CDMIS
CHRONIC DISEASE
Management Information System

Resources Module

Version 2.0

CDC
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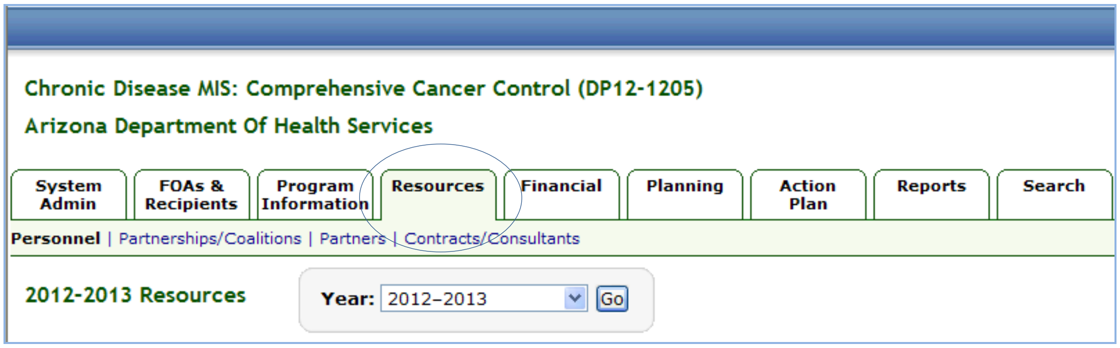
Contents

Introduction

The *Resources* tab allows you to enter and maintain resource-related information such as personnel, partners, contracts, etc.



The *Resources* tab contains the following sections:

- **Personnel** – maintains information about key personnel members who perform essential program functions.
- **Policy Task Force / Workgroup -** maintains information about the task force and workgroups in your program. Task Force/Workgroups are stakeholder organizations that are established to assist in the formulation of plans, guide project activities, and identify additional financial resources for this project.

Note

- This section is used by Demonstrating Capacity to Implement Policy and Environmental Cancer Control Interventions FOA only.

- **Partnerships/Coalitions -** maintains information about the partnerships and coalitions in your program. Coalitions are groups of stakeholder organizations that are established to assist in the formulation of plans, guide project activities, and identify additional financial resources for this project.

Note

- This section is available only to the Comprehensive Cancer Control and OSH Tribal FOAs.

- **Partners** - maintains information about organizations or persons that collaborate with the recipient to accomplish program work
- **Contracts/Consultants -** maintains information about the contracts and consultants for your program. Contracts and consultants are individuals or organizations that receive funds in exchange for program specific work; they are not "state outsourced contractors."
- **Leadership** - maintains information about the individuals that make up the leadership team for your program.

Note

- This section is available only the Strategic Alliance for Health, Community Transformation Grants, Community Transformation Grant Small Communities, and REACH Demonstration Projects FOAs**.**

Personnel

Use the *Personnel* section to add information for key personnel members, who perform essential program functions, and to edit, view or delete personnel information. Program personnel includes full time, part time, or contracted individuals, either funded by the cooperative agreement or in kind. Any number of staff members can be entered and maintained on this page.

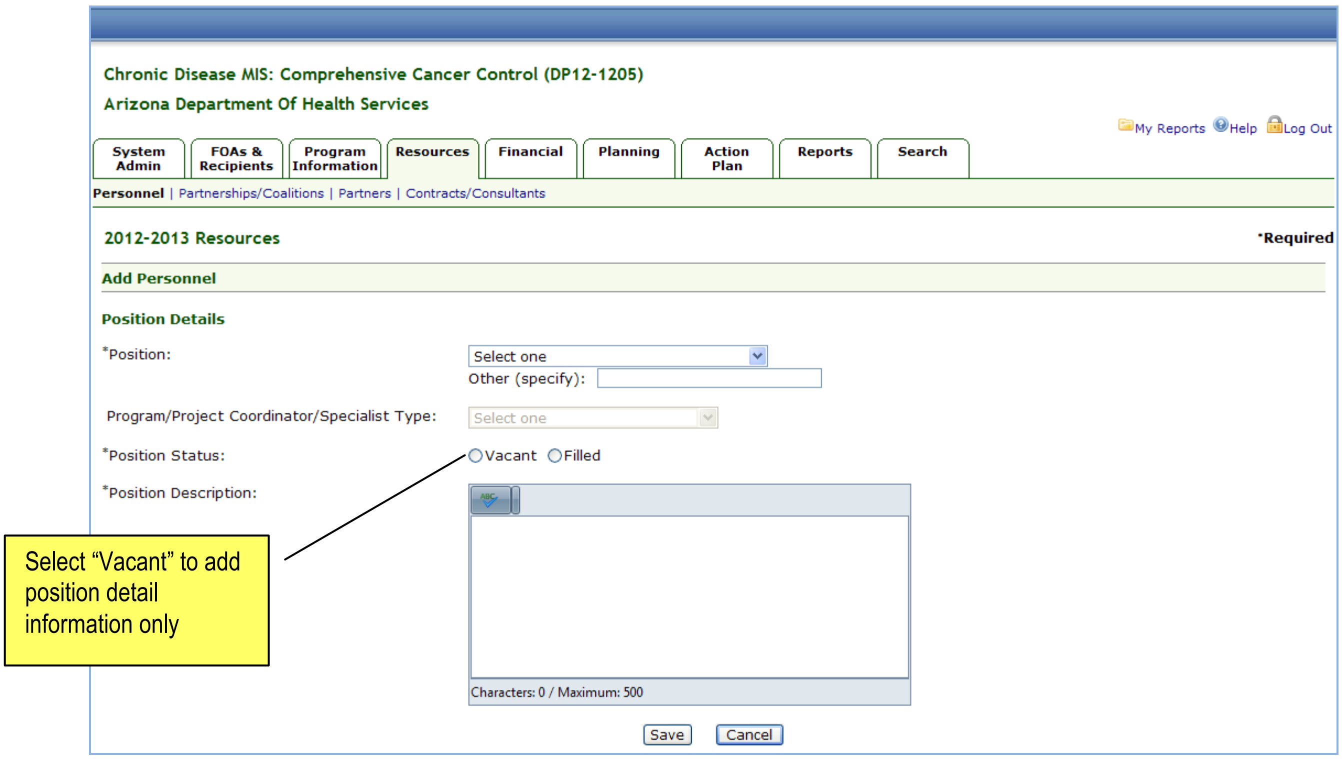
The Personnel List page

The *Personnel* List page is the first page displayed when you click the *Resources* tab. The page provides a high-level view of all personnel including vacant positions, added for the grantee. From the List page, you can add a new personnel member or view, edit, or delete an existing member.

Adding a personnel member

- Personnel information may be added for a “vacant” or “filled” position. When the position status is “vacant”, the *Add Personnel* page is displayed with the position details only. If the position status is “filled”, the page is displayed with both the Position and Personnel Details.

1. Click the **add** link on the *Personnel* List page.
   Result: The system displays the *Add Personnel* page. The page is displayed with position details fields only and provides the option to add a vacant position when a personnel member has not been identified to fill the position.



2. In the *Position* field, select the personnel member's primary role from the drop-down list.
   - If the desired role is not included in the drop-down list, select *Other*, and enter the role in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words.
3. In the *Program/Project Coordinator/Specialist Type* field, select the Program/Project Coordinator/Specialist type from the drop down list.
   - This field is enabled and required if you selected Program/Project Coordinator/Specialist in the *Position* field.
4. If the position has not been filled, do the following:
   a. In the *Position Status* field, select *Vacant*.

b. In the Position Description field, enter the description of the position. Maximum text for the Position Description field is 500 characters, about 100 words.

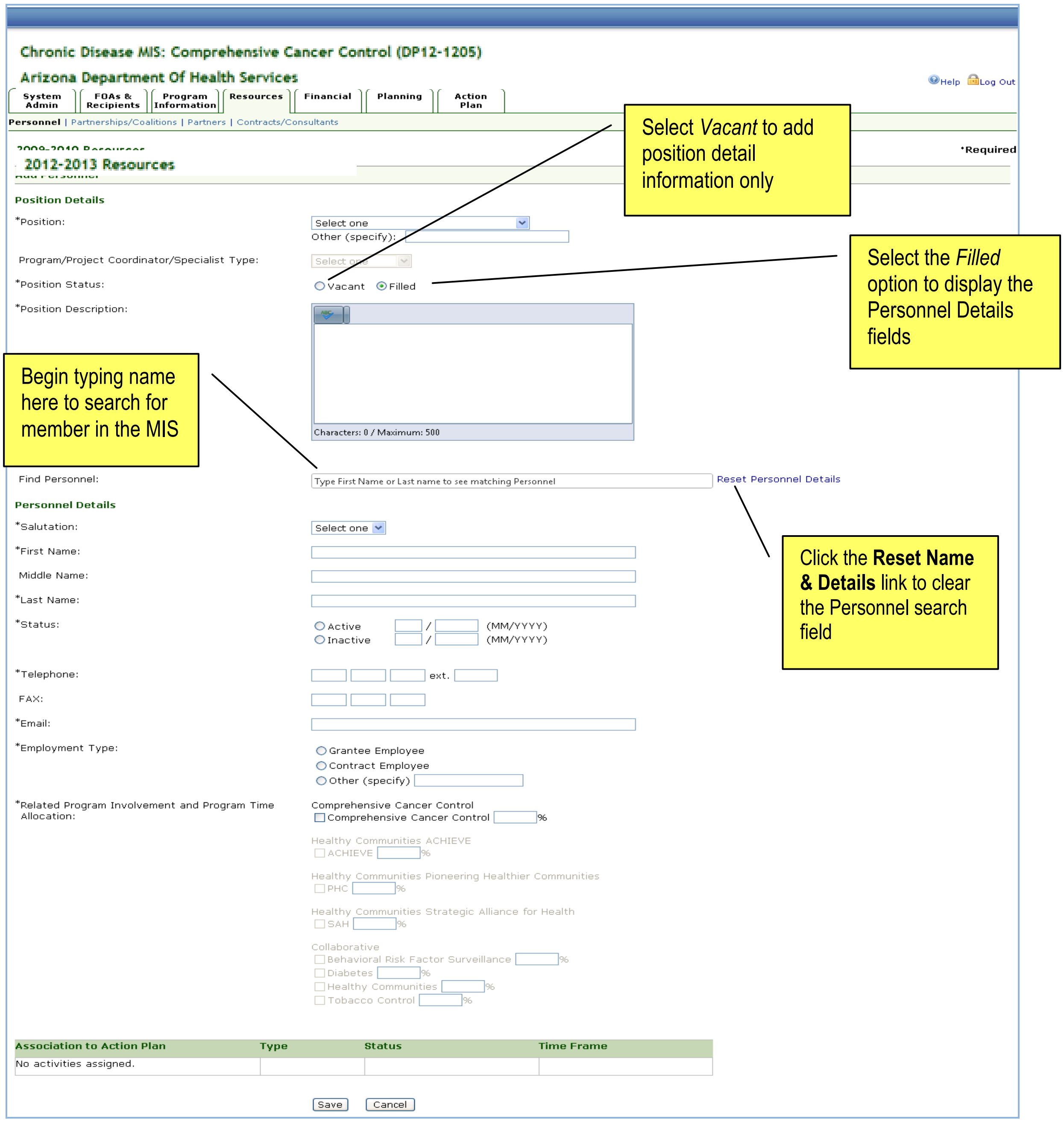
c. Click **Save**.

Result: The system returns to the *Personnel List* page.

5. If a personnel member has been identified for the position, do the following:

a. Select *Filled* in the “Position Status” field.

