

# CDC's OPERATIONAL READINESS REVIEW (ORR)

## ORR SYSTEM GUIDE FOR REVIEWEE

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Centers for Disease Control and Prevention  
Office of Public Health Preparedness and Response

# Operational Readiness Review: Enhancing the Review Process

The Centers for Disease Control and Prevention (CDC) Office of Public Health Preparedness and Response (OPHPR) Division of State and Local Readiness (DSLRL) administers the Operational Readiness Review (ORR). The ORR is an application that resides within the Data Collation and Integration for Public Health Event Response (DCIPHER) platform. This system allows users to collect valuable ORR data, streamline the review process, and facilitate dialog between ORR reviewers and those who submit ORR data and information.

## To Get Started

Enter the URL: <https://dcipher.cdc.gov>.

## For Support

Contact the DCIPHER team at [dcipher-orr@cdc.gov](mailto:dcipher-orr@cdc.gov) for technical support or questions related to system functionality.

Any content-related questions should be directed to a CDC medical countermeasure (MCM) specialist or submitted in the Online Technical Resource and Assistance Center (On-TRAC). On-TRAC can be accessed by navigating to <https://www.cdc.gov/phpr/readiness/on-trac.htm>.

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# ORR SYSTEM GUIDE FOR REVIEWEE

## GETTING STARTED

### Logging in to the ORR System

Recipient/Cities Readiness Initiative (CRI) User (non-CDC)

1. Go to <https://dcipher.cdc.gov>
2. Select the option "CDC SAMS" from the drop-down menu
3. Click the "Proceed to CDC SAMS" button
4. Input your Secure Access Management Services (SAMS) username and password/challenge phrase to access DCIPHER

CDC User

1. Go to <https://dcipher.cdc.gov> from within the CDC network utilizing VPN or via Citgo
2. Select the option "CDC Active Directory" from the drop-down menu
3. Input your CDC Active Directory user ID and password to access

### DCIPHER Home Page

After successfully logging into the system, you will arrive at the DCIPHER home page (Figure 1). To access the ORR system, click the "ORR" button under "Activities."

**Note:** The first time you log into DCIPHER, you most likely will not have an "ORR" button under "Activities." If this is the case, e-mail [dcipher-orr@cdc.gov](mailto:dcipher-orr@cdc.gov) with the subject line "Confirmed DCIPHER home access – no ORR."

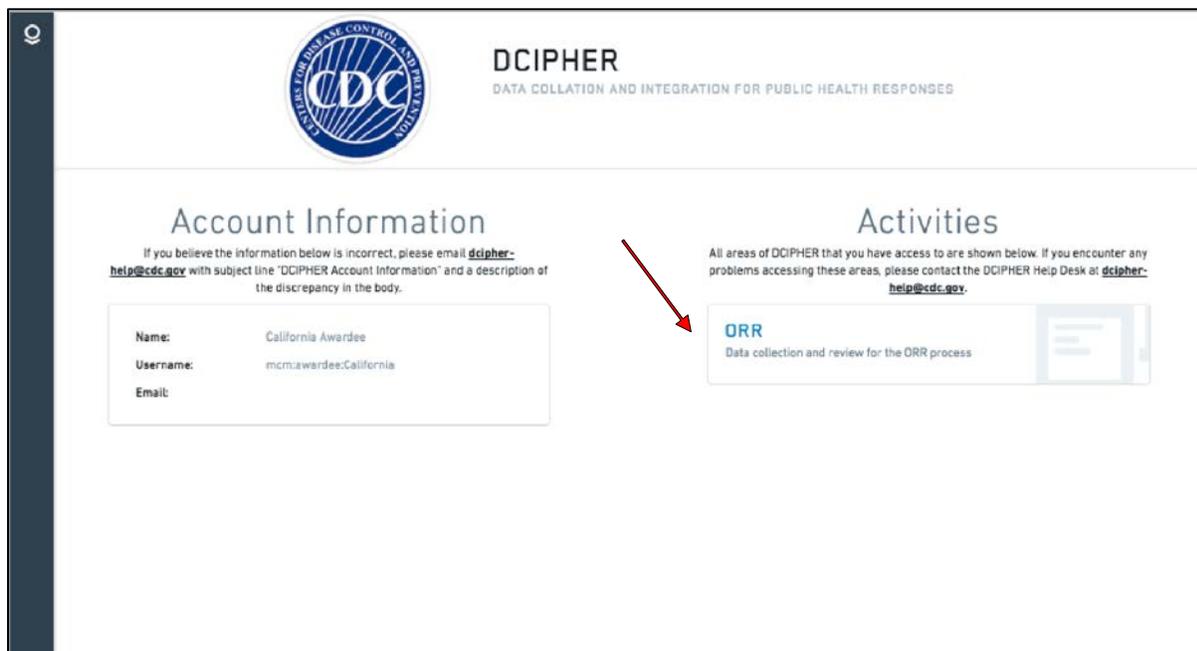


Figure 1: DCIPHER home page

## ORR Home Page

The recipient/CRI user ORR home page is a centralized hub from which you can take action on medical countermeasure (MCM) forms.

**Note:** "The CRI Reviewer Home" and "CRI Forms" tabs only will be available to state recipients and are a part of the state review of CRI jurisdictions. These tabs will be discussed in more detail in the ORR System Guide for Reviewer.

Section 1

Form Name	Review Stage	Submission Date
After-Action Report (AAR) and Improvement Plan (IP) Form	Open	N/A
Critical Contact Sheet	Open	N/A
Dispensing Full Scale Exercise (FSE)/Incident	Open	N/A
Dispensing Planning (States)	Open	N/A
Dispensing Throughput Drill	Open	N/A
Distribution Full Scale Exercise (FSE)/Incident	Open	N/A
Distribution Planning (Awardees)	Open	N/A
Facility Setup Drill	Open	N/A
Jurisdictional Data Sheet (JDS) - States	Open	N/A
PHEP/Functional/Full Scale Exercise or Incident	Open	N/A
Point of Dispensing (POD) Form	Open	N/A
Receipt, Stage, Store (RSS) Site Survey	Open	N/A
Site Activation Drill	Open	N/A
Staff Notification & Assembly Drill	Open	N/A
Tabletop Exercise (TTX)	Open	N/A
Training and Exercise Planning Form	Open	N/A

Section 2

Figure 2: Recipient/CRI ORR home page

### "ORR Information" Panel (Fig. 2, Sec. 1)

1. **ORR Statuses** – current status levels only reflect the data input as a part of the self-assessment. Reviewer input, concurrence, or disagreement will be factored into a separate, adjudicated status
  - a. **Descriptive Status** – your jurisdiction's current status (Early, Intermediate, or Established) based on data input into descriptive forms (e.g., Jurisdictional Data Sheet,

Point of Dispensing [POD] Form, Critical Contact Sheet, and/or Receipt, Stage, Store [RSS] Site Survey)

- b. **Planning Status** – your jurisdiction's current status (Early, Intermediate, or Established) based on data input into the Dispensing Planning Form and Distribution Planning Form
- c. **Operational Status** – your jurisdiction's current status (Early, Intermediate, Established, or Advanced) based on data input into tabletop exercise, drill, functional exercise, or full-scale exercise/incident forms

**Note:** Operational Status is the only status that can reach "Advanced" at this point in time

2. **Last Successful Inventory Data Exchange (IDE) Test** – the date of your jurisdiction's last successful IDE test, as reported to CDC

**Note:** If this information is not available for any reason, the field will display "Not yet reported." Contact your MCM specialist with any additional questions about this topic

3. **Site Visit Date** – the scheduled date of your jurisdiction's ORR site visit, if applicable.

**Note:** For recipients, this date should reflect the scheduled site visit of an MCM specialist from CDC. For CRIs, this date should reflect the date of an ORR site visit conducted by a representative of your state's public health team

### "Current Forms" Panel (Fig. 2, Sec. 2)

This panel contains a list of all forms that should be completed and submitted as a part of the ORR. Each form is displayed as a line item containing the form's name, its associated review stage, and the last submission date for the form. In the redesigned ORR system, forms can be submitted for review independently. The "Review Stage" column in this panel reflects the current status of each form in the ORR process. The full list of possible review stages can be found below:

1. **Open** – form is open and editable by recipient/CRI users
2. **Pending Review** – form has been submitted by a recipient/CRI user and is pending review by an ORR reviewer. At this point, the form cannot be edited
3. **Acknowledged** – ORR reviewer and recipient/CRI users have iterated through the appropriate feedback cycle for the form and understand/agree upon the responses provided

## DATA COLLECTION

### Opening a Form

1. To open a form, first select the form by clicking on its name
2. Once highlighted, click the "Edit" button at the bottom of the "Current Forms" panel to input data or update responses (Figure 3)

The screenshot shows the MCM ORR system interface. At the top, there is a header with the Colorado BP 1+2 ORR Home Page logo and an 'Open' button. Below the header, there are navigation links for 'Overview', 'CRI Reviewer Home', and 'CRI Forms'. On the left side, there is a sidebar with 'ORR Information' containing fields like 'Descriptive Status', 'Planning Status', 'Operational Status', 'Last Successful IDE Test', and 'Site Visit Date'. The main content area is titled 'Current Forms' and contains a table with columns for 'Form Name', 'Review Stage', and 'Submission Date'. A red arrow points to the 'Edit' button for the 'Training and Exercise Planning Form' row.

