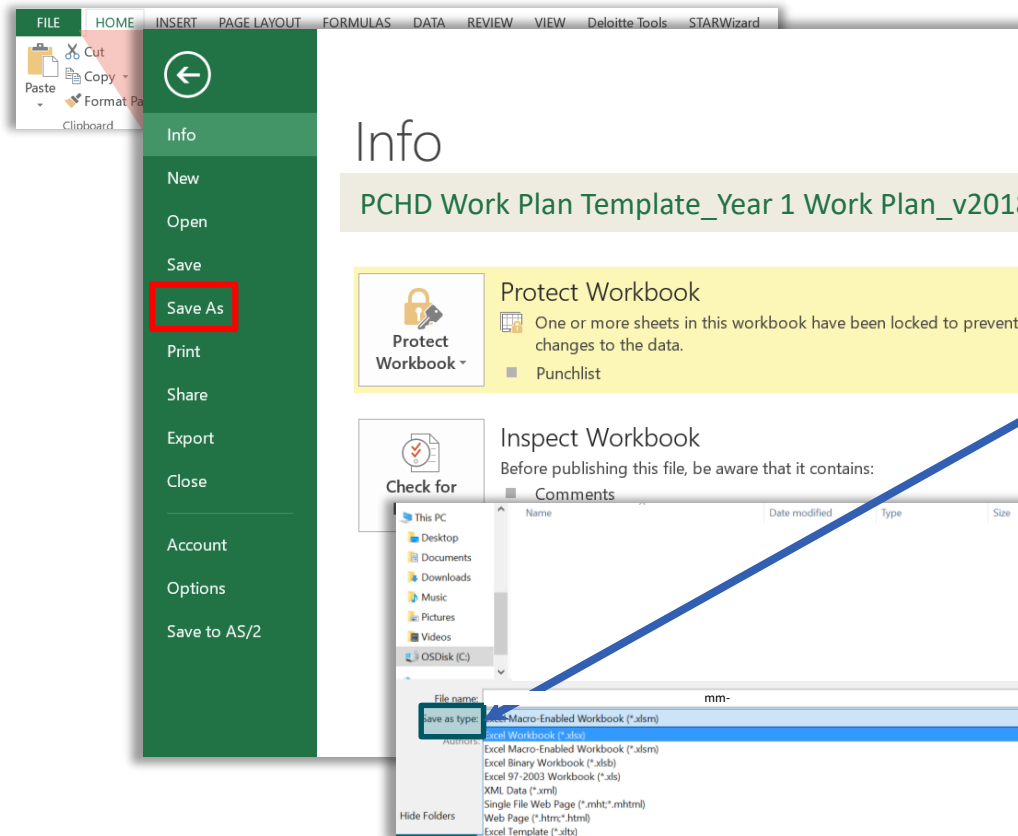
[ProjectAreaName]_5Year Plan_yy-mm-dd.xlsx

[ProjectAreaName]_Work planY1_yy-mm-dd.xlsx

Note: you <u>will not</u> be able to edit the light yellow cells in this version of the document – it will say "Note: This workbook has been marked for submission and is no longer editable."

Preparing Your Work Plan for Submission (2/2)

Option 2: You can also follow the steps below to save the work plan template as the appropriate file type for CDC. Before you submit, remember to run spell check.

Step 1: Click "File" at the top of the workbook and select "Save As" from the menu on the left.

Step 2: Choose the .xls or .xlsx file type from the "Save as type" drop-down menu.

Step 3: Save file with the following naming convention:

[ProjectAreaName]_5YearPlan_yy-mm-dd.xlsx

[ProjectAreaName]_WorkplanY1_yy-mm-dd.xlsx

You will see a warning sign that says "The following features cannot be saved in macro-free workbooks: VB project". **Click "Yes" to save the file as a .xls or .xlsx file type.** *(Note: you will still be able to edit light yellow cells, but a few features from this workbook will no longer be available).*

Part V: Printing Your Work

How to Adjust the Print Settings in Your Worksheet

If you would like to print your work, follow the steps below.

