NWX-DISEASE CONTROL & PREVENTI (US)

Moderator: Dale Babcock
January 13, 2015
8:30 am CT

Coordinator: Welcome and thank you for standing by. At this time all lines are in a listen only mode. During the question and answer session you can ask a question by pressing star 1 and recording your name when prompted. This conference is being recorded. If you have objections you may disconnect. And I'd like to turn today's conference over to Ms. Elizabeth Sullivan. Thank you and you may begin.

Elizabeth Sullivan: Good morning. Welcome to the CDC eGrATIS Post-Award Module Training Call. This is Elizabeth Sullivan. I'm with the Project - Program Operations Branch here at CDC.

This morning we're going to do this training. This is going to be very similar to our last year eGrATIS PAM call. This year we are asking awardees to respond to both the work plan notes that were made by your Project Officers and your reviewers here at CDC as well as your budget comments that were made by the Project Officers and reviewers here at CDC.

Our trainer this morning is (Mike Gregg). He works with our eGrATIS contractor so he'll be doing the training.

And we're going to go through both the work plan module as well as the budget tab pages and explain that information to you. And at the end of the call we're going to have a question and answer.

(Jeff) will be our Operator here on the call today.

And I'm going to go ahead and introduce (Mike). Please go ahead (Mike).

(Mike Gregg): All right, thanks Elizabeth. Hello everyone. Thanks for joining us today. As Elizabeth said I'll be running through the PAM Module, Post-Award Management, and the process to do that and particular to create an application change request to respond to the Project Officer's Technical Review.

Just one thing of note, we're using a copy of the database that has been de-identified. All the identifying information has been pulled out so you're going to see some things on there that may look a little odd such as up top here in the top right where my cursor is. I highlighted it; might take a few seconds for things to show up, there's a little delay but added (John Smith) 951 and the CDC Awardee 11 so we've randomized it and de-identified that.

So don't be too concerned with that. The process will be the same.

So I'll go ahead and get started. When you log in I believe most of you will see the screen that I have showing now. We'll go ahead and jump into the active grant here, the active award which is duplicated. It's up here at the top and it's here as well. I think most of you are familiar with that.

Jump in. You'll see that Post-Award Management is active. 2015, there's three links that get you to the same place on this page so the top link, the header in that Post-Award Management box there and 2015 link in the bottom. They all go to the same place. It doesn't matter which you click on.

Go ahead and pick that group.

And at this point I need to create an application change request. So go ahead and select that link.

And you'll see what we have here is again this is from removing names. We have an awardee name with the 2015 application and review so this was the version that has completed. The application has been through review. So we want to respond and have our responses based off of that version. So we go ahead and we create an application change request. We create that now.

So we jump into the screen where we can go ahead and start on that. To begin with we need to actually create the change request so we need to identify it. We need a description and a justification, the two required fields. You'll get a warning if you do not put those in.

Elizabeth has sent out some steps I believe or some processes that she wants everyone to follow. To begin with, they want the awardee name so here click in the box. And we'll add. So here is where you would put your name, your state name or locale name in here. So for example I'm in North Carolina so I would put North Carolina here if I was doing this.

Response to 2015 Technical Review of locations so I believe this is what Elizabeth wants everyone to put in the description box. And again the reason for the awardee name is for when it's printed out. When they print out the information that shows up, they know who it is. It's easily identified.

For justification you can put in here, I mean this is up to you. You can duplicate the information or in the justification you can - something in here meaningful that is meaningful to you the user.

So go ahead and after I do that I have both required fields. And I click Create. Takes a second; now I'm in a state that I'm ready to go ahead and start making changes.

You'll see up here after you created it, you'll get a green box up here that says the ACR has been saved, meaning that you are good to proceed at that point.

Forewarn you, I haven't seen it much. It's in our testing usually when we're trying to break things and we do things to break things purposefully. This will be a red box up here indicating there's been an issue encountered. If you see that you're going to need to follow-up with Technical Support. Again I don't believe any of you should see that but if that is the case we're here to help. So don't be alarmed if you see that.

Okay. So once we're in this state, I'll go over the summary tab a little later after we make some changes, but you can see the tabs; budget, work plan, review notes, transactions, key personnel. I'll go into these in more detail later. Obviously you address budget items under the budget tab, work plan items under the work plan tab. Review notes, these are the notes that Project Officers added against the work plan.