Result: The system displays the Personnel Details fields



b. In the *Find Personnel* field, begin typing the personnel member's name.
Result: The system immediately displays all personnel names in the MIS matching the letters typed. As more letters are typed, the list gets shorter.

c. If the member name appears in the search list, click the name.
Result: The system populates the *Personnel Details* fields with the selected personnel member's information.

Note

- Click the **Reset Name & Details** link to clear out the Personnel search field.

d. Inspect the fields, modify as necessary, and click **Save**.
Result: The system returns to the *Personnel List* page.

6. If you search for a personnel member, the system displays a message indicating that a match was not found, and you want to add the personnel member to the system, do the following:

Note

- The fields listed below are displayed only if you selected *Filled* in the Position Status field.
- When adding a personnel member, the First Name, Middle Name, Last Name, Telephone, FAX, E-mail fields are not editable. However, when editing a personnel member, the fields are editable.

a. In the *First Name* field, enter the first name of the personnel member. Maximum text is 50 characters, about 10 words.

b. In the *Middle Name* field, enter the middle name of the personnel member. Maximum text is 50 characters, about 10 words.

c. In the *Last Name* field, enter the last name of the personnel member. Maximum text is 50 characters, about 10 words.

d. In the *Status* field, specify the status of the personnel member. If the personnel member is active, select the *Active* option and enter the activation date in the field in mm/dd/yyyy format or select a date from the calendar.

e. In the *Telephone* field, enter the personnel member's primary telephone number by entering the first three digits in the first text box, next three digits in the second, and the last four digits in the third text box. Specify up to a five-digit extension number in the *ext*. field if available.

f. In the *FAX* field, enter the personnel member's primary fax number by entering the first three digits in the first text box, next three digits in the second, and the last four digits in the third text box.

g. In the *E-mail* field, enter the personnel member's contact E-mail address. The address must contain a name and domain, for example, jerryb@cdc.gov.

h. In the *Employment Type* field, select the employment type of the personnel member — *Grantee* or *Contract Employee*. If the desired employment type is not included in the list, select *Other*, and enter the employment type in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words.

i. Complete the *Related Program Involvement and Program Time Allocation* field as follows:
    i. For each program listed, specify the percentage of time allocated to the specific program for the partner by selecting the check box for the program and entering the number in the % text box. For example 25 or 100. Enter only whole numbers in this field. You cannot enter decimal points, for example, 25.5.
    ii. In the *Association to Action Plan - Activities* column, click an activity link to open a pop-up window that displays the activity details. After viewing the activity details, click *Close* to close the pop-up window. This column displays the activities from the action plan that are assigned to the personnel member and the Time Frame column displays the time frame, i.e., starting quarter and year and ending quarter and year for the activity.
    iii. In the *Reassign* field, select a different personnel member from the drop-down list if you want to reassign the activity to another active personnel member.

j. In the *Related Program Involvement and Program Time Allocation* field, for each program listed, specify the percentage of time allocated to the specific program for the partner by selecting the check box for the program and entering the number in the % text box. For example 25 or 100. Enter only whole numbers in this field. You cannot enter decimal points, for example, 25.5.

7. Click the **Save** button to save the information you entered. The system saves the information and returns you to the Personnel summary page. If any fields on the page are incomplete or invalid when you click **Save**, the system displays an error. Correct all invalid fields and click **Save** again.

What do I do differently for my FOA when entering personnel information? Click on your FOA to find out.
CCC DP-1205

Adding a personnel member: CCC DP-1205

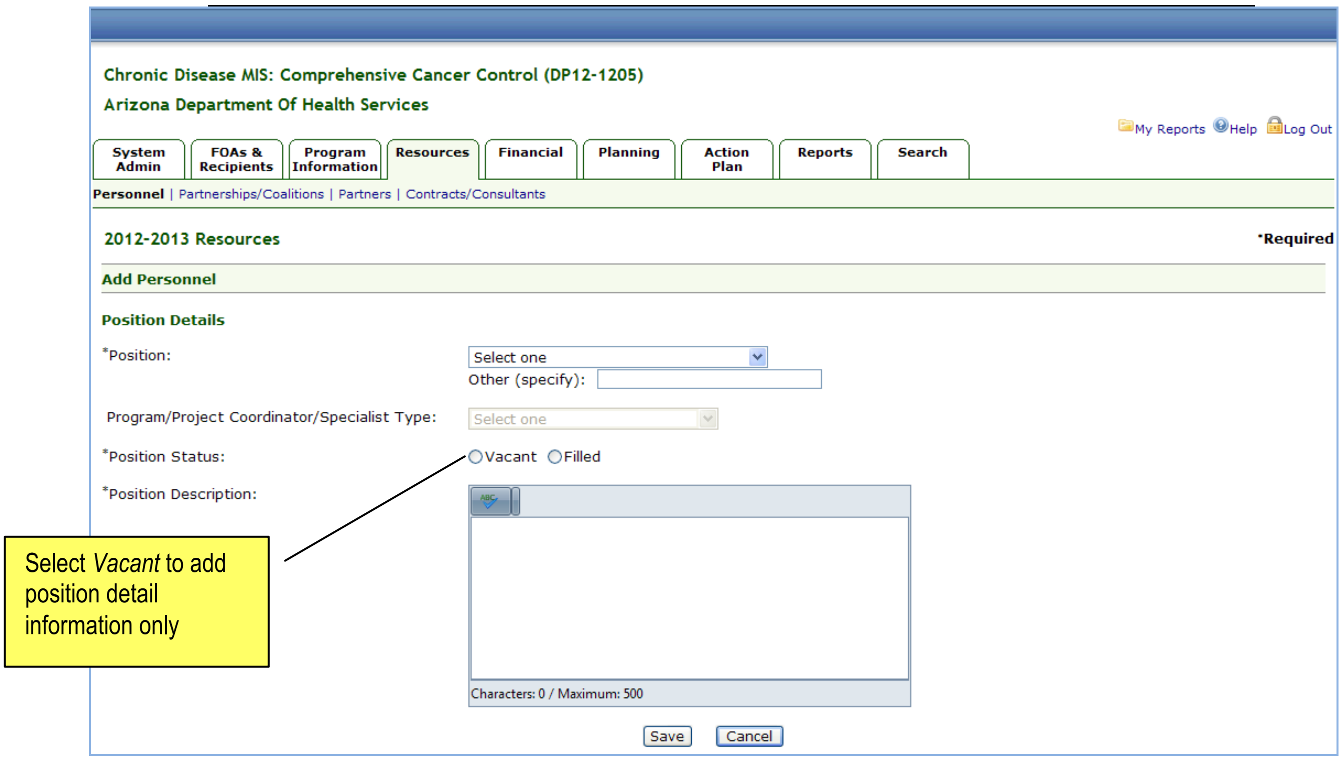
- In the *Personnel Member is a Subject Matter Expert* in field (after Employment Type), for each area of subject matter expertise listed, specify the percentage of time allocated to the specific area for the personnel member by selecting the check box for the area and entering the number in the % text box. For example 25 or 100. Enter only whole numbers in this field. You cannot enter decimal points, for example, 25.5. If the personnel member is not a subject matter expert in any of the areas listed, select *Not Applicable*.
- In the *Personnel Member Competencies* field, select the text box for each area in which the individual is competent.

Editing personnel member information

1. On the *Personnel* List page, click the **edit** link on the same row as the personnel member.
   Result: The system displays the *Edit Personnel* page.

Note

- The page for entering initial information and modifying existing information for personnel members are identical. The only difference is that the Edit page displays the existing information for the personnel member while the fields in the page for entering initial information are blank.



2. Modify the fields as necessary and click the **Save** button to save the information. The system saves the information and returns you to the Personnel summary page. If any fields on the page are incomplete or invalid when you click **Save**, the system displays an error. Correct all invalid fields and click **Save** again.

Deleting a personnel member

1. On the *Personnel* List page, click the **delete** link on the same row as the personnel member.
   Result: The system displays a confirmation message.
2. Click the **OK** button to confirm your decision to delete the personnel member.
   Result: The system deletes the personnel member.

Important

- Once a personnel member is deleted the personnel member's information is no longer available in the system.
- If a personnel member who is assigned to work plan activities is deleted,

the personnel member will also be removed from the work plan activity.

- Before deleting a personnel member, all Action Plan Activities assigned to the personnel member must be reassigned to another “Active” personnel member.

Partners

Use the *Partners* section to enter and maintain information about organizations or persons that collaborate with the recipient to accomplish program work.

Note

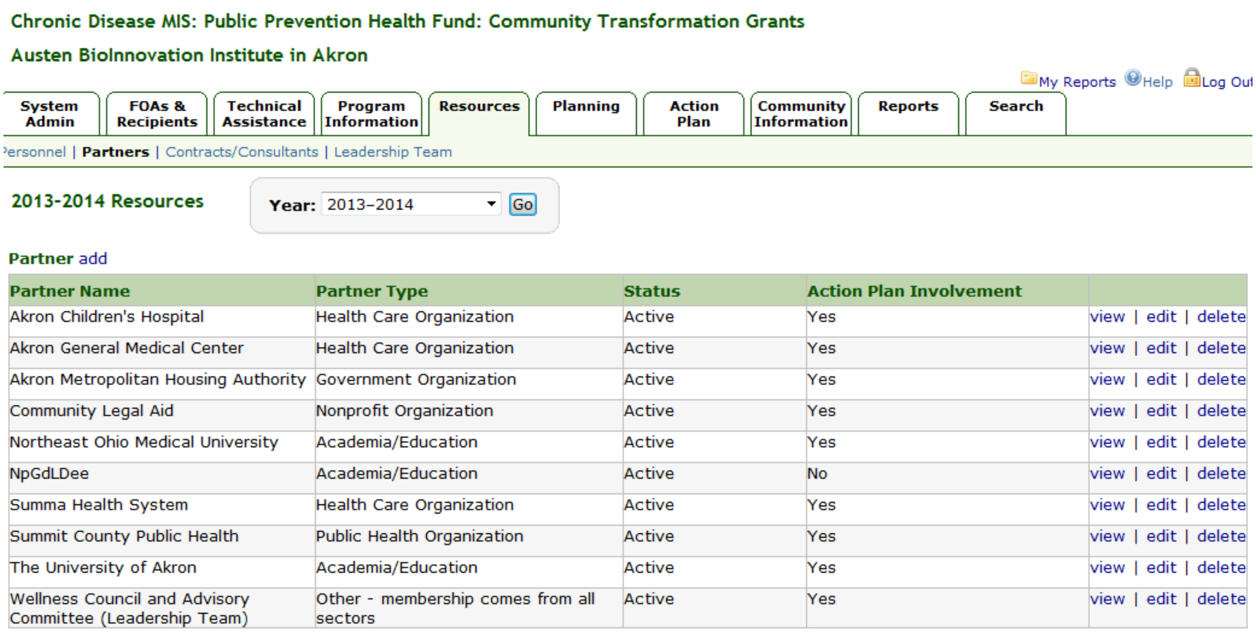
- Partner information is used in the *Action Plan* section.
- Partners may also be contractors if they provide program support beyond the scope of their contract without compensation.
- There is no limit to the number of partners that can be entered.
- Partner information should be updated as new partnerships are formed and as existing partnerships change.

The Partner summary page

The Partner page provides a high-level view of all partners in your program. From this page, you can add a new partner or view, edit, or delete an existing partner.