Form Name	Review Stage	Submission Date
After-Action Report (AAR) and Improvement Plan (IP) Form	Open	N/A
Critical Contact Sheet	Open	N/A
Dispensing Full Scale Exercise (FSE)/Incident	Open	N/A
Dispensing Planning (States)	Open	N/A
Dispensing Throughput Drill	Open	N/A
Distribution Full Scale Exercise (FSE)/Incident	Open	N/A
Distribution Planning (Awardees)	Open	N/A
Facility Setup Drill	Open	N/A
Jurisdictional Data Sheet (JDS) - States	Open	N/A
PHEP/Functional/Full Scale Exercise or Incident	Open	N/A
Point of Dispensing (POD) Form	Open	N/A
Receipt, Stage, Store (RSS) Site Survey	Open	N/A
Site Activation Drill	Open	N/A
Staff Notification & Assembly Drill	Open	N/A
Tabletop Exercise (TTX)	Open	N/A
Training and Exercise Planning Form	Open	N/A

Figure 3: Taking action on an ORR form

### Editing a Form

The different data types found within the ORR forms include

- a. Dates – select appropriate date, year, and time (where applicable). The level of detail required for a particular question will be visible in the question's placeholder text

**Start date/time**

Figure 4: Example of date field

- b. Radio buttons – select one (1) response by clicking the circle immediately to the left of your preferred response option

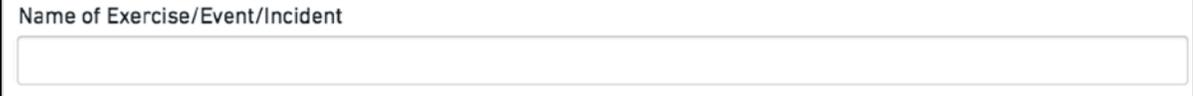


CDC Virtual Initiatives Program

Yes  No

Figure 5: Example of radio buttons field

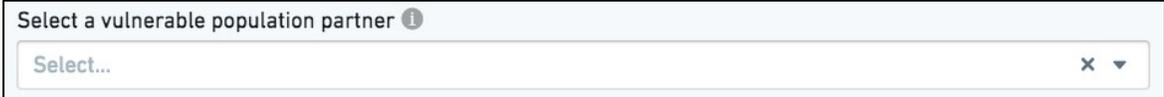
- c. Text – type response and click tab to go to next question



Name of Exercise/Event/Incident

Figure 6: Example of text field

- d. Select – choose a single response for the question. Click inside of the field to reveal the dropdown menu of response options. Move your cursor to highlight the desired response and click. Once completed, click tab to go to next question

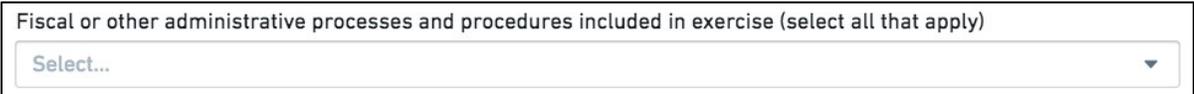


Select a vulnerable population partner ⓘ

Select... x ▾

Figure 7: Example of select field

- e. Multi-select – choose one (1) or more applicable response(s) for the question. Click inside of the field to reveal the dropdown menu of response options. Move your cursor to highlight the desired response(s) and click. Once completed, click tab to go to next question. This question type is indicated by "(select all that apply)" in the question text



Fiscal or other administrative processes and procedures included in exercise (select all that apply)

Select... ▾

Figure 8: Example of multi-select field

**Note:** For most multi-select questions, recipient/CRI users have the option to create a custom response outside of the preset response list. To add a custom response, type your desired answer into the multi-select field and press "Enter" (Figure 9 and Figure 10). An additional, custom response should only be created if the preset options do not accurately reflect the status of your jurisdiction

Fiscal or other administrative processes and procedures included in exercise (select all that apply)

Contracts (cycle time to secure) x | To add an "Other, specify" response, type it here and hit "Enter" x ▾

Financial reporting

Grants allocation

Hiring surge (staffing or reassignment considerations)

Procurement time

Receiving emergency funds (e.g., SHO or governor's emergency declaration or order)

Regulations

ADD new (States) vulnerable Population Partners) that participated

Figure 9: Help text is displayed in a multi-select field after one or more responses have been selected

Fiscal or other administrative processes and procedures included in exercise (select all that apply)

Contracts (cycle time to secure) x Testing123 x ▾

Create option "Testing123"

Figure 10: Creating a custom response for a multi-select field

## Saving a Form

Once you have input any appropriate responses, click "Save" in the bottom, right-hand corner of the screen (Figure 11).

Home [+ Logout]

EDIT COLORADO BP 1+2 Search property...

FORM PROGRESS (13/27)

- ✓ Determine Risks to the Health ... (0/2)
- ✓ Vulnerable Population Partners (0/0)
- ✓ Activate the Emergency Public... (8/7)
- ✓ Identify and Initiate MCM Disp... (0/2)
- ✓ Activate Dispensing Modalitie... (0/8)
- ✓ Activate Dispensing Modalitie... (3/5)
- ✓ Identify Responder Safety and... (2/2)
- ✓ Notify Volunteers (2/3)

Activate Dispensing Modalities - Process or protocols for PODs address

Record/log of drugs dispensed

Yes  No

Reporting data to state/federal entities (e.g., IMATS)

Yes  No

Screening for the purpose of triaging visitors to the POD

Yes  No

Identify Responder Safety and Health Risks

Process to identify all public health responders (including any first responders and critical infrastructure staff if applicable) that will be used in an incident or event is available (select all that apply) ⓘ

Local legislative mandates or laws x MCM Operation Plan x ▾

Process to ensure that mission-critical responders receive initial prophylaxis during an MCM incident is available (select all that apply) ⓘ

Standard Operating Guide (SOG) x ▾

Notify Volunteers

Procedures to notify volunteers are available (select all that apply)

Local legislative mandates or laws x ▾

Systems used to notify volunteers required to complete a dispensing and/or distribution campaign (select all that apply)

HAN x ▾

Last date of notification system was updated or tested (whichever is more recent)

MM/DD/YYYY

Cancel Save

Figure 11: Saving an ORR form

When the form is saved successfully, you will see the review page of the form. This page displays all questions with the form on the left-hand side of the page, along with your saved responses on the right-hand side of the page. If any question has not been addressed, the question will appear with the phrase "No response" (Fig. 12, Sec. 2).

Additionally, forms may require certain fields to be addressed before you are able to submit for review. While you should address all questions that appear within a particular form, a warning message will appear on the review page if you forget one of the questions required to submit. Until all of these particular questions have been addressed, the "Submit for Review" button will be disabled (Fig. 12, Sec. 1).

If, at any time, you would like to go back and edit some of your responses, click any of the "Edit" links displayed on the right-hand side of the page.

Colorado   
Tabletop Exercise (TTX)

MCM ORR [Review](#) [Supporting Documents](#) [Comments](#) [History](#)

Submit for Review: Tabletop Exercise (TTX) must have a response for "Fiscal or other administrative processes and procedures included in exercise (select all that apply)".

Filter for Comments

### Tabletop Exercise (TTX) Section 1

Name of Exercise/Event/Incident	Test exercise	<a href="#">Edit</a>
Start date/time	August 3, 2017 9:30AM	<a href="#">Edit</a>
End date/time	August 4, 2017 1:00PM	<a href="#">Edit</a>
Event type (select all that apply)	Disease Outbreak	<a href="#">Edit</a> <span style="color: red;">1</span>
	Natural Disaster	<a href="#">Edit</a>
Capabilities exercised (select all that apply)	No response	<a href="#">Edit</a>
CDC Virtual Initiatives Program	Yes	<a href="#">Edit</a>
HHS Regional participation (select all that apply)	Region 2	<a href="#">Edit</a>
	Region 3	<a href="#">Edit</a>
Fiscal or other administrative processes and procedures included in exercise (select all that apply)	No response	<a href="#">Edit</a>
	<span style="color: red;">Section 2</span>	

Figure 12: Review of a Tabletop Exercise (TTX) missing required fields for submission

## SUPPLEMENTAL INFORMATION

### Response-level Comments

Each saved response will have an associated comment icon, which can be found on the far, right-hand side of the review page (Figure 13). By clicking this icon, you can leave a comment for your ORR reviewer and view any existing comments saved by other participants in the ORR process. You are highly encouraged to leave comments for your ORR reviewer about the location of evidence within supporting documents.

**Note:** If you have not addressed a particular question (i.e., "No response" shows up on the review page), a comment icon will not be associated with that question.

Tabletop Exercise (TTX)		
Name of Exercise/Event/Incident	Test exercise	Edit
Start date/time	August 3, 2017 9:30AM	Comments
End date/time	August 4, 2017 1:00PM	Edit
Event type (select all that apply)	Disease Outbreak	Edit  1
	Natural Disaster	Edit
Capabilities exercised (select all that apply)	No response	Edit

Figure 13: Saved responses and their associated comment icons

When you click on the comment icon, a pop-up window will appear, containing a text box and two buttons (Figure 14). Type your comment into the text box provided and click "Save." Your comment, along with your name and the date/time the comment was saved, will now appear in the pop-up window any time someone clicks on this response's comment icon.