Transactions to the right, these are when a budget item was marked as needs more information and you go in and respond to that these and you make changes to your budget. Those changes show up under transactions.

And the tab I'll start with is the key personnel tab. I'll jump in there. This was something that I believe was at one point going to be used by CDC to - in submitting the grants to PGO. My understanding is this is something that won't be used going forward so I just want to make you aware. The tab is there but at this point CDC is not requesting that you do anything with this tab.

So that said, we'll jump into review to the work plan. We'll start with the work plan. It's a little more straightforward. So we'll start with the review notes tab.

So you can look through the tab or look through the information in this tab. So we go through and we see, okay, that it looks like we need to address a couple things. In this case the awardee has recommendations. In addition to recommendations you'll see weaknesses that they would want - that the Project Officer feels you should address. In this case we're seeing recommendations.

So the process to do this is a two-step process. In preparation for that you can print this page. You can do what I often do on this and especially because this fits on one page is I'll take a screenshot. Use an All Print Screen, go to a Word Document. And paste that in which and blow that up. But you have information - you have that information saved.

And while I'll show that is important is first one we have, first recommendation it says the target goal of 5% increase result and covers greater than 100%. But that target should be revised so the goal is 100% of the identified incentive plan kept within one calendar of book.

So in here I'm going to say in my response to that I'm looking at the first one again. I'm going to say okay, updating or at this point if you do it afterwards you can say updated or updating but updated. I'm going to go ahead and say I updated target to reflect. I save that.

And then over here I have the performance measure that the recommendation is against so it's C5B/SM2. All right, go over to the work plan tab. And I scroll down to C5B. And I'm going to see it down here, SM2. It's going to - the recommendation is going to pop up here.

So I can't make any changes. The work plan is in a read only state indicated by the green dot here. And if you want to see it over here, the green dot is duplicated over here. Says the objective is approved.

So that in order to make changes I need to unapprove that. And you'll see that both blue dots here and here turn to blue. And it says it's in a ready to approve state.

And once I do that I can come in and I have options. I can edit this or drop this. So I'm going to go ahead and edit. And I'm going to change my target. Again this is for demonstration purposes, just throwing a number in here.

And you'll see it took a second. It updated. And here's my new target. The state is right here, is modified so this is in a modified state.

And I can say I'm happy with that so I can go to the top and I can, again I can't leave it in this state. I have to go ahead and approve it.

I'm going to scroll down. You'll see it's back to a read only state. It indicates it's modified, the - my new target here.

I'll turn it now, let's say I get there and I'm looking, oh that's not what I wanted. So I go back up. I have to go through the process again. I have to unapprove it. Come down and I say oh, well I'm going to revert that. I don't want that change.

Give it a second to refresh. And you'll see it's back to the original state. Drop, edit and those are my two options. It's 5%. Let's say I didn't want this performance measure. I'm going to say no, this didn't make sense for me. I can click Drop. If I click Okay performance measure will be removed from the work plan.

I'm not going to do that here. I'm going to go ahead and cancel. And I'm going to edit it. Go ahead, go edit it again. So I can make a change. Just a performance measure and I can go up and approve that.

Okay now again as I said you can go back and forth between work plan and review notes to do that. The other way as I said to do it is I could have my screenshot open or I could've printed this out. Have a copy with me. And I can come look at okay my next one is D1. Scroll here, open up D1. Okay, good.

Now for everyone there is a - and a lot of these for the - a lot of the work plans they're implementing an HL7 (2.5.1), the system does not allow the entry of a date. So we need to - in order to address that so we go up here. We're looking at this as a suggested activity too.

You know what this is a good point for me to stop. Sorry. So I'm jumping here. This is a suggested activity. And required activity, suggested activities require performance measures and required - you know, suggested performance measures so that's required activities and performance measures, suggested activities and performance measures, cannot be edited other than a target value.

So I can't go into - I can't unapprove this. I can't go into D1/SA2 and I can't make any changes to that. It's either I have to take it in this case as it is. This is a - was added as a compliance. If it was a target there'd be a target number here. I believe that's there in performance measure. The target meant for target here. That's the only - that's why you can edit that. That's the edit length because target's the only thing I can edit on suggested activities, again required as well. I can't make any changes. I can just drop them.

