NWX-DISEASE CONTROL & PREVENTI

Moderator: Dale Babcock
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2:00 pm CT

Coordinator: Welcome and thank you for standing by. At this time, all participants are in a listen-only mode. During the question and answer session of today's call, you may press Star 1 to ask a question. Today's conference is being recorded and at this time I'll turn the call over to Elizabeth Sullivan.

You may begin.

Elizabeth Sullivan: Hi. Good afternoon and thank you for participating in the eGrATIS Post-Award Module Call. My name is Elizabeth Sullivan and I work here at the program operations branch for the immunization program at CDC. Today, our training is going to last, probably, about an hour and then we'll leave about a half an hour for calls - for questions.

This is our second call of this training. We will put this information on the eGrATIS Web site in about a week or so. And we will leave questions and answers to the end of this call.

I want to go ahead and introduce our speaker. Our speaker is Mike Gregg. He is with our eGrATIS contractor. And Mike, you can go ahead and start. Thank you.

Mike Gregg: All right. Thanks, Elizabeth. Thanks everyone for joining us today. As Elizabeth said, my name is Mike. I will be running through the process to go through creating an application change request in the PAM module - Post-Award Management.

And this is the first step that you'll take in responding to the project officer's technical review of the application you submitted sometime back end of September/middle of October-ish time frame. So with that said, I'm going to go ahead and get started.

I've logged into the system. I've logged into eGrATIS. Now, on the screen, I believe most everyone will see when they log in. Before I start, I'm going to point out that we've went through and we've went through and we've created some test data so you're going to see some things that may look a bit odd.

If you look at the top-right of the screen, you'll see we have random names up here -- JohnSmith 951 and CDCAwardee11. So this is just our test data; don't get too concerned with that. When you log into the system, you will see the actual data.

With that said, first thing we do is we go to the active award. So I'm going to click that link. We come into the page where we can access the modules. And you'll see that the - there are three places you can get to the post-award management system here at - under the active modules in the modules section.

There is a box for the post-award management and you can click on that header. And down at the bottom, there's also a link to the 2015 version. All three links on this page go to the same place so you don't have to worry about clicking one over the other.

I'll click that one since I'm already on it. Okay. Then once we get to this - the page I believe everyone should be seeing, where we'd want to start is we want to create an application change request. I'll go ahead and click that.

And this is - this screen that you see here under application changes - go into this tab up here - this is the application changes screen. This is where you're going to see all of the changes that have made to your application. If this says that funding rounds were released into the system, you'd see those here as well.

So it's kind of a running list of the application as it evolves throughout the year. Up here, you'll see that the first link is the application and review. So this is the version of the application at the end of the review. So it's basically the original application.

Up here, again, this is - with the awardee name in parentheses is just the test data. You should see your information there - your awardee name there. So the first thing you want to do - and let me jump back - as you'll see over here, this one - the first one here -- the application and review is status is completed.

So you cannot make any further changes to that. So you need to create a working copy so you come up to the drop-down box and you select add change request and you click the create button - create now. When this opens, you'll see that you have access to the application change request - or to your application details.

The first thing you need to do is you need to create this change request. And to do that, we have to give it a description on - and I believe Elizabeth has sent out guidance on this. But just to reinforce that, the first thing to put in the description is your name - the awardee name.

So I'm going to put that here in parentheses. For example, I've given a demo from North Carolina so if I was the North Carolina awardee, I'd put North Carolina in where it says awardee name. And then respond to 2015 tech call.

I do - and what page. So again, that's - as you see on the screen, it's going to be your awardee name and then followed by response to 2015 technical review of application. In talking to Elizabeth, this comes down to when the system prints this information out for them, it's nice that they can look on this page and see the awardee name right there in the description without having to jump around.

As you'll see, this description is a required field. There is a red asterisk for it as well as the justifications. So you do need to add a justification.

You can copy the description or you can put in more meaningful information to you if you so desire. I'm just going to put I'm responding to 2015. Okay.

Now I'm going to create this. Go ahead and click create. You'll see you'll get some messages it's creating. When that goes away, you'll see up top there is a green box up here.

It says the ACR has been saved. If there were any issues in saving that, you will get a red box up there to indicate that there was an error. I do not expect anyone to see that error but the moment I say you won't, someone will.

So I'm going to let you know if you do see that, try it again. And if you still get that red box, please reach out to the project officer to let me know you're having an issue and we'll look into that for you. Again, I do not expect anyone to encounter that.

So to begin with, we're on the Summary tab. I'm going to go over that at the end because it'll be more meaningful; it'll show some changes that we make along the way. The other tabs that you'll see at the top are the Budget tab.

This is where you go in and you'll see the exceptions - the project officer has ended against the budget. And you'll also get the standard budget view that most of you are used to from the application process you just went through. So you'll see a budget summary and then from there, you can jump into the various funding source categories and view the line items for each of those.

You have the work plan tab. This is where the objectives are and the activities and performance measures that you've applied - something, again, should be very familiar to everyone. Then we have the Review Notes tab.

This is where the project officer has added review notes against the work plan. Next we have the transactions. The Transactions tab will keep a list of the changes made to the budget.