Tabletop Exercise (TTX)		
Name of Exercise/Event/Incident	Test exercise	Edit
Start date/time	August 3, 2017 9:30AM	Edit
End date/time	August 4, 2017 1:00PM	Edit
Event type (select all that apply)	Disease Outbreak	
	Natural Disaster	
Capabilities exercised (select all that apply)	No response	
CDC Virtual Initiatives Program	Yes	

Colorado Awardee Now

See TEST.doc in Supporting Documents tab

Cancel Save

Figure 14: Writing a response-level comment

**Note:** Response-level comments cannot be deleted, so be conscious of this fact as you leave comments with supplemental information or feedback.

Additionally, the comment icon will turn red to indicate that comments are associated with this particular response. A number also will appear on the right-hand side of the comment icon to indicate the number of comments (Figure 15).

The screenshot shows a form titled "Tabletop Exercise (TTX)". The form contains several fields with their corresponding values and edit icons:

Name of Exercise/Event/Incident	Test exercise	Edit
Start date/time	August 3, 2017 9:30AM	Edit
End date/time	August 4, 2017 1:00PM	Edit
Event type (select all that apply)	Disease Outbreak	
	Natural Disaster	
Capabilities exercised (select all that apply)	No response	
CDC Virtual Initiatives Program	Yes	
HHS Regional participation (select all that apply)	Region 2	
	Region 3	

A comment popup is displayed over the "End date/time" field. The popup contains the following text:

**Colorado Awardee** a few seconds ago  
See TEST.doc in Supporting Documents tab

**Colorado Awardee** Now

Enter comment...

Buttons: Cancel, Save

Figure 15: Saved response-level comment

Response-level comments can be added by both recipient/CRI users and ORR reviewers at any time throughout the ORR process. This feature is intended to help track important pieces of information related to ORR data over time as well as facilitate communication between the recipient/CRI users and their ORR reviewers.

### Special Case: Response-level Comments on Multi-select Questions

The redesigned ORR supports the ability to preserve important communications between recipient/CRI users and their ORR reviewer for future reference. As you move through the ORR process, your responses may change over time.

If your responses change, having your reviewer be able to see both your original responses and their associated comments as you proceed with your review is important. For questions in which you choose a single response, a comment left on that question will remain visible over time, regardless of any changes to the response. However, for multi-select questions, you have the ability to add multiple responses and then comment on each individual response.

If your responses to a multi-select question change over time, any associated comments are still considered valuable as a part of the review process. Therefore, you should not delete any responses to multi-select questions that have response-level comments. If, for any reason, a response to a multi-select question becomes invalid or no longer applicable, comment "No longer valid" instead of deleting the response.

### Adding Form-level Comments

In addition to response-level comments, both recipient/CRI users and ORR reviewers can leave comments on the form overall. In order to leave overall comments, click on the "Comments" tab from the review page of the form (Figure 16).

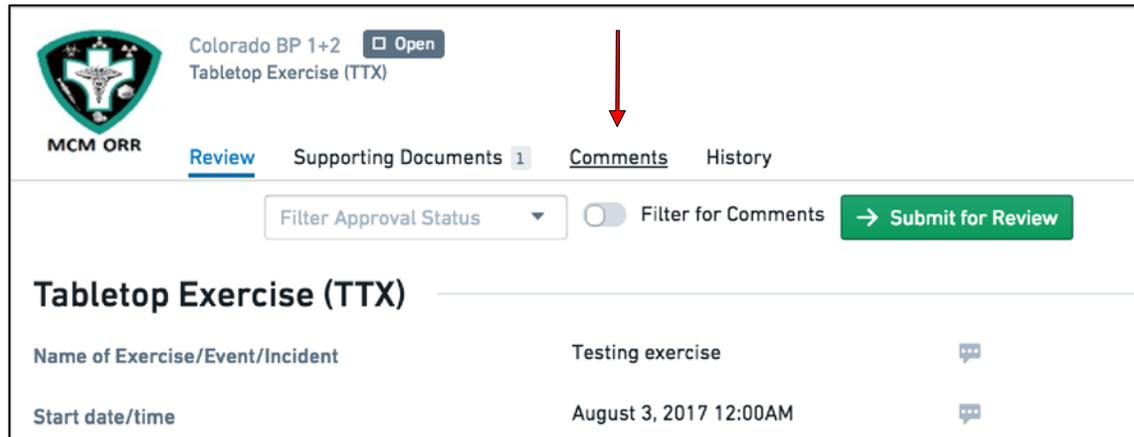


Figure 16: Navigating to the "Comments" tab from the review page of a form

When you first navigate to the "Comments" tab, the page will be blank. Similar to response level comments, form-level comments can be added by both recipient/CRI users and ORR reviewers at any time throughout the ORR process. To add a new form-level comment, click the "New Comment" link (Figure 17).

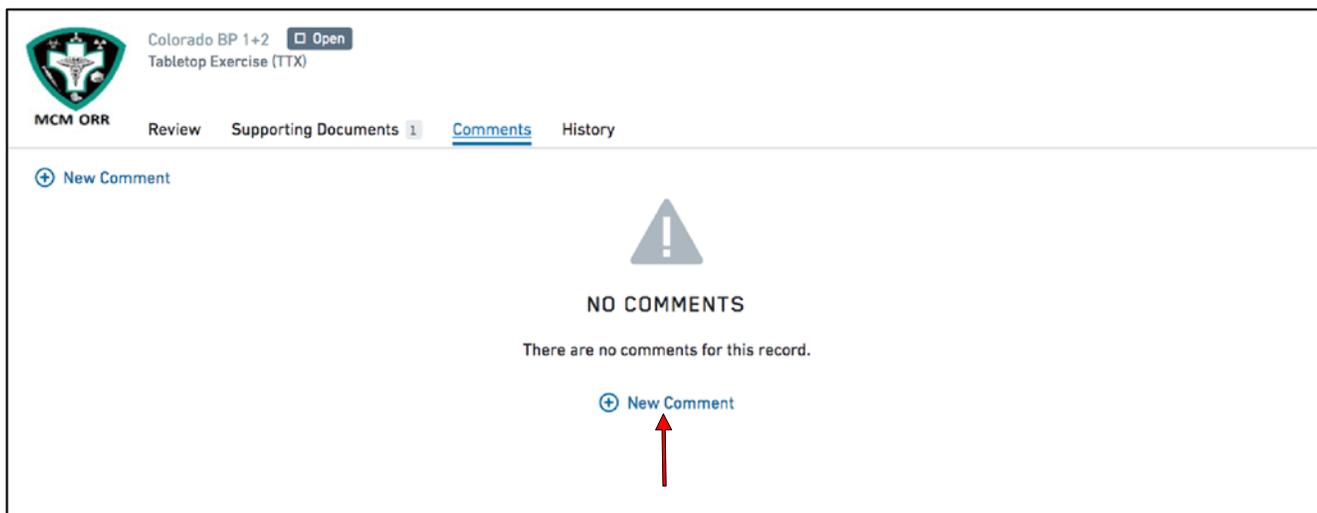


Figure 17: Comment tab without any form-level comments

Type your desired message into the text box provided and click "Comment" to save (Figure 18). The new comment will appear on the page along with the name of the individual who saved the comment and the time/date stamp (Figure 19). Form-level comments can be seen by any recipient/CRI user or ORR reviewer with access to this form. These form-level comments in the "Comments" tab cannot be deleted after they have been saved, so be cognizant of this fact when leaving comments or feedback.