And again so the problem is there's a limitation in eGrATIS. You can't add a date to the - to developing your HL7.

So what's being - a recommendation up here is add a performance measure or D1/SA2 to an implementation date. So this - we're going to go ahead and add a suggested activity. I'm sorry. Sorry, I'm going to add an awardee defined activity, activity.

And I'm going to go back. I'm going to go ahead and reference that back to D, reference that back to the suggested activity.

I was talking to Elizabeth. And follow-up with your Project Officer if you have any questions but she had mentioned that that date would be, so 31, 2015. I tab out. I go ahead and add that and it's there.

Now I believe for this when you see this recommendation to go ahead and add that, this is the process to do that. You just go in and add an awardee defined activity, new down here. And I can delete that and edit that.

But once I've completed that I can approve it. And then I could come back to my - I can come back to my list and I can go through as I've done and make these changes.

Once I've completed that I can go back to the review notes. And I can add in here, added. Make my note there, save it, shows up here. If I want to edit that and come in I can edit it again. Save that and I'm not sure though. It's pretty straightforward this process to go through back and forth.

I think the - that is probably the one that would cause some questions. Again that's the one where you can't add a date to a suggested - to this suggested activity. So you need to create a new awardee defined activity to add that. The rest of those should be as you'll see recommendation to add. Possibly add more activities or performance measures, update targets, things of that nature. But again it's just follow the note - the review note from the Project Officer. Go back to the work plan and make those changes.

So I'm going to go ahead now and jump into up - making the budget changes. One of the things I've mentioned is transactions here. The transactions tab shows the budget changes that have been made. And you can see at this point we haven't made any changes so these - there are no transactions.

So let's go ahead and jump into the budget and we'll come back after we make some changes and I'll show you how they're reflected here.

Okay, all right, so when we come to the budget tab we have two, you know, there's two options, links at the top. The default one is respond to selection - respond to exceptions which is already selected. That's the view that we have currently on screen.

And this shows you all of the line items that were marked as needing more information by the Project Officer during their review.

And this is where we want to start to go in and edit, make changes. Before I do that though I'm going to come back and I'll go into modify budget just to show you the differences.

So here's the modified budget link so I can at a glance take a look at my budget. And you'll see on here when you have a question mark. The question mark indicates that there were line items. In this case there were four (unintelligible). You hover over it and there's four allocations in this budget category and funding source that were marked as needing more information.

So you can kind of see from this screen. You can get an overview of where the needs more information, where all those exceptions were identified.

And I'm going to make - going to - I'll show one approved. This is kind of an important step here that I'm going to take and because this does lead to some confusion.

If you were to come into the budget without going through and responding to the exceptions first, you're going to see - pay attention to these icons. This says its original item.

So when I open this up I have the ability here to modify this. But it wasn't marked as needs more information. It was a line item that was approved. Therefore the Project Officer was fine with this line item. But you wanted to make an update to it. You have the ability to come into the budget and modify it. Again this is the one with the little dollar sign.

The ones that are marked as needs more information, when I open those up the Modify button is not there. You can't put this into an editable state from this view.

So if you're in this view and you don't have the option to modify check this icon and if you see the blue circle with the question mark you're going to need to go back to the budget tab, to the first default screen. And you're going to need to open that here, contracts, this contract, open that here. Give it a second, you know, there might be a delay so I'm sure you see it.

And the Modify and Respond button is here. I know sometimes when I go through the system to verify things that on my end I'll get in a hurry and I'll get to that screen and be a little confused for a second.

So I just want to draw your attention to that. That if you're in that other budget line item view and you can't modify, it's not - it's only in a read only state. You need to come back to this view.

With that said, we'll go back to respond to exceptions. This is where you'll want to begin. You'll want to make your changes here first. One of the reasons is as you go through and you make changes here it's going to, for example if you have a line item that you need to remove or you need to change funding, if you go ahead and remove it here then jump into your budget and try to reallocate those funds you might come - you know you might come into a conflict with another item later in this list.

So it's recommended that you start here in no particular order. I'll just start at the top.

And as you can see, I - it's in a state. I can't make any changes to anything on the screen here. I need to modify. And it says per the - and again the request for information. This was what the Project Officer was looking for, for the budget justification. The position should also align with B3/A Fix activities.