Important

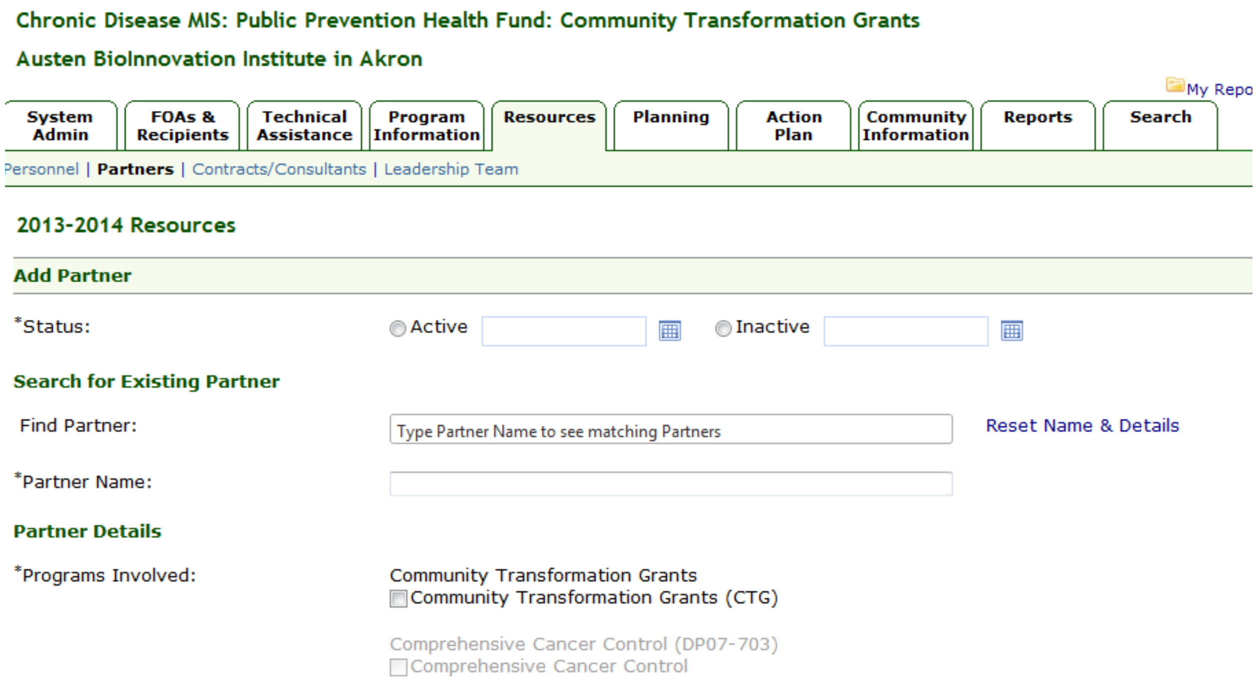
- In order to maintain a history of partner information, it is recommended that partners are not deleted, but a partner's status can be changed to Inactive in the "Status" field. However, if a partner is entered by mistake, it is appropriate to delete the partner.



Partner Name	Partner Type	Status	Action Plan Involvement	
Akron Children's Hospital	Health Care Organization	Active	Yes	view | edit | delete
Akron General Medical Center	Health Care Organization	Active	Yes	view | edit | delete
Akron Metropolitan Housing Authority	Government Organization	Active	Yes	view | edit | delete
Community Legal Aid	Nonprofit Organization	Active	Yes	view | edit | delete
Northeast Ohio Medical University	Academia/Education	Active	Yes	view | edit | delete
NpGdLDee	Academia/Education	Active	No	view | edit | delete
Summa Health System	Health Care Organization	Active	Yes	view | edit | delete
Summit County Public Health	Public Health Organization	Active	Yes	view | edit | delete
The University of Akron	Academia/Education	Active	Yes	view | edit | delete
Wellness Council and Advisory Committee (Leadership Team)	Other - membership comes from all sectors	Active	Yes	view | edit | delete

Adding a partner

1. Click the **add** link on the *Partner* page.
   Result: The system displays the *Add Partner* page.



2. In the *Status* field, indicate the status of the partner by selecting *Active* or *Inactive*. After selecting a status, enter the date that the status became effective. Be sure to enter the date as numbers in the following format: MM/DD/YYYY. For example, 10/08/2013. You can also click the calendar graphic to select a date from the calendar.
3. To locate a partner, in the *Find Partner* field, enter the name of the partner. As you type, the system displays a drop-down list with the names of partners that have already been entered into the MIS for all programs. When you select the desired name from the list, the system auto-populates the Partner Name field. If the desired name is not displayed, use the Partner Name field to enter the partner's name.

Note

- You can click the **Reset Name & Details** link to clear the Search fields and start another search.

4. In the *Partner Name* field, enter the name of the partner organization. Maximum text is 50 characters, about 10 words.
5. In the Programs Involved field, select the check box for the programs associated with the partnership.
6. In the *Partner Type* field, select the type of partner from the drop-down list. If the desired partner type is not included in the list, select *Other*, and enter the partner type in the *Other* text box. Maximum text for the *Other* field is 100 characters, about 20 words.
7. Click the **Save** button to save the information you entered. The system saves the information and returns you to the Partners summary page. If any fields on the page are incomplete or

invalid when you click **Save**, the system displays an error. Correct all invalid fields and click **Save** again.

What do I do differently for my FOA when entering partner information? Click on your FOA to find out.

CCC (DP07-703) | CCC (DP12-1205) | PHC | SAH

Adding a partner: CCC (DP07-703) and CCC (DP12 1205)

- In the *Partner Role* field below the Partner Type field, select the role of the partner from the drop-down list. If the desired partner type is not included in the list, select *Other*, and enter the partner role in the *Other* text box. Maximum text for the *Other* field is 100 characters, about 20 words.
- In the *Partner Agreement/MOU/MOA* field, Click *Browse* to navigate to the location where the document is saved, and select the document. To edit an attached file, edit the copy of the file on your computer, delete the attached file, and then upload it again. You can attach only one file, attaching a second file will overwrite the existing file.

Adding a partner: PHC and SAH

- In the *Health Priority Area* field, from the Chronic Disease and Related Risk Factors sub-sections, select the health priority area(s) that are addressed by the partner.
- In the *Setting/Sector Represented* field, select the setting or sector represented by this partner.

Editing partner information

1. On the *Partners* page, click the **edit** link on the same row as the partner.
   Result: The system displays the *Edit Personnel* page.

- The page for entering initial information and modifying existing information for personnel members are identical. The only difference is that the Edit page displays the existing information for the partner while the fields in the page for entering initial information are blank.

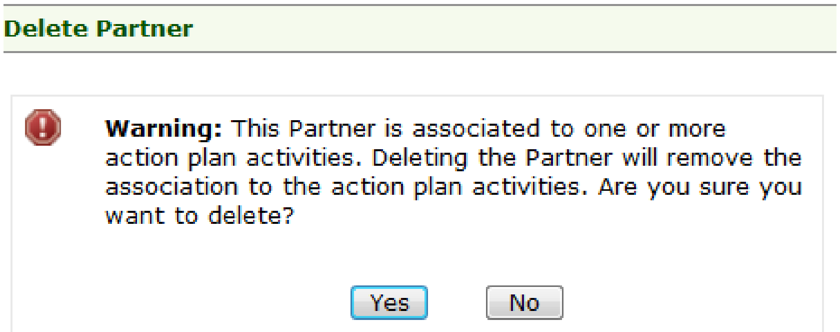
2. Modify the fields as necessary.

- When modifying partner information, the system displays the Association to Action Plan-Activities section, which lists the activities from the action plan that are assigned to the partner. A Time Frame column displays the time frame, i.e., starting quarter and year and ending quarter and year for the activity. You can click the activity link to open a pop-up window that displays the activity details. After viewing the activity details, click **Close** to close the pop-up window.
- The Association to Action Plan-Activities section also has a Reassign field that you can use to reassign the activity to another active partner. To reassign the activity, select a different partner from the drop-down list.

3. Click the **Save** button to save the information. The system saves the information and returns you to the Partner summary page. If any fields on the page are incomplete or invalid when you click **Save**, the system displays an error. Correct all invalid fields and click **Save** again.

Deleting a partner

1. On the *Partner* page, click the **delete** link on the same row as the partner.
   Result: The system displays a confirmation message.



2. Click the **OK** button to confirm your decision to delete the partner.
   Result: The system deletes the partner.

Important

- Once a partner is deleted the partner's information is no longer available in the system.
- If a partner who is assigned to work plan activities is deleted, the partner will also be removed from the work plan activity.
- Before deleting a partner, all Action Plan Activities assigned to the partner must be reassigned to another "Active" partner.

Contracts/Consultants

Use the *Contracts/Consultants* section to enter and maintain information about the contracts and consultants for your program. Contracts and consultants are individuals or organizations that receive funds in exchange for program specific work; they are not "state outsourced contractors".

Note

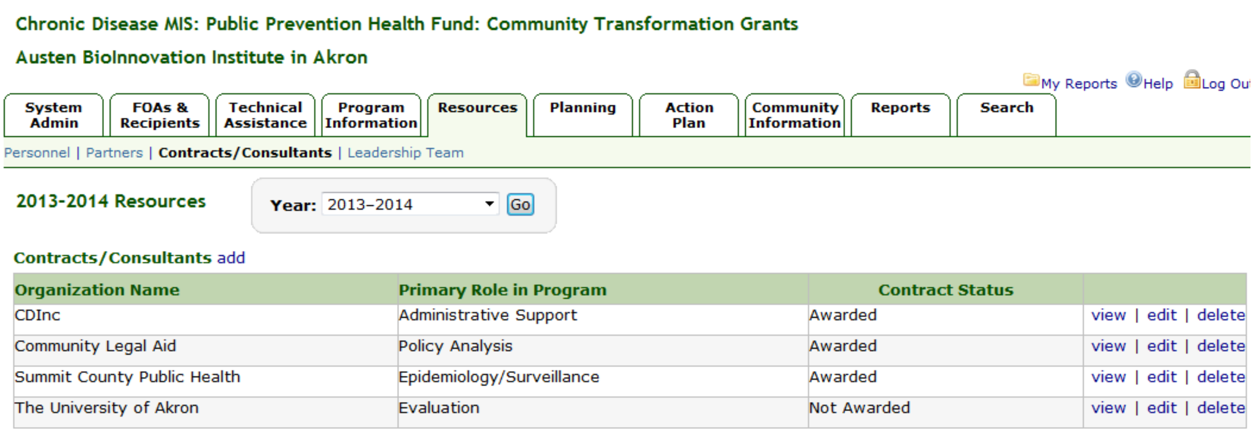
- A contractor/consultant cannot be both a staff member and a contractor.
- Contractors/consultants who act as staff members should be documented in the Staff section as "state outsourced contracts."
- A contractor/consultant may also be a partner if the program support is being provided beyond the scope of their contract without compensation.
- Key contractor/consultant information should be updated as new contracts are awarded or existing contracts change.
- States are required to submit a hard copy of the contract/consultant when submitting the budget justification.
- There is no limit to the number of contracts/consultants that can be entered.

The Contracts/Consultants summary page

The *Contracts/Consultants* summary page provides a high-level view of all contracts and consultants in your program. From this page, you can add a new partner or view, edit, or delete an existing contract or consultant.

Important

- In order to maintain a history of contract/consultant information, it is recommended that contracts/consultants are not deleted. However, if a contract/consultant is entered by mistake, it is appropriate to delete the information.



Organization Name	Primary Role in Program	Contract Status	
CDInc	Administrative Support	Awarded	view | edit | delete
Community Legal Aid	Policy Analysis	Awarded	view | edit | delete
Summit County Public Health	Epidemiology/Surveillance	Awarded	view | edit | delete
The University of Akron	Evaluation	Not Awarded	view | edit | delete

Adding a contract/consultant

1. Click the **add** link on the *Contracts/Consultants* page.
   Result: The system displays the *Add Contract* page.

2. In the *Contract Status* field, select *Awarded* or *Not Awarded* to indicate whether the contract has been awarded or not.
3. In the *Primary Role in Program* field, select the primary role that the contractor performs in your program from the drop-down list. If the desired role is not in included in the list, select *Other*, and enter the role in the *Other* text box. Maximum text for the *Other* field is 100 characters, about 20 words.
4. In the *Organization Name* field, enter the name of the organization. If the contractor is an individual, enter the first and last name. Maximum text is 200 characters, about 40 words.
5. In the *Organization Type* field, select the type of organization from the drop-down list. If the desired organization type is not in included in the list, select *Other*, and enter the organization type in the *Other* text box. Maximum text for the *Other* field is 100 characters, about 20 words.
6. In the *Organization's Status on Contract* field, select *Active* or *Inactive* to indicate whether the organization is active or inactive on the contract.
7. Click the **Save** button to save the information you entered. The system saves the information and returns you to the Contracts/Consultants summary page. If any fields on the page are incomplete or invalid when you click **Save**, the system displays an error. Correct all invalid fields and click **Save** again.

