Public Health Emergency Preparedness (PHEP) Operational Readiness Review (ORR) Reporting and Tracking System (PORTS) User Guide

October 2023

Table of Contents

Getting Started with PORTS

The **PHEP ORR Reporting and Tracking System (PORTS** is accessible through the [Secure Access Management System (SAMS)](#) and provides a central location to access multiple modules used to submit and review PHEP Operational Readiness Review data.

Available modules differ based on an individual user's permissions. The Operational Readiness Review, Forms Administration, and System Administration modules are currently available. CDC plans to add additional modules in the future. To ensure proper functionality of the system, users should ONLY use the Google Chrome browser to access PORTS or any related modules.

System Announcements

Users can view recent system or program announcements on the [PORTS home page](#). Announcements are organized by module.

Navigation

The primary navigation option is the **navigation bar** on the left side of the page. Expand the navigation bar by hovering the mouse over the blue column with icons located on the left side of the page, and then click the module name.

The second navigation option is to use the clickable **module header**, which is available when there is an announcement for that module on the PORTS home page.

Tip: To keep the navigation bar expanded, click the three horizontal lines at the top of the navigation bar. This will keep the navigation bar permanently expanded until the three lines are clicked again or the user navigates away from the PORTS home page.

Support Request

If users encounter a system or technical error with PORTS or related modules, they should send an email to dslritsupport@cdc.gov. A **technical support request** relates to the functionality of PORTS and a user's ability to complete actions required of the user's assigned role(s). For example, users can request assistance uploading a document in the Operational Readiness Review module.

To send a technical support request while in PORTS, click the DSLR Support hyperlink located on the top-right side of the page. An email message addressed to DSLR IT Support will appear. Provide a detailed description of the support request in the body of the email and click send. This support feature will always be accessible on the top-right side of the page.

Tip: A **program-related support request** should be directed to PHEP project officers. This type of request should be made to help the user understand the context or meaning of the data entered as they relate to the PHEP ORR guidance. Example: The Strategic National Stockpile (SNS) will not review the local receipt, store, and save (RSS) site.

Account Information
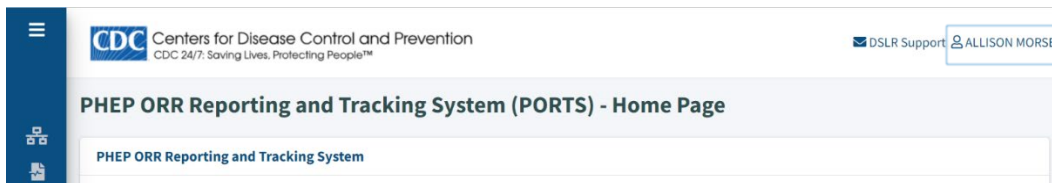
When logged into PORTS, the **user account** information is located on top-right side of the page. This identifies the user currently logged into the system and has no other associated actions.

Getting Started with the ORR Module

The Operational Readiness Review module's navigation bar appears like the PORTS navigation bar; however, it contains options specific to the Operational Readiness Review module. Depending on the assigned user role, a user may see a variation of the following options:

- PORTS Home
- Operational Readiness Review Dashboard
- Add Descriptive Forms

- Add Operational Requirement
- Document Library
- Manage Users

Users can hover their mouse over the navigation bar to temporarily expand it and move their mouse away from the navigation bar to minimize it. Clicking the three horizontal lines at the top of the navigation bar keeps it expanded, while clicking it again will minimize it.

"Breadcrumbs" are an additional way to navigate. They identify a user's current location in the Operational Readiness Review module in relation to higher-level pages within PORTS. The breadcrumbs are located on the upper right side of the page, below the user role, jurisdiction, and budget period filters. To use breadcrumbs, click on the hyperlinked page name to navigate back to the selected page.

Tip: Users are encouraged to navigate using breadcrumbs instead of using the browser's back arrow, which may cause an error loading the page.

Applying Filters

Information displayed on the Operational Readiness Review Dashboard can be filtered by **user role**, **jurisdiction**, and **budget period**. Filters are located near the top-right side of page underneath the support request link and user account information.

- **User Role:** Users will only see the role(s) they have been assigned. In some instances, users will have multiple roles.
- **Jurisdiction:** PHEP recipient and local jurisdictional users will see their respective state or jurisdiction. CDC users will be able to see all 62 PHEP recipients.
- **Budget Period:** The following budget periods will be available in the Operational Readiness Review module.
  - BP4: July 1, 2022, to June 30, 2023
  - BP3: July 1, 2021, to June 30, 2022
- **Go:** Users must select **Go** to apply the selected filters to the forms displayed in the Operational Readiness Review Requirements section.

To change the information displayed on the Operational Readiness Review Dashboard, users should select the user role, jurisdiction, or budget period from the drop-down menu(s). Apply the selected filter(s) by clicking the **Go** button located to the right of the budget period filter.

Tip: The entries in the Operational Readiness Review Requirements section will not update until the user clicks the **Go** button to apply the filters.

Progress Stage Overview

The **Progress Stage** lists forms requiring action by the user. The forms listed depend on the user's role and the form's designated progress stage. A form's progress stage allows users to track where a form is as it moves through the completion process. If a user is assigned multiple jurisdictions, all forms requiring action will appear regardless of the applied filters. The progress stage contains the following columns:

- Jurisdiction
- Number of Forms
- Progress Stage
- Filter Operational Readiness Review Requirements By

Clicking **Filter Operational Readiness Review Requirements By Icon** filters forms displayed in the Operational Readiness Review Requirements section. Click this icon to display forms only for a given jurisdiction and progress stage.

Operational Readiness Review Requirements Section Overview

The **Operational Readiness Review Requirements Section** displays forms within the Operational Readiness Review module. It is where users initiate most data entry and reviewer actions. The forms populated in this section are organized by descriptive, planning, and operational forms and contain general information displayed in the columns at the top of this section. Below is a description for each of the columns (from left to right):

- **Indicator:** Contains icons that notify the user of the form's status.

- o **Lock Icon** indicates the form is locked for review. Hover your mouse over the lock icon until a small pop-up appears to see which user locked the form. When a form is locked by another user, this means that user is currently editing a form. Locking a form prevents one user from writing over another user's data while entering or reviewing data.
  - o **Check Mark Icon** indicates no further action is necessary for the role. The form is complete when a check mark appears, and the progress stage displays "Reviewer: Acknowledged."
  - o **Warning Icon** alerts a user that a form requires action.
- **Exercise/Incident/Event Name:** Displays the name entered for the reported operational activity.
- **Form Name:** Displays the descriptive, planning, or operational activity.
- **Program Requirements:** Displays the operational program requirements; this column will be empty for descriptive and planning entries.
- **Start Date:** Identifies the start date of the exercise, incident, or event.
- **End Date:** Identifies the end date of the exercise, incident, or event.
- **Submit Date:** Identifies the date the form was submitted to the reviewer; this column will be empty until the form is submitted to the reviewer.
- **Progress Stage:** Identifies the form's stage within the Operational Readiness Review module workflow.
- **Submitted By:** Identifies the submit for review user that submitted the form; this column will be empty until the form is submitted for external review.
- **Actions:** Lists the actions a user can take on a form. The available actions vary depending on the user's role and form progress stage.

ORR Requirements

Show 100 ⌄ entries •••••• **Show Entries**   **Search Feature** •••••• Search: ack

Indicator	Exercise/Incident/Event Name	Form Name	Program Requirements	Start Date	End Date	Submit Date	Progress Stage	Submitted By	Actions
⌄ Descriptive (1)									
✓		Workforce Development and Training (WDT)		03/01/2022	03/02/2022	03/18/2022	Reviewer: Acknowledged	MARCIE KANAVAGE	••• ▾
⌄ Operational (2)									
✓	3 Rivers	Pandemic COVID-19 FE: Vaccination for Critical Workforce Groups and Disproportionately Impacted Populations (VAC)	OPS2.mPandemic COVID-19 Incident Response: Vaccination for Critical Workforce Groups and Populations Disproportionately Impacted (VAC)	03/01/2022	03/02/2022	03/16/2022	Reviewer: Acknowledged	MARCIE KANAVAGE	••• ▾
✓	3 Rivers	PHEP-funded LRN-C Specimen Packaging and Shipping Exercise (SPaSE / LAB2.c)	OPS2.u PHEP-funded LRN-C labs SPaSE (LAB2.c)	03/01/2022	03/02/2022		Data Entry: Updating		••• ▾

Showing 1 to 3 of 3 entries (filtered from 15 total entries) •••••• **Entries Displayed**   **Navigation** •••••• Previous 1 Next

The **show entries** feature is located above the Indicator column and allows the user to specify the number of rows to display at once in the Operational Readiness Review Requirements section. Entries can display in increments of 10, 25, 50, or 100 forms.

The **search feature** enables a user to search or filter forms by entering key words into the search field. The search feature is available for the Progress Stage and Operational Readiness Review Requirements sections. To use the search feature, click in the appropriate search field and begin typing. The forms in that section will begin automatically filtering based on the user's entry. Click the X to the right of the search field to clear the search and display all available forms.

The entries displayed out of the total entries will be shown on the bottom-left side of the page. If a search is applied, the entries displayed out of the total entries fitting the search criteria will display. The total number of entries from which the search was filtered is displayed in parenthesis.

To navigate through multiple pages of entries, click the **Previous** and **Next** buttons on the bottom-right side of the page. Alternately, click on a page number located between these buttons to navigate to a specific page or set of entries. If only one page exists, these buttons are disabled.

Understanding User Roles
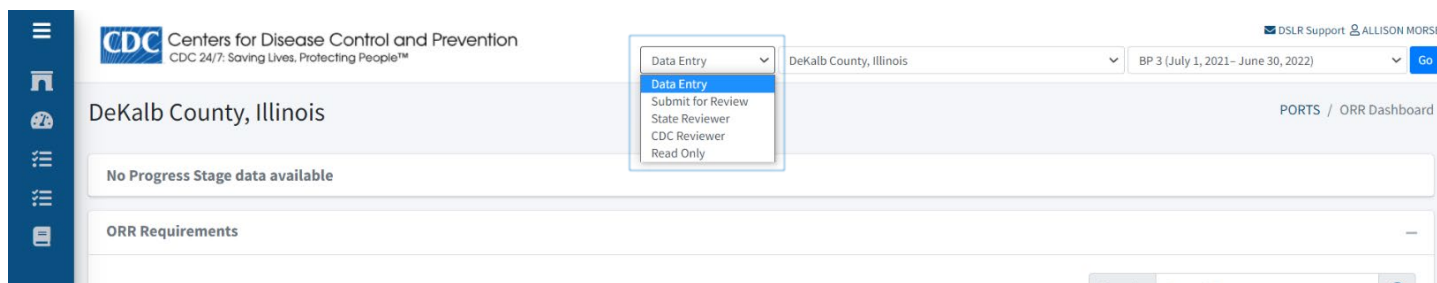
There are six user roles available in the Operational Readiness Review module: Data Entry, Submit for Review, State Reviewer, CDC Reviewer, Read Only, and Manage Users. The following are descriptions for each user role.