Again, I want to emphasize that although it's way over here, the Transactions tab is based on monetary changes or changes to line items. So they do tie directly to the budget. The work plan changes will not show up in Transactions. And the final tab is Key Personnel.

I'm going to - so I'm going to start here with the Key Personnel, mainly, so you can see the screen. This is where you would add in any key personnel that you wanted to to your application. However, I believe Elizabeth has given me the guidance that this is something that is not used currently.

There's no plans to use that in 2015. It's something that will be reviewed going forward but at this point, you do not need to use that Key Personnel tab. With that said, I'm going to go ahead and I'm going to jump into the process that I'm recommending that you follow.

And the first part is probably the most straightforward and easy to handle, so we'll begin with the work plan changes. So the best place to address the work plan will be to jump to the review notes because, again, these notes all highlight the changes of the - or the notes that the project officer has cited against the work plan.

It's all one view. You can take a look at that and get all the information from there. As you can see, in - on the review notes page, there is - there's an ID. You can ignore that; that's a system-generated ID to keep things unique in the system.

You'll see that there's the note - the type of note it is. It's a little confusing because then, over to the right, you have note and recommendation. The note recommendation is the actual text. Over here on the left - the note to the left - this is where you will see recommendations and weaknesses.

And the example I'm using there - the test data that I pulled didn't have any weaknesses, but the weaknesses will show just like recommendations. They will be in bold - a weakness. And these recommendations and weaknesses can be linked to objectives, activities, performance measures, or they could be a project-level note.

Obviously, for the project-level notes, they are not tied directly to any objective, activity or performance measure directly. They're an overall note to make those updates on this screen. And I'll jump into that and I'll remind you as I do that here how you would do that.

Again, on this, we have recommendations. They're linked to objectives and performance measures. We don't have activities, but should there have been a recommendation or a weakness to an activity, it would state that over here where this one says you can see the first one is a performance measure, second one is an objective.

Similarly, a project/an activity show up. So - so we're looking at this screen and we see we have recommendations. We're going to have to jump back - back and forth from here to the work plan to make the updates that are being requested.

I'm going to - there's a couple ways you can do that. You can do it one-for-one; you can start with this recommendation, jump into the work plan, make the necessary updates and then come back here, go to the next one. Another option is what I often use in testing is do an all print screen to get a screen capture.

Then you can put it in - in here, in a Word document, load it up so you can read it. And you can use that for a reference so you don't have to keep jumping back and forth - all that. I do want to mention - and I did mention this on the first training that don't open another tab.

Don't open another window with this information in it. Behind the scenes, eGrATIS is saving a lot of stuff in the browser session so you can start getting conflicts and errors can be introduced. So please do stick to one browser/one tab while you're making your updates.

Again, if you want a copy of this, you could print the page - that's another option - or you could do a screen capture as I just did. Okay, with that said, I'm going to go ahead and I'm going to start the process with the first recommendation.

I look here and I see that I need a target goal. There's a note here -- link to a performance measure -- that I need to - the target goal of a 5% increase would result in coverage greater than 100%. So I read the note I have to make a change.

So I want to add my response here. Again, this is just for testing purposes. You obviously would be adding more information here that you would expect your project officers to see such as the change you're making or have made here.

Oh, sorry. So I'm going to say I made the suggested changes. I can save that note. Let's say - I look at that note and I know it's not - I want to add more. So I can click that edit response link.

Let me - right here. I click that edit response link which opened up the window. Keep forgetting you might have a delay so try to slow down a little bit.

So I made the changes reflected in work plan and I wanted to update that it was against C5B-SM2. Now, where did I get that from? Over here in the recommendation, it shows me that it's linked to the performance measure and it gives me the performance measure - C5B-SM2.

So, to make that change, I said I made that change. I'm going to jump into the work plan and I'm going to C5B-SM2. So the first thing I do is I jump down and there it is; I see the note - the recommendation here and the note that was there and I want to make that change.

So how do I do that? It's in read-only; I can't make that change. So to get it in a state that you can make the edits, you have to come up and you'll see up here it says the objective in an approved state.

When it's in an approved state, you can't make changes; it's read-only. This is indicated by the green circle here and the green circle over here; those green icons. So when I click unapproved, it says it's in a ready state, meaning, I can go ahead and approve it if I wanted to.

But when it's in that state, you can make edits. And you'll see the blue - the green circle turned to blue over here and over here. So I know that I can edit it.

And I come down and I see okay, I have some options. I could drop this performance measure if I decided I don't really need this and I'm going to go ahead and drop this.

So let's say I did that. I was like okay, I don't need this, I drop it - in which case, I go back to the review notes and a put an update into there and say I dropped this performance measure. It really didn't fit our program goals after reviewing further.

But we’re not going to do that for this demo. I’m going to go ahead and I’m going to edit that and go as requested. So I’m just going to put a number in here.

Again, I’m just using testing - for testing purposes, I’m just throwing a number in. I’m going to go ahead and save that (unintelligible). You’ll see that my new target of 1% is applied here; the change is reflected.