What do I do differently for my FOA when entering contract/consultant information? Click on your FOA to find out.
CCC (DP07-703) | CCC (DP12 1205) | Collaborative | REACH | REACH Demo | CTG-SC

Adding a contract/consultant: CCC (DP07-703), Collaborative, REACH, REACH Demo, CTG-SC

- In the *Is contract funded by this FOA?* field, indicate by selecting *Yes* or *No* whether the specific contract is funded by this FOA. If you select Y*es*, enter the amount funded in the text box provided.
- If you selected Yes in the *Is Contract Funded by this FOA?* field, specify the amount of contract that is funded by this FOA in the *In the Amount of Contract Funded by this FOA?* field. If the contract is fully funded or partially funded, select *Yes* and enter the amount in the text boxes provided. Maximum text is 12 numeric digits in the following format ##########.##. The amount entered in this field must be greater than zero (0).

Adding a contract/consultant: CCC (DP12 1205)

- In the Is *contract funded by this FOA?* field, indicate by selecting *Yes* or *No* whether the specific contract is funded by this FOA. If you select Y*es*, enter the amount funded in the text box provided.
- If you selected Yes in the *Is Contract Funded by this FOA?* field, specify the amount of contract that is funded by this FOA in the In the Amount of Contract Funded by this FOA field. If the contract is fully funded or partially funded, select *Yes* and enter the amount in the text boxes provided. Maximum text is 12 numeric digits in the following format ##########.##. The amount entered in this field must be greater than zero (0).
- If you selected *Yes* in the *Is contract funded by this FOA?* field, indicate if the contract is "fully funded" or "partially funded".
- If you select *Yes* in the *Is contract funded by this FOA?* field and the contract is partially funded by the FOA, enter the amount partially funded in the text box provided.
- If you selected *No* in the *Is contract funded by this FOA?* field, describe the other funding sources in the text box provided.
- If you selected *Filled* in the Position Status field, the system displays the *Contract/Consultant is a Subject Matter Expert in* field. For each area of subject matter expertise listed in the Contract/Consultant is a Subject Matter Expert in field, specify the percentage of time allocated to the specific area for the contract/consultant by selecting the check box for the area and entering the number in the % text box. For example 25 or 100. Enter whole numbers in this field. You cannot enter decimal points, for example, 25.5. If the contract/consultant is not a subject matter expert in any of the areas listed, select *Not Applicable*

Editing contract/consultant information

1. On the *Contracts/Consultants* page, click the **edit** link on the same row as the contract or consultant.
   Result: The system displays the *Edit Contract* page.

Note

- The page for entering initial information and modifying existing information for contracts/consultants are identical. The only difference is that the Edit page displays the existing information for the contract/consultant while the fields in the page for entering initial information are blank.

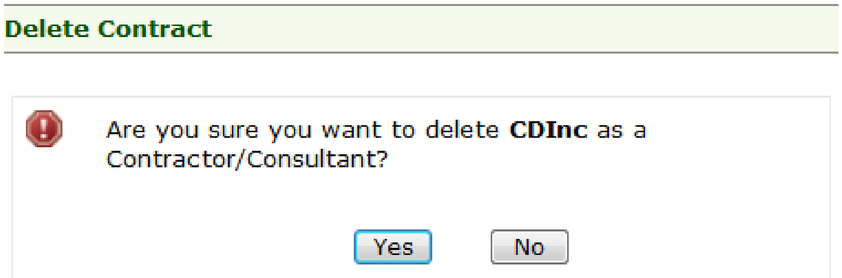
2. Modify the fields as necessary.

- When modifying contract/consultant information, the system displays the Association to Action Plan-Activities section, which lists the activities from the action plan that are assigned to the contract/consultant. A Time Frame column displays the time frame, i.e., starting quarter and year and ending quarter and year for the activity. You can click the activity link to open a pop-up window that displays the activity details. After viewing the activity details, click **Close** to close the pop-up window.
- The Association to Action Plan-Activities section also has a Reassign field that you can use to reassign the activity to another active contract/consultant. To reassign the activity, select a different contract/consultant from the drop-down list.

3. Click the **Save** button to save the information. The system saves the information and returns you to the Contract summary page. If any fields on the page are incomplete or invalid when you click **Save**, the system displays an error. Correct all invalid fields and click **Save** again.

Deleting a contract/consultant

1. On the *Partner* page, click the **delete** link on the same row as the contract/consultant.
   Result: The system displays a confirmation message.



2. Click the **Yes** button to confirm your decision to delete the contractor/consultant.
   Result: The system deletes the contract/consultant.

Important

- Once a contract/consultant is deleted the contract/consultant's information is no longer available in the system.
- If a contract/consultant who is assigned to work plan activities is deleted, the contract/consultant will also be removed from the work plan activity.
- Before deleting a contract/consultant, all Action Plan Activities assigned to the contract/consultant must be reassigned to another "Active" contract/consultant.

Policy Taskforce/Workgroup

Use the *Policy Task Force/Workgroup* section to enter and maintain information about the task force and workgroups in your program. Task Force/Workgroups are stakeholder organizations that are established to assist in the formulation of plans, guide project activities, and identify additional financial resources for this project. When you access the Policy Task Force section for the first time, the system displays an **add** link that allows you to enter Policy Taskforce/Workgroup information. After adding the information, you can then choose to edit the displayed information or upload attachments.

Note

- The Policy Task Force/Workgroup section is displayed only for the CCC Policy DP-1017 FOA.

Adding Policy Workgroup/Taskforce information

1. Click the **add** link on the Policy Workgroup/Taskforce page.
   Result: The system displays the *Add Policy Workgroup/Taskforce* page.

2. In the *Policy Taskforce/Workgroup Name* field, enter the full name of the task force or workgroup.
   Maximum text is 100 characters, about 20 words.
3. In the *Chairperson Name* field, enter the name of the chairperson for the task force or workgroup.
   Maximum text is 200 characters, about 40 words.
4. In the *Chairperson Phone* field, enter the chairperson's primary telephone number by entering the first three digits in the first text box, next three digits in the second, and the last four digits in the third text box. Specify up to a five-digit extension number in the *ext*. field if available.
5. In the *Chairperson Email* field, enter the chairperson's contact Email address. The address must contain a name and domain, for example, jerryb@cdc.gov. Maximum text is 100 characters, about 20 words.
6. If a Co-Chairperson exists for the taskforce/workgroup, enter the Co-Chairperson's name, phone number, and Email address in the Co-Chairperson Name, Co-Chairperson Phone, and Co-Chairperson Email fields.
7. In the *Is this Taskforce/Workgroup part of a 501c3 Organization?* field indicate by selecting *Yes* or *No* if the task force or workgroup is part of a 501c3 organization.
8. If the task force or workgroup is part of a 501c3 organization, do the following:
   a. In the *501c3 Executive Director Name* field, enter the 501c3's Executive Director's name. Maximum text is 200 characters, about 40 words.
   b. In the *501c3 Executive Director Phone* field, enter the Executive Director's primary telephone number by entering the first three digits in the first text box, next three digits in the second, and the last four digits in the third text box. Maximum text is 200 characters, about 40 words.
   c. In the 5013c Executive Director Email field, enter the Executive Director's contact E-mail address. The address must contain a name and domain, for example, jerryb@cdc.gov. Maximum text is 100 characters, about 20 words.
9. In the *Is this Taskforce/Workgroup Legislatively Mandated?* field indicate by selecting *Yes* or *No* if the task force or workgroup mandated by a legislative act.
10. If the task force or workgroup is legislatively mandated, enter the name of the authorizing official or body in the Authorizing Official/Body text box and enter the date that the task force/workgroup was established in the Date Established text box in mm/dd/yyyy format. You can also select a date from the calendar. Maximum text for the Authorizing Official/Body field is 200 characters, about 40 words.
11. In the *Member Composition* field, select the CDC Chronic Disease programs that are affiliated with the task force or workgroup. If the desired type is not listed in the list, select *Other* and enter the type of member composition in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words.
12. In the *Race, Ethnicity and Geographic Representation* field, select the race, ethnicity and geographic locations that are represented by this task force or workgroup. If the desired

option is not listed in the list, select *Other* and enter the type of race, ethnicity, or geographic representation in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words.

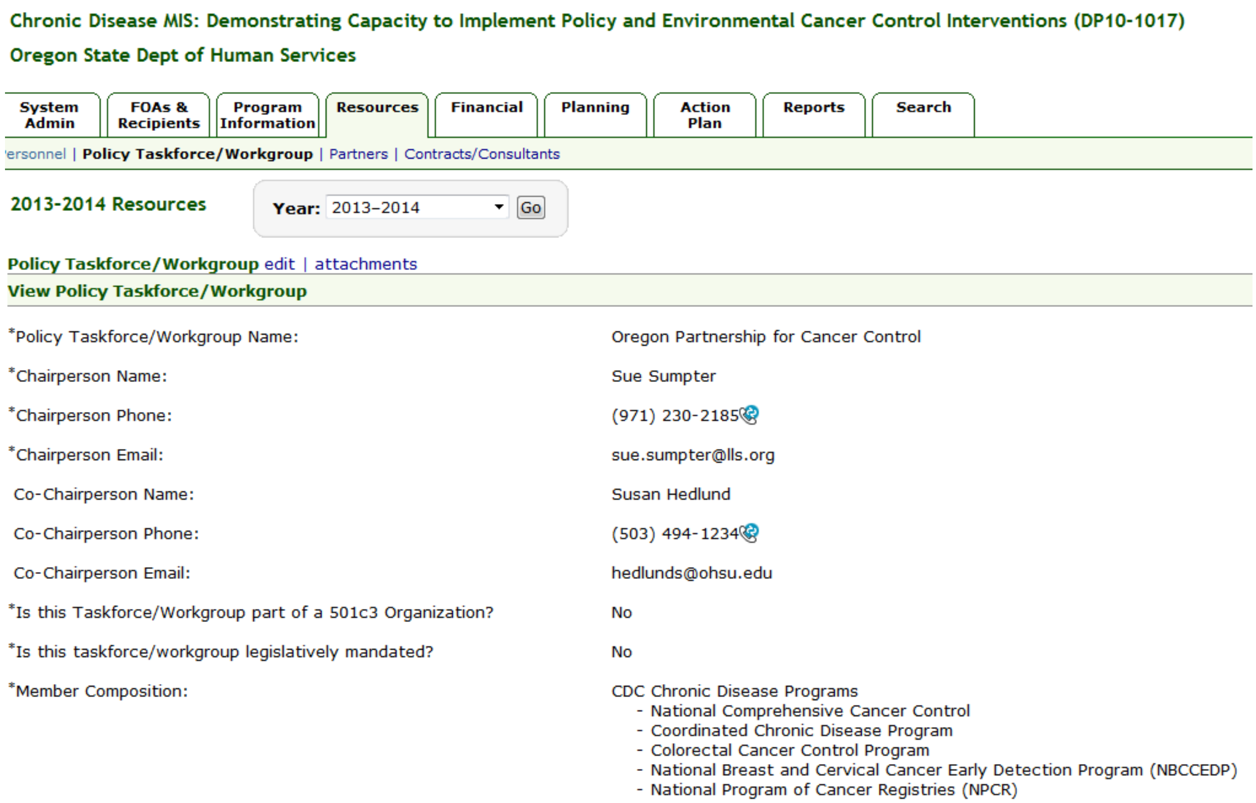
13. In the *Workgroups in Partnership/Coalition* field, select the workgroup(s) that are involved in the partnership or coalition. If the desired workgroup is not listed in the list, select *Other* and enter the workgroup in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words.
14. In the *Number of Organizations in Task Force/Workgroup* field, enter the number of organizations that are included in the task force or workgroup.
15. In the *Association to Action Plan - Activities* section, click an activity link to open a pop-up window that displays the activity details. After viewing the activity details, click *Close* to close the pop-up window. This column displays the activities from the action plan that are assigned to the personnel member and the Time Frame column displays the time frame, i.e., starting quarter and year and ending quarter and year for the activity.
16. Click **Save** to save the task force or workgroup information.
    Result: The system saves the information and returns you to the View Policy Task force/Workgroup page, where it displays the newly added information.

