

NPHII Online System Grantee Training

CDC Performance Improvement Managers Network Call

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Today's Presenter: Bobbie Erlwein, MPH, Team Lead, National Public Health Improvement Initiative (NPHII)

Moderators: Melody Parker, CDC/OSTLTS
Teresa Daub, CDC/OSTLTS

Holly (Operator): Welcome and thank you for standing by. At the time, all participants are in a listen-only mode until the question and answer session of today's conference. I would like to inform all parties that this call is being recorded. If you have any objections, please disconnect at this time. I would now like to turn the call over to Ms. Melody Parker. Thank you, ma'am. You may begin.

Melody Parker: Thank you so much, Holly. And thanks, everyone for joining us today. First off, let us apologize for the technical difficulties with the phone lines that we were having with Verizon when maybe first you were trying to join. So thanks for hanging in there and joining us today on the June Performance Improvement Managers Network webinar. I'm Melody Parker. I'm with the Office for State, Tribal, Local and Territorial Support. I am joined here today by colleagues from OSTLTS, and Teresa Daub and I will be co-moderating the call. So thanks for joining us again. For our fifth call of 2013, let me remind you that the PIM Network is a community that supports all NPHII performance improvement managers in learning from each other, as well as from partners and other experts. These calls are a way for members of the Network as well as everyone else to learn about each other and share information about resources and training opportunities that are related to this work that we do in quality improvement and performance management. So today we're going to be introduced to the new NPHII Online System. But, before we begin, let's review some of the technological features of today's call. Teresa, will you do that for us today?

Teresa Daub: Yes, Melody. And these features are working today, so we're excited about that. Uh, for those of you who are not on the web portion of the call, please refer to the slides that were emailed earlier, and for those on the LiveMeeting site, you can see the slides on your screen. You can also download these slides via the icon at the top right of your screen. That's the icon that looks like three sheets of paper. If you're on the web, you will also be able to see other sites participating in the call by



looking at attendees under the link at the top left of your screen. We'll have two ways to take your call or your questions today as Melody mentioned. We'll do an open Q and A period at the end. To help us with that, please go ahead and mute your phone line by using your phone's mute button or pressing star-six. Please do not put us on hold, because if you do, we will hear your hold music when the phones go live. The second way of taking your questions is the Q and A box via LiveMeeting, and you may enter your questions there at any time. Just click Q and A in the toolbar and then type in your question. You can pose an anonymous question by typing Anon either before or after the question. Our call today will be about an hour. It is being recorded and it will be archived on the OSTLTS PIM Network web page. I think that's it. Melody, I'll turn it back to you.

Melody Parker: Thank you much, Teresa. As customary, we'll be conducting a couple of polls today. I'll introduce them, have a look, click, yes, you are at it already. Thank you so much. First of all, it gives us an idea of who's participating on the call today. Please indicate your affiliation. Are you a state health department, a tribal health department, a local health department, a territorial or United States-affiliated Pacific Island health department, a national public health organization, or other something we haven't captured? Poll is open. You are casting your votes. Thank you so much. We'll give you just a moment. And thank you. It looks like the majority of our participants today are from states. About 50 percent of you are coming in there. We've got five percent tribal health department representation. About 15 percent of you are local. Two percent are territories. Two percent with Pacific Island health departments, and about five percent are with our national public health organizations.

Running on to our second poll. How many of you are in the room? Are there more than ten of you in there? Are there five of you together? Are there three to five? Are there two of you? Are you solo ... flying solo today? Please vote. Well, it looks like about 87 percent of us are alone in the room, but you're not alone. We are with you. Thanks so much, you guys. There will be another poll, of course, at the end of the poll ... at the end of the call for feedback, so look for that at the end and you can tell us what you thought.

So, you have been hearing about a creation of the NPHII Online System for a while now. And the time has finally come. The system's gone live and today members of the team responsible for getting it up and running, as led by NPHII team lead Bobbie Erlwein, will be taking us on a guided tour. Bobbie, tell us about it, please.