Data Entry Role

Users in the data entry role are responsible for inputting data and evidence into the Operational Readiness Review module. These tasks are completed by both PHEP recipients and local jurisdictions. Users in this role perform the following actions:

- Adding new descriptive and operational forms.
- Entering and editing data in forms.
- Uploading and referencing evidence to support form data.
- Adding and viewing comments.
- Submitting completed forms.
- Recalling forms submitted to the reviewer.
- Editing forms returned by the reviewer.

Data entry users must submit completed forms to the submit for review user for internal supervisory review. A data entry user cannot submit a form directly to state or CDC Reviewer unless also assigned to the submit for review role.

Submit for Review Role

Users in the submit for review role are responsible for ensuring the accuracy of data in forms completed by data entry users and submitting those forms to state or CDC Reviewers. This role is intended for PHEP directors, but they can delegate these tasks to proxies or other staff members if desired. Local jurisdictions must submit forms to state reviewers, while PHEP recipients must submit forms to CDC Reviewers.

State Reviewer Role

Users in the state reviewer role are responsible for reviewing, adjudicating, and acknowledging forms submitted by local jurisdictions. Users in this role perform the following actions:

- Reviewing form data and evidence.
- Adding and viewing comments.
- Adjudicating and acknowledging forms.
- Returning forms to data entry users.

CDC Reviewer Role

Users in the CDC Reviewer role are responsible for reviewing, adjudicating, and acknowledging forms submitted by PHEP recipients. This role does not review forms submitted by users in local jurisdictions. Users in this role perform the following actions:

- Reviewing form data and evidence.
- Adding and viewing comments.
- Adjudicating and acknowledging forms.
- Returning forms to data entry users.
- Recalling forms that have already been acknowledged.

Read Only Role

Users in the read only role can view and print forms that have been acknowledged by state or CDC Reviewers. Users in this role do not perform any other actions in the Operational Readiness Review module.

Manage Users Role

Those in the manage users role are responsible for assigning or modifying user roles for all individuals who contribute to a local or PHEP recipient Operational Readiness Review. This role is intended for PHEP directors, who can add proxies and defer this role to other staff members if desired.

Understanding a Form's Progress Stage

Search: [Search Forms]

Show [100 ▾] entries

Indicator	Exercise/Incident/Event Name	Form Name	Program Requirements	Start Date	End Date	Submit Date	Progress Stage	Submitted By	Actions
Descriptive (4)									
⚠		Partner Planning Sheet (PPS) - Meals on Wheels		03/14/2022	03/17/2022		Data Entry: Updating		••• ▾
✓		Workforce Development and Training (WDT)		03/14/2022	03/17/2022	04/07/2022	Data Entry: Resubmitted	MARCIE KANAVAGE	••• ▾
✓	California 2022-03-24-11:25:31	Point of Dispensing (POD) Form				04/01/2022	Reviewer: Returned	MARCIE KANAVAGE	••• ▾
✓		Jurisdictional Data Sheet (JDS) - States				04/07/2022	Data Entry: Resubmitted	MARCIE KANAVAGE	••• ▾
Operational (3)									
🔒	Hurricane Jaime	Pandemic COVID-19 Incident Response (RSP)	OPS2.q Pandemic COVID-19 Incident Response (RSP)	02/27/2022	03/22/2022	03/30/2022	Data Entry: Updating	JUDITH ROBINSON	••• ▾
🔒	Practice Makes Perfect	Pandemic COVID-19 Incident Response (RSP)	OPS2.q Pandemic COVID-19 Incident Response (RSP)	03/14/2022	03/17/2022	03/23/2022	Data Entry: Revising	JUDITH ROBINSON	••• ▾
⚠	Practice Makes Perfect	Pandemic COVID-19 FE: Vaccination for Critical Workforce Groups and Disproportionately Impacted Populations (VAC)	OPS2.mPandemic COVID-19 Incident Response: Vaccination for Critical Workforce Groups and Populations Disproportionately Impacted (VAC)	03/14/2022	03/17/2022		Data Entry: New		••• ▾

A form's progress stage allows users to track where a form is as it moves through the data entry, submission, and review process. The progress stage is specific to only one form and is a column in the Operational Readiness Review Requirements section of the Operational Readiness Review Dashboard. See the form progress definitions below for a definition of each form progress stage.

Form Progress Stage Definitions

- **Data Entry: New:** The data entry user added a new form but has yet to enter any data.
- **Data Entry: In-Progress:** The data entry user populated one or more field(s) on the form and saved the information.
- **Data Entry: Completed:** The data entry user finished entering form data and submitted it for internal supervisory review by the submit for review user.
- **Data Entry: Submitted:** The submit for review user reviewed the form and submitted it to the reviewer.
- **Data Entry: Updating:** The data entry user submitted a form, and the form has been recalled for updating before the review process.
- **Reviewer: In-Progress:** The reviewer role is reviewing the data and adjudicating the form.
- **Reviewer: Returned:** The reviewer returned the form to the data entry user to revise the form.
- **Data Entry: Revising:** The data entry user is revising the form based on reviewer feedback.
- **Data Entry: Resubmitted:** The submit for review user reviewed the modified form and resubmitted it to the reviewer.
- **Reviewer: Acknowledged:** The reviewer completed the form review and marked the form as final.

Understanding the Progress Stage by User Role

The Progress Stage on the Operational Readiness Review Dashboard summarizes the forms requiring action by the user. Depending on the user's role, only forms with certain progress stages will display in this section. This is because different user roles act upon a form at different points throughout the data entry, submission, and review process. Below is a list of the form progress stage(s) that display for each user role and a respective description of the action the user must take on the form.

Data Entry Role

Reviewer: Returned: The data entry user modifies the form returned by the CDC Reviewer.

Submit for Review

Reviewer: Returned: The submit for review user can modify the form returned by the CDC Reviewer.

Data Entry: Completed: After reviewing the completed form, the submit for review user must submit the form for external review to the CDC Reviewer.

CDC Reviewer

Data Entry: Submitted: The CDC Reviewer must review the form submitted by the submit for review user (PHEP recipient).

Data Entry: Resubmitted: The CDC Reviewer must review the form resubmitted by the submit for review user (PHEP recipient).

Read-Only

Reviewer: Acknowledged: The read-only user will be able to view forms acknowledged by the CDC Reviewer.

Data Entry

Data entry users input data and evidence into the Operational Readiness Review module. See the Understanding User Roles section of this user guide for a more detailed description of the data entry role.
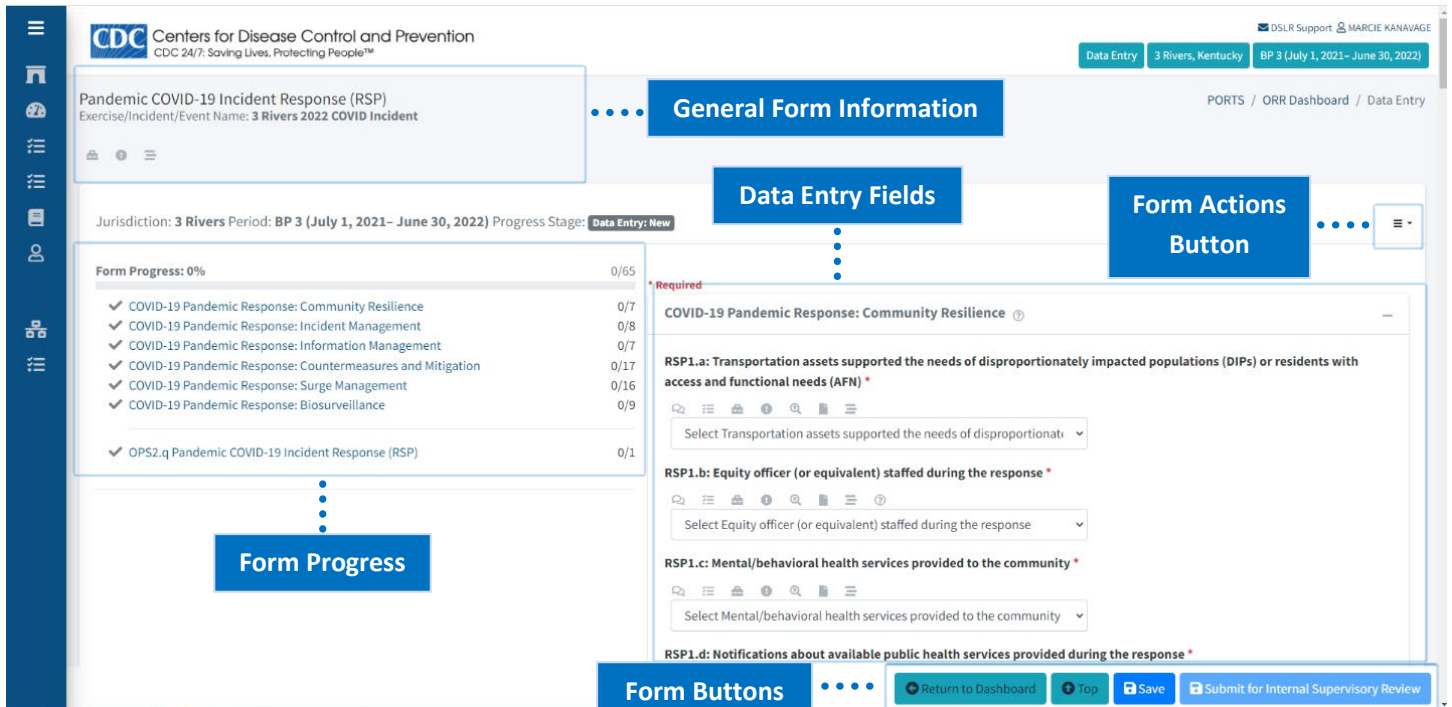
This section provides an overview of the form layout and features within the Operational Readiness Review module. After opening a form from the Operational Readiness Review Dashboard, users will see the following components.
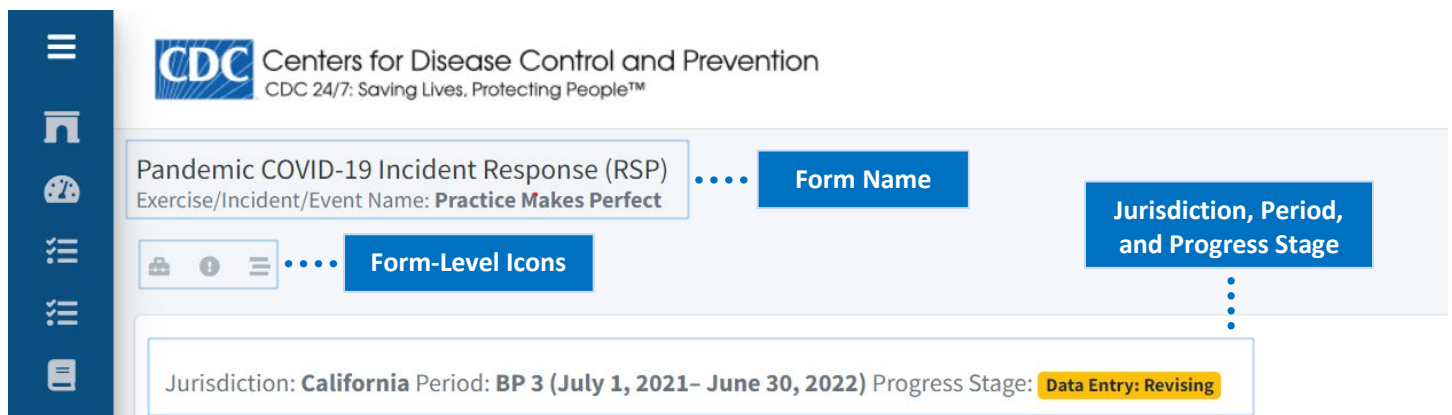
General Form Information

The **form name** displays the descriptive, planning, or operational activity and is located on the top left of the page. Directly below the form name is the **exercise/incident/event name**, which displays the name of the reported activity.