Editing Policy Workgroup/Taskforce information

1. Click the **edit** link on the Policy Workgroup/Taskforce page.
   Result: The system displays the *Edit Policy Workgroup/Taskforce* page.

Note

- The pages for entering initial information and modifying existing workgroup/taskforce information are identical. The only difference is that the Edit page displays the existing information while the fields in the page for entering initial information are blank.



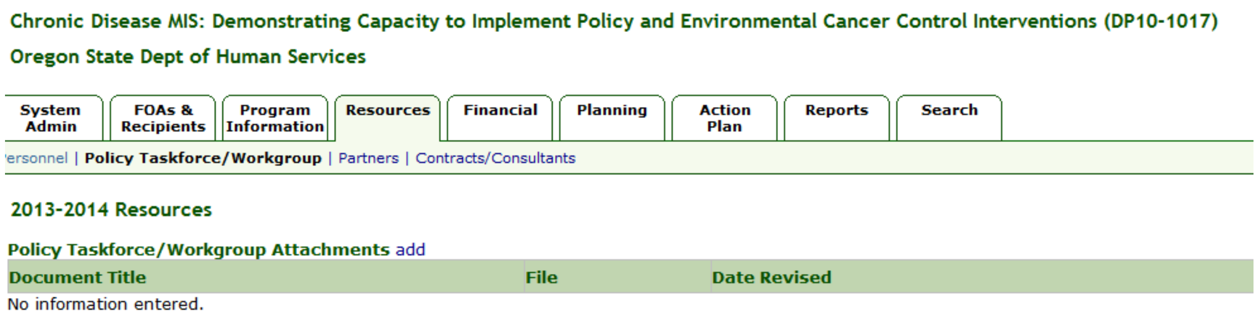
2. Modify the fields as necessary and click the **Save** button to save the information. The system saves the information and returns you to the *View Policy Task force/Workgroup* page, where it displays the newly updated information. If any fields on the page are incomplete or invalid when you click **Save**, the system displays an error. Correct all invalid fields and click **Save** again.

Workgroup/Taskforce information attachments

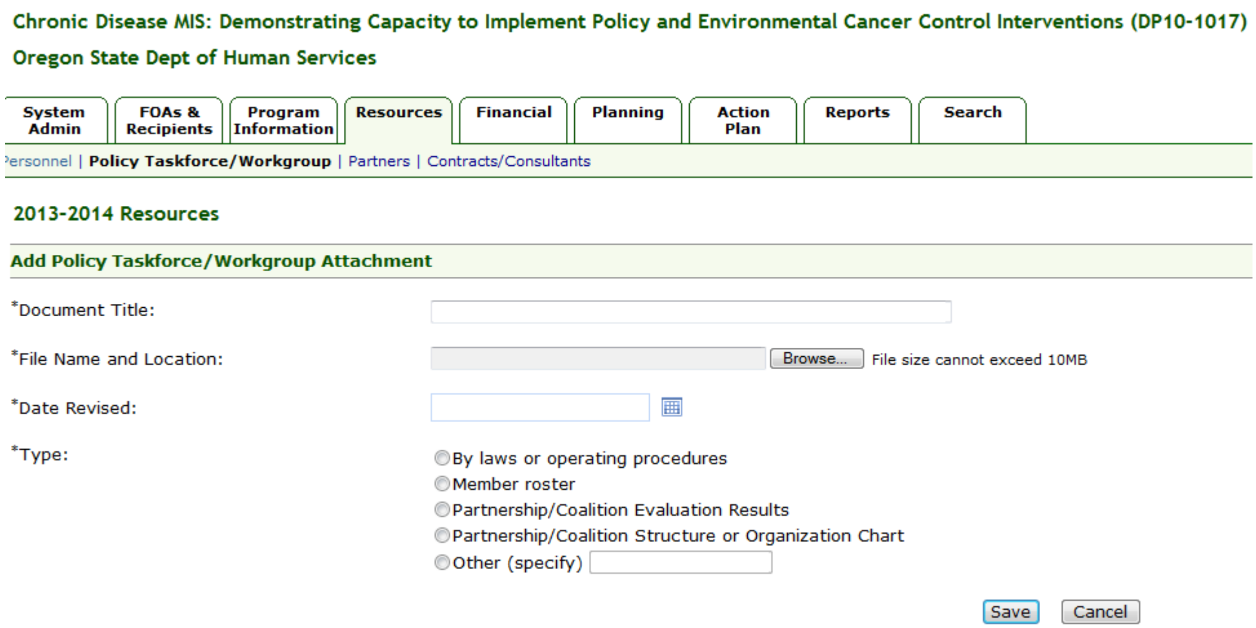
Use the Policy Task Force/Workgroup Attachments section to attach documents to a policy taskforce or workgroup, access existing attachments, or delete attachments.

Attaching a document to Workgroup/Taskforce information

1. Click the **attachments** link on the Policy Workgroup/Taskforce page.
   Result: The system displays the *Policy Workgroup/Taskforce Attachments* page.

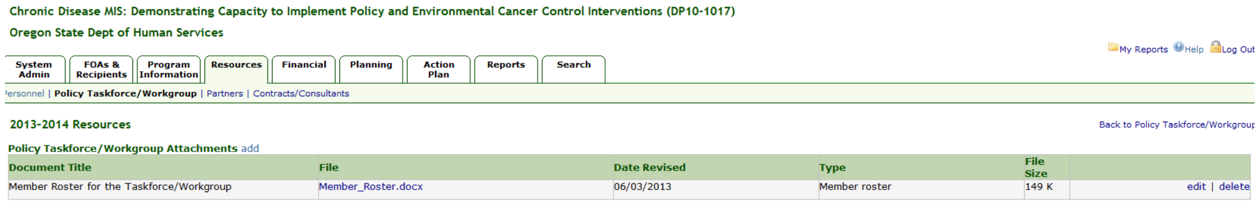


2. Click the **add** link.
   Result: The system displays the *Add Policy Workgroup/Taskforce Attachment* page.



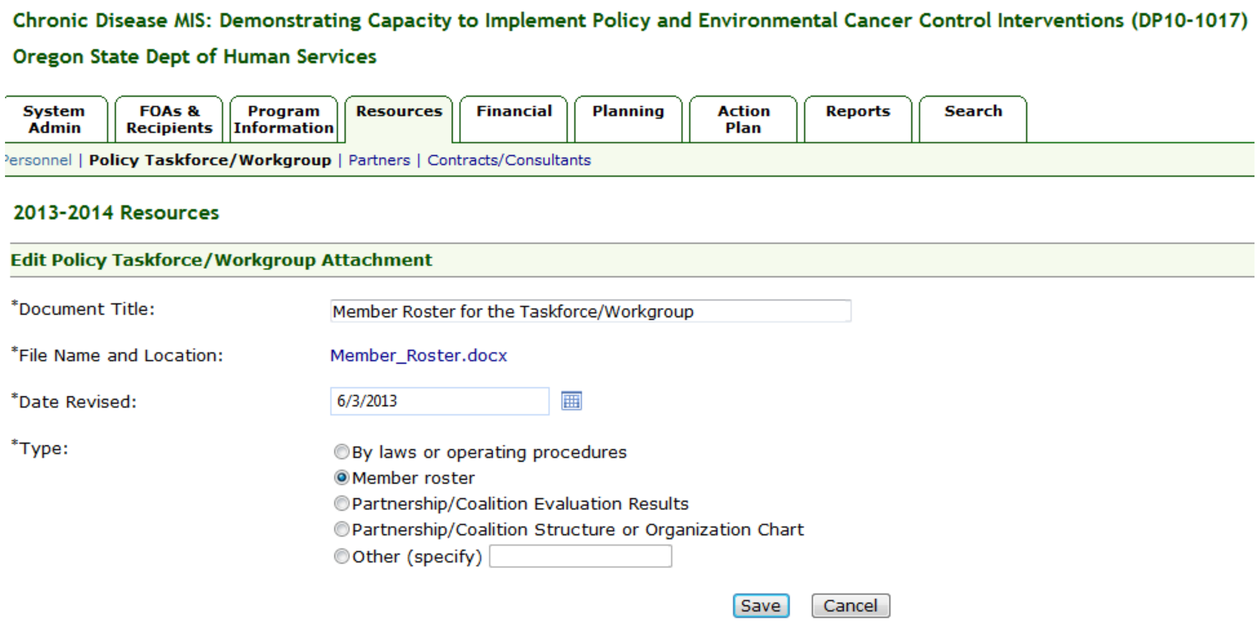
3. In the *Document Title* field, enter the document title for the attachment that you want to upload. Maximum text is 100 characters, about 20 words.
4. In the *File Name and Location* field, click **Browse** to navigate to the location where the document is saved and select the document.
5. In the *Date Last Revised* field, enter the day, month, and year the document was last revised in mm/dd/yyyy format, or select a date from the calendar.
6. In the *Type* field, select the type of document that you want to upload. If the desired type is not listed, select *Other* and enter the type of document in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words.
7. Click **Save** to attach the document.
   Result: The system saves the information and returns you to the *Policy*

Workgroup/Taskforce Attachments page, where it displays the newly uploaded attachment.



Editing Workgroup/Taskforce attachment information

1. On the *Policy Workgroup/Taskforce Attachments* page, click the **edit** link on the same row as the document you want to edit.
   Result: The system displays the *Edit Policy Workgroup/Taskforce Attachment* page



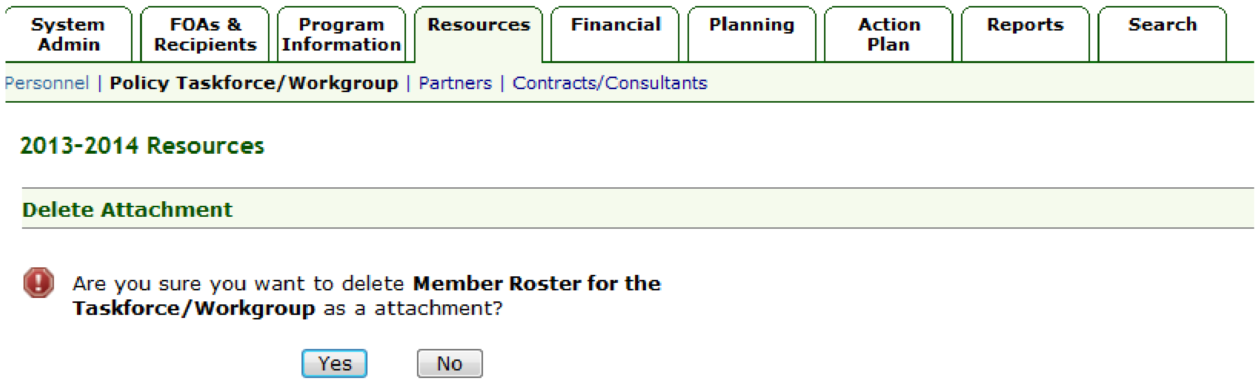

Note

- The pages for entering initial information and modifying existing attachment information are identical. The only difference is that the Edit page displays the existing information while the fields in the page for entering initial information are blank.
- This page only allows you to update attachment information. If changes to the actual attached file are made, you must upload the new version of the file as a new attachment or delete the attachment and attach it again
- You can click on the document name to open the attachment and view the document.