So when I did click the Modify button down, that was down here, I went from not addressed meaning this line item that was marked as needing more information had not been addressed yet. But once I click the Modify button that was here before, I went into a pending response state.

Now I want to go ahead and I want to make changes to this. So when I click that button to modify the changes I make, I can edit the line item details here except for the name. I cannot change the name. That is a read only state because it is a unique identifier for this line item. This is similar with contracts. The contractor name can't be changed.

And I'll get into that in a little more detail as we go through. I'll show some examples of how to clear that out and why that's important to take note of. I'll go over that in contractor or contractual stuff in a few minutes.

So I come in and I want to address this. Okay, this position also needs to align with B3/A Fix activities.

In this view I can't - the only thing I can do is edit the line item details. So to go ahead and tie this to the work plan I need to edit the financial details. I need to go to the funding source. So I pick the funding source, go to the work plan, looking for it to catch up, 3/A Fix. I'm going to add 1%. I'm making this up again. You guys will know how to better address this and how - what percentages to use and so this is just demo purposes.

So I went and I've added B3/A Fix at 2%. Now I have a red 102 down here. So I'm over 100%. One way you can see that is when you come over here to these icons you'll see that the Needs More Information button that was a circle with a question mark has changed to the dollar sign plus or minus circle on it. That's a modified icon.

And to the left of that is a red flag. If I hover over that red flag you'll see that this is not reviewed. That's one error. It's not really an error. It's a status. It's not reviewed. And these are things that need to be fixed I should say.

So and the other one is the work plan split does not equal 100%. Down here at the bottom you see mark modified is - and move next, mark modified is not available and that's because we have an error here so to fix that I need to come in and change one of these.

Tab out. And my mark modified and move next becomes available. So I can mark this one as modified.

Now I can jump back to and an easy way back you just got to hit the budget tab. And you'll see that this one is - I marked it as modified so okay, I've responded. I've aligned some B3/A Fix activities. The status went from pending response to responded. And that was through clicking the Mark Modify button.

There's some options here. There is the option to remove the modification. I'll go ahead and do that just to show you that once I do this I say okay and I'm going to remove those, those three, four, three, eight six. Sometimes it takes a little time.

Yes. And you'll see that we're back into not - they're not addressed. And here was the first one based to align with B3/A Fix activity.

So process again would be to we want to modify. And just so you can see, we went through. We want to put it under 317 Ops, got that. Open, edit the line item. Yes. Work plan, A Fix. Effective line item over 18, we're at 100%, in good shape.

Similarly this revert is to remove the modifications so this will remove the modifications as well.

And now that the work plan, I've went through and my work plan, is 100%. And I'll have the red flag on the work plan tab. And when I hover over this red flag it's only - the only issue I have is that this one is not reviewed. So I go ahead and I mark that as modified.

Go back to the view, budget tab. And we have one here that's responded. So and sometimes the things move around a little bit on the screen here. And you'll see that what it did is it sorted this by personnel and over here by not addressed and responded alphabetical and status.

So don't be surprised if it was first and when you made the changes it dropped down to the bottom of the personnel. It's just the way the system is sorting it.

So okay, so looks similar for the next line items that we have to go through. Add B3/A Fix to them.

We'll jump down here to another one and it's contractual. And I'll try to do a - try this one.

So I want to take a look at this one. And it looks like - oh, okay, it looks like everything - contractor or the awardee put this contract in and as it says here it's not to one entity.

So the program awardee is going to need to break out each separate contract. So this will be a little more involved. This process begins the same way, want to modify it.

So the first thing that we want to do is we're going to need this contract, I can't change this. And by default I changed all the contractor names so this is contractor ABC. And the system won't allow you to change the names. I did this behind the scenes. It won't allow you to change the names so as the awardees you can't go in and say okay, I'm just going to edit this to the new contractor. I'm going to have to go in and I'm going to have to zero this out. I can zero that out here and tab out and now I have zero dollar amount. I can mark that as responded here. Go ahead and do the - so well this one didn't. I'm sorry.

So all right, so I'm back in. I've responded to this. I've zeroed out the amount so as you can see here that the amount is zero for this contractor.

I'm going to go in and take a look at - I'm going to edit the financial details. And this one is across four funding sources. So I'm going to pick one of those funding sources.