Bobbie Erlwein: That's quite a lead-in. Thanks, Melody, and thanks, everyone, for joining us. So I will tell you, I'm so excited about this system, as I mentioned at the grantee meeting. I believe it's going to save us a load of time and energy on the administrative side of life in terms of how much time it takes to complete forms and all that sort of thing. More importantly, I think it's going to give us much better information about all the work that you're doing and NPHII in general. So it's a win-win for sure. The program, as you're hearing, the system covers several major aspects of the work we do together. So your program reporting, your interim progress report, your annual progress report, including your project plans, and technical assistance will all be handled through this new system. So I really do think it's going to touch many, many of the aspects of our working relationship. If you have not yet signed up



to get access to the system, I really want you to be able to use it, so please reach out to either your PO or me, or Christine Dorsey, or send a note to the NPHII TA mailbox, and we'll be happy to get your organization set up to participate. We're looking for two representatives per organization to have access to the system. So if you would do that if you have not already, I would be very appreciative.

I'm going to introduce you now to Meredith Corg. Meredith is a colleague from Deloitte who was instrumental in developing the system and these slides. She's going to take us on a tour and an overview of the system, so I think that's enough from me. Meredith, would you take it away, please?

Meredith Corg: And thank you, Bobbie. Hi, everyone. I'm Meredith Corg, Deloitte Consulting. As Bobbie mentioned, I'll be walking you through some slides to introduce the NPHII Online System, and then we'll actually be logging into our test site to give you an overview of it. As Bobbie mentioned, the NPHII Online System is a centralized repository that's going to allow NPHII and the grantees to collaboratively manage their data for workplans, interim and annual progress reports, and technical assistance. In this session, we're really hoping to introduce you to the system and provide some basic training for other different modules. In this system, you'll be able to manage your workplans, your progress reports and TA requests, and each grantee is going to have access to only their own plans. And at any point during the year, you'll also be able to submit requests for TA through the system. You can see on the diagram below this is a time based representation of the process in the workplan, one phase, that would be where you'd be submitting your initial workplan, submitting your interim progress report. And then we go back to the workplan phase. And what this is about is this will enable you to submit updates for your workplan throughout the year. So, I know in the past everyone's been using Word documents and has had different versions of those. In the NPHII Online System, there will be one living version of the workplan that can be updated throughout the year. And then the last phase would be the APR submission.

We're briefly going to touch on login and site navigation for the NPHII Online System. The system sits on CDC partner SharePoint site, and that's what allows everyone outside the CDC to log into it. This ties back to the CDC JOIN process that Bobbie mentioned, the emails you got and the contact information provided us? Those credentials are what will enable you to log into the system. In the email announcing the launch of the system, there was a link that you can click to access the NPHII Online System home page. When you click on that link, it will bring you to the screen shot you see below as the CDC JOIN home page. To log in, we'll just type this, or select which kind of computer you're using, public or private, by default external partner is selected, which is correct. And then you'll just take your CDC user name ... CDC JOIN user name and the password that you created as part of that process to log in. Once you log in, you'll be taken to the NPHII Online System home page, and one item I did want to note is that all the screen shots in the presentation were taken from our test site, so none of the data is real. It's all created for test purposes. Then when you log in, you'll have your welcome screen, any announcements that have been placed on the site, and you'll also be able to navigate to different modules via the left-hand navigation and you'll use this throughout to get anywhere you need to go within the site.