2. Modify the fields as necessary and click the **Save** button to save the information.
   Result: The system saves the information and returns you to the *Policy Task force/Workgroup Attachments* page, where it displays the newly updated information. If any fields on the page are incomplete or invalid when you click **Save**, the system displays an error. Correct all invalid fields and click **Save** again.

Deleting a Workgroup/Taskforce attachment

1. On the *Policy Workgroup/Taskforce Attachments* page, click the **delete** link on the same row as the document you want to delete.
   Result: The system displays a message asking you to confirm the deletion.



2. Click **Yes** to confirm the deletion.
   Result: The system deletes the attachment and returns you to the *Policy Task force/Workgroup Attachments* page.

Note

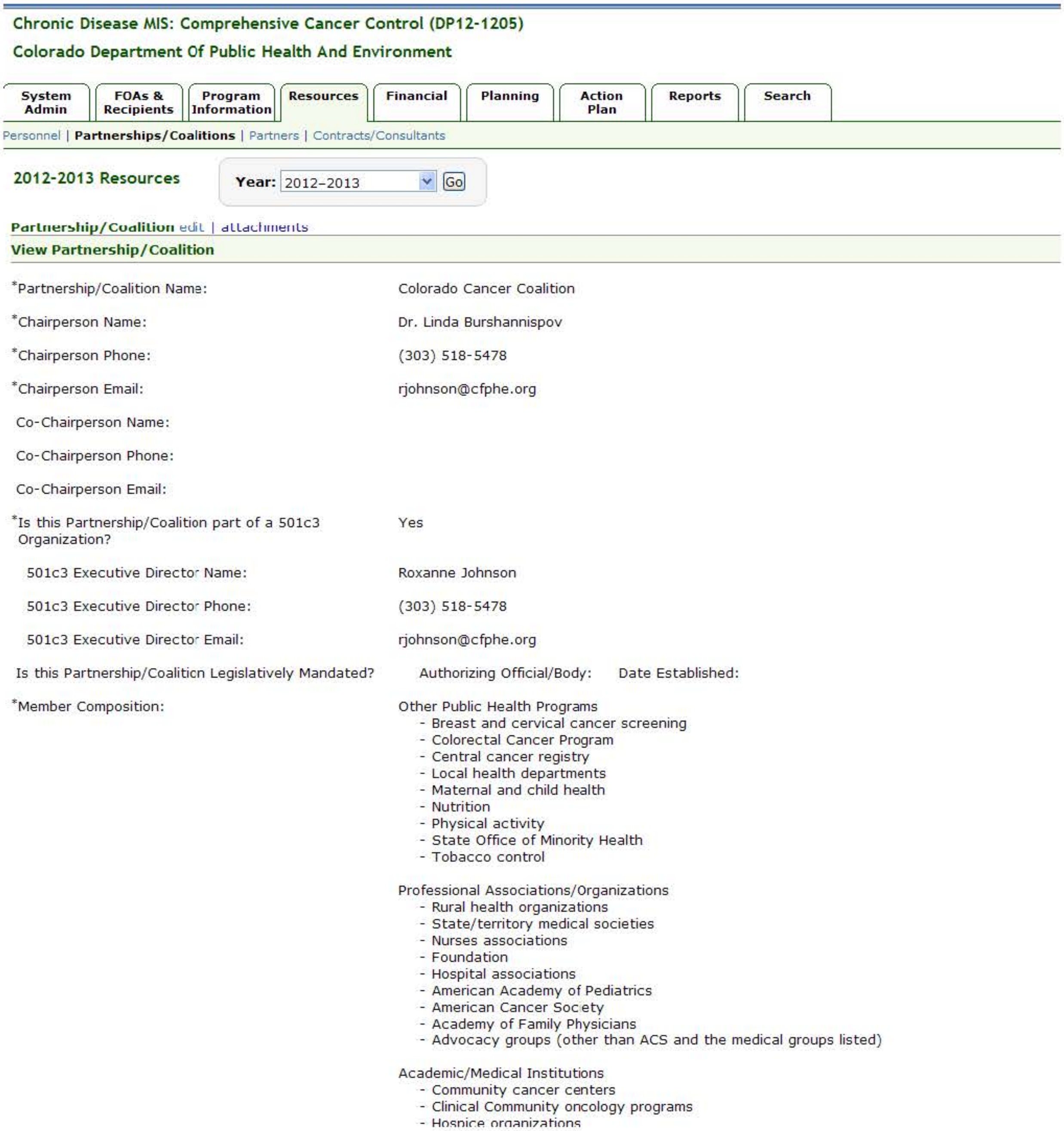
- Once an attachment is deleted it is no longer available in the system.

Partnerships/Coalitions

Use the *Partnerships/Coalitions* section to enter and maintain information about the partnerships and coalitions in your program and attach documents to the section. Coalitions are groups of stakeholder organizations that are established to assist in the formulation of plans, guide project activities, and identify additional financial resources for this project.

Note

- The Partnerships/Coalitions section is displayed only for the Comprehensive Cancer Control (CCC-703, CCC-1205) and OSH Tribal FOAs.


Chronic Disease MIS: Comprehensive Cancer Control (DP12-1205)
Colorado Department Of Public Health And Environment
System Admin
FOAs & Recipients
Program Information
Resources
Financial
Planning
Action Plan
Reports
Search
Personnel | Partnerships/Coalitions | Partners | Contracts/Consultants
2012-2013 Resources
Year: 2012-2013 Go
Partnership/Coalition edit | attachments
View Partnership/Coalition
*Partnership/Coalition Name: Colorado Cancer Coalition
*Chairperson Name: Dr. Linda Burshannispov
*Chairperson Phone: (303) 518-5478
*Chairperson Email: rjohnson@cfphe.org
Co-Chairperson Name:
Co-Chairperson Phone:
Co-Chairperson Email:
*Is this Partnership/Coalition part of a 501c3 Organization? Yes
501c3 Executive Director Name: Roxanne Johnson
501c3 Executive Director Phone: (303) 518-5478
501c3 Executive Director Email: rjohnson@cfphe.org
Is this Partnership/Coalition Legislatively Mandated? Authorizing Official/Body: Date Established:
*Member Composition:
Other Public Health Programs
- Breast and cervical cancer screening
- Colorectal Cancer Program
- Central cancer registry
- Local health departments
- Maternal and child health
- Nutrition
- Physical activity
- State Office of Minority Health
- Tobacco control
Professional Associations/Organizations
- Rural health organizations
- State/territory medical societies
- Nurses associations
- Foundation
- Hospital associations
- American Academy of Pediatrics
- American Cancer Society
- Academy of Family Physicians
- Advocacy groups (other than ACS and the medical groups listed)
Academic/Medical Institutions
- Community cancer centers
- Clinical Community oncology programs
- Hospice organizations

Editing Partnership/Coalition information

1. Click the **edit** link on the *View Partnerships/Coalitions* page.
   Result: The system displays the *Edit Partnership/Coalition* page.

Chronic Disease MIS: Comprehensive Cancer Control (DP12-1205)
Colorado Department Of Public Health And Environment

My Reports

System Admin | FOAs & Recipients | Program Information | Resources | Financial | Planning | Action Plan | Reports | Search

Personnel | **Partnerships/Coalitions** | Partners | Contracts/Consultants

2012-2013 Resources

Edit Partnership/Coalition — Last Updatec

*Partnership/Coalition Name:	Colorado Cancer Coalition
*Chairperson Name:	Dr. Linda Burshannispov
*Chairperson Phone:	303 518 5478 ext.
*Chairperson Email:	rjohnson@cfphe.org
Co-Chairperson Name:	
Co-Chairperson Phone:	ext.
Co-Chairperson Email:	
*Is this Partnership/Coalition part of a 501c3 Organization?	◉ Yes ○ No
501c3 Executive Director Name:	Roxanne Johnson
501c3 Executive Director Phone:	303 518 5478 ext.
5013c Executive Director Email:	rjohnson@cfphe.org
*Is this Partnership/Coalition Legislatively Mandated?	○ Yes Authorizing Official/Body: Date Established: ○ No
*Member Composition:	

CDC Chronic Disease Programs
- [ ] Colorectal Cancer Control Program
- [ ] Community Transformation Grant (CTG)
- [ ] Coordinated Chronic Disease Program
- [ ] Demonstrating Capacity to Implement Policy and Environmental Cancer Control Interventions
- [ ] Diabetes Prevention and Control Program
- [ ] National Breast and Cervical Cancer Early Detection Program (NBCCEDP)
- [ ] National Heart Disease and Stroke Prevention Program
- [ ] National Program of Cancer Registries (NPCR)
- [ ] National Tobacco Control Program
- [ ] Nutrition and Physical Activity Program to Prevent Obesity and other Chronic Disease
- [ ] REACH
- [ ] State Public Health Approaches to Improving Arthritis Outcomes
- [ ] WiseWoman
- [ ] Other (specify)
- [ ] Other (specify)
- [ ] Other (specify)

Other Public Health Programs
- [x] Breast and cervical cancer screening
- [x] Colorectal Cancer Program
- [ ] Environmental Health
- [ ] Immunization
- [ ] Local/Tribal health Departments
- [x] Maternal and child health
- [x] Nutrition
- [x] Physical activity
- [ ] SEER Cancer Registry
- [ ] State/Tribe/Territory/Pacific Island Jurisdiction CCC
- [ ] State/Tribe/Territory/Pacific Island Jurisdiction Health Commissioners
- [ ] State/Tribe/Territory/Pacific Island Jurisdiction Health Departments
- [ ] State/Tribe/Territory/Pacific Island Jurisdiction Office of Minority Health
- [x] Tobacco control
- [ ] Urban Indian Health Centers
- [ ] Other (specify)