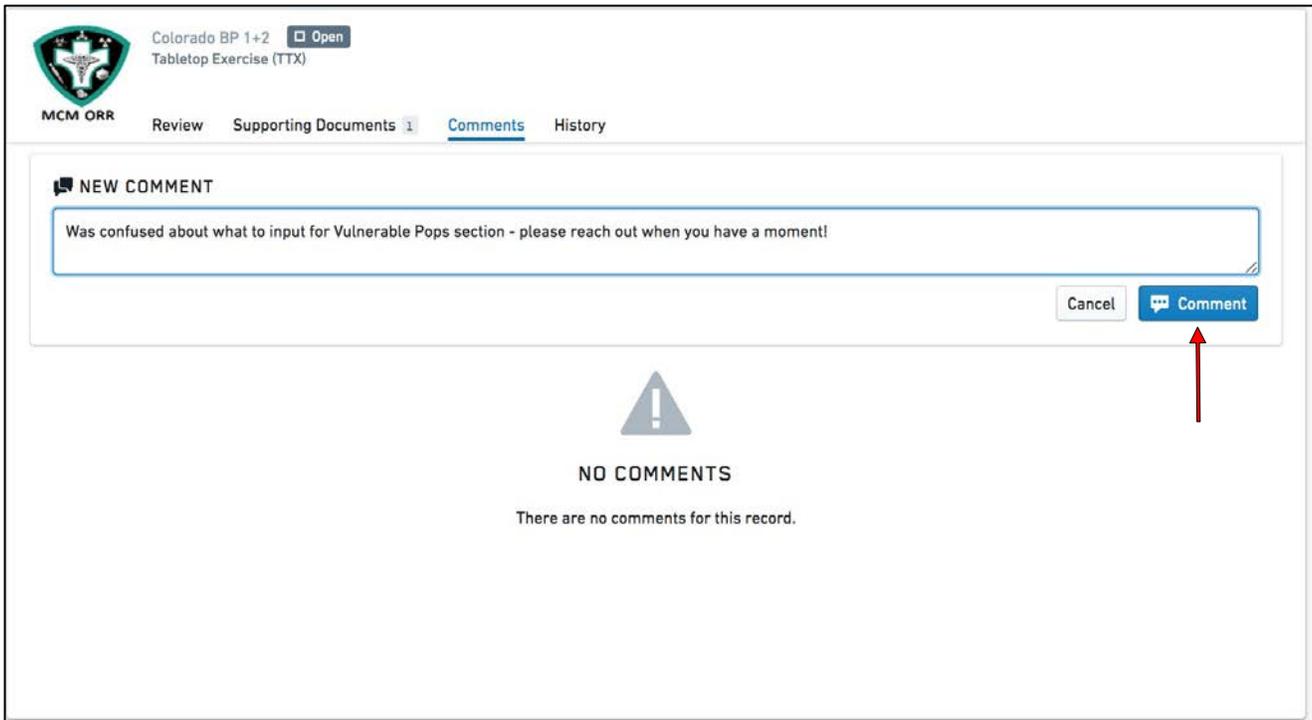


Figure 18: Entering a new comment into the "Comments" tab

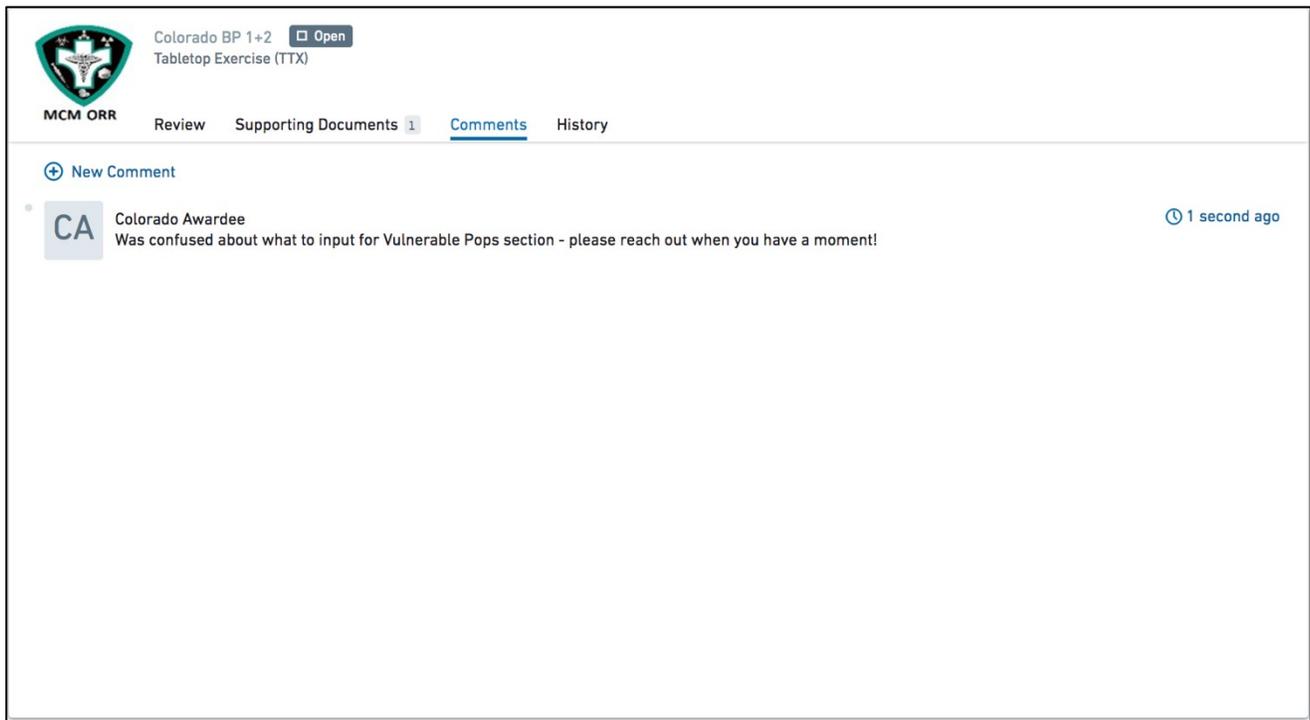


Figure 19: "Comment" tab with one saved comment

## Uploading Supporting Documents

As you collect data within an ORR form, you will often need to supplement it with supporting evidence and documentation. The ORR system is capable of storing most document types associated with an ORR, including text documents (e.g., .txt, .doc, or .docx files), worksheets (e.g., .xls or .xlsx files), PDF documents, and image files (e.g., .png, .jpeg, .tiff, or other image files). To upload a file, click on the "Supporting Documents" tab from the review page of a form (Figure 20).

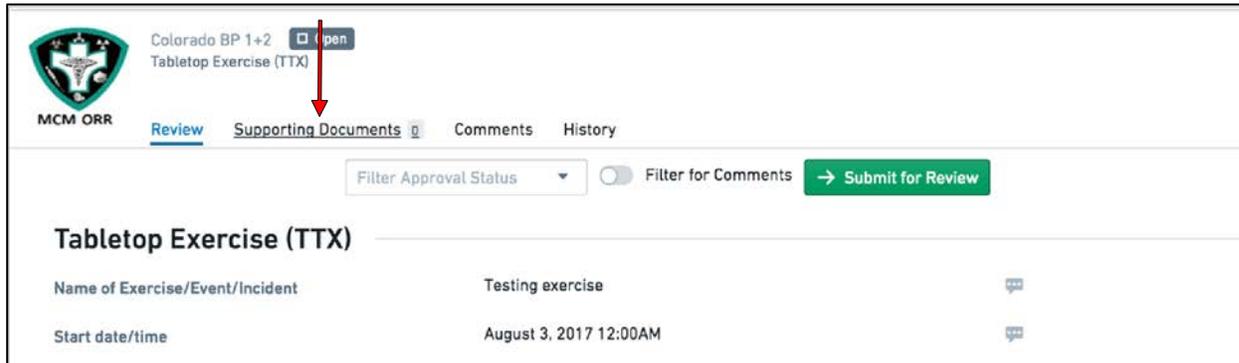


Figure 20: Navigating to the "Supporting Documents" tab from the review page

Once in the "Supporting Documents" tab, you can upload a file by clicking "Click here to add files" (Figure 21).

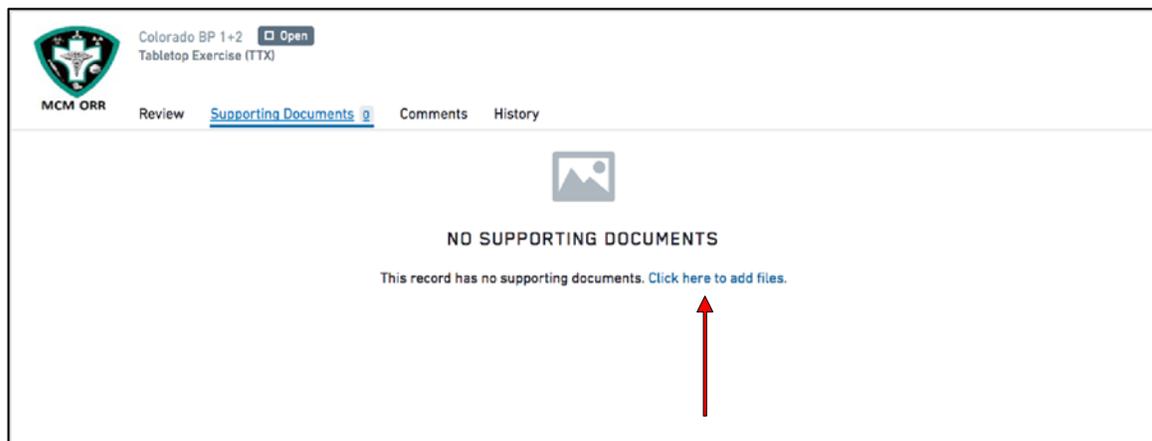


Figure 21: "Supporting Documents" tab without any attachments

After you click this link, a pop-up window will appear and allow you to select a file (Figure 22) to upload into the ORR system. You can upload more than one file at the same time by clicking the "Add" button on the pop-up. Each time you click "Add", another line will appear where you can browse for an additional file.

**Note:** The maximum upload size is 25 megabytes (MB). For reference, a 25 MB file is typically the maximum file size allowed for an e-mail attachment. If your file exceeds 25 MB, you can compress the file into a .zip file and upload the compressed file into the system.