I'm going to move on into some of the different modules, and we're going to start with workplan. As I mentioned, you'll be managing your workplan through the workplan module. And since the year's is the last, the workplan for giving your world display under that year. So as you can see, if you wanted to access your year three workplan, you would go under year three and click on that workplan folder. And for year three, the most recent version of your workplan has been inputted into the system and is now available by clicking on the title if you want to access it. Moving forward in future years, your original submission to Grants.gov is also going to be available, and it will be saved in the Grants.gov submission folder right below the workplan. So as I mentioned, year three data has been imported and as we move forward with the system, year four workplans will be collected through the Word documents as more users come online, and that data too will be imported in the system. In future years, we'll be going through the full life cycle in the NPHII Online System, and as part as that practice, there'll be several different interactions and opportunity for interaction with the performance officers. And the performance officers will be able to release your workplan to you for updates throughout the year. If you'd like to request your workplan, it's currently in view-only mode, so you can look at it, copy and paste data from it, but if you have updates to make, you can scroll to the bottom of your form, and there'll be a box for request for revisions to fill out that basically is requesting it, and then click the request for revision button, which will notify your PO.

Finally, for year five, when we're going through the entire process and workplans are actually being entered in the system to start, there'll be different options. These workplans will be able to be saved and completed in multiple sessions, and there will be also opportunities for grantees to submit the workplan to the PO if they have questions or would like to request feedback prior to their final submission. You can see in the box below there's different options to submit for peer review or to submit the final version to Grants.gov and the PO.

So moving on to IPRs, one item that you'll notice about our system is all of the modules are designed to mirror each other. They each have very similar functionality. They're like the workplan. In the IPR recording timeframe, your IPR will be available in the IPR folder. And it will be updated with the latest workplan information, meaning the most recent version of activities that you have, the most recent information in your workplan will be reflected in the IPR. And again, like the workplan, the original submission for the IPR that's submitted to Grants.gov will be saved in that IPR-Grants.gov submission folder.

Starting with year four, IPRs will be submitted through the Online System. Your year three data is currently available in the system. If you navigate to year three IPR-Grants.gov submission, you'll see your IPRs in the folder. But again, starting with year four you'll be able to use the system, and you'll have the similar functionality to the workplan where you can interact with your PO, submit the IPR for review prior to final submission, and also then submit the final version to Grants.gov and your PO. The next module related to the workplan is the annual progress report, and you'll notice it's again buried somewhere to the IPR. It's almost identical functionality. The APR will be available during the APR reporting period only, and one item to note here is during the IPR and APR reporting periods, your living



version of your workplan will temporarily not be available, and that's to prevent both the IPR or APR and the workplan from being updated at the same time. Again, the APR will have your latest workplan information, and original APR submissions will be saved in the APR archive folder, which is just a change in terminology. This is not submitted to Grants.gov. And again, starting in year three, APRs are going to be submitted through the system and there will be that same opportunity for interaction with your PO if you have questions as you're completing your APR. If you'd like your PO to take a look at it and provide feedback, you can submit it to them for review prior to your final selection or submission.

The technical assistance module is the last module in phase one of the NPHII Online System, and you can access it by scrolling to the very bottom of the left-hand navigation. And you'll see there's options for you to submit a request. You'll be able to monitor your pending requests, which is all the active requests, and also reference any past requests that were submitted through the system. When you click on that submit TA request, the system will pull up the technical assistance request form. Using the screen shot of that form, it'll be pre-populated with your information and your PO's information and it will allow you to input information to describe the type of the technical assistance you need. This is an active request, and this grantee has two that are currently active and they can be accessed through your pending request folder. And to access the request, you would simply click on the title and that would bring up the TA request form. The last piece of the TA module is the past requests, and any requests that have been submitted in the system and then closed, meaning they're no longer active, will be saved in this folder and available for future reference. And again, to access the request you can just click on the title of it.