2. In the *Partnership/Coalition Name* field, enter the full name of the task force or workgroup. Maximum text is 200 characters, about 40 words.
3. In the *Chairperson Name* field, enter the name of the chairperson for the coalition. Maximum text is 200 characters, about 40 words.
4. In the *Chairperson Phone* field, enter the chairperson's primary telephone number by entering the first three digits in the first text box, next three digits in the second, and the last four digits in the third text box. Specify up to a five-digit extension number in the *ext*. field if available.
5. In the *Chairperson Email* field, enter the chairperson's contact Email address. The address must contain a name and domain, for example, jerryb@cdc.gov. Maximum text is 100 characters, about 20 words.
6. If a Co-Chairperson exists for the taskforce/workgroup, enter the Co-Chairperson’s name, phone number, and Email address in the Co-Chairperson Name, Co-Chairperson Phone, and Co-Chairperson Email fields.
7. In the *Is this Partnership/Coalition part of a 501c3 Organization?* field, indicate by selecting *Yes* or *No* if the partnership or coalition is part of a 501c3 organization.
8. If the coalition is part of a 501c3 organization, do the following:
    a. In the *501c3 Executive Director Name* field, enter the 501c3's Executive Director's name. Maximum text is 200 characters, about 40 words.
    b. In the *501c3 Executive Director Phone* field, enter the Executive Director's primary telephone number by entering the first three digits in the first text box, next three digits in the second, and the last four digits in the third text box. Maximum text is 200 characters, about 40 words.
    c. In the 5013c Executive Director Email field, enter the Executive Director's contact E-mail address. The address must contain a name and domain, for example, jerryb@cdc.gov. Maximum text is 100 characters, about 20 words.
9. In the *Is this Partnership/Coalition Legislatively Mandated?* field, indicate by selecting *Yes* or *No* if the partnership or coalition is mandated by a legislative act.
10. If the partnership or coalition is legislatively mandated, enter the name of the authorizing official or body in the Authorizing Official/Body text box and enter the date that the task force/workgroup was established in the Date Established text box in mm/dd/yyyy format. You can also select a date from the calendar. Maximum text for the Authorizing Official/Body field is 200 characters, about 40 words.
11. In the *Member Composition* field, for each composition section displayed, Public Health Programs, Other Government Agencies, Professional Associations/Organizations, etc., select all that apply.
12. In the *Race, Ethnicity and Geographic Representation* field, for each section, Racial Populations, Ethnic Populations, Geography, select all that apply.
13. Complete the *Regional Representation* field as follows:

   a. In the *Number of Regions* text box, enter the number of regions represented. Maximum text is 10 characters.
   b. In the *Number of Regions with Member Organization Located in Region* text box, enter the number of regions that actually have member organizations present in the region. Maximum text is 10 characters.
14. In the *Workgroups in Partnership/Coalition field*, select the workgroups represented in the partnership/coalition. If the desired workgroup is not listed in the list, select *Other* and enter the type of workgroup in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words.
15. In the *Number of Organizations in Partnership/Coalition* field, enter the number of organizations that exist in the partnership/coalition in the text box. Maximum text is 10 characters.
16. In the *Number of Individuals in Partnership/Coalition* field, enter the number of individuals in the partnership/coalition in the text box. Maximum text is 500 characters, about 100 words.
17. In the *Date of Last Assessment* field, enter the date that the last assessment was performed. Be sure to enter the date as numbers in the following format: MM/DD/YYYY. For example, 10/08/2009. You can also click the calendar graphic to select a date from the calendar.
18. Click **Save** to save the partnership/coalition information.
    Result: The system saves the information and returns you to the View Partnership/Coalition page, where it displays the newly edited information.

What do I do differently for my FOA?

Edit Partnership/Coalition Information: CCC

In the *Workgroups in Partnership/Coalition field*, select the workgroups represented in the partnership/coalition. If the desired workgroup is not listed in the list, select *Other* and enter the type of workgroup in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words.

Edit Partnership/Coalition Information: SODPP

In the *Workgroups in Partnership/Coalition field*, select the workgroups represented in the partnership/coalition. If the desired workgroup is not listed in the list, select *Other* and enter the type of workgroup in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words.

Partnership/Coalition information attachments

Use the Partnership/Coalition Attachments section to attach documents to partnership/coalition information, access existing attachments, or delete attachments.

Attaching a document to Partnership/Coalition information

1. Click the **attachments** link on the Policy Workgroup/Taskforce page.
   Result: The system displays the *Policy Workgroup/Taskforce Attachments* page.

2. Click the **add** link.
   Result: The system displays the *Add Partnership/Coalition Attachment* page.

3. In the *Document Title* field, enter the document title for the attachment that you want to upload. Maximum text is 100 characters, about 20 words.
4. In the *File Name and Location* field, click **Browse** to navigate to the location where the document is saved and select the document.
5. In the *Date Last Revised* field, enter the day, month, and year the document was last revised in mm/dd/yyyy format, or select a date from the calendar.
6. In the *Type* field, select the type of document that you want to upload. If the desired type is not listed, select *Other* and enter the type of document in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words.
7. Click **Save** to attach the document.
   Result: The system saves the information and returns you to the *Partnership/Coalition Attachments* page, where it displays the newly uploaded attachment.

Editing Partnership/Coalition attachment information

1. On the *Partnership/Coalition Attachments* page, click the **edit** link on the same row as the document you want to edit.
   Result: The system displays the *Edit Partnership/Coalition Attachment* page

Note

- The pages for entering initial information and modifying existing attachment information are identical. The only difference is that the Edit page displays the existing information while the fields in the page for entering initial information are blank.
- This page only allows you to update attachment information. If changes to the actual attached file are made, you must upload the new version of the file as a new attachment or delete the attachment and attach it again
- You can click on the document name to open the attachment and view the document.

2. Modify the fields as necessary and click the **Save** button to save the information.
   Result: The system saves the information and returns you to the *Partnership/Coalition Attachments* page, where it displays the newly updated information. If any fields on the page are incomplete or invalid when you click **Save**, the system displays an error. Correct all invalid fields and click **Save** again.

Deleting a Partnership/Coalition attachment

1. On the *Partnership/Coalition Attachments* page, click the **delete** link on the same row as the document you want to delete.
   Result: The system displays a message asking you to confirm the deletion.
2. Click **Yes** to confirm the deletion.
   Result: The system deletes the attachment and removes it from the attachments list.

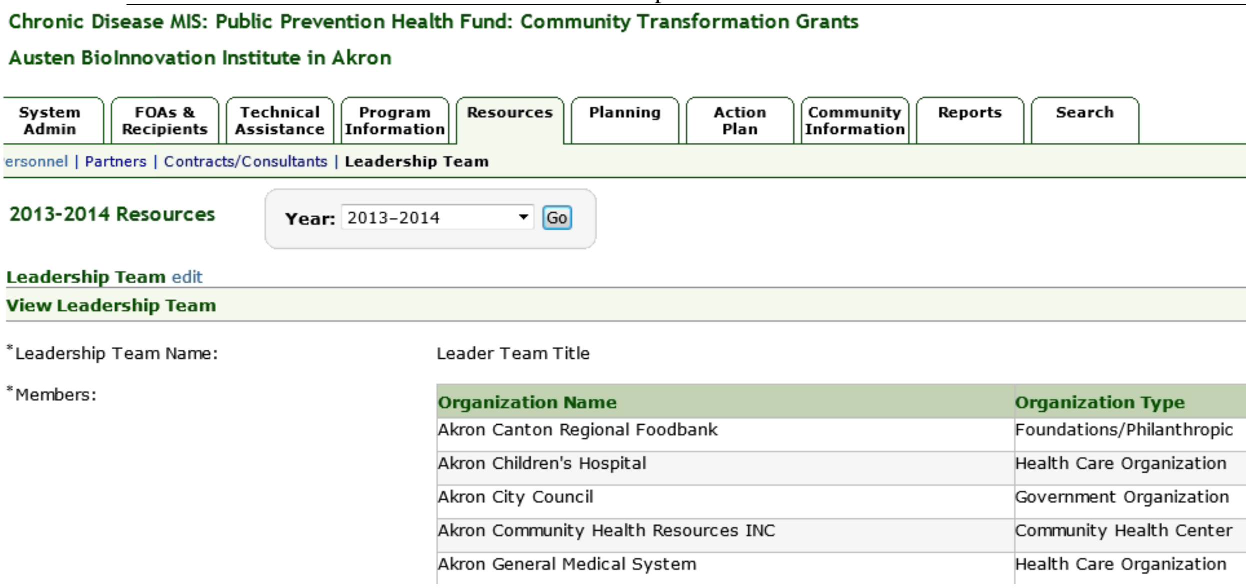
- Once an attachment is deleted it is no longer available in the system.

Leadership Team

Use the *Leadership Team* section to maintain information about the individuals that make up the leadership team for your program.

Note

- The Leadership Team section is displayed only for the Strategic Alliance for Health & CTG FOAs.
- Leadership team information is used in the Action Plan section.
- There is no limit to the number of leadership team members that can be entered.



Editing Leadership Team information

1. On the *View Leadership Team* page, click the **edit** link.
   Result: The system displays the *Edit Leadership Team* page which contains fields for editing leadership team information, adding a new leadership team member and links for editing or deleting existing team members.

2. In the *Leadership Team Name* field, enter the name of the leadership team. Maximum text is 200 characters, about 40 words.
3. To add a new leadership team member:

   a. In the *Organization Name* field, enter the organization name associated with the leadership team member. . Maximum text is 200 characters, about 40 words.
   b. In the *Organization Type* field, select the organization type associated with the member from the drop-down list. If the desired organization type is not in included in the list, select *Other*, and enter the organization type in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words.
   c. Click the **Add** button. The system saves the newly added member and displays the member in the members list. If any fields in the Members section are incomplete or invalid, the system displays an error. Correct all errors and click **Add** again.

4. In the *Setting/Sector Represented* field, for each sector listed, enter the number of members into the corresponding #of Members text box. Maximum text is 200 characters, about 40 words
5. In the *How were Leadership Team Members Identified* field, enter a description of how members were identified for the leadership team. Maximum number for this field is 5000 characters, about 1000 words.

Note
- You can use the spell checker to check your entry. The character count also allows you to keep track of how much data you have entered and how many characters you have left.
- This field is not available for the REACH Demo and CTG-SC FOAs.

6. In *Summarize the structures and processes for communication within the Leadership Team* field, enter a detailed description of the means or mechanisms put in place for communicating with the leadership team. Include information such as how the structures and processes have impacted and changed the program. Maximum number for this field is 5000 characters, about 1000 words.

Note
- You can use the spell checker to check your entry. The character count also allows you to keep track of how much data you have entered and how many characters you have left.
- This field is not available for the REACH Demo and CTG-SC FOAs.

7. In the *How is the Leadership Team engaged in the development, implementation, and ongoing review and updating of the State Action Plan and the as needed reviewing and updating of existing state plans for IPV primary prevention* field, describe in detail how the Leadership Team is engaged in the development, implementation, and ongoing review and updating of the State Action Plan. Additionally describe how the Leadership Team reviews and updates existing state plans for IPV primary prevention. Maximum number for this field is 5000 characters, about 1000 words.
8. In the *How is the Leadership Team engaged in identifying and addressing barriers and system support opportunities, ensuring linkages between state and local level prevention strategies, and reducing system duplications* field, describe in details how the Leadership Team is engaged in identifying and addressing barriers and system support opportunities. Be sure to describe how the Leadership Team ensures that there are linkages between state and local level prevention strategies, and reduces system duplications. Maximum number for this field is 5000 characters, about 1000 words.
9. In the *Summarize the frequency, structures and processes for communication within the Leadership Team (e.g. meeting frequency, succession planning, orientations, etc.)* field, enter a detailed summary frequency, structures and processes for communication within the

Leadership Team. These may consist of meeting frequency, succession planning, orientations, etc. Maximum number for this field is 5000 characters, about 1000 words.

10. In the *What decision making process was developed by the Leadership Team and how has this process changed over the program* field, Enter a description of the decision making process that was developed by the leadership team and how the process has impacted and changed the program. Maximum number for this field is 5000 characters, about 1000 words.
11. The Association to Action Plan section displays a list of all action plan 5 Year Outcome Objective and Annual Outcome Objective titles for the current budget year, which are associated to this leadership team. To open and view and activity, click on the associated activity title.
    Result: The system opens the activity in a new window.
12. Click the **Save** button to save the information you entered.
    Result: The system saves the information and returns you to the Leadership Team summary page. If any fields on the page are incomplete or invalid when you click *Save*,, the system displays an error. Correct all errors and click **Save** again.

Editing Leadership Team member information

1. On the *View Leadership Team* page, click the **edit** link.
   Result: The system displays the *Edit Leadership Team* page which contains fields for adding a new leadership team member and links for editing or deleting existing team members.

2. Click the **Edit** link on the same row as the leadership team member you want to edit.
   Result: The system populates the fields above the list with the selected member's information.