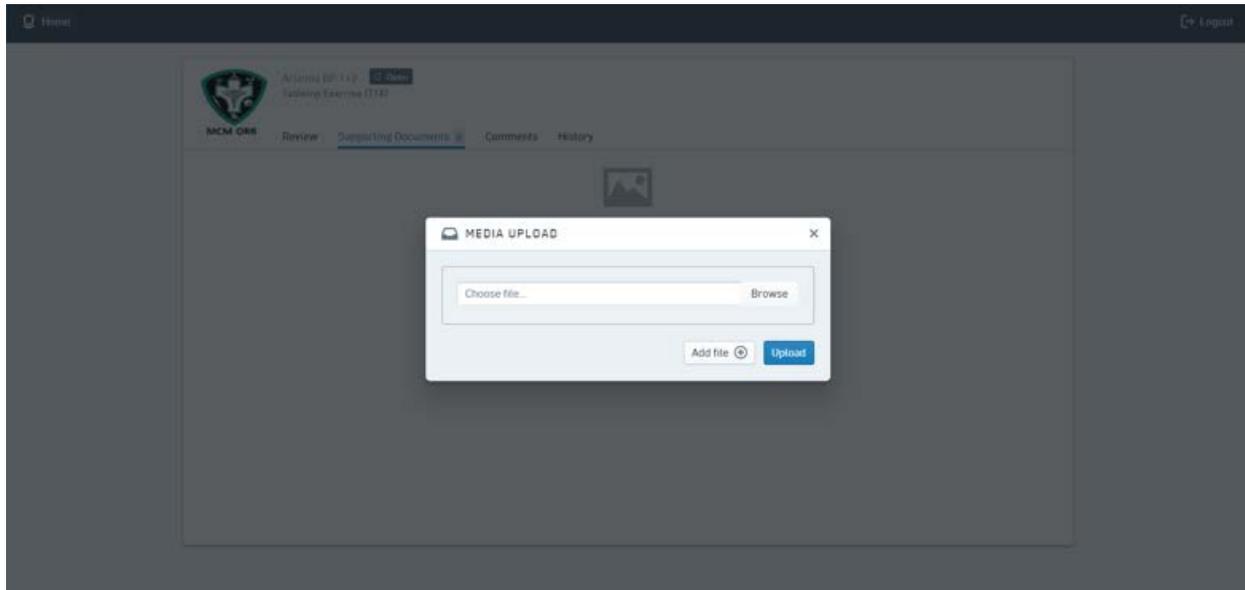


Figure 22: Uploading a file

When a file successfully uploads, it will appear in the "Supporting Documents" tab along with any other existing uploads (Figure 23). You can download the file by clicking on the file icon to select it, and then clicking the "Download" button. To delete an uploaded file, click the file icon to select it and then click the "Delete" button (Fig. 23, Sec. 1).

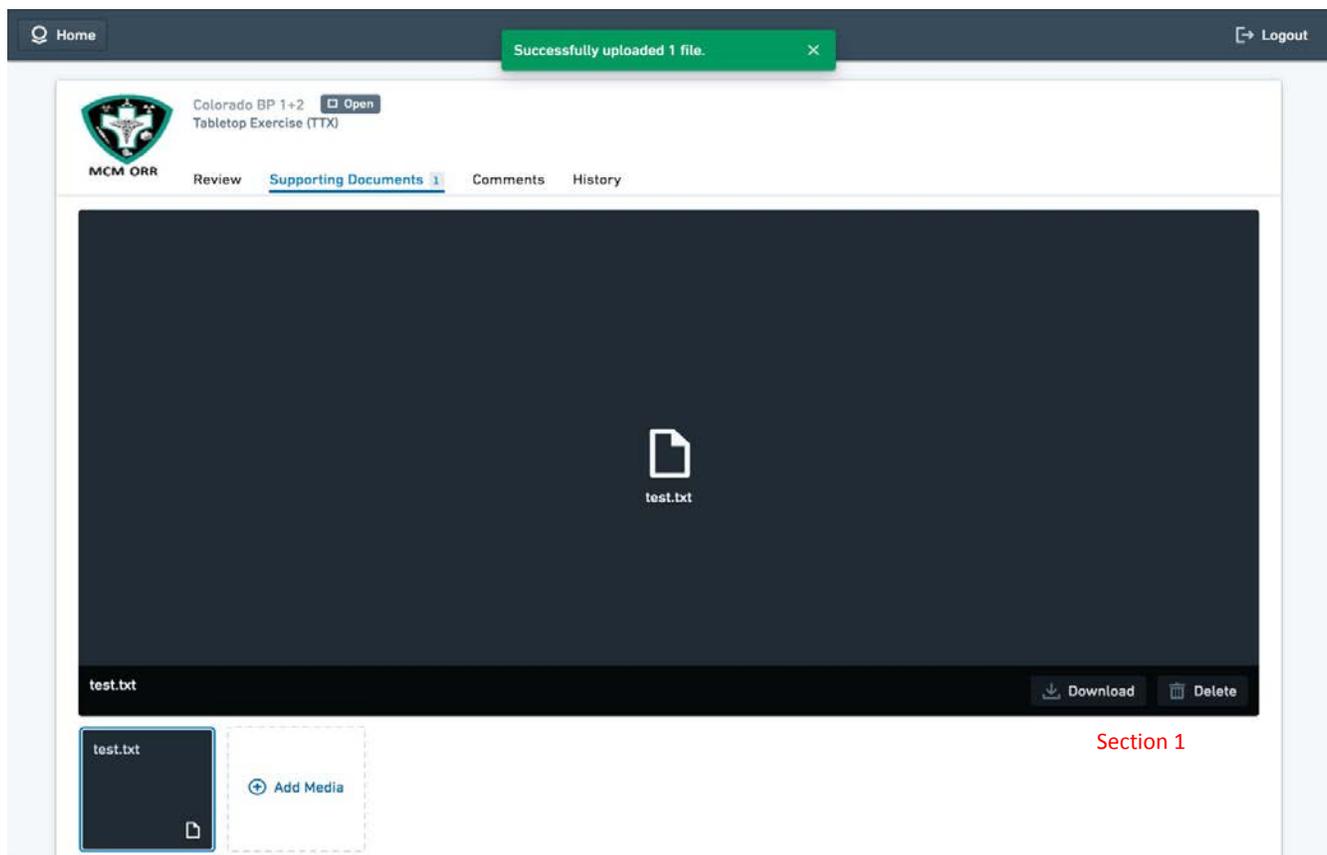


Figure 23: Navigating to the "Supporting Documents" tab from the review page

## FORM SUBMISSION AND REVIEW

### Submitting a Form

After inputting data into a particular ORR form, adding any necessary comments, and uploading supporting documents, you are ready to submit your form for review. If you would like to submit from either the "Comments" or "Supporting Documents" tab, click on the "Review" tab to get back to the review page of the form (Figure 24).

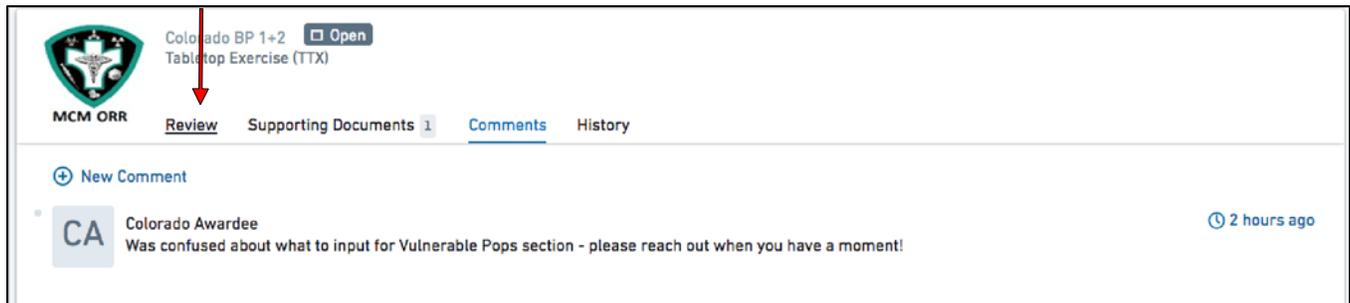


Figure 24: Navigating to the "Review" tab from the "Comments" tab

If you would like to submit a form directly from your ORR home page, click the form's name to highlight it and then click the "Review" button at the bottom of the "Current Forms" panel (Figure 25).