Before we move into our site walk-through, I'm going to quickly give you some recommendations and next steps. There are a couple of best practices and recommendations for the NPHII Online System. The first is that it is a web-based system, so we do recommend that you save frequently and periodically when you're entering data. And if you're entering a large amount of data, or maybe walking away from your computer, we recommend that you use offline templates. Like any other system, it can log you off, where if you lose internet connectivity there's a risk that you could lose that data. We recommend, again, that you navigate the system using only the left sidebar menu, and use the top ribbon only to check in and check out forms, and we're going to touch on that in a minute and in our site walk-through. For those of you not familiar with SharePoint functionality, the check in and check out feature is SharePoint's form of version control, and this will prevent multiple contacts who are going into the form at the same time and overriding each other ... each other's changes to do that, so just, when you're accessing your documents on the top ribbon, check out and that will lock the document for editing by others, and when you're done, you'll be able to check in the document.

The next steps, and we've already gone through several of these, is prepare for the soft launch. And we're about to give you our site demonstration. As Bobbie mentioned, if you haven't yet identified your system contacts and completed the CDC JOIN process, we'd like to add you to the system, and in the email announcement the launch we provided a user guide, and this is a very detailed step-by-step



instructions for how to use the system. The system launched on June 17th, so it's been lodged for two weeks now, and if you have any questions, please contact your PO.

Give me just a minute, I'm going to pull up our testing site with the NPHII Online System. And what you should see on your screen is our test site for the NPHII Online System. And again, all of the data included in here is not real. It does not reflect anyone's plan, TA requests or otherwise. I am currently logged in as if I'm a representative from the Cherokee Nation, but there's no data that will be shared. I can reiterate what we just walked through. I am currently in the workplan under year three. So this would be how I would access my year three workplan. And to demonstrate the check in and check out features, if you'd like to go into the document and you're planning to make edits you'd hover over it to the left of the check mark, and then click check out in that top navigation. As we can see, that changes the appearance of the icon, and that is the signal to others that this one has been checked out and cannot be edited. Once we check it out, we'll be able to go in and view or edit your workplan. So the workplan we're showing you is currently empty, but we wanted to give you an idea of the workplan that you will see when you log into the system. And at the bottom you'll see the request for revision box that we talked about during our presentation. This is how for year three leading forward, if you have updates that you need to make to your plan, this is how you request it. You'll need to type a reason into the box, and that will activate the request for revision button and you'll be able to submit that to your PO. And the last step, and this is an important step as well, is to check this document back in. This is what will allow others to access and edit it. So it's just the reverse process. You hover over it, watch the check light, and click check in. A pop-up box will appear. It has a little bit of strange phrasing regarding the check in or maintaining check out. Just leave it marked as no, that's the default, and click OK. And that will check your document back in. In a minute, you'll see the icon has returned to its normal status, meaning it's available.

For year three, if you'd like to access your IPR submissions, they are stored, as I mentioned, in the IPR-Grants.gov submission folder. As we move forward to year four, your workplans in Grants.gov submissions will be imported to these folders. Last piece I'm going to touch on is the technical assistance module and how to submit a request. To submit the request, we click submit request and that will pull up the technical assistance request form, and as you can see, it's pre-populated with the user's information and PO information. You'll be able to fill out details about the request and either save it and come back to it at a later date, or submit it to your PO. In the pending request folder, it just shows that this grantee has two requests that are in ... that are active, so they're in progress. They've been submitted. They have not yet been closed out and are available for reference in that folder. Once these requests are completed and become closed, they'll be transferred to the past requests folder where they can be referenced in the future.

That completes our basic site demonstration, and at this time I'll open it up for questions.

Teresa Daub: Meredith, thank you for walking us through the system. It was great to see it. Before we go to questions live on the line, we do have one question via LiveMeeting. And we're going to that right



now. And the question is coming from Magaly in Rhode Island. Will the federal reporting form be also uploaded in the system for us to complete by July 15th?

Scott: HI this is Scott from the NPHII team with Deloitte. If you're referring to the financial forms?

Bobbie Erlwein: This is Bobbie, Scott, and I don't think that she is. I think Magaly talking about the required PPHF reporting that was required under the appropriations language, because that's due in ... in July. So would you like me to take this one?

Scott: Please.