I'm going to jump in and you're going to see that when I add - when I zeroed out that line item amount, keep in mind that this contractor line item was getting a full total of $2,780,628 and that was across all four funding sources. So for this funding source it was only $2 million, it's like $2,025,585. This leaves it under allocated as you can see over here. I'm going to get a flag. The line item is not balanced.

I need to zero out this money. And tab out. And it looks - I have - wait a minute. I have $760,000 still unallocated. That's because this is across multiple funding sources. So I need to go and zero this out across all of those funding sources. The easiest way to do that is when you're on the line item you'll see this little page here, looks like a little sheet of paper. If you click that it'll open up the funding breakout and you'll see we are in 317 Ops. It's not underlined. And we see the amount is zero.

So I'm going to go ahead and jump into VC - VFC Ops for the same line item, and I'll go through this process of zero, tab out, update and the amount went down by the $100 that I had taken out and I can jump back to VFC/A Fix. Looks like there's listed just short of $4 million there or I mean $400,000 so I want to zero that out.

And move this up, there's one left, PAM (Flu) and I want to zero that out, the tab there, there. Mark it as modified at this point because I have made these changes.

And you'll see green checkmark. It is complete. I've zeroed it out. But in the process of doing so for PAM (Flu) I haven't allocated those funds for 2317 Ops. I have under allocated for the amount that I zeroed out.

Now the way to fix that, I'll just for each of these I got to mark modified. So each change I have to come in and mark modified.

The way to fix that is I need to come in here. And I need to add a new line item. So I'll have to go out and create and this process was the same as it was in application where I come in. I go ahead and I add the contractor. Add a contractor name, give the amount here. I'll go ahead and do that real quick, oh and again once I set this name to this contractor here I can't change that in the future.

So and it's similar to personnel. I mentioned that earlier. This - that this person, I wanted to update the budget. There was - let's say there was someone we had put in for application, no longer going to be working on the grant or with this grant. You have to zero them out and go add a new person. You can't just simply swap names.

So once I put in this information, the contractor, the amount, the selection, the type, justification come over here. Need to add, again these, again just demo purposes, illustration. So I go ahead and I add that, the details.

So I have everything in there. It looks good. I come down here and I'm like wait a minute. I can't modify that. Need to come up here and allocate how much I'm requesting for this which I don't need to modify it because it's already in read only state. So and I'm adding it new.

So this is new line item that I've added. I can look at this. I also apologize real quick. These don't show up in production. This is just a UAT issue so you can ignore these little red Xs or I mean these little Xs here.

But when we come into the change log you can see that on this today, we added this new line item for this amount. A quick summary of what we did.

So as you can see I added the new line item trying to meet the Project Officer's request. The budget is now balanced. I've spent the full amount. I'm not over allocated and I'm no longer under allocated.

So this is the same process for each line item marked as needs more information. There's something - some of this stuff is a little more straightforward. See if I can find one real quick. There we go.

If I come down to this one, I say I want to modify it. As you can see up here it says more detailed line item, budget justification. So I just click in here and say - going to tab out of that. And then in this case I've met the - what the Project Officer has requested, more justification or at least I've attempted to meet that. It'll go to the Project Officer for further review when you submit it.

So we have the status is now, went from not addressed, pending response. I come down. I put mark responded. And the status changes to responded right here and it moves to the next one in line.

So again those are the ways that we address the Project Officer exceptions. And we can update as requested the line item details here. We can jump into the budget for the line item and the allocations and we can make the changes there.

And once we're complete and we're satisfied, we mark it as responded and the status changes to responded; now before I jump into that I said these would all be handled in the transactions tab. So you can go back and say what did I do? Let me take a look.

So I can jump in and I can see okay, here are the changes I've made. This icon indicates it's been modified. So I can see. I take a look. It's kind of a summary. The status is responded. It's not in a pending response.

So it is completed. I can take a look and I say, oh I added the work plan linkage at 2%. I drop the other. And there's no other changes here. It just highlights the dollar amounts and the financial components so they're easy to find, doesn't indicate any changes there.

We look at the line item that we added. You can see it, I added it. It just shows why did I add the line item there? It's the budget justification and how I've linked that.