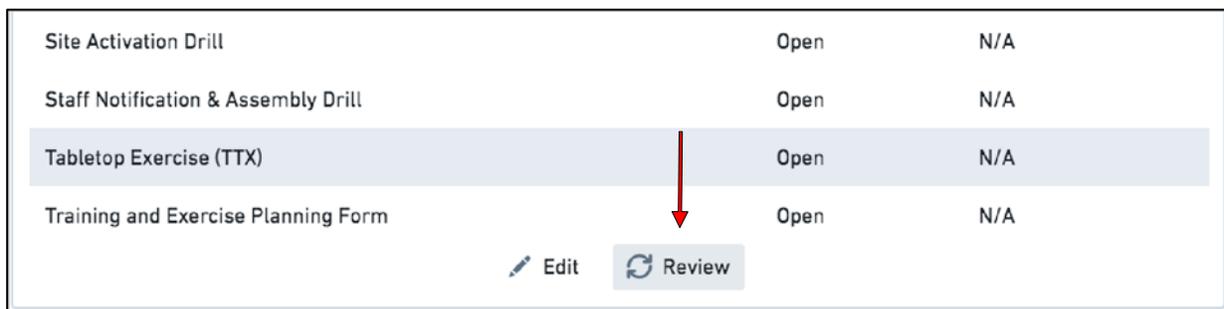
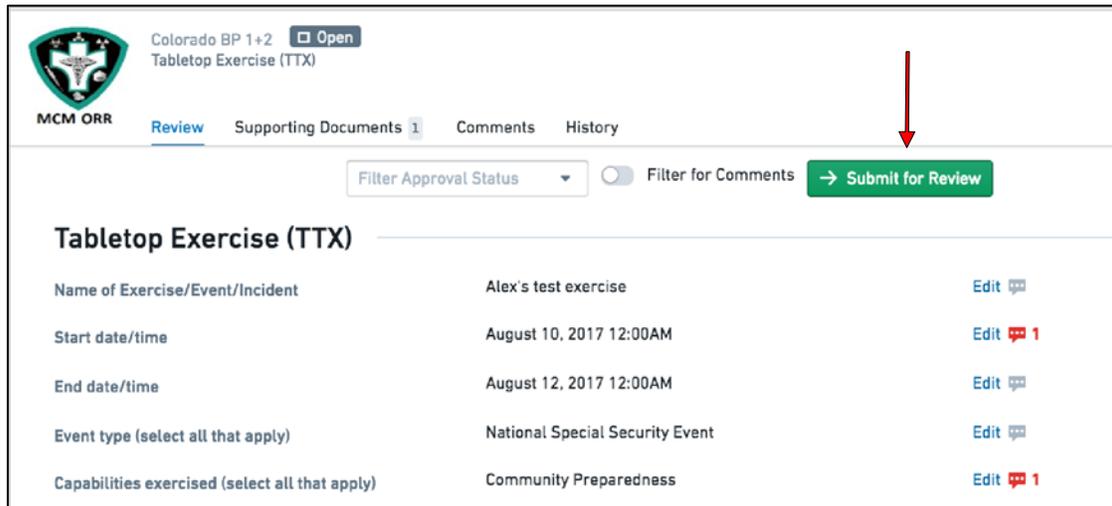


Figure 25: Navigating to the Tabletop Exercise (TTX) review page from the ORR home page

After you arrive at the review page of the form, you will see the "Submit for Review" button at the top of your page. The button will be enabled as long as you have addressed all required fields for submission. To submit your form, click the "Submit for Review" button (Figure 26). A pop-up window will appear to confirm your submission (Figure 27).



Colorado BP 1+2 Open  
Tabletop Exercise (TTX)

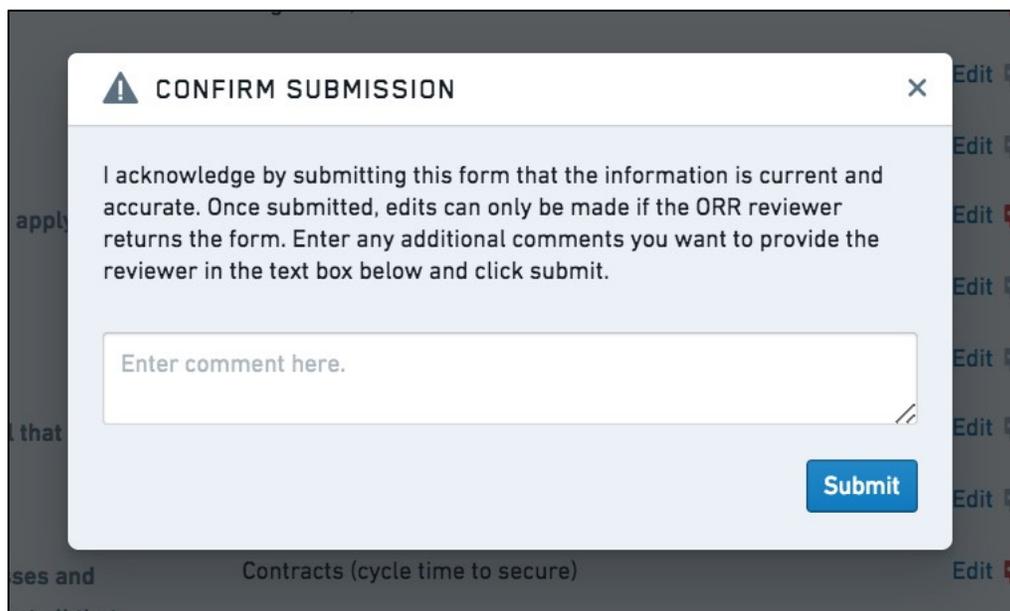
MCM ORR [Review](#) [Supporting Documents 1](#) [Comments](#) [History](#)

Filter Approval Status  Filter for Comments [→ Submit for Review](#)

### Tabletop Exercise (TTX)

Name of Exercise/Event/Incident	Alex's test exercise	<a href="#">Edit</a>
Start date/time	August 10, 2017 12:00AM	<a href="#">Edit</a> <span>1</span>
End date/time	August 12, 2017 12:00AM	<a href="#">Edit</a>
Event type (select all that apply)	National Special Security Event	<a href="#">Edit</a>
Capabilities exercised (select all that apply)	Community Preparedness	<a href="#">Edit</a> <span>1</span>

Figure 26: Clicking "Submit for Review" button to submit your ORR form



**CONFIRM SUBMISSION**

I acknowledge by submitting this form that the information is current and accurate. Once submitted, edits can only be made if the ORR reviewer returns the form. Enter any additional comments you want to provide the reviewer in the text box below and click submit.

Enter comment here.

[Submit](#)

Figure 27: Confirm submission pop-up window

If you feel comfortable submitting your data for review at this time, click the "Submit" button. If you would like, you can leave an additional comment about your submission in the text box provided. This comment will be saved to the "Comments" tab for future reference.

If you clicked the "Submit for Review" button prematurely and are not yet ready to submit your form for review, you can exit the pop-up window by clicking the "X" icon at the top, right-hand side of the pop-up window. After exiting, you can continue to edit your form as usual.

**Note:** Once your form is submitted for review, it cannot be retracted until the ORR reviewer has completed his/her review. If you accidentally submit a form with a mistake or need to retract the form for any reason, you can indicate this accidental submission by leaving a comment on the form for your reviewer.

## ORR AND NEXT STEPS

### After Submitting a Form

Once you submit your form for review, you will notice that the buttons at the top of your review page are disabled (Fig. 28, Sec. 2) and the "Edit" links disappear (Fig. 28, Sec. 3). These changes indicate that your form has been successfully submitted and you are not able to edit any responses until the review has been conducted. You also can see that the tag at the top of your review page now says "Pending Review," which is another indication that your form has been successfully submitted (Fig. 28, Sec. 1).

Colorado BP 1+2 Pending Review  
 Tabletop Exercise (TTX) Section 1

MCM ORR [Review](#) [Supporting Documents 1](#) [Comments](#) [History](#)

Return Form: You must have at least one of roles: REVIEWER,ADMIN to perform this transition.

Acknowledge: You must have at least one of roles: REVIEWER,ADMIN to perform this transition.

Filter Approval Status  Filter for Comments Return Form Acknowledge

Section 2

Tabletop Exercise (TTX)	
Name of Exercise/Event/Incident	Alex's test exercise <span style="float: right;">💬</span>
Start date/time	August 10, 2017 12:00AM <span style="float: right;">💬 1</span>
End date/time	August 12, 2017 12:00AM <span style="float: right;">💬</span>
Event type (select all that apply)	National Special Security Event <span style="float: right;">💬</span>
Capabilities exercised (select all that apply)	Community Preparedness <span style="float: right;">💬 1</span>
	Community Recovery <span style="float: right;">💬</span>

Section 3

Figure 28: Review page of successfully submitted form

If you navigate back to the ORR home page, you also will see that the form's review stage has changed from "Open" to "Pending Review" (Figure 29). At this time, you cannot take action on this particular form until the ORR reviewer completes his or her review.

Staff Notification & Assembly Drill	Open	N/A
Tabletop Exercise (TTX)	Pending Review	8/31/2017
Training and Exercise Planning Form	Open	N/A

Figure 29: Form review stage is now "Pending Review"

### Special Case: Review of Planning Forms

Most forms evaluated as a part of the ORR are assessed as a whole. However, two exceptions to this rule exist: Dispensing Planning Form and Distribution Planning Form. In these forms, any single response saved by a recipient/CRI user will be assessed individually by the ORR reviewer. The responses all have an associated approval status, which is indicated on the far, right-hand side of the review page (Fig. 30, Sec. 1).

#### Preliminary Assessment

Date of most recent preparedness plans review/update	2017-08-22	Edit	Concur: Sufficient...
Plans include strategies to coordinate with subject matter experts to inform incident management decision making (select all that apply)	Emergency Operations Plan (EOP)	Edit	Concur: Sufficient...
	Memoranda of Understand/Agreement (MOU/MOA) with roles and responsibilities identified	Edit	Insufficient Eviden...
Subject matter experts involved in developing plans include (select all that apply)	Biological SME	Edit	Insufficient Eviden...
	Chemical SME	Edit	Contradictory Evi...
	Immunization coordinator/SME	Edit	Insufficient Eviden...