Form-level icons are located below exercise/incident/event name and allow a user to view additional details specific to the form. Click on the icon to view the additional information. The icons available for each form vary, but can include:

- Purpose/Form Guidance: Provides detail and clarifies expectations about what is measured.
- Form Significance: Describes the implication of the form.
- Form Reviewer Guidance: Clarifies expectations about the form the reviewer must identify to deem the information as acceptable or sufficient evidence.
- Form Required Documentation: Provides examples of information recipients can submit as evidence to substantiate responses. These examples are not exhaustive.
- Form Submission Frequency: Identifies when Operational Readiness Review data must be submitted for documentation and validation.

The **jurisdiction, budget period, and form progress stage** are located directly below the form level icons.

Form Actions

The **Form Actions button** is located directly below the breadcrumbs and provides a list of actions a user can take upon the form. When clicked, a drop-down menu will appear with the following actions:

- **View Comments:** View comments added at the form level.
- **Add New Comment:** Add a comment for other users to view at the form level.
- **View Evidence:** View evidence associated with the form.
- **Upload Evidence:** Upload a document to substantiate the form's data.
- **View Reference:** View a reference to evidence associated with the form.
- **Reference Existing Evidence:** Select a previously uploaded document and associate the file with the form.
- **Print:** Print the form and/or data entered in the form.
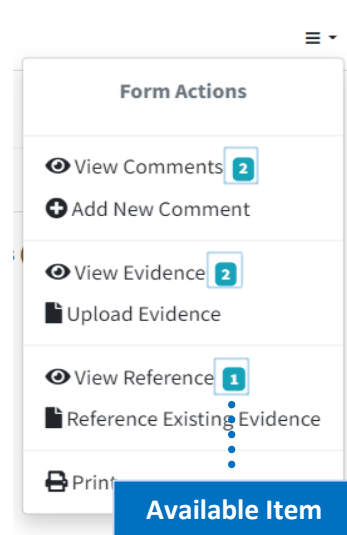
A teal indicator will appear to the right of the action showing the number of available items to view for that action.

Tip: The View Evidence and View Reference actions appear in the form of a drop-down menu only after evidence has been uploaded or referenced for the form.

Form Progress

Form Progress Bar

Section Progress

Check Mark Indicator

Form Progress: 100%	65/65
✔ COVID-19 Pandemic Response: Community Resilience	7/7
✔ COVID-19 Pandemic Response: Incident Management	8/8
✔ COVID-19 Pandemic Response: Information Management	7/7
✔ COVID-19 Pandemic Response: Countermeasures and Mitigation	17/17
✔ COVID-19 Pandemic Response: Surge Management	16/16
✔ COVID-19 Pandemic Response: Biosurveillance	9/9

The **form progress bar** displays the percentage of a form completed by the data entry user. It also includes the number of data entry fields completed out of the total number of data entry fields by form. As a user enters and saves data, the green bar expands to the right.

The **section progress** displays number of data entry fields completed out of the total number of data entry fields in that section. Once all data entry fields within a section are complete, the **check mark indicator** will turn green.

Tip: Click on a section name to quickly navigate to that section of the form.

Data Entry Fields

The form's data entry fields are located to the right of the form progress. Each data entry field (Operational Readiness Review element) identifies the data to be entered and corresponds with the Operational Readiness Review guidance. The red asterisk (*) symbol located at the end of each question indicates the field is required and must be answered to submit the form. Each of the form's main sections can be minimized or expanded by clicking the (-) symbol in the top-right corner of each section.

Question-Level Icons

Question-level icons are located below the question but immediately above the data entry field on the form and allow a user to provide or view additional details specific to the question by clicking the icon. Available icons for each data entry field vary, but can include:

- **Comments:** View or add comments at the question level.
- **Evidence:** Upload or reference existing evidence at the question level.
- **Purpose/Data Entry Guidance:** Provides detail and clarifies expectations about what is measured.

- **Significance:** Describes the implication of the element.
- **Reviewer Guidance:** Clarifies expectations about content components the reviewer must identify to deem the information as acceptable or sufficient evidence.
- **Required Documentation:** Provides examples of information recipients can submit as evidence to substantiate responses. These examples are not exhaustive.
- **Submission Frequency:** Identifies when Operational Readiness Review data must be submitted for documentation and validation.

Form Buttons

The buttons located at the bottom of the form can include:
- **Return to Dashboard:** Returns the user back to the Operational Readiness Review Dashboard.
- **Top:** Takes the user to the top of the form.
- **Save:** Saves the data entered in the form.
- **Submit for Internal Supervisory Review:** Submits the completed form to the submit for review user for internal supervisory review. This button will not be clickable until all data entry fields are completed.
- **Submit for External Review:** Submits the form to the CDC Reviewer.
- **Unlock Form:** Appears if a data entry or submit for review user enters or modifies data and clicks save.

Data Entry: Editing a Form

1. Navigate to the Operational Readiness Review Requirements section on the Operational Readiness Review Dashboard.
2. Click the Actions button (ellipsis) for the form you wish to edit.
3. Click **Edit** from the drop-down menu that appears.

Adding a Comment

Users can add and view comments to further explain or respond to data entered in the form. A comment added at the form level pertains to the entire form, while a comment added at the question level pertains to an element on the form. When a comment is added, a small number icon will appear next to the view comments action at the form or question level.

Adding a Form-Level Comment

1. Open the form for which you wish to add a comment on the Operational Readiness Review Dashboard.
2. Click **Form Actions** Button.
3. Click **Add New Comment** on drop-down menu.
4. Click the drop-down menu under Add New Form Comment.
5. Click **General Comment**.
6. Type the comment in the data entry field.
7. Click the **Save** button to add the comment.
8. Click the **Close** button to close the pop-up window.
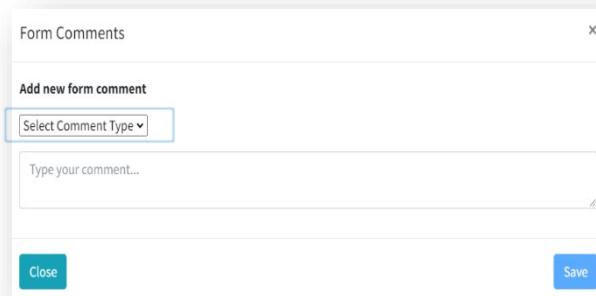
Adding a Question-Level Comment
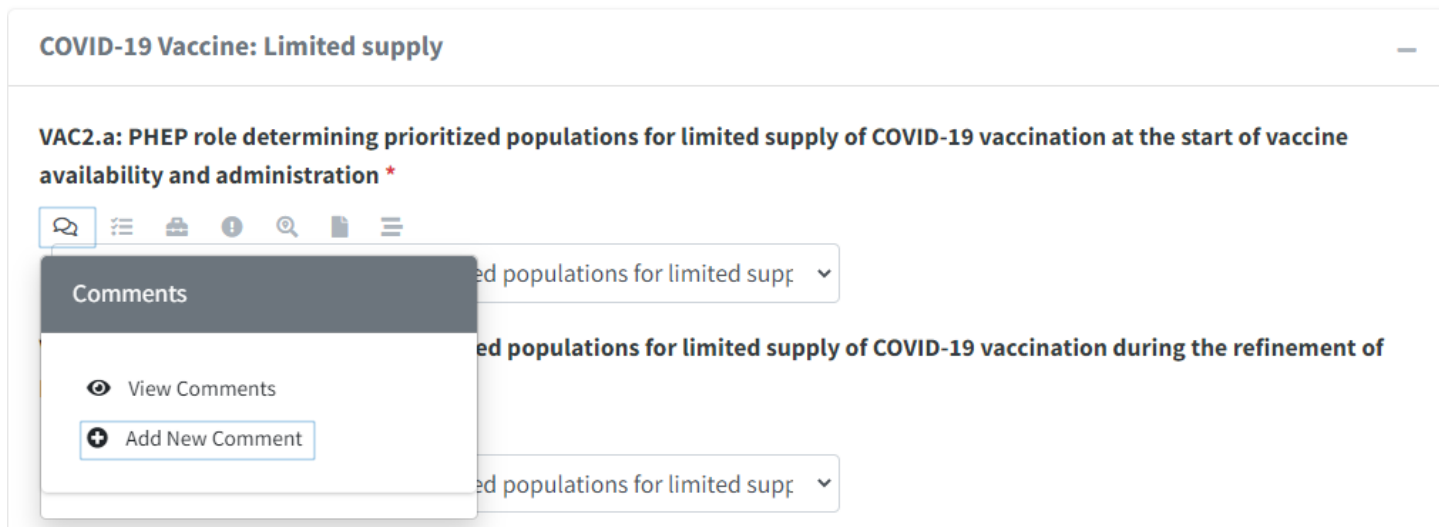
1. Open the form for which you wish to view a comment on the Operational Readiness Review Dashboard.
2. Navigate to the question on the form for which you wish to view a comment.
3. Click the speech bubble icon directly below the question.
4. Click **Add New Comment** in the drop-down menu that appears.
5. Click the drop-down menu under Add New Form Comment
6. Click **General Comment**.
7. Type the comment in the data entry field.
8. Click the **Save** button to add the comment.
9. Click the **Close** button to close the pop-up window.

Tip: Once a comment is added it cannot be deleted. Add another comment to indicate if a previous comment should be negated.

Viewing a Comment

Viewing a Form-Level Comment

1. Open the form you wish to view a comment on by selecting **Edit.**
2. Click the **Form Actions** button in the form.
3. Click **View Comments** from the drop-down menu.
4. View all comments.
5. Click the 'X' in the top right corner to close the comments pop-up window.

Viewing a Question-Level Comment

1. Open the form you wish to view a comment on by selecting **Edit.**
2. Navigate to the question on the form for which you wish to view a comment.
3. Click the speech bubble icon directly below the question.
4. Click **View Comments** from the drop-down menu that appears.
5. View all comments.
6. Click the 'X' in the top right corner to close the pop-up window.

Uploading Evidence

Users must upload evidence to substantiate responses to descriptive, planning, and operational forms. Evidence can be uploaded at the both the form level and question level and is accessible by the data entry, submit for review, and CDC Reviewer roles. Users should upload evidence files once but can reference the evidence in multiple forms. Uploaded files are stored in the document library, which is accessible through the left navigation bar.

Uploading Form-Level Evidence

1. Open the form for which you wish to upload evidence on the Operational Readiness Review Dashboard.
2. Click the **Form Actions** button.
3. Click **Upload Evidence** from the drop-down menu.
4. Complete the following data entry fields:
   - Document Title: Type the document title.
   - Document Reference: Cite page numbers that reference specific sources of information.
   - Document Comments:
   - File Creation Date/Revision Date: The date the file was created or last revised.
5. Click the **Choose Files** button.
6. Locate the file to upload in the pop-up window that appears.
7. Click the **Open** button.
8. Click the **Upload** button.