Step 1: Set your print area by clicking "View" from the ribbon

Step 2: Select "Page Break Preview"

Step 3: Click on the dashed blue line to adjust the print area

How to Print Your Worksheet

If you would like to print the current sheet you are working on, follow the steps below.

Step 1: Select "File" then "Print"

Step 2: Select the appropriate printer

- *You can select multiple worksheets by holding Shift and clicking on the individual tabs you would like to print*
- *You can print all worksheets by selecting "Print Entire Workbook" under "Settings"*

  Note that it may take several seconds to print the entire workbook.

How to Print to PDF

If you would like to save your work in a non-editable format, such as PDF, follow the steps below.

Step 1: Select "File" then "Print"

Step 2: Select Adobe PDF under "Printer"

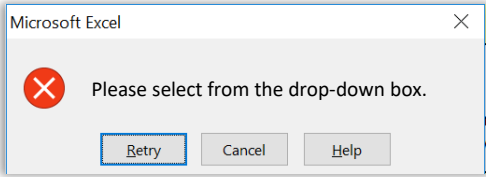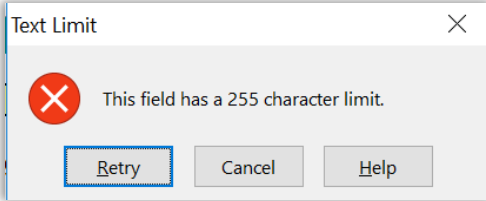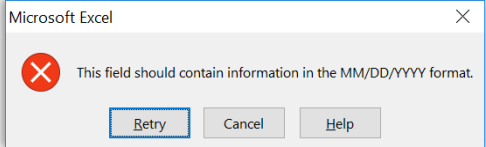**Step 3:** Click Print

Step 4: Save PDF

- *You can select multiple worksheets by holding Shift and clicking on the individual tabs you would like to print*
- *You can print all worksheets by selecting "Print Entire Workbook" under "Settings"*

  Note that it may take several seconds to print the entire workbook.

Common Issues

Common Issues for the Excel-Based PCHD Work Plan Templates

The following items are common issues that users may run into when completing the PCHD 5 Year Plan and Year 1 Work Plan.

Issue	Issue Description	Issue Resolution
Microsoft Excel dialog box: "Please select from the drop-down box." with Retry, Cancel, Help buttons	User typed a response into cell with a drop-down menu instead of selecting the appropriate response from the drop-down menu.	Click "Cancel" and select the appropriate response from the drop-down menu.
Text Limit dialog box: "This field has a 255 character limit." with Retry, Cancel, Help buttons	User typed or copied a response into a cell that is limited to 255 characters.	Click "Cancel" and retype the response in less than 255 characters. If you are copying the response from another document, highlight the response and click Word Count under the Review Ribbon. Edit response so that it does not exceed 255 characters.
Microsoft Excel dialog box: "This field should contain information in the MM/DD/YYYY format." with Retry, Cancel, Help buttons	User typed or copied a response into a cell that is not in the MM/DD/YYYY format.	Click "Cancel" and retype the response in the MM/DD/YYYY format.

Appendix

Using the S.M.A.R.T. Objectives Builder Tool

The S.M.A.R.T. Objectives Builder Tool enables you to build objectives that are specific, measureable, achievable, realistic and time-bound. Follow the instructions below to generate a S.M.A.R.T. annual objective.

Step 1: Follow the instructions in the boxes with ◤ for additional guidance

Step 2: Select or type in relevant information into the yellow cells

Step 3: Type in or copy/paste the Calculated S.M.A.R.T. Objective Statement into Year 1 Work Plan

You can copy (Ctrl + C) and paste (Ctrl + V) the Calculated S.M.A.R.T. Objective Statement into Year 1 Work Plan

For more information, please contact
std_pchd@cdc.gov