Down to the next one, and again this was in a responded state because I responded to an exception. And you can see that here is where I went in the exception text where detailed line item budget justification is needed. And I have added that. It's highlighted in green; green, blue depending on your monitor to show the difference in what was added. So I can say okay, I'm good with that.

And I can come to the next one. It's in a responded state as well. And you can see the changes that were made where I went ahead and I decreased funding. In other words, I've zeroed out that contract so it shows that I went ahead and I've decreased all of that and that process where we went through to zero it out. And then I came back in and I added the new one at the top as part of that process. So that's the step you take.

There's a couple things I'll show you quickly. We come in here. Not addressed. Say I just wanted to modify and responded. So I did. I made any changes. It is in a pending response so jump back to the transactions tab.

And you can see that it's in a (unintelligible). I can say oh it's a pending response. I haven't completed this so I need to go ahead and make sure that I take care of that.

So it's kind of two ways to see it. I mean it's obvious. You can go to the budget tab and you can look through this list and see pending response right here.

But the transactions tab is just another way to see what budget changes have been made and how you've addressed these. Kind of a difference type view to show you the differences.

There's a couple - all right, we're going to look at the summary tab. Before I do that - no, let's go ahead. I'm going to jump into the summary tab.

Okay and we have the description up here, justification. Is there anything - and we scroll down, we can see in the application change summary here in the budget category it shows that in the contractual we have suspended this full amount of 2780, $2,700,000 roughly and we've redirected $2 million.

So we can see that there's a difference here. So that's indicative that we have not fully allocated because these are not balanced. Our negative value here is greater than our positive value.

So if you see that because the system doesn't currently give any under allocation errors or over allocation, there's some technical reasons for that and we're working with CDC on.

But until that is resolved right now if you see these line item or these dollar amounts not adding up across the line items, you need - you should jump back into your budget. And in this case you want to go to the modified budget screen. And you'll want to take a look up here and you'll want to - you'll want the unallocated funds to be zero. So in other words you won't want to over allocate and you won't want to under allocate.

I was talking to Elizabeth and I know the Project Officers will check this. And they can then send back - they can send this back for rework to get those addressed.

So it's probably easier if you're able to, to go ahead and zero those out at this point. Make sure that you fully allocated all the funding and have not over allocated that funding.

And so again when you come down and you see the changes you made to the budget when you're not seeing things line up here, the negative values and positive values not being zeroed out, jump back in to make sure your totals are correct and that you have allocated the funding.

Let's see. Then after that we can come in. We see there's a work plan change summary on the summary page. It looks like the activities, we added one activity. That was the B3/A Fix. And you saw that there were a couple other line items marked as needing more information where B3/A Fix needed to be added so that count would be - would go up as we completed this.

Performance measures, I made the one modification. That's where I went to change the target. And these were the objectives, the affected objectives where I made those changes where I went in and I changed the target. I went and I added a new - where I added a new activity. Those were C5B and D1.

So review notes, when we come down we can see in the review notes tab that I added one objective note. And I've added one performance measure note. These were opened against the objective of performance measures. And the affected objectives were C5B and D1. Again if I wanted to go back and see the status of this, you know, I had this printout. And I was like oh it looks like I've got a few more to go through. That was kind of a quick summary, dual comparison.

Okay, discrepancies again this is or we have budget discrepancies. Those are turned off mainly and again we're working with CDC to try to resolve those but so for now those are handled by. So you can look at these figures, making sure they add up and also reviewing the budget summary to make sure there's no fund - allocated funds or over allocated funds.

So for test, I have every one. And I came in unapproved an objective. And I come into the discrepancies. Now the budget discrepancies are not on the ones that run strictly against the budget or over/under allocations, however the work plan of discrepancies are turned on.

So I went in what I just did was I told you in the unapproved an objective and then approve it. You know to unapprove have to put it in an editable state so you can make changes.

But if you forgot to then go in and approve it afterwards when you come here you're going to say oh I have an objective that it's not approved or reviewed. So I come back in. The easiest way to find that is look to the left. You'll see the blue dot. Click that. And then unapprove it.

Once these are all green the discrepancies go. You don't see any discrepancies on the summary page.

Next is attachments, there's the required attachment. You have to add a cover page. And as you'll see down here the Submit button is not active. I'm going to go ahead and add a new attachment because I can't submit without it.