Tip: Evidence documents cannot have the same file name. The user will receive an error if a file already exists with the same name.

Uploading Question-Level Evidence

1. Open the form and navigate to the question that you wish to upload evidence.
2. Click the checklist icon directly below the question.
3. Click **Upload Evidence** on the drop-down menu.
4. Complete the following data entry fields:
   - Document Title: Type the document title.
   - Document Reference: Cite page numbers that reference specific sources of information.
   - Document Comments:
   - File Creation Date/Revision Date: The date the file was created or last revised.
5. Click the **Choose Files** button.
6. Locate the file to upload in the pop-up window that appears.
7. Click the **Open** button.
8. Click the **Upload** button.

Referencing Existing Evidence

A user can reference existing evidence at both the form level and question level to substantiate the responses entered in the form. A reference to existing evidence will refer to evidence already uploaded in the document library.

Referencing Existing Evidence at the Form Level

1. Open the form for which you will reference existing evidence.
2. Click the Form Actions button.
3. Click **Reference Existing Evidence** from the drop-down menu.
4. Click the drop-down menu under Select Existing Evidence.
5. Locate and select the existing evidence documents by using the scroll bar or search feature.
   - Scroll bar: Click and drag the scroll bar to locate the existing evidence.
   - Search feature: Click in the search data entry field above the documents list and type the file name of the existing evidence. The evidence automatically filters as the user types.
6. Check the box for the evidence name.
7. Click away from the drop-down menu to close the evidence list.
8. Enter the document reference.
9. Enter the document comments.
10. Click the **Attach** button.

Tip: The document reference captures the details of the evidence reference and should include page numbers at minimum.

Referencing Existing Evidence at the Question Level

1. Open the form and navigate to the question to which you will reference existing evidence.
2. Click the checklist icon directly below the question.
3. Click **Reference Existing Evidence** from the drop-down menu.
4. Click the drop-down menu under Select Existing Evidence.
5. Locate the existing evidence documents by using the scroll bar or search feature.
   - Scroll bar: Click and drag the scroll bar to locate the existing evidence.
   - Search feature: Click in the search data entry field above the documents and type the file name of the existing evidence. The evidence automatically filters as the user types.
6. Click away from the drop-down menu to close the evidence list.
7. Check the box for the evidence name.
8. Enter the document reference.
9. Enter the document comments.
10. Click the **Attach** button.

Viewing Evidence

Viewing Form-Level Evidence

1. Open the form for which you wish to view evidence.
2. Click the **Form Actions** button.
3. Click **View Evidence** from the drop-down menu.
4. Click the actions button in the Form Evidence pop-up window.
5. Click **View** or **Download** on the drop-down menu to view the form evidence.

Viewing Question-Level Evidence

1. Open the form and navigate to the question for which you wish to view evidence.
2. Click the checklist icon directly below the question.
3. Click **View Evidence** from the drop-down menu.
4. Click the actions button in the Question Evidence pop-up window.
5. Click **View** or **Download** on the drop-down menu to view the question evidence.

Tip: The **View Evidence** option will not appear unless evidence has already been uploaded.

Deleting Evidence

Deleting Form-Level Evidence
1. Open the form for which you will delete evidence.
2. Click the **Form Actions** button.
3. Click **View Evidence** from the drop-down menu.
4. Click the actions button for the evidence to be deleted in the Form Evidence pop-up window.
5. Click **Delete** in the drop-down menu that appears.
6. Click the **Yes** button in the pop-up window that asks, "Do you want to REMOVE this Form Evidence?"

Deleting Question-Level Evidence

1. Open the form and navigate to the question to which you will delete evidence.
2. Click the checklist icon directly below the question.
3. Click **View Evidence** from the drop-down menu.
4. Click the actions button for the question-level evidence to delete.
5. Click **Delete** in the pop-up window that appears.

6. Click the **Yes** button in the pop-up window that asks, "Do you want to really DELETE this Question Evidence?"

Tip: Deleting evidence will also delete it from the Document Library.

Deleting a Reference to Evidence

Deleting a Form-Level Reference to Evidence
1. Open the form for which you will delete the reference to evidence.
2. Click the **Form Actions** button.
3. Click **View Reference** from the drop-down menu.
4. Click the actions button for the form reference to be deleted in the pop-up window.
5. Click **Remove** in the drop-down menu that appears.
6. Click **Yes** in the pop-up window asking, "Do you want to REMOVE this form reference?"

Deleting a Question-Level Reference to Evidence
1. Open the form and navigate to the question to which you will delete the evidence reference.
2. Click the checklist icon directly below the question.
3. Click **View Reference** from the drop-down menu.
4. Click the actions button for the question level reference to be deleted.
5. Click **Remove** in the pop-up window that appears.
6. Click **Yes** in the pop-up window asking, "Do you want to really DELETE this form evidence?"

Unlocking a Form

A form will lock when a data entry user enters and saves data in a form. It will remain locked until either the data entry user unlocks the form or submits it for internal supervisory review. If a form is locked, other data entry users will not be able to access or edit the form. The data entry user who locked the form is the only data entry user who can unlock it.

| ⬅ Return to Dashboard | ⬆ Top | 💾 Save | 💾 Submit for Internal Supervisory Review | 🔓 Unlock Form |
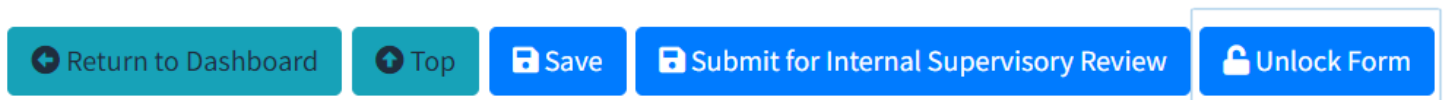
The user who locked the form must complete the following steps:

1. Open the locked form from the Operational Readiness Review Dashboard.
2. Click the **Unlock Form** button.
3. Click **Yes** in the pop-up window asking, "Do you want to unlock this form?"

Tip: The Partner Planning Sheet (PPS) locks automatically by the user who generates the form. Click the **Unlock Form** button on the PPS to allow other data entry users to edit the form.

Recalling a Form

A data entry user can recall a form in the Data Entry: Completed progress stage, which means it has been submitted for internal supervisory review.

1. Click the actions button of the form to be recalled on the Operational Readiness Review Dashboard.
2. Click **Recall** from the drop-down menu.
3. Click **Yes** in the pop-up window to recall the form.
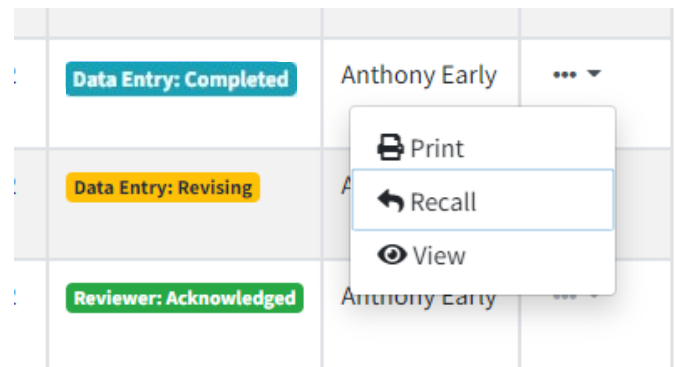
Requesting the Return of a Form

A data entry user may want to amend or edit a form to include additional information or after-action reports (AARs) that are finalized. If a form has been submitted to the CDC Reviewer and is in the Review: In Progress or Acknowledged form progress stage, a PHEP recipient cannot recall the form. The PHEP recipient must contact the CDC PHEP project officer by email or telephone to request the form be returned for editing.

If a form has been submitted to the CDC Reviewer and is in the Data Entry: Submitted form progress stage, the submit for review user can recall the form. The data entry user must contact a submit for review user for their jurisdiction by email or telephone to request the form be returned for editing.

Editing a Returned Form
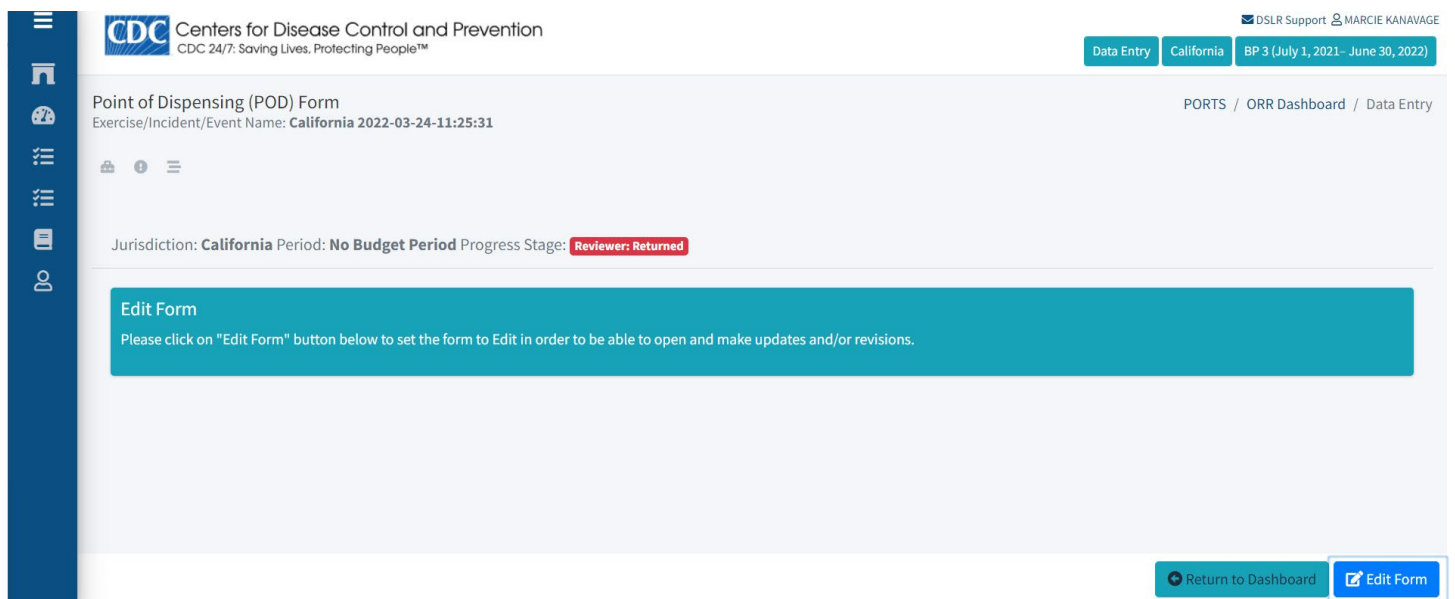
A form returned by the CDC Reviewer can be revised by the data entry user. The form will be listed in the Progress Stage on the Operational Readiness Review Dashboard as Reviewer: Returned. To revise the form, complete the following steps.

1. Navigate to the Operational Readiness Review Requirements section on the Operational Readiness Review Dashboard.
2. Click the Form Actions button of the returned form.
3. Click **Edit** from the drop-down menu.
4. Click the **Edit Form** button on the new page that appears.
5. Edit the data entry fields or evidence as necessary.

Tip: View the comments entered by the CDC Reviewer to understand why the form was returned.

