

**Attachment 4C: Summary of Changes to Work Plan Guidance**

**Revised 2011**

## Work Plan Updates

The Guidance Document was updated to reflect system changes and now links to specific locations in the document from the Work Plan Main page, instead of linking to six smaller documents.

### **A. Statutory Information**

1. It is now **mandatory** for grantees to submit scanned forms of both the Certifications and Certifications & Assurances forms.
2. The ability to add and delete the Certification and Certification & Assurances forms from the main Statutory Information page has been removed. Separate pages have been created for the editing and uploading of the Certification and Certification & Assurances forms. Each uploaded form must be in a separate file.
3. The system now captures the date each form was signed instead of the date the forms were sent to CDC.

The help system was updated to include new procedures for adding statutory forms (Certification, Certifications & Assurances).

### **B. Healthcare-Associated Infections Certification**

1. A Healthcare-Associated (HAI) Certifications Form is now required to be signed by an authorizing agent and uploaded into BGMIS. This form is only required to be completed by the 50 US grantees, Puerto Rico, and DC but NOT American Samoa, Federated Micronesia, Guam, Kickapoo Indians, Marshall Islands, N. Mariana Islands, Republic of Palau, Santee Sioux, and the US Virgin Islands.
2. A message indicating this new requirement is displayed in red on the BGMIS Work Plan Main page if the HAI Certification form has not yet been uploaded for the respective grantee. The link contained in this message takes the user to a separate window, the HAI Certification Edit page.

### **C. Additional Work Plan Functionality Updates**

1. Addition of a link at the top right-hand corner of any page within the Work Plan to “verify, then submit work plan”. This link is only visible in editable work plans (work plans with a status of “In Progress” or “Revision in Progress”) to users with Control Center rights.
2. The "CDC Recommends" item was removed from the Evidence Based Guidelines/Best Practices page. Users with work plans with "In Progress" or "Revision In Progress" status will need to select a different item on this page before they can submit their work plan.
3. Impact Objective date ranges are limited to 12 months or less for FY2010 or later work plans.

4. Two new sections were added to the work plan Verify page: section 8 verifies that date ranges for objectives are compatible with higher level objectives; section 9 verifies that Impact Objective date ranges are within the 12 month limit.
5. BGMIS has been updated to improve the date editing to make it easier for respondents to enter the dates that they want in their Work Plans. Currently, the date validations for the HO, IO, and Activities are overly restrictive. With this new release, the date validations will be relaxed so that they can change the Health Objective (HO) dates independently of the Impact Objective (IO) dates, and the IO dates independently of the Activity dates. You will need to update your dates in this order:
  - State Health Objective
  - Impact Objective
  - Activity
6. "Analyze" has been added as a verb option in the SMART Objective Builder for Impact Objectives in the Work Plan Subsystem.
7. BGMIS now includes an "Adjust Dates" page which allows users to change all dates within a Health Objective (Health Objective (HO) date, Impact Objective dates, and Activity dates) on a single page. Users will still need to access each corresponding page in BGMIS to modify the associated text if changes are necessary. (For example, a user can change the start and end dates of an Impact Objective (IO) on the Adjust Dates page, but must still access that IO's page in BGMIS to change its text.)
8. The new Adjust Dates Page can now be accessed via a link in the "Other Tasks" Section located on the right-hand pane when an HO is selected on the tree.
9. The BGMIS Help System has been updated to include information on the new Adjust Dates page.
10. BGMIS now allows Advisory Committee meetings to be entered with meeting dates up to 5 months prior to the start of the fiscal year (e.g. May 1, 2009 or later for FY 2010 work plans).
11. A new column is included in the Work Plan List to show the status of the Advisory Committee Meeting Minutes.
12. When creating an Impact Objective, users will now see that the "Preview the SMART Objective" button is larger and users will be required to verify that their objective is written in SMART format.
13. The Impact Objective (IO) Summary Report was added to preview SMART objectives that will appear in the Annual Report.
14. The Verify page now includes a link to the Program/HO List page for troubleshooting Health Objective Allocations.
15. When creating or editing Impact Objectives, the projected SMART Outcome is now listed in the Impact Objective "Verify SMART Objective" pop-up window
16. The link to "Save Impact Objective and Add Activity" has been moved to the Impact Objective "Verify SMART Objective" pop-up window

17. A note has been added to the “Edit Cover Page” page, under the Title field: *“Please ensure you 1) include your state or territory’s name in the title, 2) ensure you have included the correct fiscal year in the title if you choose to include it and 3) do not include “PHHS Block Grant” as the system already includes this in the title for you.”*
18. Users now receive a warning when they create a new version of a work plan for a given fiscal year when an annual report based on an earlier version of a work plan for the same fiscal year already exists. Users are not prevented from doing so should they choose to continue, although this is obviously not recommended.
19. Removed ability to update Contact Information from within the Work Plan Subsystem.
20. Grantees must now certify that the grantee contact information is correct as listed in the Cover Page section; The Work Plan will not pass verify if the selection is “no.”
21. A New Health Objective has been added per user request - HO 5-2 New cases of diabetes.
22. BGMIS now prevents grantees from submitting an original version of a work plan after 11:59 PM on July 1<sup>st</sup> of each calendar year.
23. BGMIS now sends reminder emails to the grantee and project officer if a work plan that was returned for revision by CDC has not been resubmitted by the grantee within 30 days.