I need - I just go pick one (unintelligible) local (unintelligible). And the PDF I believe Elizabeth had mentioned that they're requesting these to be PDF so I'm just grabbing a PDF I have on my drive for demonstration purposes again.

What I want this to show up as. I can add a description as optional. I'm not going to do that. (Unintelligible) it's good enough. My name is pretty descriptive.

So I go ahead and I upload the file. All right, get a random error so I apologize for that, new way to the environment. And you can see that my cover page was uploaded. I can click to review the cover page off that PDF. I can delete it here.

So scroll down to the bottom. You'll see as I said you need that for the Submit button to be active. I can go ahead and submit this. That is the only requirement that the system validates against is that that attachment is there. However when you do submit this this goes to the Project Officer for review.

So the Project Officer will come and they'll take a look at the review notes. Have they all been addressed and have the work plan changes been made? They'll come in and take a look at the budget, say have they responded to everything that was marked for needs more information.

So although you can submit it if there are things, if you come back and if you were to look at this, go back to the budget tab. You see we have some not addressed items in here. The Project Officer is going to send that back for rework.

I believe down at the bottom there's some - down here there's some reports you can run. Again, the key personnel not related in that so you won't need that. I can go ahead and take a look. I'll run this report real quick. The initial ACR which is this document, document version of the changes we just made. I'll go ahead and close that.

So go ahead and open it. And you'll see that here is the - there's some header information. Again here's the description you entered for this where is your awardee name, response to 2015 Technical Review of Application that CDC has requested.

And then it's just it shows the summary. It shows the notes that were addressed. And you can look through. You'll see the work plan details that were changed. It shows budget summaries.

I know I'm going through pretty quickly. You can see the budget changes here show up. So kind of a documented overview of the changes so you can open that up and review that if you need to.

And I can also open up budget data, so open up that and so just to get a look at the budget data. If I get this, there's some extensions in Excel. It's okay. You can say yes.

Actually that's using - you'll see it goes through. I see the personnel. I see the personal name, the description and the amount for each so it's kind of a snapshot view of your budget. You have travel, supplies. That's by line item. I can come in here and I can get that further refined by source as well.

So and those are available to you. So at the bottom of the page, once we get here we can submit.

Now there are a couple other buttons here. The first we're going to look at is Save and Cancel.

I know Save is way down here at the bottom. But the only information you can change on this page is the description and the justification.

So I want to add that here and tab out. I'm up top. I need to scroll to the bottom. And click Save. So that Save button is there to capture these changes and there's two boxes.

Delete, I can click Delete and it's going to ask me am I sure I want to delete this change request. By this change request it's asking if you want to delete this entire ACR. Everything you've done in here, you want to get rid of and start new.

That option is there. I'm not sure you would ever use it but if there is a reason you need to do that it is - the functionality is there and that's where you would do it. I'm going to cancel that.

Cancel is, well I'm going to delete those. Then I click Cancel. And I just canceled out of that. I don't want to save those changes that I just made or cancel out of the view, sorry. The changes were saved. Cancel saves it but it cancels the view, my apologies.

I think that's it. I think we've been over everything. I went through - we went through the budget, the work plan. The review notes. How they're tied to the work plan, the transactions which show the budget changes you've made. And you can ignore the key personnel tab. Went through the summary, the things to look for on the summary tab, how to kind of review that and see what's there.

And when you're fine - the final step, they can go ahead and submit. Where it'll go to the Project Officer for them to review the changes you've made and either approve or send them back for further modifications.

At this point Elizabeth I don't know. Is there anything that you have to add?

Elizabeth Sullivan: Hi. It's Elizabeth. Why don't we do questions/answers first or question and answers first. And then we'll go ahead and I'll do some summary at the end.

Coordinator: Operator here. To ask a question first make sure your phone is unmuted. Press star 1 and record your name when prompted. To withdraw your question from our queue, press star 2. Once again to ask a question press star 1 and record your name; one moment to see if we have questions.

And it can take a few moments for questions to populate the queue. We do have a question. Please standby. I'll get their name.

And our first question comes from (Beth English). Your line is open.

(Beth English): Hi Elizabeth. I was just wondering if you have a template for what the cover page needs to include that you could send to us.