Printing a Form

Printing a form can be done directly from the Operational Readiness Review Dashboard or while a form is open. When a form is printed, it will include the information specific to that form. It can also include the data entered and adjudication status depending on the process stage of the form.

Printing a Form from the Operational Readiness Review Dashboard

1. Navigate to the Operational Readiness Review Requirements section on the Operational Readiness Review Dashboard.
2. Click the actions button of the form you wish to print.
3. Click **Print** from the drop-down menu.
4. Click the **Print icon** on the pop-up window that appears.
5. Choose the desired print settings.
6. Click the **Save/Print** button.

Printing from an Open Form

1. Open the form you wish to print from the Operational Readiness Review Dashboard.
2. Click the **Form Actions** button.
3. Click **Print** from the drop-down menu.
4. Click the **Print icon** on the pop-up window that appears.
5. Choose the desired print settings.
6. Click the **Save/Print** button.

Deleting a Form

Indicator	Exercise/Incident/Event Name	Form Name	Program Requirements	Start Date	End Date	Submit Date	Progress Stage	Submitted By	Actions
ORR Requirements									−

Search: Search Forms ⊗

Show 100 entries

Indicator	Exercise/Incident/Event Name	Form Name	Program Requirements	Start Date	End Date	Submit Date	Progress Stage	Submitted By	Actions
⌄ Descriptive (4)									
✓		Partner Planning Sheet (PPS) - Meals on Wheels		03/14/2022	03/17/2022	04/08/2022	Reviewer: Acknowledged	MARCIE KANAVAGE	••• ▾
✓		Workforce Development and Training (WDT)		03/14/2022	03/17/2022	04/07/2022	Data Entry: Completed	MARCIE KANAVAGE	••• ▾
✓	California 2022-03-24-11:25:31	Point of Dispensing (POD) Form				04/01/2022	Reviewer: Returned		🖨 Print
✓		Jurisdictional Data Sheet (JDS) - States				04/07/2022	Data Entry: Resubmitted		↩ Recall
								KANAVAGE	✓ Submit for Review
									👁 View

Data entry users can view roles and delete a form in the Data Entry: New and Data Entry: In Progress form progress stages.

1. Navigate to the Operational Readiness Review Requirements section of the Operational Readiness Review Dashboard.
2. Click the actions button of the form you wish to delete.
3. Click **Delete** from the drop-down menu.
4. Click **Yes** on the pop-up window asking, "Do you want to DELETE this form?"

Do you want to DELETE this form?

Yes   Cancel
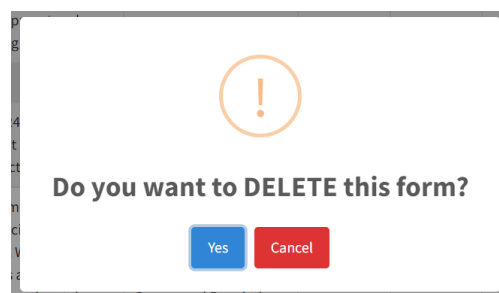
Submit for Review

The submit for review role can perform the same actions as the data entry role, with the additional responsibility of assuring data accuracy of forms completed by data entry users. Reference the Data Entry section of this user guide for instructions on how to complete any actions related to data entry.

Submitting a Form for External Review

To submit a form for external review, complete the following steps.

1. Navigate to the Operational Readiness Review Requirements section on the Operational Readiness Review Dashboard.
2. Click the actions button of the form to be submitted.
3. Click **Submit for Review** from the drop-down menu.
4. Review and modify data in the form as necessary.
5. Click the blue **Submit for External Review** button.

Recalling a Form

Recalling a Form in Data Entry: Completed Progress Stage

A submit for review user can recall a form in the Data Entry: Completed progress stage, which will return the form to the data entry user for revision. There are two ways to recall a form in the Data Entry: Completed progress stage:

Option 1: Recalling from the Operational Readiness Review Dashboard

1. Navigate to the Operational Readiness Review Requirements section on the Operational Readiness Review Dashboard.
2. Click the actions button of the form to be recalled.
3. Click **Recall** from the drop-down menu.
4. Click **Yes** on the pop-up window asking, "Do you want to recall this form?"

Option 2: Recalling from an Open Form

1. Navigate to the Operational Readiness Review Requirements section on the Operational Readiness Review Dashboard.
2. Click the actions button of the form to be recalled.
3. Click **Submit for Review** on the drop-down menu.
4. Click the **Recall** button at the bottom of the form.
5. Click **Yes** on the pop-up window asking, "Do you want to recall this form?"

Recalling a Form in Data Entry: Submitted or Data Entry: Resubmitted Form Progress Stages

To recall a form that has been submitted or resubmitted to the CDC Reviewer, complete the following steps.

1. Navigate to the Operational Readiness Review Requirements section on the Operational Readiness Review Dashboard.
2. Click the actions button of the form to be recalled.
3. Click **Recall** from the drop-down menu.
4. Click **Yes** on the pop-up window asking, "Do you want to recall this form?"

CDC Reviewer

Users in the CDC Reviewer role are responsible for reviewing, adjudicating, and acknowledging forms submitted by PHEP recipients. See the understanding user roles section of this user guide for a more detailed description of the data entry role.

General Form Information
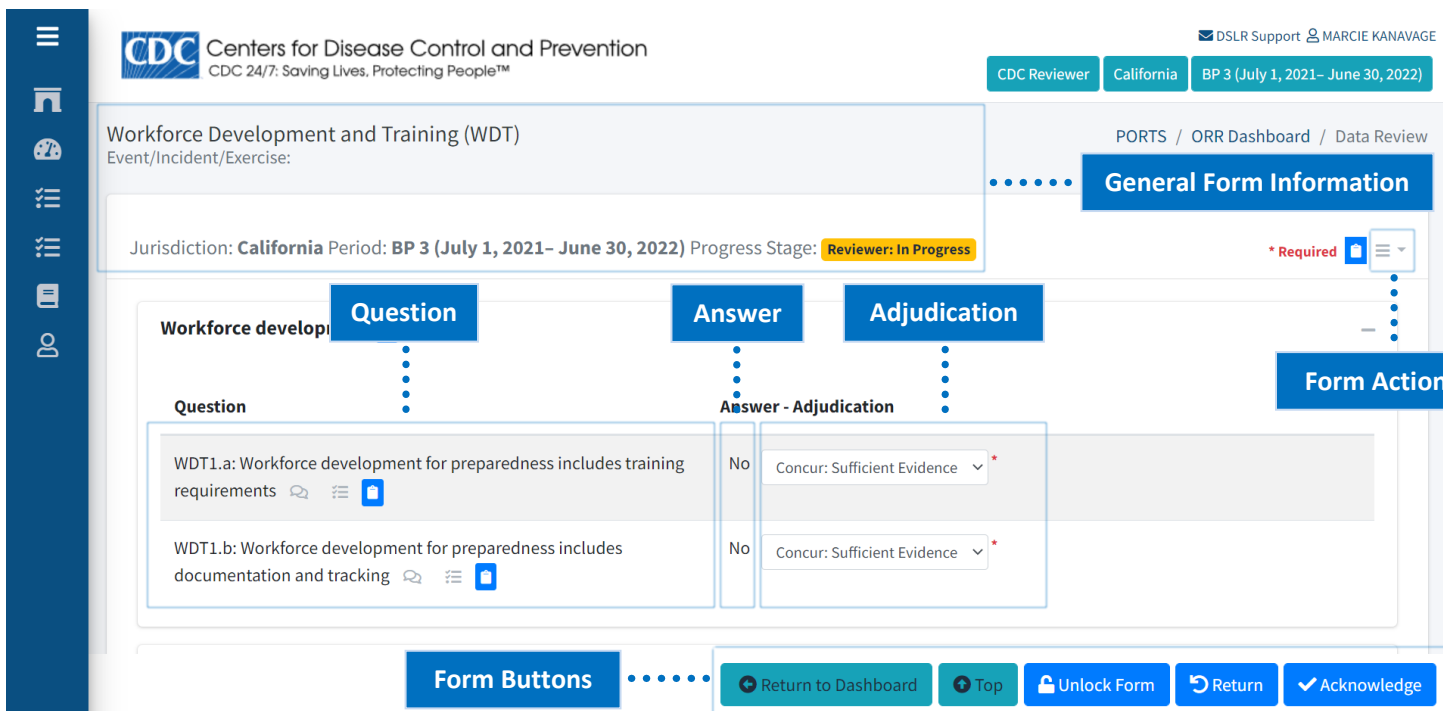
This section provides an overview of the form layout and features within the Operational Readiness Review module. Please note that the CDC Reviewer's view of form is different than the data entry and submit for review user's view of a form. After opening a form from the Operational Readiness Review Dashboard, the CDC Reviewer will see the following components.

General Form Information
The **form name** displays the descriptive, planning, or operational activity and is located on the top left of the page. Directly below the form name is the exercise/incident/event name, which displays the name of the reported activity. The **jurisdiction, period, and progress stage** for the form are located directly below the form-level icons.

Form Actions
The **Form Actions button** is located directly below the breadcrumbs and provides a list of actions a user can take on the form. When clicked, a drop-down menu will appear with the following actions:

- **View Comments:** View comments added at the form level.
- **Add New Comment:** Add a comment for other users to view at the form level.
- **View Evidence:** View evidence associated with the form.
- **Upload Evidence:** Upload a document to substantiate the form's data.
- **View Reference:** View a reference to evidence associated with the form.
- **Reference Existing Evidence:** Select a previously uploaded document and associate the file with the form.
- **Print:** Print the form and/or data entered in the form.

An indicator will appear to the right of the action showing the number of available items to view for that action.
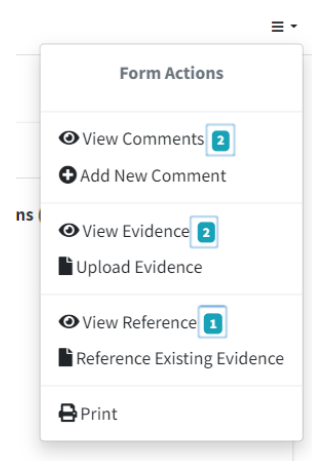
Question, Answer, and Adjudication Columns
- **Question:** The questions column displays each element in the form.
- **Answers:** The answers column displays the data entered for that element by the PHEP recipient.
- **Adjudication:** The adjudication column displays the adjudication indicated by the CDC Reviewer.

Form Buttons

The form buttons include the following items:
- **Return to Dashboard:** Returns the user back to the Operational Readiness Review Dashboard.
- **Top:** Takes the user to the top of the page.
- **Unlock Form:** Unlocks the form, which allows it to be reviewed by others.
- **Return:** Returns the form to the data entry user for updates.
- **Acknowledge:** Acknowledges the form and completes the review.

Starting a Review

ORR Requirements

Search: Search Forms

Show 100 entries

Indicator	Exercise/Incident/Event Name	Form Name	Program Requirements	Start Date	End Date	Submit Date	Progress Stage	Submitted By	Actions
Descriptive (6)									
✔		Partner Planning Sheet (PPS) - Meals on Wheels		03/14/2022	03/17/2022	04/08/2022	Reviewer: Acknowledged	MARCIE KANAVAGE	••• ▼
✔		Workforce Development and Training (WDT)		03/14/2022	03/17/2022	04/11/2022	Data Entry: Resubmitted	MARCIE KANAVAGE	••• ▼
⚠		Partner Planning Sheet (PPS) - Sign Language Association		07/01/2021	07/01/2021		Data Entry: Completed	☰ CDC Review 🖶 Print 👁 View	

To review a form submitted by a PHEP recipient, complete the following steps:
1. Navigate to Operational Readiness Review Requirements section on the Operational Readiness Review Dashboard.
2. Click the actions button of the form to be reviewed.
3. Click **CDC Review** from the drop-down menu.
4. Click the **Start Review** button at the bottom of the next page that opens.