And it’s also indicated over here that hey, you’ve made a modification; it is modified. Then as the final step, I will come up and approve it if I was happy with that change. So I come down, I look, I review - oh, yes, there’s my - oh, I made a mistake.

So I go up here and I unapproved it because I have - I want to make a change to it. I can’t remember from looking at it and I’d say oh, I don’t know what it was. Let me go back to original.

So it’s going to ask me do I want to, and I say yes, I’m going to revert that change back to the original, give it a second to update. And you’ll see that the revert went away. I can now drop it or edit it again.

So I’m going to go in and I want to change it this time. I’m going to put 10% in and that’ll make me a happier - wait for it to come up - see it’s 10% here. And then over here, we’re back to a modified state.

And my final step, I’m happy with it, approve it, and I can move on. Now, in the first case, I put my note in first. I could come in and do my notes second. So let’s - I’ll do that on the - it doesn’t really matter because what I’m saying is what are you - add your response here.

Just make sure that you put your response or your change there to respond to this note from the project officer. So the next one in line - and I'll - this one, I'm going to call attention to because I think everyone who's put in an implementation for HL7 using D1 suggested activity 2.

So if I look here, that falls under D1. So I want to go into D1 to make this change. So I wait for it to load, scroll down to D1, open D1, and I'd see add a performance measure for D1 SA2 implementation date for HL7 capacity.

This was - eGrATIS doesn't support the addition of a date or it did not for this year. This is something we have to address moving forward from a program - programming standpoint, behind the scenes on the application. But for this year, it - we just didn't have time to get that implemented.

However, we have a suggested activity where states put a date in. And that's D1 SA2. Here it is - develop and provide a local implementation guide and a date for it.

So they want a date added. So what - how do I handle that? Because required activities and measures and suggested activities and measures can't be changed. And I'll show you what I mean by that.

So I'm going to put it in an editing state. When I scroll down, I'm not given an option to edit; I can only drop it. So the way around that, if you should see this note, is okay, I have to respond.

I'm going to add a performance measure and it has to be something that I can control. So I'm - it has to be awardee-defined performance measure because, again, if I was to pick another suggested one, I can't change that. So awardee performance measure where I can come in and I can say okay, this is going to be compliance and I'm going to go ahead and I'm going to put in - and I'm going to put in a target date.

And again, this is something if you weren't sure you reach out to your project officer to get the date or verify the date. For here, I'm going to put in the target date of 12/31/2015 - obviously, the end of the year - and I'm going to add that. So when I scroll down, you'll see, in the performance measure, I have a new - indicated with the new - awardee-defined performance measure.

And it has the target date as requested up here by the project officer. So I'd say okay, I've put my data in, I'm happy with that. But jump back to the review notes.

In this case, I'm going to add the review note after the fact and put - I have the information and save it. Again, the project officer will review your notes here and the changes you've made to make sure they're in line with what they were looking for. Once you submit - get this finalized - this ACR.

So that's - that's basically the process to run through and respond to the notes from the review notes and to make the changes in the work plan and tie them together. It's pretty straightforward for me. In looking at it, the biggest issue is having to jump back from review notes to work plan.

And again, if you wanted to just have that screenshot that shows as many notes as you can fit on the screenshot, you can - you can probably work from - go to the work plan, work from the screenshot and then come back and make your notes of dates that reflect the changes you made. Those are some options there for you. Again, you could print it out as well.

And I believe that is all for that that we have to go over for review notes and work plan. Again, it's pretty straightforward. The next one we'll jump into is the budget - the Budget tab.

This one has a little more to it. And the two, again, that are tied together are the Budget tab and the Transactions tab. And before I go to the Budget tab, I'll open up the Transactions tab to show you we haven't made any budget changes yet.

So obviously there's no transactions here that we're going to see. But however, as we make them, they will show up here and once I make some changes, we'll come and review that at the end. So as I've done with the review notes and the work plan updates, jump into the budget.

And the first screen that you come to when you start on the Budgets tab is the respond to exceptions. That's up here as you'll see. It's not underlined, it's not linked and that's because that's the page we're one.

And these are the items that the project officer marked as needing more information. And they are by a budget category so you can go through, see - go through the list, see the changes being requested or the information being requested, I should say. And this is where you would start.

But before I do, I want to jump in to show you the modify budget link. Again, when we go to this, this is the - what - commonly referred to as the budget summary page. And this is the one you probably are used to seeing from your application as you developed it over time and you could see the changes reflected here.

One thing I want to point out to you is these question marks. When you hover over them, these question marks indicate that for this funding source - in this case, PAM FLU and this category, personnel - that there are two allocations that were marked as needing more information. As you go through, you could see there was one here, personnel had a few, six there.

And these are driven, again, by the ones that you see from the respond to exception screen in the first one we came into. The - and one other thing I want to show you before we get started is that let’s say I jumped in and I didn’t respond to exceptions. Instead, I said I’m just going to jump in and take a look at the budget.

Again, I don’t recommend that and I’ll show you why in a moment. So I come down here and I find the icon down here needs more information. It’s the blue circle with the question mark in it.