Bobbie Erlwein: Okay. It won't, Magaly and others. It will not. That reporting for PPHF, this is the one where you have to report how much money you gave out in contracts and sub awards, that sort of thing. That reporting, I expect, will run very much like it did the last time around in January. It will actually ... the information will go back into a central site that's run by a different office here at CDC. So this system will not replace that. I expect you'll get guidance on that process in the next, I hope, couple of days.

Teresa Daub: Okay. Thank you, Bobbie, for taking that question. And there any follow-up questions that are coming from that? Magaly, did we answer it for you? Okay, Holly. We will ask that you open the lines now. And as a reminder to everyone on the call, if your phone is not muted, please use star-six to mute the lines. But if you do have a question or comment, go right ahead. The floor and the line is yours.

Holly: We will now begin the question and answer session. All lines are now open. Please use the mute function on your phone or star-six when not speaking.

Teresa Daub: Okay, hearing no questions. I'll turn it back to you, Bobbie, and Meredith, our presenters. Is there anything that you would like to add about the system, or any questions that you want to toss out to the group yourself.

Bobbie Erlwein: Meredith, how about from your point of view?

Meredith Corg: I don't think so, thank you.

Bobbie Erlwein: Okay. And thanks, Teresa, for asking. I actually think I'm okay in terms of asking questions. I would just encourage every ... thank everyone again for listening in and joining us today. And I really encourage everyone to get in there and take a drive around the system yourself. And again, if you have not yet gotten access so that you can see the new system, please get in touch with us. We really want everyone to be able to use it.

Magaly: Hello?

Teresa Daub: Hi. Go ahead, please.



Magalya: Oh, yes, hi. This is Magaly. So I just wanted to ask, I mean, usually that federal grant reporting you send us an email with an attachment with a specific score every one of the grants. So I thought, you know, just to save that email, you think to just put it into the system if that was going to work. But I guess if not, then that's fine.

Bobbie Erlwein: Yeah, I mean, Magaly, that's a great idea. This is Bobbie. I think that would be a great idea, but it's just not going to run that way, largely because CDC is orchestrating this across all the programs that send out PPHF money, so they're actually not being run by NPHH. It's being run by a centralized location. So we won't be folding it in.

Magaly: Okay. And then I have another question. I was looking at the system, and there is something on the corner that says tags and notes, and I wanted to ask Meredith if she can, you know, give an example of what that will be, because I was trying to ... I was reading it and it says that I can write my notes or something, that they will be seen by everyone. So I'm not sure why I would be putting some notes there.

MC: This is Meredith. And that's a default SharePoint feature and in the final version that won't be there.

Teresa Daub: Thanks, Meredith. Any other questions on the line? Okay, we do have a question from Susan Ramsey, and the question is the year four grant application will be entered into Grants.gov. Will you then enter workplan and use this system? Is that a Meredith question or a Bobbie question?

Meredith Corg: I think it's a Bobbie question.

Teresa Daub: All right, Bobbie.

Bobbie Erlwein: Yeah, I agree. It's a Bobbie question. So yes, you will enter this ... what we envision, actually Laverne, is that you'll build your workplan in this system, the Online System, and then you'll be able to export it and submit it with your application into Grants.gov. So we're actually looking for you to build it in this Online System that we've created.

Teresa Daub: That's fine, thank you, Bobbie. You were ahead of us, because we do now have a question from Laverne uh, via LiveMeeting.

Bobbie Erlwein: I'm sorry.

Teresa Daub: I'm doing a peer onsite consult in Micronesia, cannot dial in for audio. It's 7:30 a.m. tomorrow here, and many of the other Pacific PIMs have similar issues. How and how soon will I be able to get a recording of the webinar to watch with the audio. I think that may actually be a Melody question.

Melody Parker: Thanks for that question. We can generally get those up within about a week or so. Actually actually about two weeks it'll take us to get those up with all the accompanying materials that you'll need to see. And as soon as they're up, we will let the Network know.