Reviewing a Form

Forms are reviewed at the form or question level. When conducting a form-level review, the reviewer makes one adjudication for the entire form. When conducting a question-level review, the reviewer makes an adjudication for each element on the form. Below is a description of how to adjudicate at various levels of the form.

Form-Level Adjudication

A form-level adjudication applies the same adjudication for every element on the form. Applying this type of adjudication may be helpful to expedite the adjudication process if most elements on the form receive the same adjudication by the CDC Reviewer. Complete the following steps to make a form-level adjudication:

1. Click the form adjudication icon at the top of the form.
2. Click the drop-down menu in the pop-up window that appears.
3. Select the desired adjudication.
4. Click the **Save** button.

Section-Level Adjudication

A section-level adjudication will apply the same adjudication for every element in a section. Complete the following steps to make a section-level adjudication:

1. Click the section adjudication icon for the section name.
2. Click the drop-down menu in the pop-up window that appears.
3. Select the desired adjudication.
4. Click the **Save** button.

Question-Level Adjudication

A question-level adjudication will apply an adjudication for one element on a form. Complete the following steps to make a question-level adjudication:
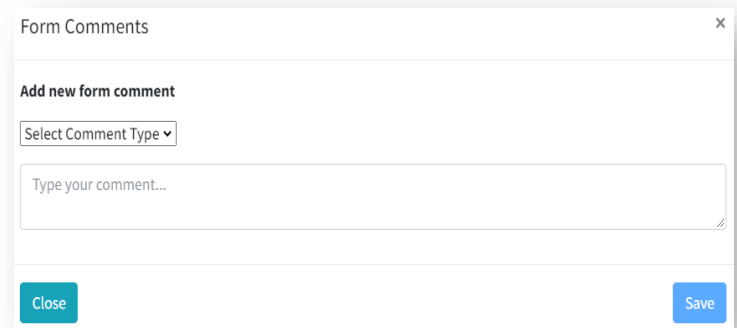
1. Click the question adjudication icon for the element.
2. Click the drop-down menu in the pop-up window that appears.
3. Select the desired adjudication.
4. Click the **Save** button.

Adding and Viewing Comments
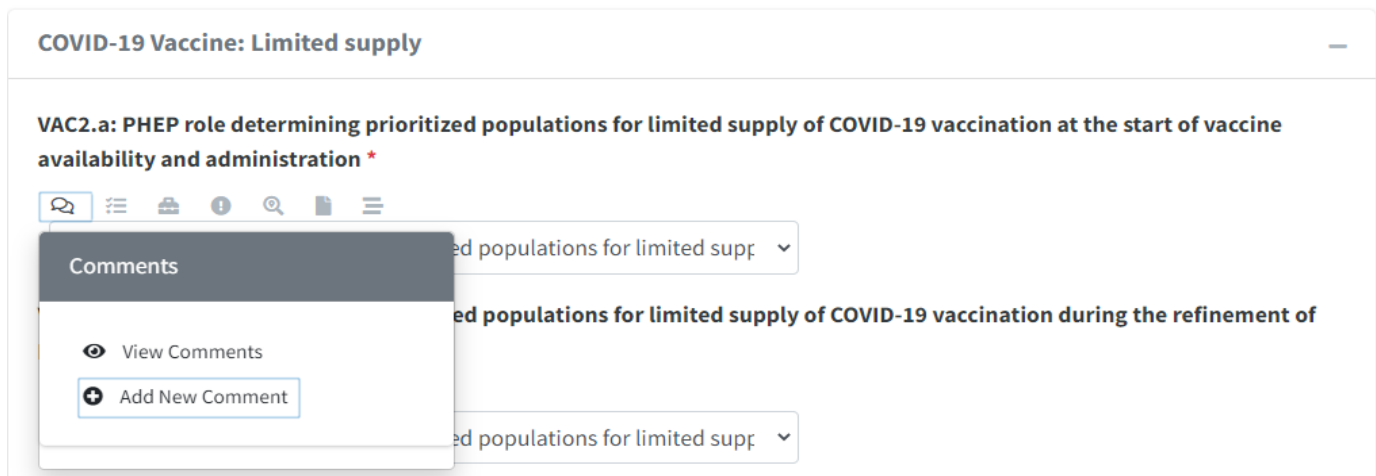
Reviewers can view and add comments to respond to data entered in the form. A comment added at the form level pertains to the entire form, while a comment added at the question level pertains to an element on the form. Comments added by the data entry user will be labeled as a general comment, while comments added by the CDC Reviewer will be labeled as a reviewer comment. When a comment is added, a small number icon will appear next to the view comments action at the form or question level.

Adding a Form-Level Comment

1. Open the form for which you wish to add a comment on the Operational Readiness Review Dashboard.
2. Click the **Form Actions** button.
3. Click **Add New Comment** on drop-down menu.
4. Click the drop-down menu under Add New Form Comment.
5. Click **Reviewer: Comment**.
6. Type the comment in the data entry field.
7. Click the **Save** button to add the comment.
8. Click the **Close** button to close the pop-up window.

Adding a Question-Level Comment

1. Open the form for which you wish to add a comment on the Operational Readiness Review Dashboard.
2. Navigate to the question on the form for which you wish to add a comment.
3. Click the speech bubble icon directly below the question.
4. Click **Add New Comment** from the drop-down menu that appears.
5. Click the drop-down menu under Add New Form Comment.
6. Click **Reviewer: Comment**.
7. Type the comment in the data entry field.
8. Click the **Save** button to add the comment.
9. Click the **Close** button to close the pop-up window.

Tip: Once a comment is added it cannot be deleted. Add another comment to indicate if a previous comment should be negated.

Viewing a Form-Level Comment
1. Open the form for which you wish to view a comment on the Operational Readiness Review Dashboard.
2. Click the **Form Actions** button.
3. Click **View Comments from the** drop-down menu that appears.
4. View all comments.
5. Click the 'X' in the top right corner to close the comments pop-up window.

Viewing a Question-Level Comment
1. Open the form for which you wish to view a comment on the Operational Readiness Review Dashboard.
2. Navigate to the question on the form for which you wish to view a comment.
3. Click the speech bubble icon directly below the element.
4. Click **View Comments** from the drop-down menu that appears.
5. View all comments.
6. Click the 'X' in the top right corner to close the pop-up window.

Review Adjudication Terms

Below is a description of each review adjudication term available in the Operational Readiness Review module.

- **Concur: Sufficient Evidence:** Sufficient evidence is given, and no additional comments are required.
- **Contradictory Evidence:** The reviewer found inconsistent information and comments will include requests for clarification.
- **Data Input Error:** The reviewer identified an error on the form. This helps promote data integrity (documenting why data is changed) and helps the recipient recognize the issue to correct the error.
- **Insufficient Evidence:** More information is needed. Reviewer comments will include what additional data are required.
- **No Evidence:** Nothing relevant to the element was provided and reviewer comments will include requests for data to meet minimal standards.
- **Not in Plan:** The reviewer concurs with the jurisdiction that evidence is not present in plan.

Tip: If selecting an adjudication other than Concur: Sufficient Evidence, add a comment explaining why the selection was made for the PHEP recipient.

Acknowledging a Form

After the CDC Reviewer(s) adjudicates the form, click the **Acknowledge** button at the bottom of the form. A pop-up window will appear indicating the form is acknowledged.

Returning a Form

It may be necessary to return a form to a data entry user if there is not enough or incorrect information, the form was submitted too soon, or the data entry user requests to add additional information. To return a form, complete the following steps:

1. Navigate to Operational Readiness Review Requirements section on the Operational Readiness Review Dashboard.
2. Click the **Form Actions** button of the form to be reviewed.
3. Click **CDC Review** from the drop-down menu.
4. Click the **Start Review** button on the new page that appears.
5. After the form opens, click the **Return** button at the bottom of the page.
6. Click Yes on the pop-up window that appears asking "Do you want to return this form?"

Tip: The form must be in the Reviewer: In Progress form progress stage to return a form to the data entry user.

Recalling a Form

ORR Requirements

Indicator	Exercise/Incident/Event Name	Form Name	Program Requirements	Start Date	End Date	Submit Date	Progress Stage	Submitted By	Actions
⌄ Descriptive (6)									
✓		Partner Planning Sheet (PPS) - Meals on Wheels		03/14/2022	03/17/2022	04/08/2022	Reviewer: In Progress	MARCIE KANAVAGE	••• ▾
✓		Workforce Development and Training (WDT)		03/14/2022	03/17/2022	04/11/2022	Reviewer: Acknowledged	MARCIE K...	••• ▾
⚠		Partner Planning Sheet (PPS) - Sign Language Association		07/01/2021	07/01/2021		Data Entry: Completed	🖨 Print ↩ Recall 👁 View	
⚠		Partner Planning Sheet (PPS) - Partner		07/01/2021	07/01/2021		Data Entry: Completed		••• ▾

A CDC Reviewer must recall an acknowledged form before being able to return the form to the data entry user. To recall an acknowledged form, complete the following steps:

1. Navigate to Operational Readiness Review Requirements section on the Operational Readiness Review Dashboard.
2. Click the **Forms Actions** button of the form to be recalled.

3. Click **Recall** from the drop-down menu.
4. Click the **Yes** button on the pop-up window asking, "Do you want to recall this form?"

Tip: The data entry user will only know that a form has been returned if the user looks for returned forms in the Operational Readiness Review or if the reviewer communicates outside of the system that a form has been returned.

Unlocking a Form

RSP1.e: COVID-19 Pandemic Response: Community Resilience Strength	ghnd	Concur: Sufficient Evidence ⌄ *
RSP1.f: COVID-19 Pandemic Response: Community Resilience Area for Improvement	stfghs	Concur: Sufficient Evidence ⌄ *
RSP1.g: COVID-19 Pandemic Response: Community Resilience Root Cause Analysis	sgfsg	Concur: Sufficient Evidence ⌄ *

⊕ Return to Dashboard   ⊕ Top   🔒 Unlock Form   ↩ Return   ✔ Acknowledge

Once a CDC Reviewer starts reviewing a form, it will lock which prevents other users from accessing the form. To unlock the form for another CDC Reviewer, complete the following steps:

1. Navigate to Operational Readiness Review Requirements section on the Operational Readiness Review Dashboard.
2. Click the **Forms Actions** button of the form to be unlocked.
3. Click **CDC Review** from the drop-down menu.
4. Click the **Unlock Form** button at the bottom of the page.
5. Click the **Yes** button on the pop-up window asking, "Do you want to unlock this form?"

Accessing the Action Plan Module

The Action Plan (AP) Module enables PHEP recipients to identify areas for improvement in their public health preparedness and response programs, document activities, and request technical assistance. These activities may help address identified gaps and improve upon existing successes. The AP Module is accessible through the ORR Module within PORTS. There is no submission of the action plan from user to user, which means the module can be accessed at any time by the data entry, submit for review, and CDC reviewer user roles.