The one above it - the - just the green dollar sign - circle with the dollar in it is just indicates it’s an original line item. Check - it’s approved; there’s no changes. However, the one with the blue circle is marked as needs more information.

When I open that up, and we’ll see down here, I have no option to make any modifications here. I can just view the next allocation. To show you what I mean, if I was to go into one of the line items that wasn’t marked as needs more information, I can click modify and I can change that line item.

I cannot do that for something that’s been marked as needs more information. I have to address it from that respond to exceptions screen. So why I mention that is when I do some testing to the system sometimes and I jump in here, it’ll take me a second as I look at it to realize why can’t I make any changes?

So again, if you're in this screen, you're in the line item view here and you can't make a change - realize what do I do - look up for this blue circle with a question mark and realize oh, I know what that is. I have to jump back to respond to exceptions.

So that's just a - kind of a heads-up should you run - encounter that as you're running through. Okay, so I'm going to go ahead and start here with - we'll just grab the first one. So it looks like the status, I have not addressed it. I have a - an exception here that is not addressed and it says per the budget justification, the position should also align with B3 AFIX activities.

It's in personnel. It has amount and the line item description. Again, we've cleared out some of this information in the system for demo purposes. So I come down and it's not addressed. The first thing I have to do is get it into a state where I can address it.

I, in other words, edit it and I do that here. I click the modify and respond button. So now, it's in a state where I can make the changes.

What it's saying I need to do is I need to add B3 AFIX activities to it. I can't do that here on this view. In this view, I can change, obviously, the title salary, the percent FTE - I believe you can see the rest of the month - percent frames - any other frames.

And, again, because we shortened it, it doesn't look right here for - but I can change the budget justification here. It is an editing field and I can change the user-defined ID. What I cannot do - and this is for the - in particular, personnel and contracts - and when we get to contracts, I'll mention this again for the ones that were marked as TBD.

I can't change the name. This is a system identifier. If I needed to suspend this line item or get rid of it or, let's say, this Jane Doe was replaced by John Smith -- Jane Doe left the position, we're not going to use her on a grant this year - I would zero out her funding here and then I would go create a new line item for John Smith.

I'll go over that process as well, but I just want to reinforce here that you cannot change that. That is a unique - that's a unique system identifier. Once you put it in - put in your application, that became locked.

So - so since I need to make changes that aren't reflected on this details page - the line item details - I have to edit the financial details. There's a link down at the bottom that I can click and when I do, it opens up and it gives me the funding sources that this line item is associated with.

So I'm going to - just going to jump into 317 OPS - wait a moment to load - and I'm going to show you, at the top, show you we are in 317 OPS personnel. So I jump down and here's the line item again. You can see that there's a flag here that says it's not reviewed, which means it's not a green check.

So I have an issue I have to address. There's an icon here that says it is modified. That's because I marked it as modified or respond. So I'm going to go ahead and make that modification.

So from here, I'm going to go to the work plan and as the project officer pointed out, I need to add this. So I'll go ahead - I add it, put a percentage in - you'll know the correct percentage, just demo purposes here. And you'll see down here now I'm greater than 100%.

Got a (unintelligible) to - if I come and hover over this flag up here, you'll see it says work plan split does not equal 100%. So it kind of - it gets updated with all the errors for a particular line item. I want to correct that and enter that to 18%, tab out, load - got 100% down here.

There was a red flag that - oh, next to the work plan - forgot to show you that - that indicated there was an issue. And the flag up here just says it's in the not-reviewed state. So I've added it; I can mark this as modify.

And when I go back, I'm going to jump back to - you just - what - I'm going to jump back to the budget exception. And the easiest way is just to click the Budget tab and - and scroll down and you'll see right here, this line - oh, this line - that it's marked as responded.

I've moved it from not addressed. There was a pending response - sorry, I forgot to show you that - there's a pending response - I'll show you that as we go forward. That's where you have not marked it as modified.

You - you've went from a not addressed state. You said I want to modify this, then it goes into pending response and it stays in that state until you mark it as modified. So we did that.

So I've addressed it; I've added the B3 AFIX activity to the work plan and it's in a responded state so I'm - I've met the requests. Just FYI, this is an issue in our staging UAT environment with this icon. You won't see this in the production environment so don't get caught up on that.

Let's - so we do that. We go through - one of the other things we could do is we could come in and we could say no, I don't want to do that. For whatever reason you want to revert back - you don't want those modifications - you say okay, I didn't want to do that. Give it a second to come back.

And you'll see that everything is now back to not addressed and the first line item that I had addressed is back to the original state. And if I wanted to make those changes, I click the modify and respond. You'll see up here now - I meant to show you this - the pending response.

When you see pending response, it means I've just marked it as - I've said I want to modify it so it's in a state to be modified. And then once I make my changes, I click it as - I mark it as modified and it goes to a responded. Again, just so this shows up - I'm going to go do it quickly (unintelligible) the system will allow me - down to plan then I have the error.

And about 100% so I'll - since I'll do - I'll do it a different way this time. Again, you could mark it modified here but I've made the update; it is saved for this line item. So I could jump back to the exceptions tab.