Note

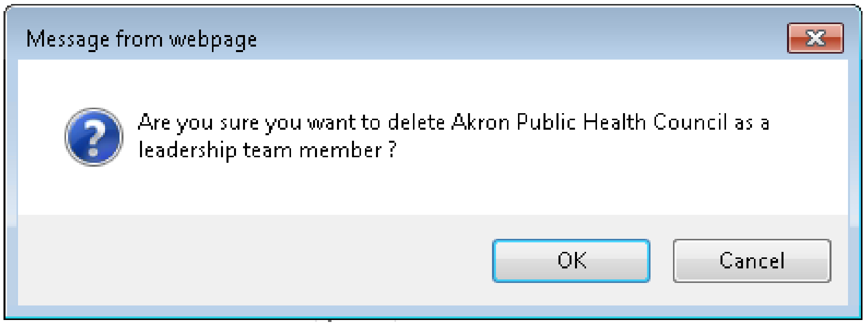
- The fields for entering initial member information and modifying existing information are identical. The only difference is that the Edit fields displays the existing information while the for entering initial information are blank.

3. Modify the fields as necessary and click the **Save** button.
   Result: The system saves the information and returns you to the Leadership Team summary page. If any fields on the page are incomplete or invalid when you click *Save*,, the system displays an error. Correct all errors and click **Save** again.

Deleting Leadership Team member information

1. On the *View Leadership Team* page, click the **edit** link.
   Result: The system displays the *Edit Leadership Team* page which contains fields for adding a new leadership team member and links for editing or deleting existing team members.

2. Click the **Delete** link on the same row as the leadership team member you want to delete.
   Result: The system asks you to confirm the deletion.



3. Click the **OK** button.
   Result: The system deletes the member and removes the associated information from the list.

Note

- Once member information is deleted, it is no longer available in the system.

SDVC Structure

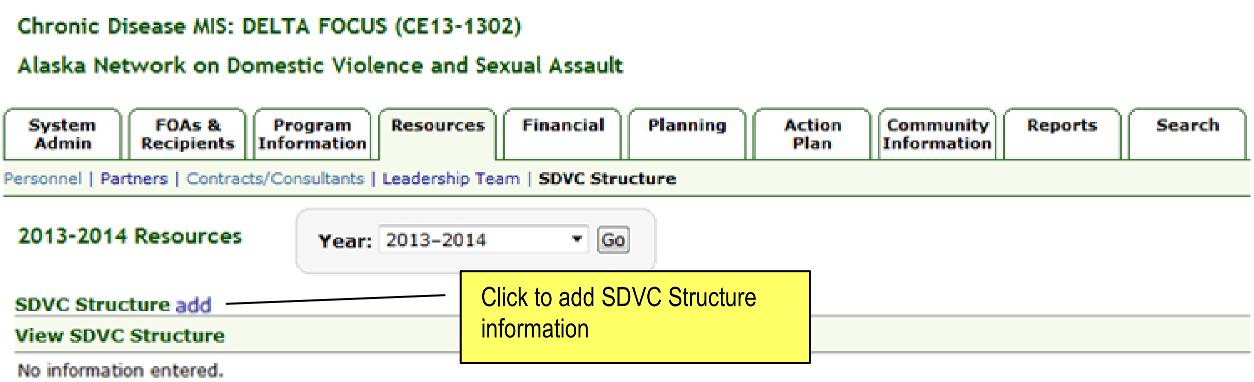
Use the SDVC Structure section to enter details about the SDVC board members, its mission, and its vision.

Note

- The SDVC Structure section is available to only the DELTA FOCUS (CE13-1302) FOA.

The SDVC Structure Summary page

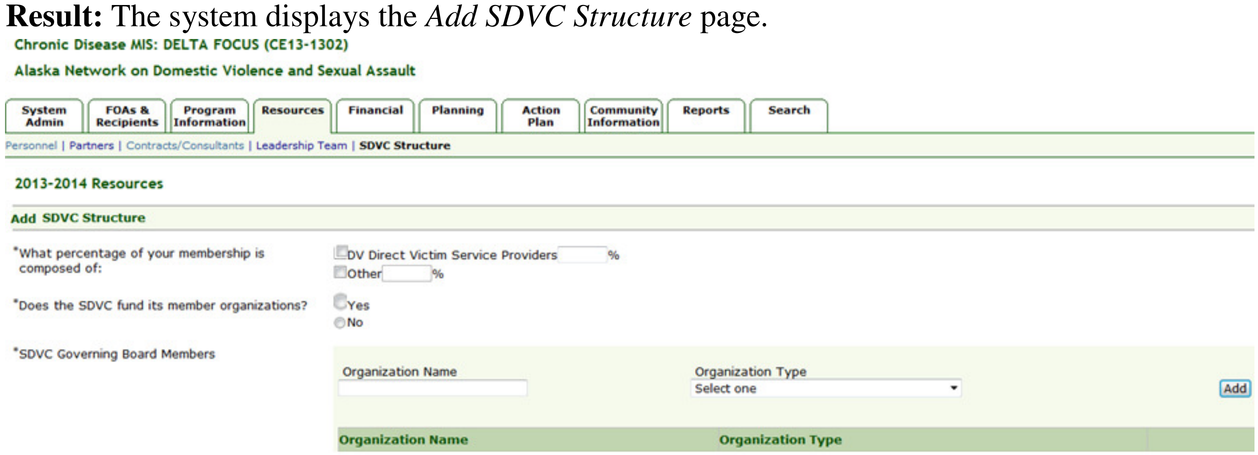
When you access the SDVC Structure section for the first time, the system displays an **add** link that allows you to enter SDVC Structure information. After adding the information, you can then choose to edit the displayed information or upload attachments.



Adding SDVC Structure information

1. Click the **add** link on the *SDVC Structure* page.

   Result: The system displays the *Add SDVC Structure* page.



2. Complete the *What percentage of your membership is composed of* as follows:

  a. Select the *DV Direct Victim Service Providers* check box if the SDVC membership is made up of DV Direct Victim Service Providers and enter the percentage in the text box.
  b. If the SDVC membership is not made up entirely of DV Direct Victim Service Providers, select the *Other* check box and enter the remaining percentage in the text box.

3. In the *Does the SDVC fund its member organizations?* field, indicate by selecting *Yes* or *No* if the SDVC funds its own member organizations.
4. Complete the *SDVC Governing Board Members* field as follows:
   a. In the *Organization Name* field, enter the organization name of the SDVC board member. Maximum text is 200 characters, about 40 words.
   b. In the *Organization Type* field, select the organization type associated with the SDVC board member. If the desired organization type is not in included in the list, select *Other*, and enter the organization type in the *Other* text box. Maximum text for the *Other* field is 100 characters, about 20 words.
   c. Click the **Add** button.
   Result: The system saves the board member information and displays it on the board members list with **Edit** and **Delete** links that you can use to edit the information or delete it.

Important

- You must add at least one SDVC board member before the system will allow you to successfully save the page.

5. In the *SDVC Mission Statement* field, enter the SDVC's mission statement. If the SDVC does not have a mission statement, please indicate this in your response. Maximum text is 2000 characters, about 400 words.
6. In the *SDVC Vision Statement* field, enter the SDVC's vision statement. If the SDVC does not have a vision statement, please indicate this in your response. Maximum text is 2000 characters, about 400 words.
7. In the *Does your SDVC have a strategic plan?* field, indicate by selecting *Yes* or *No* if your SDVC has a strategic plan. If you select *Yes*, you must attach your strategic plan. To attach the strategic plan, enter the complete path for the document that you want to upload as an attachment or click *Browse* to navigate to the location where the document is saved and select the document.

Note

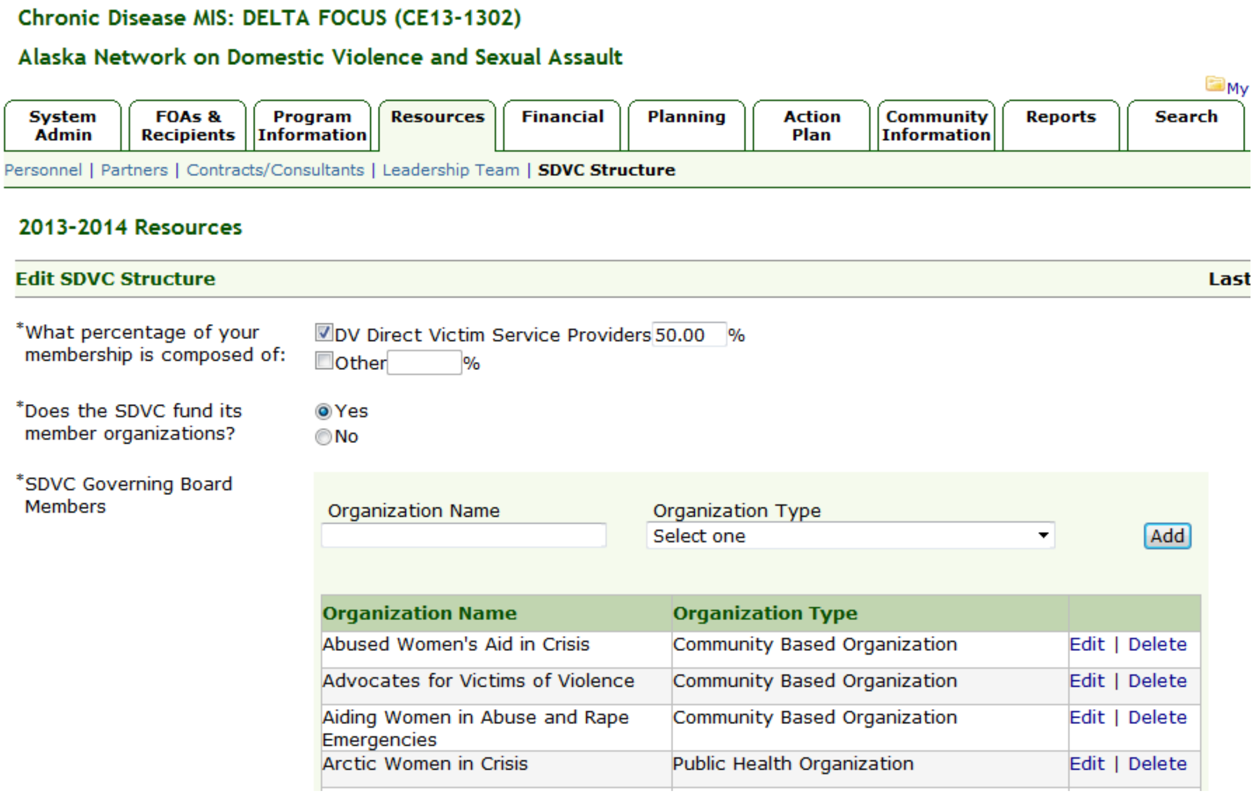
- The file size cannot exceed 10MB.

8. Click the **Save** button to save the information you entered.
   Result: The system saves the information and returns you to the *View SDVC Structure* page.

If any fields on the page are incomplete or invalid when you click **Save**, the system displays an error. Correct all invalid fields and click **Save** again.

Editing SDVC Structure information

1. On the *View SDVC Structure* page, click the **edit** link.
   Result: The system displays the *Edit SDVC Structure* page.



Note

- The page for entering initial information and modifying existing information for SDVC Structure are identical. The only difference is that the Edit page displays the existing information for the SDVC Structure while the fields in the page for entering initial information are blank.

2. Modify the fields as necessary.

Note

- When viewing or modifying SDVC Structure information, the system displays the Association to Action Plan-Activities section, which lists the activities from the action plan that are assigned to the SDVC Structure. A Time Frame column displays the time frame, i.e., starting quarter and year and ending quarter and year for the activity.

3. Click the **Save** button to save the information.
   Result: The system saves the information and returns you to the *View SDVC Structure* page. If any fields on the page are incomplete or invalid when you click **Save**, the system displays an error. Correct all invalid fields and click **Save** again.