Applying Filters

Filters must be adjusted and applied in the ORR Module before accessing the Action Plan Dashboard. Filters cannot be applied directly in the AP Module.

Action Plan Dashboard

The Action Plan Dashboard displays the following information.

- **Jurisdiction**: Name of jurisdiction.
- **Name of Action Plan**: Title of the action plan.
- **Status**: Displays the status of an action plan.
  - Open: The action plan is open and has not been completed.
  - Closed: The action plan is closed. Either it has been completed or the budget period is over.
- **Date Created**: The date and time the action plan was created.
- **Active**: Displays whether the action plan is active or inactive.
  - White check mark in blue box indicates an active action plan.
  - Empty gray box indicates an inactive action plan.

- **Actions Button:** Lists the actions a user can take on the action plan.
    - Edit
    - Items
    - Comments
    - Print

Tip: You will see status columns throughout the AP Module. Please note these are not clickable. To modify the status boxes, you must use the Action button (ellipsis).

Creating an Action Plan
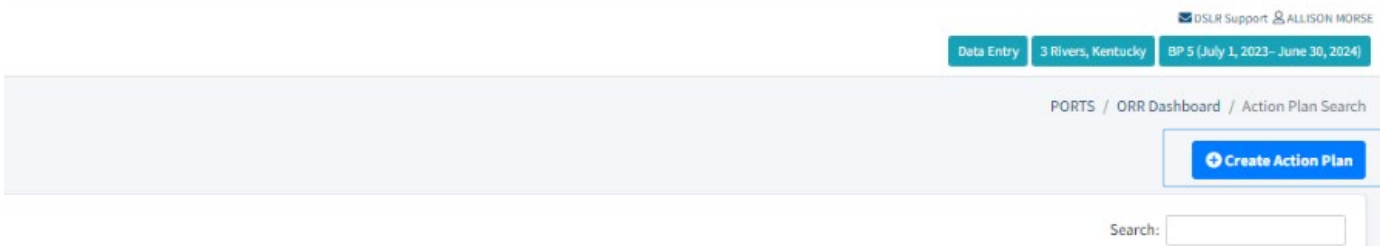
Each PHEP recipient can create only one action plan per budget period. To create an action plan, complete the following steps.

1. Click the **Create Action Plan** button (top right) on the Action Plan Dashboard.
2. Complete the following steps when the **Add a New Action Plan** pop-up window appears.
    - **Jurisdiction**: Select the jurisdiction from drop-down menu.
    - **Name of Action Plan**: Type name per naming convention.
    - **Period**: Is prepopulated based on budget period filter already selected.
    - **Note**: Type additional information in this section.
    - **Active Toggle Button**:
        - When toggle is blue, the action plan is active.
        - When toggle is gray, the action plan is inactive.
    - Click **Save** to create the action plan.

Editing an Action Plan
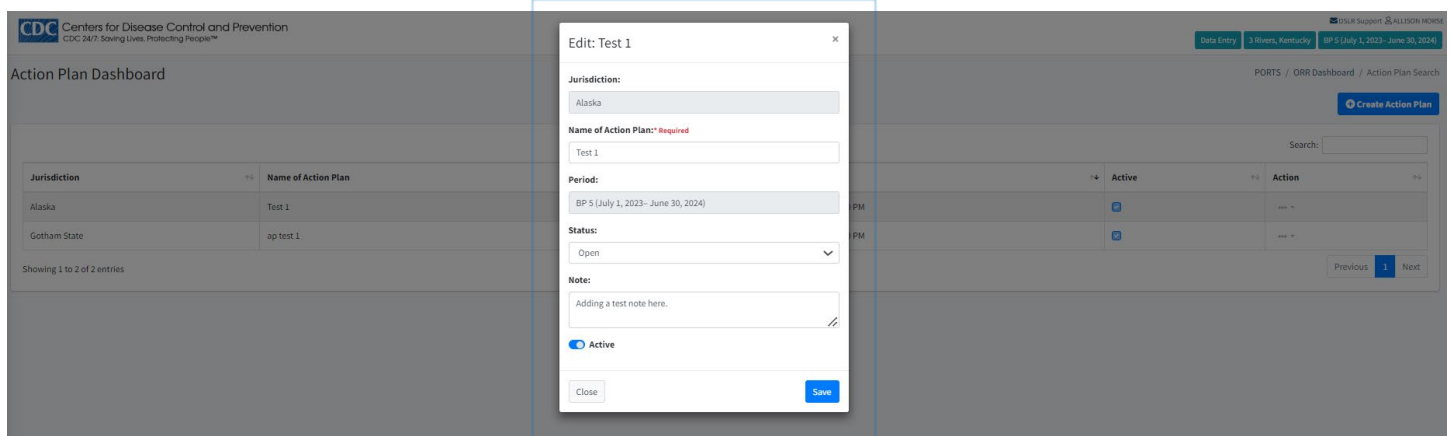
1. Click the **Action button** drop-down menu of the existing action plan you wish to edit.
2. Click **Edit** from the drop-down menu.
3. The Edit pop-up window appears.
4. Items available for editing:
   - Name of Action Plan
   - Status
   - Active Toggle Button
5. Click **Save** to save changes.

Adding Action Plan Items from the Previous Budget Period
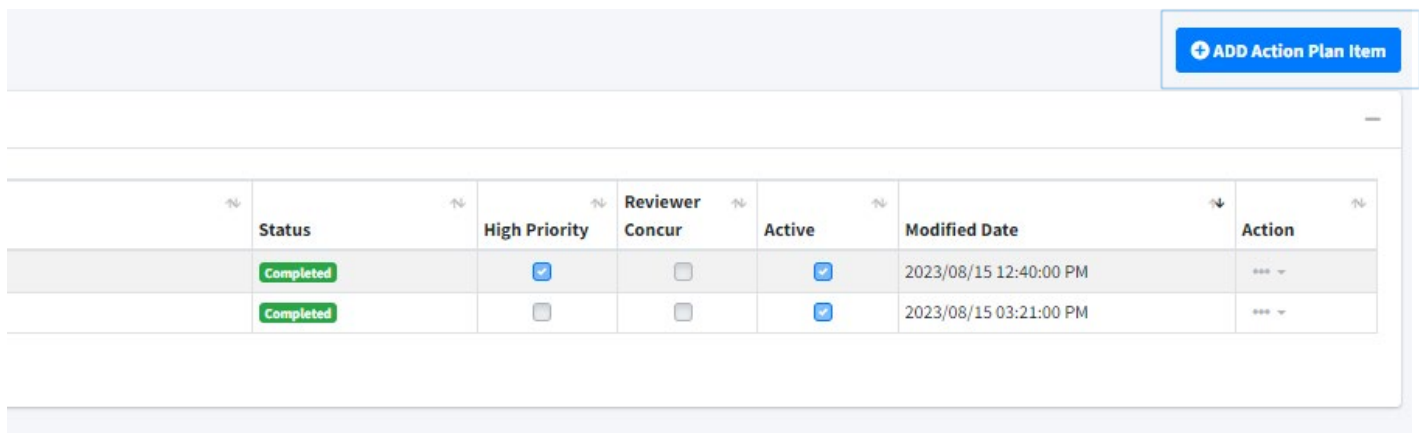
Questions adjudicated as anything other than Concur: Sufficient Evidence from the previous budget period will be included in the list of action plan items from which to choose. Questions adjudicated as Concur: Sufficient Evidence may also be included in this list if manually included by the CDC reviewer. Starting on the Action Plan Dashboard, complete the following steps to include an action plan item from the previous budget period's submissions.

1. Click the **Action button** to add action plan items.
2. Click **Items** from the drop-down menu.
3. Click the **ADD Action Plan Item** button.
4. The Add New Action Plan Item pop-up window appears.
5. Click the **Item Name** drop-down menu.
6. Select item(s) to include in the action plan from the drop-down menu.

7. Item Description: Type a description of the action plan item(s). Please note the item description entered here will apply to all action plan items selected.
8. Click away from the Item Name drop-down menu to close the list.
9. Status: Mark the status of the action plan item.
   - **Not Started:** This item has not been started.
   - **In Progress**: This item has been started but is not completed.
   - **Paused**: This item has been suspended and is no longer on the original timeline due to unforeseen issues.
   - **Cancelled**: This item has been stopped and will not be completed. This may be due to unforeseen issues or a change in direction.
   - **Completed**: This item has been fully accomplished, requires no additional updates, and is considered finished.
10. Note: Type any additional notes related to the action plan item.
11. isActive Toggle: Toggle the button to active or inactive.
    - When toggle button is blue, the action plan item is active.
    - When toggle button is gray, the action plan item is inactive.
12. HighPriority Toggle: Toggle the button to high priority or not high priority.
    - When toggle button is blue, the action plan item is high priority.
    - When toggle button is gray, the action plan item is not high priority.
13. Click **Save** to save changes.

Adding "Other" Action Plan Items

Items not identified from the previous budget period can be manually added to the action plan. Complete the following steps to include a custom action plan item.

1. Click the **Action button** to add action plan items.
2. Click **Items** from the drop-down menu.
3. Click the **ADD Action Plan Item** button.
4. The Add New Action Plan Item pop-up window appears.
5. Click the **Add Other Item** toggle button to include an item not listed in the Item Name drop-down menu.
6. Other Item Name: Type the name of the other action plan item to add to the action plan.
7. Item Description: Type a description of the action plan item.
8. Status: Mark the status of the action plan item.
   - **Not Started**
   - **In Progress**
   - **Paused**
   - **Cancelled**
   - **Completed**
9. Note: Type any additional notes related to the action plan item.
10. isActive Toggle: Toggle the button to active or inactive.
11. HighPriority Toggle: Toggle the button to high priority or not high priority.
12. Click **Save**.

Action Plan Detail Page

Action Plan Items   −

Item	Description	Status	High Priority	Reviewer Concur	Active	Modified Date	Action
CAP1.1b - BIOLOGICAL hazards identified in the assessment (select all that apply) - (Non-infectious diseases)		Completed	☐	☑	☑	2023/09/14 10:40:00 AM	••• ▾
Expedited hiring procedures to the administrative plan		In Progress	☐	☐	☑	2023/09/14 10:13:00 AM	••• ▾
CAP1.1a - Date of the most recently conducted jurisdictional risk assessment (JRA) or equivalent. Top five jurisdictional risks must be selected CAP1.1b-k - (09/04/2023)		Not Started	☐	☐	☑	2023/09/14 10:08:00 AM	••• ▾

Showing 1 to 3 of 3 entries

1. **Item**: Displays the action plan item name.
2. **Description**: Displays the action plan item description.
3. **Status**: Displays the status of an action plan item.
4. **High Priority**: Indicates if the action plan item is high priority or not.
   - Check mark in blue box indicates it is a high-priority item.
   - Empty gray box indicates it is not a high-priority item.
5. **Reviewer Concur**: Indicates if the CDC reviewer has concurred with the action plan item or not. This cannot be seen or modified until after an action plan item is created.
   - Check mark in blue box indicates the reviewer concurs with the action plan item.
   - Empty gray box indicates the reviewer has not concurred with the action plan item.
6. **Active**: Displays if the action plan item is active or inactive.
   - A check mark in blue box indicates an active action plan item.
   - An empty gray box indicates an inactive action plan item.
7. **Modified Date**: The date and time the action plan item was last modified.
8. **Action button**: Lists the actions a user can take on the action plan item.
   - Edit Item
   - Comments
   - Add Activity
   - Delete Item

Editing an Action Plan Item

1. Click the **Action button** of the existing action plan item you wish to edit.
2. Click **Edit Item** from the drop-down menu.
3. The Edit pop-up window appears.
4. Items available for editing:
   - Name of Action Plan Item
   - Item Description

- Status
- Note
- Active Toggle Button
- High Priority
5. Click **Save.**

Adding an Action Plan Activity to an Action Plan Item

1. Click the **Action button** to add an action plan item activity.
2. Click **Add Activity** from the drop-down menu.
3. The Add New Action Plan Activity pop-up window appears.
    - Action Plan Name: Is prepopulated based on previous selections.
    - Action Plan Item: Is prepopulated based on previous selections.
    - Activity Plan: Type the name of the action plan activity.
    - Activity Description: Add a description for the new action plan activity.
    - Status: Select the status of the activity.
        o Not Started
        o In Progress
        o Paused
        o Cancelled
        o Completed
    - Target Completion Date: Select the anticipated date the action plan activity will be completed.
    - TA Requested: Select if technical assistance is required?
        o Default: No
        o Other option: Yes
    - Note: Add additional notes regarding the new action plan activity.
    - isActive Toggle: Toggle the button to active or inactive.