Elizabeth Sullivan: The cover page template is available. I can go ahead and send that out. CDC requires a cover page for any changes to your documents. If you look in the Notice of Award it does discuss a cover page. And a cover page must have two signatures on it, the signature of the PI and the signature of the financial person responsible in your state.

We have examples. I can get one to send out to you (Beth).

(Beth English): Thank you.

Coordinator: And I show no further questions. Once again to ask a question, press star 1 and record your name.

Elizabeth Sullivan: Well let me go ahead and discuss some of the details that have come up in the last couple weeks. There was an error in all of your Notice of Awards on the Technical Review Statement Response Requirement. So we sent out an All Awardee Message on January 8th. It identified a new staff person in PGO to be responsive to any of your needs for this cooperative agreement and that staff person is (Dwayne Cooper), Sr. That information went out.

We also established a new date for this response to Technical Review in your Notice of Award. It says the response is due on February 2nd. We've extended that deadline to February 27th. So please note that.

And hopefully that will help you with a little bit more time because we wanted to make sure that you had time and you had the information to make these responses within the eGrATIS Post-Award Module Application.

This training has been recorded and will be available on the eGrATIS Training web site in approximately a week. I will send a notice out via the All Awardee Message once it is available and has been uploaded.

And I'm always available as well as your Project Officer to answer any other comments that you have or questions that you have.

(Jeff) do we have any more questions?

Coordinator: No questions from the queue.

Elizabeth Sullivan: All right, so one other note. There is going to be a second training that will be Thursday afternoon. That's January 15. That's going to be at 3:00 pm Eastern Time.

The calling information has not yet been sent out. I'm hoping to get it out today or tomorrow. We're waiting for that.

It will go out via All Awardee Message. It's basically the same training as this so if you have people in your staff that you think would benefit from this you can remind them that that's happening on Thursday at 3:00 pm Eastern Time.

And that training will be recorded as well and both of them will be put on the eGrATIS Training web site.

Any other questions?

Coordinator: We do have a question in the queue from (Karen Fowler). Your line is open.

(Karen Fowler): Elizabeth hey, it's (Karen). Just a couple questions on when we were talking about zeroing out a name and we had to zero out the funding amounts, do we also zero out the percentages assigned to the objectives?

Elizabeth Sullivan: You do - it is not required to do that. For example if you had something in your application that was like a to be determined whether it was a contractor or a personnel staff, you could just zero out the budget amount and that will zero out any budget attached to that and any other - it will zero out all their attachments.

(Mike) do you have any other comments about that?

(Mike Gregg): No, that's correct. It would just basically behind the scenes, it would just take 2% of zero or 10% of zero so you...

((Crosstalk))

Elizabeth Sullivan: Right and...

(Karen Fowler): Okay. So we're not worried about our objectives showing 100% funded.

Elizabeth Sullivan: Well it would change the percentage in the objectives on the work plan side. So the funding...

(Karen Fowler): Okay.

Elizabeth Sullivan: ...would change because you would've taken that and made it to a zero. The percentage of zero is still zero.

(Karen Fowler): Okay. Okay. And one other question, will there be a User's guide?

Elizabeth Sullivan: There is a User's Guide that's being produced right now by the contractor. We are also putting sort of a Quick Tips page together. That is not as short as

I'd like it to be. We will get that out in the next 24 hours. Hopefully I can finish it.

(Karen Fowler): Great, thank you.

Coordinator: No further questions in the queue.

(Mike Gregg): And Elizabeth. Oh sorry. Elizabeth this is (Mike). I wanted to add one thing to that. You were sending out the Quick Tips in 24 hours. We're still working on making modifications to the User Manual to make it - streamline it a little bit and make it a little more procedural and we hope to have that out in the near future as well.

But I don't think it'll be in 24 hours.

Elizabeth Sullivan: No. Yours is much longer than mine.

(Mike Gregg): Yes, okay.

Elizabeth Sullivan: I believe so. So that's supposed to be out in the next ten days or so.

(Mike Gregg): Yes. Yes.

Elizabeth Sullivan: All right, any other questions before we end this call?

Coordinator: No questions in the queue.

Elizabeth Sullivan: All right, thank you all for participating. Please contact your Project Officer or you can always contact me if you have any questions. Thank you very much. Have a good day.

Coordinator: Leader you please stay on the line. That concludes today's conference. Thank you for your participation. All participants may now disconnect.

END