You'll see it's pending response right here. I could - in this case, I have to make a change - and the mark responded comes up. I don't recommend going through that way of doing it. I know - because then I have - I do have to make a change here.

It's best to go to the line item. I just wanted to show you it is possible to do that. It's best to go back to your line item and do it from here. I didn't - and no further changes were required.

And I see responded so - and you can go through the same process for the next three. There's other - as we look through, there's some other ones here for personnel. But I'm going to jump down to contractual.

I'm going to jump down to a rather large one - the first one here. And this is for a contract and it's a 2.7 million contract. And you're going to see - and according to the project officer's note - because this contract is not for one entity, the program needs to break out the funds - give it to each entity.

So we're going to have to list separate contracts for this and reallocate the funds. Now, the process here, as I mentioned earlier, is that I got to modify and responded - modify or respond. So I mark it to put it into that edit state.

And you see - I can't change the contractor so I don't have the option to just use this - change its name/change some of the funding and run with what's here. I have to zero out this line item - zero out the - suspend the line item. So, in order to do that, I put it in the amount of zero.

So tab out, and I have - I have to go add some new contracts to make up for that. So I want to point out this is the first step in doing this. I've just zeroed out the money that was going to be given to this contract, which is one line item.

And if we look at the edit financial details, this line item is split over four funding sources. And what - when I jump into this funding source - so I'm going to go and I'm going to - I zeroed that out. Now, the next step is to jump into the - into that funding source.

And you're going to see that the total for this line item is zero. The amount I was requesting for this - I requested a total of 2. - originally, 2.78 million for this contract, but because I zeroed it out, that full amount is now available. And right over here, I put this funding in particular 317 OPS; I've requested about 2 million of that 2.7.

So I need to zero that out. You'll see I'm up here; I'm under allocated. Oh, sorry - how is this running - under allocated. I need to clear this up and how I clear this up, I have to zero out the requested amount for the funding.

So I'm going to go ahead and zero this out and you're going to see that 2.7 is going to drop to 760,000. So I know there were other funding sources so I could keep jumping back and forth and in - back into the exceptions page and go into each funding source or the easier way is when you hover over the line item or anywhere on the line for the line item, you're going to get this quick edit funding breakout.

It looks like a little page that pops up. If you click that, it's going to pop up the funding sources and show all the funding sources that this line item is associated with and the dollar amount. The first one is the one-on-one.

There's no link; I can't go to that. So I could just click the second one. I jump in, I zero that out. Tab out and see the unallocated drop-down here. So - and we just go through 5 - looks like we have 515.

We're going to get rid of close to 4. And final one. So, clear that out. All right, I'm going to mark that as modified. I'm going to jump back to the respond to exceptions tab. And you're going to see over here, I'm - although I marked that one as modified, didn't do that for each.

I didn't do that for each one. However, because I went ahead - I marked one of them modified and made my changes - the button shows up so I can mark it as responded. And you'll see that that line item - responded, zeroed out - so zeroed out all of the funds for that line item.

So what did - what was the impact of doing that. One of the things that we could do is we could go back to the modify budget and you'll see, up top, since I freed up that 2 million dollars - 2.7 million - you'll see that I have some unallocated funds.

So this was 117,397, so it's going to come to the 2.78 that I freed up for that contract. Now, the idea here is I'm going to go and add new contracts - individual contracts, as was requested in the exception - that are going to zero this back out. So these unallocated funds will be allocated against all of those new line items.

Just to show you have that process. I'm pretty sure everyone's familiar with that. Did the wrong one. Go ahead and I'll just (unintelligible), sorry. So - so I'm going to go ahead and I just go ahead and I say up top - again, I'm not going to do this.

I'm just showing you how to write a - add a new line item because I'm basically redoing what I just undid, which the contracting officer requested you needed to fix that. So I'm adding a new contract. I'm going to go to my work plan.

What is a contract going to - how's it going to be? Once again, this may not make sense. But I'm just - demo purposes, I need to make sure I allocated 100% to the work plan.

I look at the flag. It says the line item does not balance - doesn't - okay, I've went in, I've created - I've added the details, I've added the amount that's associated with the work plan. What's wrong?

Over here, I haven't requested funding. Just real - again, real quick, this is the total that I've requested for this line item. This is the unallocated.

So to make this go away, I would do 2020585, tab. I got a green check mark and I'm all set. I've created a new line item and you will go through that, again, breaking out that funding across multiple contracts as was requested to resolve this issue.

I think that's a - the most complicated example that you should encounter where you just have to go in and suspend funds in that format. I will show you again another - so let's say someone comes in and they go to the project officer up here. I want to modify - so this.

And I come in - I've zeroed this out. I'm going to zero that out, run and (unintelligible) to lunch or something, got in a hurry and they haven't respond - market has responded. So responded up here.

No I don't know - I can come in and I can edit financial details. I will be able to go to the - the other way is to look at modify budget. I come in and I look at modify budget and you're going to see that up here, the unallocated funds have changed.