- Click **Save** to add new action plan activity.

Editing an Action Plan Activity

1. Click the **Action button** to edit an existing action plan activity.
2. Click **Edit Activity** from the drop-down menu.
3. The Edit pop-up window appears.
4. Items available for editing:
   - Activity Plan Name
   - Activity Description
   - Status
   - Target Completion Date
   - TA Requested
   - Note
   - Active Toggle Button
5. Click **Save** to save changes.

Viewing Activities Under an Action Plan Item

1. Click the green plus sign to the left of the action plan item name.
2. Activities added to an action plan item will display:
   - **Activity Plan**: Name of action plan activity.
   - **Description:** Description of action plan activity.
   - **Status**: Action plan activity status.
   - **Target Completion:** Anticipated date of action plan activity completion.
   - **TA Requested**: Indicates if the PHEP recipient requests TA.
   - **Active**: Displays the active status.
   - **Modified Date:** Date the activity was last modified.
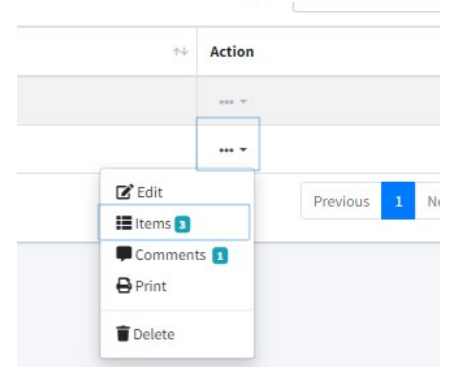   - **Action button**.

Tip: Changing the status of an action plan item and an action plan activity is completed in the same way.

Adding Comments to an Action Plan

1. Click the **Action button** to add a comment to an action plan.
2. Click **Comments** from the drop-down menu.
3. The Comment pop-up window appears.
   - Type new action plan comment under "Add New Action Plan Comment".
   - Click the blue Save button.
4. The comment window will close.

Viewing Action Plan Comments

1. Click the **Action button** to view the action plan comments.
2. Click **Comments** from the drop-down menu.
3. View comments added to the action plan. The following information will display.
   - **Comment**: The comment written by the user.
   - **Type**: Action Plan: Comment.
   - **User**: The name of the user that added the comment.
   - **Date**: Date and time the comment was added.

Adding Comments to an Action Plan Item

1. Click the **Action button** to add a comment to an action plan item.
2. Click **Comments** from the drop-down menu.
3. The Comment pop-up window appears.
   - Type new action plan item comment under "Add New Action Plan Item Comment."
   - Click the blue Save button.
4. The comment window will close.

Viewing Action Plan Item Comments

1. Click the **Action button** to view action plan comments
2. Click **Comments** from the drop-down menu.
3. View comments added to the action plan item. The following information will display.
   - **Comment**: The comment written by the user.
   - **Type**: Action Plan: Item Comment.
   - **User**: The name of the user that added the comment.

Adding Comments to an Action Plan Activity

1. Click **the Action button** to add an action plan activity comment.
2. Click **Comments** from the drop-down menu.
3. The comment pop-up window appears.
   - Type new action plan activity comment under "Add New Action Plan Activity Comment."
   - Click the blue Save button.
4. The comment window will close.

Viewing Action Plan Activity Comments

1. Click the **Action button** to view action plan activity comments.
2. Click **Comments** from the drop-down menu.

3. View comments added to the action plan activity. The following information will display.
   - **Comment**: The comment written by the user.
   - **Type**: Action Plan: Activity Comment.
   - **User**: The name of the user that added the comment.

Tip: The comments feature functions the same way at the action plan, action plan item, or action plan activity level.
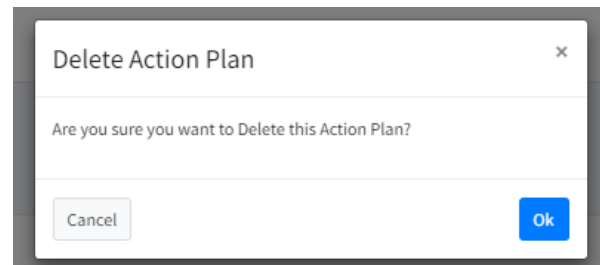
Deleting an Action Plan

1. Click the **Action button** for the action plan.
2. Click **Delete** from the drop-down menu.
3. Delete Action Plan pop-up window that appears asking "Are you sure you want to Delete this Action Plan?"
4. Click **OK** to delete the action plan.

Tip: Deleting at the action plan or action plan item level will also delete everything that falls underneath it. For example, deleting an action plan item will also delete all the activities listed under that item.

Deleting an Action Plan Item

1. Click the **Action button** for the action plan item.
2. Click **Delete Item** from the drop-down menu.
3. Delete Action Plan Item pop-up window that appears asking "Are you sure you want to Delete this Action Plan Item?"
4. Click **OK** to delete the action plan item.

Deleting an Action Plan Activity

1. Click the Action button for the action plan activity.
2. Click **Delete Activity** from the drop-down menu.
3. Delete Action Plan Activity pop-up window that appears asking "Are you sure you want to Delete this Action Plan Activity?"

4. Click **OK** to delete the action plan activity.

Concurring with an Action Plan Item

Only the CDC reviewer can concur with an action plan item. Complete the following steps to concur with an action plan item.

1. Click the **Action button** to concur with an action plan item.
2. Click **Edit Item** from the drop-down menu.
3. Change the Reviewer Concur toggle to blue.
4. Click **Save**.

Closing an Action Plan

An action plan can only be closed when all action plan items have a status of complete or canceled. This can be done by the data entry, submit for review, and CDC reviewer roles. Complete the following steps to close an action plan.

1. Click **Action Plan Home** in the breadcrumbs located below the filters.
2. Click the **Action button**.
3. Click **Edit**.
4. Click the **Status** drop-down menu.
5. Select **Close**.
6. Click **Save**.

Tip: If all items and activities in the action plan are not marked as complete or canceled, the option to close the action plan is not available.

Manage Users

The manage users role allows a user to manage the roles assigned to individuals within their jurisdiction. After a user's SAMS account is approved, the user is added to PORTS and given access to the Operational Readiness Review module. A jurisdiction's user manager can assign one or more user roles to an individual user. Following is an overview of the manage users features.

- **User Activation/Deactivation:** This button activates or deactivates an individual within the Operational Readiness Review module.
- **User Role Presets:** This allows the user manager to quickly:
  - **Clear all permissions:** Clears any existing user role assignments for an individual.
  - **Set user read only:** Sets the user as read only for all available jurisdictions.
  - **Set user to CDC default:** Sets the user as CDC Reviewer for the 62 PHEP recipients and read only for local jurisdictions.
  - **Set user to state default:** Sets the user as data entry and submit for review for the PHEP recipient and state reviewer for local jurisdictions. This button is not shown above but would be displayed in place of the, set user to CDC default, if selected. A user manager can only choose either the CDC default or State default, not both.
- **Current User Role Assignments:** Displays the user roles currently assigned to an individual.
- **Action Button:** Allows the user manager to edit the roles assigned to an individual.

Activating or Deactivating a User in the Operational Readiness Review Module

1. Click on **Manage Users** in left navigation bar.
2. Click the user's name you for which you will activate.
3. Click the **User Active in Operational Readiness Review** toggle button.
   - Activated: Toggle to the right.
   - Deactivated: Toggle to the left.

4. Click the **Disk Icon** to the right of the toggle button to save the user status.

Assigning or Modifying User Roles

1. Click on **Manage Users** in left navigation bar.
2. Click the user's name you for which you will assign or modify user roles.
3. Click the **Form Action button** in the row of the jurisdiction you wish to assign or modify roles.
4. Click **Edit** from the drop-down menu.
5. Click the **toggle button** for any of the user roles to assign or modify.
6. Click the **Save** button.
7. Click the **Close button** to exit the pop-up window.

Tip: The user administrator role enables the ability to manage users.

Using the Document Library

The document library is a repository for all evidence files uploaded by users in data entry or submit for review roles and is accessible by all user types. PHEP recipients and local jurisdictions can view and download documents for their respective states or jurisdictions, while CDC Reviewers can view and download documents for all users.

The document library displays the following information for each file.

- **Document Title:** The name of the document.
- **Uploaded Location:** Where the file was uploaded within the Operational Readiness Review module.
- **Size:** The file size of the document.
- **Uploaded Date:** The date the file was uploaded.
- **Uploaded By:** The user who uploaded the file.

Locating Evidence in the Document Library

1. Click on **Document Library** in the left navigation bar to access the document library.
2. Locate the file you wish to open.
3. Click the file name to download and open the attachment.

Tip: When using the search function, a user can search for a file by document title, uploaded location, size, upload date, or by whom the file was uploaded.

Icons Defined

Check Mark Icon indicates no further action is necessary for the role. The form is complete when a check mark appears, and the progress stage displays "Reviewer: Acknowledged."

Warning Icon alerts a user that a form requires action.

Lock Icon indicates the form is locked for review. Hover your mouse over the lock icon until a small pop-up appears to see which user locked the form. When a form is locked by another user, this means that user is currently editing a form. Locking a form prevents one user from writing over another user's data while entering or reviewing data.

Filter Operational Readiness Review Requirements By Icon filters forms displayed in the Operational Readiness Review Requirements section.

Comments: View or add comments at the question level.

Evidence: Upload or reference existing evidence at the question level.

Purpose/Data Entry Guidance: Provides detail and clarifies expectations about what is measured.

Significance: Describes the implication of the form or element.

Reviewer Guidance: Clarifies expectations about content components the reviewer must identify to deem the information as acceptable or sufficient evidence.

Required Documentation: Provides examples of information recipients can submit as evidence to substantiate responses. These examples are not exhaustive.

Submission Frequency: Identifies when Operational Readiness Review data must be submitted for documentation and validation.

Tooltip: Provides a hint or additional clarification about the question, answer choices, or guidance.

Form Actions: Allows the user to complete various actions at the form level.