Section 1

Figure 30: Response level approval statuses in Distribution Planning Form

Any question that has been approved by the ORR reviewer will say "Concur: Sufficient Evidence". Any question that has not been approved will have the reason for disapproval indicated in that field. Reasons for disapproval include Insufficient Evidence, Contradictory Evidence, No Evidence, or Data Input Error.

ORR reviewers are recommended to provide supplemental information about a response's approval status in the response-level comments. Please see ORR Guidance document for more information on these status levels.

#### ORR Reviewer Returns the Form

If an ORR reviewer has feedback for a recipient/CRI user or does not agree with any of the responses provided, he or she can return the form to the recipient/CRI by putting it back into "Open" review stage. You can review any feedback or applicable response-level approval statuses by going to the review page of the form. As described above, to get to the review page of a form, click on the form name in the "Current Forms" panel and then click the "Review" button.

To quickly filter down to only those questions that have comments, use the "Filter for Comments" toggle at the top of the review page (Fig. 31, Sec. 1). This filter allows you to quickly drill down to only those responses with comments. The comments can be written by either recipient/CRI users or ORR reviewers.

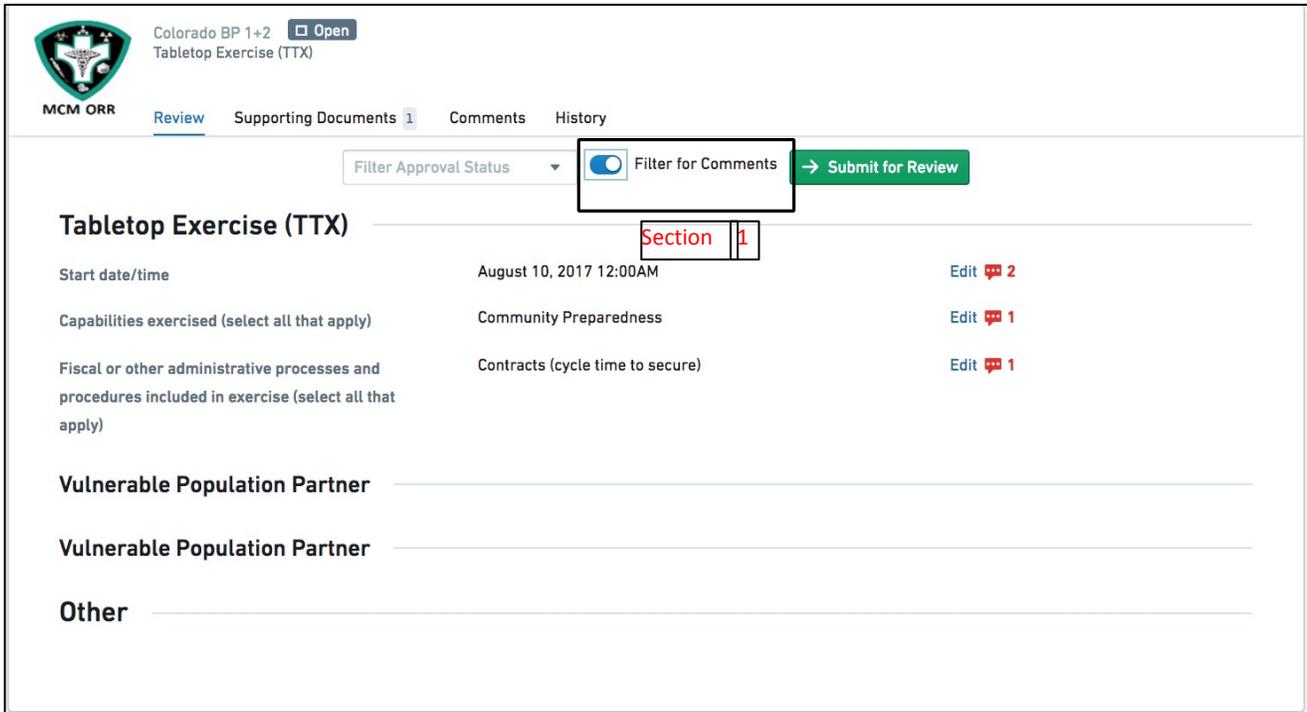


Figure 31: "Filter for Comments" toggle

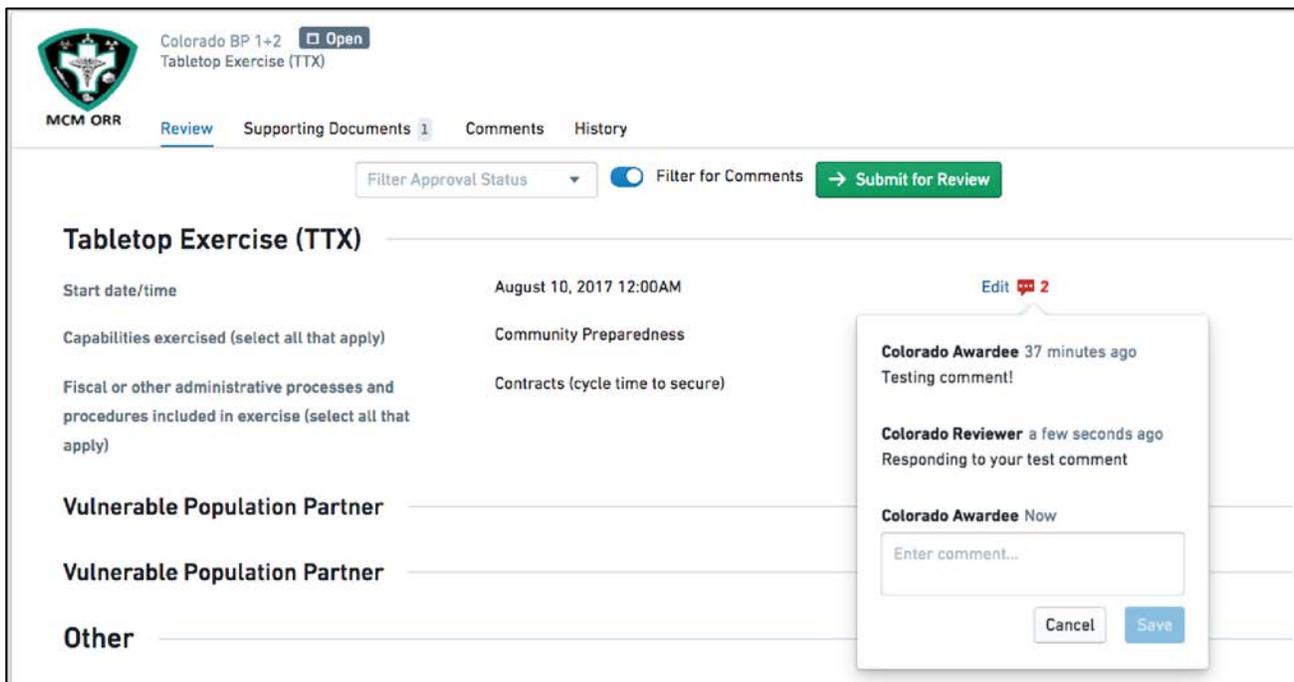


Figure 32: Example conversation between recipient/CRI user and ORR reviewer in comments

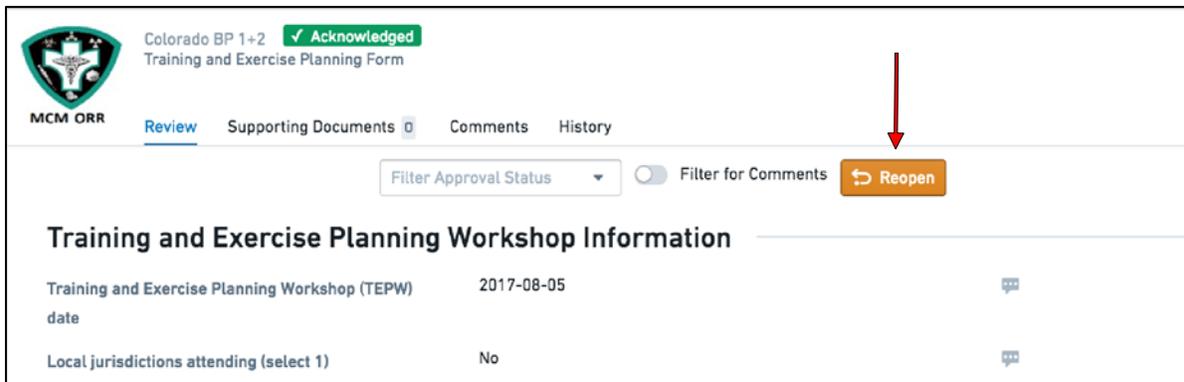
Since the form's review stage has been changed to "Open," you can edit the form again and take action on the feedback provided. Such actions include updating responses within the form and uploading additional supporting evidence.

### ORR Reviewer Acknowledges the Form

On the other hand, if your ORR reviewer does not have any additional feedback or agrees with the responses and evidence provided for an ORR form, the form will be moved to the "Acknowledged" review stage. At this point, the review of that particular form is considered final and the data is no longer editable.