So up here, if these - if the unallocated funds aren't zero, there's something that's not fully allocated and that's obvious here. So it's a quick way to come in and say okay, what didn't we do? If you see it and you don't have zeros up there, you can come back to the respond to exceptions and you can look through here to find it - or in a moment, I'll jump into Transactions to show you another way.

Hopefully, that's pretty straightforward. And it - and I think I've shown you the simplest way to do it. There are - as I said, you can jump back and forth. It's whatever works best for you. There's many ways - several ways - I won't say many -several ways you can address this.

But let's say I went through, I made - I've responded. I want to see what changes were made, I come over to the Transactions tab and I can see - let's start at the first one, open that up. You can see the status is responding.

Here was what the project officer requested. Here was what was in the budget justification again and it's our test data. And then, down here, it shows you what changes were made. It looks like I've added the B3 AFIX work plan linkage, which is requested up above.

And I had to drop some percentage down to get that in so that the - it added to 100%. Look at one a little more interesting down here - the contractual one - the one that we suspended and zeroed out the large contract. Again, you'll see it's in a responded state.

There's exception text and what the project officer had requested - the budget justification. And below it, you'll see the changes that we made to the fundings. So we decreased all of the funding, which is shown here in the box.

So we can take a look and say okay, it looks like we've met, at least from this view, as you can see, we've met part of it. But if we decrease the funding, we should see up here little redirection - a little triangle with the plus in it because we've taken that funding that we suspended and we've reallocated that to these other contractual items.

So you'll see that when I added it, it shows my budget justification - the work plan linkage that I've added, and of course, the amount, obviously, is up here. So I do want to show you one other one real quick that'll show up because on the Transactions tab, you can see this as well. And we'll modify one where we need to update a budget justification.

So tab out, mark that as responded, sorry if it's flashing real quick. I just want to get to the end of that change to show you what it looks like here from our - this one. You're looking - depending, again, on your monitor color here, it's going to be blue or green - a light blue or green.

That indicates that I've added something here. I've added a budget justification here. So any changes I made, I can look and see what - how I addressed it. It'll show up in green.

If I deleted something, you'll get some strikethrough as well. So again, this is just the way to go at the end and review and say okay, did I make all of those - all of the updates or did I address each - did I address the exception text appropriately.

And once you go through that for the budget, get done with the - and the process there - sorry, I skipped this - the process would be to go to the Budget tab, respond to all of the exceptions first, and then jump in and make line item updates - adding things as requested.

The reason is as you go through and you make your budget changes and if you have to zero out line items, if you do that, you know, you could be at the top and zero out the first line item, go through your budget, reallocate those funds and then get down to maybe the sixth line item that was marked with and exception that you have to go ahead and zero that out - suspend that line item that you just went through and allocated funds to.

You could just be making changes that you're undoing later. So I strongly suggest you start with the budget exceptions, work through those to respond to what's needed and then go make your changes to each line item to get your budget to balance.

So let's say we went through, we've completed the review notes and work plan, we've updated the budget. You can jump into the Summary page. And what you'll see in this summary is you have the description up here - again, this would be your name -- the awardee name -- as a response to 2015 technical review application.

The justification - if you look below, here, you're going to see the budget changes. And what you're going to see is that on the modified line items, under contractual, I have suspended 2.7 million and I've redirected 2 million. What that - is showing me on this page is that I have unallocated funds because I have freed up more than I have allocated and I need to go and address that.

I want to really emphasize this point. The - there's a - there's some things we're working on with CDC on the budget side of the house in EGrATIS - the actual EGrATIS code. And until we get that resolved, right now, to make sure that you have - we want to make sure that the budget is fully allocated and is not over-allocated.

As you make changes here, if you started with a balanced budget, you're going to notice these should be the same. So suspended, redirected or added, these funds should zero out across the line. If now, jump back into your budget and take a look at it.

And just to reinforce this, before I'm finished, I'll go in and show you the other way to take a look at that. But please pay attention to make sure these figures here across the line are zeros. Down here, in the work plan change summary, we can see that in the performance measure, we added one.

That was the add to compliance date. We modified one - that was changing the target. And down here, it shows the ones that - the objectives that were affected by those changes.

Below that, the review notes. And it - again, the same ones up here have been addressed down here and it shows - it says we've added an objective note - a performance measure note. So again, these should line up in these two boxes.

And if you go through the process that we started with, that shouldn't be a big issue. Again, we don't have budget discrepancies on - there is an issue for that. There is a reason for that that we're working to resolve.

So this section is not going to show anything at this point. And then, down at the bottom, we have - there is a required attachment - a cover page that we have to attach. Once I do this, this is - will enable the submit button.

I would like to point out that the only requirement at this point is that you add a cover page. So you could add a cover page and submit this, however, if you have not addressed the review notes or budget exceptions, the project officer, if you submit it, will send it back to you for you to complete the other task. So just please be aware that the submit button is driven by the cover page.

And make sure that you have addressed everything else. Don't get the sense that because the submit button's there, you're in a state you could submit it - I guess is what I'm trying to say. I'm going to show you some - a work plan exception now that can show up before I attach the cover page.