Teresa Daub: Thanks, Melody.

Heather: Hi, this is Heather of D.C. I don't know if Melody showed us a printing function, but is there a printing function?

Teresa Daub: Go ahead, Meredith.

MC: Hi, this is Meredith. Uh, there is print functionality in the system. You'll be able, if you're just accessing the forms in file print, and it will print it and print in a print friendly view or when you're working in the system and submit your final versions, that will automatically bring up a version that is printable and could either be printed or saved as a PDF.

Heather: That's fine, thank you.

Teresa Daub: Another question for you.

Megan Davis: Hi, folks. This is Megan Davis in Washington State, and I wondered if, when we submit it for final to the PO and then it says print for Grants.gov, does that get it into Grants.gov?

Meredith Corg: No, it does not get into Grants.gov. There is an extra step. That submission just brings up the print version that will need to be saved as a PDF and then submitted to Grants.gov.

Megan Davis: Okay, thank you.

Teresa Daub: Thanks for clarifying that. Looks like we have another LiveMeeting question. So one more question here. The request for technical assistance, is this for issues with the system only? It appears no, but, Bobbie, would you care to say more about that?

Bobbie Erlwein: You're exactly right, Teresa. We intend this to be for any technical assistance that you need from CDC to help you advance your work under NPHII. If you're stuck on the system, then by all means give us a call and we'll be happy to try and troubleshoot for you. This is really for technical assistance with the work of NPHII.

Teresa Daub: Thanks, Bobbie. And if there are issues with the system, what is the first line of the system?

Bobbie Erlwein: That's a great question. So first, check in with your performance officer and then ... actually, Christine Dorsey is going to help lead the charge for technical assistance as a first run. But we'll elevate issues if we need to get you the help you need.

Teresa Daub: That's excellent, thank you.

Mississippi: Calling in from Mississippi.

Teresa Daub: Mississippi, go ahead, please.



Mississippi: I have a question about budget redirect requests and carryover requests. Is this included? Do we do this on this system, or do we still just send this directly to our budget person?

Bobbie Erlwein: This is Bobbie. I think that's an excellent question. I really wish that we had been able to build the financial parts of your reporting and questions and carryover and all that into the system, but we could not. So you will still need to direct those carryover redirection requests to PGO, and as always, we would ask that you carbon your POs on this request.

Mississippi: All right, of course. And I'd like to ask another question, and you may have answered this earlier. But the grant announcement that was up and then was removed, has not been officially released yet, has it?

Bobbie Erlwein: No. Unfortunately, we don't have that reposted quite yet.

Mississippi: And so we still don't have a grant deadline for that?

Bobbie Erlwein: That is correct.

Mississippi: All right. I just wanted to make sure.

Bobbie Erlwein: I hear you. It's absolutely something we're all working hard on to get reposted. So I'm hoping that I'll be able to send you a happy note in the very near future.

Mississippi: Okay.

Teresa Daub: All right. We still have some time here on the call, so we're happy to take any further questions or comments from those gathered. Okay, hearing none, Melody, I'll turn it back to you for our final comments and thoughts.

Melody Parker: Well, thanks, Teresa, and everyone else, and Meredith, of course, and for handling this for us. Thank you, thank you so much. And everyone else out there for, again, hanging in there with us and participating on today's call. So before we leave today, let's kick out our final poll. How would you rate the webinar overall? It's open, please cast your vote. And while you're doing that, of course, if you'd want to give us any additional feedback on the call, or as always, suggest topics for calls in the future, you can contact us at PIM Network at CDC.gov. And I want you to remember to join us for the next call that is scheduled for July 25th. In the meantime, as we mentioned before, remember that you can view and download these calls and materials from the PIM Network webinar series on the OSTLTS PIM Network site. And so without any further ado, I will bid you all adieu and will see you next month. Thanks so much.

Holly: Thank you. That concludes today's conference. Thank you for participating. You may disconnect at this time.