If you need to make updates to planning forms, descriptive forms, or the Training and Exercise Planning Form at a later date, you can do so by reopening the form from "Acknowledged" review stage to "Open" review stage.

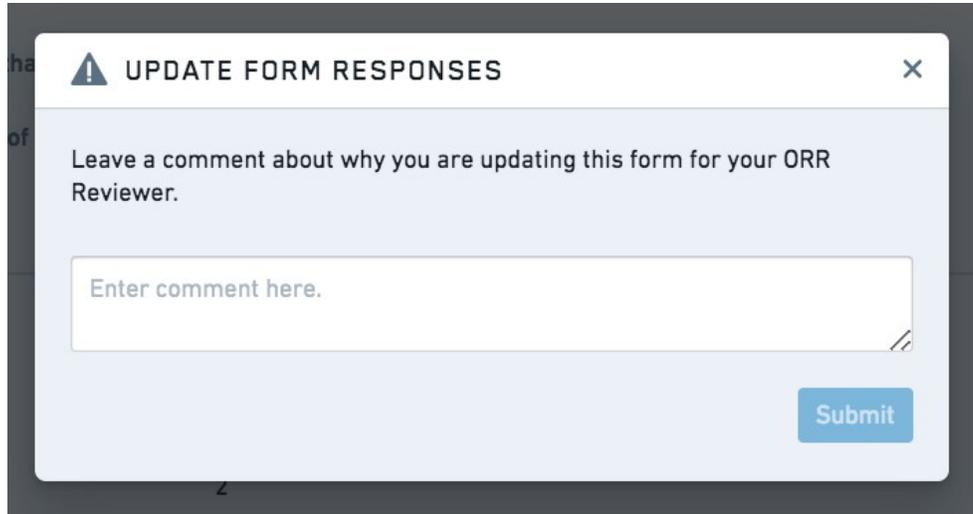
To reopen the form for updates, you need to go back to the review page of the form in question by selecting the form name on the ORR homepage and then clicking the "Review" button. On the review page, you will see a button at the top of the page that says "Reopen" (Figure 33).



The screenshot shows the ORR system interface for a form titled "Colorado BP 1+2 Training and Exercise Planning Form". The form status is "Acknowledged" (indicated by a green checkmark). The interface includes a navigation bar with "Review", "Supporting Documents", "Comments", and "History" tabs. Below the navigation bar, there are filters for "Approval Status" and "Filter for Comments", and a prominent orange "Reopen" button with a circular arrow icon. A red arrow points to this button. Below the navigation and filters, the form details are displayed under the heading "Training and Exercise Planning Workshop Information".

Training and Exercise Planning Workshop Information		
Training and Exercise Planning Workshop (TEPW) date	2017-08-05	⋮
Local jurisdictions attending (select 1)	No	⋮

Figure 33: An example of a form that can be reopened from "Acknowledged" to "Open" review stage



ha

of

⚠ UPDATE FORM RESPONSES ×

Leave a comment about why you are updating this form for your ORR Reviewer.

Enter comment here.

Submit

*Figure 34: Confirmation pop up window to reopen a form for updates*

If you click this button, a pop-up window will appear asking you to confirm that you would like to reopen your form for updates (Figure 34).

### **Special Case: Operational Forms**

Operational forms (e.g., drills, full-scale exercises, tabletop exercises) cannot be reopened once they have moved into the "Acknowledged" review stage. However, you can create a new version of an operational form that has been acknowledged by your ORR reviewer.

To create a new version of the form, go to the ORR homepage and locate the drop-down menu at the top of the "Current Forms" panel. If you click on the field, you will see that the options in the dropdown menu are the names of a subset of operational forms (Figure 35). This subset of forms includes any operational form in which the most recent version of the form has been moved to "Acknowledged" review stage. Additionally, the forms in this list do not have an existing version of the form in "Open" review stage at this time.

Current Forms

Select...
▼

Create Form

Tabletop Exercise (TTX)

Form Name	Status	Submission Date
After-Action Report (AAR) and Improvement Plan (IP) Form	Open	N/A
Critical Contact Sheet	Open	N/A
Dispensing Full Scale Exercise (FSE)/Incident	Open	N/A
Dispensing Planning (States)	Open	N/A
Dispensing Throughput Drill	Open	N/A
Distribution Full Scale Exercise (FSE)/Incident	Open	N/A
Distribution Planning (Awardees)	Open	8/30/2017
Facility Setup Drill	Open	N/A
Jurisdictional Data Sheet (JDS) - States	Open	N/A
PHEP/Functional/Full Scale Exercise or Incident	Open	N/A
Point of Dispensing (POD) Form	Open	N/A
Receipt, Stage, Store (RSS) Site Survey	Open	N/A
Site Activation Drill	Open	N/A
Staff Notification & Assembly Drill	Open	N/A
Tabletop Exercise (TTX)	Acknowledged	8/31/2017
Training and Exercise Planning Form	Acknowledged	8/31/2017

✎ Edit | 
 ↻ Review

*Figure 35: Creating a new version of the Tabletop Exercise (TTX) form*

After you select the form that you would like to duplicate, click the "Create" button to create an empty form of the same type (Figure 36). Upon clicking the "Create" button, an additional version of the form will appear as a new line item in your "Current Forms" panel (Figure 37). You can distinguish the versions of the form by the "Submission Date" column.

**Note:** You can only have one version of each operational form in "Open" or "Pending Review" stage at any given time.



Figure 36: Creating a blank copy of the selected operational form

Tabletop Exercise (TTX)	Acknowledged	8/31/2017
Tabletop Exercise (TTX)	Open	N/A

Figure 37: "Open" and "Acknowledged" versions of the Tabletop Exercise (TTX) in the "Current Forms" panel. Submission dates are shown in the far, right-hand column.

### Tracking Form History Over Time

The ORR system also allows both recipient/CRI users and ORR reviewers to track changes in a form over time. This feature is available for all ORR forms and can be accessed by navigating to the "History" tab for the form in question. To see the history tab, select the form you would like to examine in the "Current Forms" panel of the ORR homepage and then click the "Review" button.

Once you are on the review page of the form in question, click on the "History" tab at the top of the screen (Figure 38). This tab shows all form response changes, response-level comments, form-level comments, and review stage transitions (Figure 39). It also contains information about both the user who made these changes and the times at which they took place. You can think of this capability as a way to track all changes to a form over time.

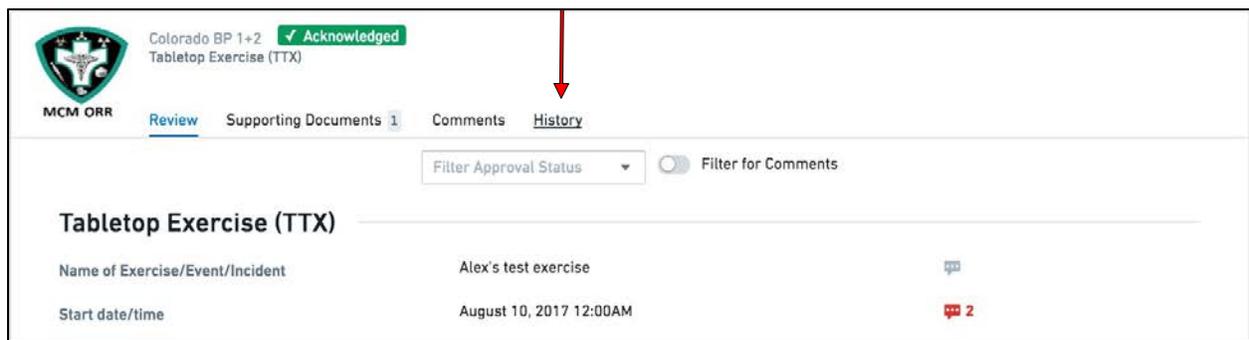


Figure 38: Navigating to the "History" tab from a form's review page

 Colorado BP 1+2 <span style="background-color: green; color: white; padding: 2px;">✓ Acknowledged</span> Tabletop Exercise (TTX)	
MCM ORR    Review    Supporting Documents <span style="border: 1px solid gray; border-radius: 50%; padding: 0 2px;">1</span> Comments <u>History</u>	
<b>Colorado Reviewer</b> acknowledge.	🕒 57 minutes ago
<b>Colorado Reviewer</b> added comment. as	🕒 57 minutes ago
<b>Colorado Awardee</b> submit for review this record.	🕒 57 minutes ago
<b>Colorado Reviewer</b> added intrinsic Comment "Responding to your test comment".	🕒 1 hour ago
<b>Colorado Reviewer</b> return form.	🕒 1 hour ago
<b>Colorado Awardee</b> submit for review this record.	🕒 2 hours ago
<b>Colorado Awardee</b> added intrinsic Comment "Test again!".	🕒 2 hours ago
<b>Colorado Awardee</b> added intrinsic Comment "Testing comment!".	🕒 2 hours ago
<b>Colorado Awardee</b> added a "Vulnerable Population Partner (Operational)" link to "Vulnerable Population Partners (States)".	🕒 2 hours ago

Figure 39: History tab for the state of Colorado's Tabletop Exercise (TTX) form