Wait for it to load, jump in. So I mentioned earlier that I've look - I had to unapprove to put it in a - put the work plan in a state that I could make changes - I could edit it. If I come back to the summary page - if I scroll down, I'm going to see - and I apologize that this is not - I don't like the way this is showing.

This is discrepancies. There is a budget discrepancy in impact up here. However, it also shows work plan discrepancies below it and you'll see that there is a one objective that's not approved or reviewed. So there is an indication that if you forgot to do that here, if you see those discrepancies, you can come in and approve this.

Again, it will be work plan discrepancies. You will not see the budget discrepancy. Now, to reinforce the other point that I was making here, for the application change summary, and we look at the budget, we see that these in - figures here aren't balanced.

And when you see that, you should jump in here, go to the modify budget screen - I went over this earlier - and the unallocated funds (unintelligible), you'll see that we do have unallocated amounts. That's why it's not balanced out on the summary page.

So please be aware. If these aren't balanced - if you have over-allocations or under-allocations, the project officer will send it back so that you can make those corrections. So I just want to emphasize try to take a look at that, check your budget summary, check the summary on the first page, make sure everything sears out.

So let's say I went through, I verify my budget is zeroed out, I've responded to all exceptions in the budget, completed the work plan update, I think I'm ready to go. I've reviewed it so I want to submit it.

Again, the submit button is not there so I'm - I need to add that. So you - it's pretty straightforward. Just navigate on your computer to where your cover letter is - your cover page. Put your - it's required to put your title page in or put your title in - the display name - what you want it to see on the screen.

Select the type - obviously, we could put - we have the option to add optional attachments. But in this case, we have a required - let's get that out of the way. We want to put that in.

And this is - the description is optional. Again, there's no red asterisks so I don't have to put it in but let's just say I want to go ahead and add that description anyway and I want to upload the file. And now I get this error.

This is a random error that I've been receiving. I'm hoping that you don't see this on production. If you do, I'm going to show you how to get out of it.

Go back, scroll down, try again, it goes away. I apologize. I'm not sure why I'm seeing that and I'm not sure why it's adding it sometimes and failing other times. But if you do - if you do get that and you try it a couple times and it doesn't add it, please let your project officer know and we'll take a look at it and see if we can figure that out.

In the meantime, I'll be looking at it as well to see - see if we can try to avoid that. Again, the cover page is there. I can click on that and open it - make sure I have the right document in there and say okay, I have my cover page, good; looks good.

If I - if it was the wrong one, I have the delete link over here. I can - click the delete. I point out there's no warning so once you click delete, it is gone and so you have to go the process of - this time I'm not going to worry about the description. I'm going to upload the file - worked.

Cover page is here and you'll see the submit button is now enabled. I can go ahead and submit this to the project officer for review. There's a couple of documents down here you could see the - reports - sorry - that you can run.

I can run a budget data if I want to take a look at the budget data that I have. It's going to ask so I'm going to open that like I'm - its high-level view of the budget information. See, it's going to ask me about different extensions for Excel - yes, it's fine - just the difference in Excel versions.

And as you can see, (unintelligible) you can run through and take a look at your budget information. And we can open up the initial ACR -- application change request. This is a progress window; you can close that. It doesn't need to be open for this to be generated.

So it takes a while to pull that information together from the database and populate this report. But as you can see up here, here's your description that you entered for your ACR. And if we scroll through, we can see the review notes, you can see the - your responses to it.

So again, at the end, it's a way you can go through and just look at the changes that have been made for the ACR that you've just created. You can see as you go through the budget categories, you can see decrease in values - I'm sorry, no, down here, my apologies.

They see before change/after change/difference. Here you can see the differences, so that's where you see the changes you've made. So again, if you wanted to see is everything balanced out, this would be a good thing to check.

I have 397 - I've freed up 397. That should be a zero. So once I've done that, again, I'm done. I go ahead and submit to the project officer and they'll review the information you've added.

I think I've gone - I think that I've gone over everything - some of it in, maybe, some excruciating detail. But hopefully if you come across some of these things, it's a little easier to address. So at this point, Elizabeth, if you want to, we can go ahead and open it up to questions.

Elizabeth Sullivan: So, hi. This is Elizabeth. So (Shirley's) going to open us up for questions in just a minute. And thank you, Mike. We appreciate all your efforts in doing that.

I did want to remind people while I have you on the call that we did send out a message on January 8 from PGO that makes some changes to your response requirement. So I want to make sure everyone had an opportunity to see that in their all awardee message.

The first change was that, originally, the response date was due Jan - February 2. That has been extended to February 27. So it gives you a couple more weeks to make sure that you can get it through all the processes that you need to at your state or awardee office.

It also talked about a change in our PGO contact. Our new staff person at PGO is (Dwain Cooper) and his information and e-mail was contained in that message that went out. And just as a reminder, the ACR initial PDF format and the cover letter need to go directly to PGO as an e-mail.

When you submit it through EGrATIS, that submits it to the program, but there is a CDC requirement that it gets submitted to PGO and that should be via e-mail. So hopefully everyone's had an opportunity to see that. If you have any questions, by all means, please contact your POB project officer and we'll try and work with you to get any of those details worked out.

So we are ready for questions and answers. (Shirley), if you're ready, you want to go ahead and give that information please.

Coordinator: Certainly. Thank you. We will now begin the question and answer session. If you would like to ask a question, please press Star 1 and record your name clearly. Again, press Star 1 to ask a question.

And one moment please for our first question. Again, press Star 1 to ask a question. And we do have a question coming in - one moment please - and that comes from (Catherine Herlson). You may ask your question.

(Catherine Herlson): Hi. Thank you very much for the demonstration. I'm sure it's going to be a little bit more complicated than this showed, but hey, we're up for it. My question is this: will there be a user guide that we can access?

Elizabeth Sullivan: So, this is Elizabeth. The contractor is in the process of producing a user guide. We should have it available. I have developed a quick tips guide which is a little bit shorter than their user guide.

It's going through review here. So I'm hoping to give that out - I hope to get it out this week. I'm not sure if it'll be out Friday or Monday so I - we'll get that out to you, yes.

(Catherine Herlson): Okay - Elizabeth, also when is the module going to be open for us to begin this?

Elizabeth Sullivan: The module is open now. So it opened last Friday on the 9th - or - either late-night on the 8th or early on the 9th. So it is available in production on your SAMS EGrATIS page.

(Catherine Herlson): Okay, thank you.

Elizabeth Sullivan: Thank you.

Coordinator: Thank you. At this time, I'm showing no further questions. Again, if you'd like to ask a question, just press Star 1 at this time. And one moment please.

And at this time, I'm showing no further questions. Actually, we do have a question coming in. One moment please.

And that comes from (Leanne Bailey). Go ahead with your question.

(Leanne Bailey): Yes, I just logged into eGrATIS and tried to go into the 2015 Post-award Management tab and it will not let me in. It says redirect: the subsystem failed. So who do we - how do we need to contact if the system does not seem to be functioning?

Elizabeth Sullivan: Can - this is Elizabeth - can you go ahead and send - get a screenshot of that and you can send it to our eGrATIS - what's my Web site - what's my information? We actually included this on the FAQs before but it's the egratissupport@cdc Web site and I will contact you, (Cat) - is this (Catherine Herlson)?

Is that who it was?

(Leanne Bailey): No, (Leanne Bailey).

Elizabeth Sullivan: Oh, (Leanne). What state are you, (Leanne)?

(Leanne Bailey): South Carolina.

Elizabeth Sullivan: South Carolina. So I'll go ahead - we've been using it and I haven't heard - this is the first I've heard. We may be having a SAMS issue here at CDC. Sometimes we have that.

So I'll take a look at that as soon as I leave this room and I will contact you as well.

(Leanne Bailey): Okay, so who do - you do want me to send a screenshot to you (unintelligible)?

Elizabeth Sullivan: egratissupport@cdc.gov.

(Leanne Bailey): Okay, egratissupport.

Elizabeth Sullivan: Yes, s-u-p-p-o-r-t.

(Leanna Bailey): @...

Elizabeth Sullivan: @egratis - or, at cdc.gov.

(Leanne Bailey): cdc.gov - okay, I'll do that.

Elizabeth Sullivan: Thank you.

(Leanne Bailey): Thank you.

Coordinator: Thanks, and we do have a question from (Steve Weems). Go ahead with your question.

(Steve Weems): Yes, thanks. Elizabeth, just wanted to confirm about the progress on the 2014 progress report. The - actually, our response. That came out in Round 1.

Do - does that come with the cover letter and all that to PGO in February or is that due at the end of the month?

Elizabeth Sullivan: So the response to the progress report - there is no requirement to respond to the progress report. The progress report is hope - is intended for you to take a look at as you're moving forward to do your end-of-year report which will be due in a few weeks - in a few months.

So we'll get more information on that but there is no requirement response to the progress report. There just is a required response to the technical review for the budget and the technical review for the work plan.

(Steve Weems): Oh, okay. Thank you, because in Round 1, it said that there was a response that was required to a certain e-mail address.

Elizabeth Sullivan: Yes. Yes, in the NOA - the information in the NOA that went out on page 4, I think, talks about submitting a response to the technical review. And the NOA was sent out only with the mid-year report.

But since then, your project officers should have sent you out the technical review of both the work plan and the budget review. We are really expecting technical - the response for those.

(Steve Weems): Okay, thanks, will do.

Elizabeth Sullivan: And that reflects also in that e-mail that went out on January 8 from PGO that talks about the change in date and the change in review.

(Steve Weems): Gotcha, thank you.

Elizabeth Sullivan: Thanks, (Steve).

Coordinator: Thank you. And at this time, I'm showing no further questions.

Elizabeth Sullivan: All right. Well thank you all. We'll go ahead and end this call. This call and training will be up and available on our eGrATIS Web site in a month or so - or in a week or so. We'll wait for that to come up.

We'll send out an all-grantee message. If you do have any questions immediately, you can always contact your project officer/you can contact me. Thank you very much. Have a good day.

Mike Gregg: Thanks.

Coordinator: Thank you. And this does conclude today's conference. We thank you for your participation. At this time, you may disconnect your lines.

END