Work Plan Process for FY2021 PPA Goal 1 Surveys

- All PPA 7721 Goal 1 survey projects will use the new online work plan interface with the exception of *P. ramorum* and Honey Bee Surveys.
  - For *P. ramorum* and Honey Bee Surveys, continue to use the program-specific work and financial plan templates. Do not use the online work plan interface for these surveys.
- PPA 7721: The online work plan interface will only be used for Goal 1 Survey work plans. Work plans for other Goal areas should not be created in the interface.
- CAPS: Starting with FY2022 work plans, the online work plan interface will be required for CAPS work plans as well.
- State Survey Coordinators (SSC) will enter the details in the Survey Summary Form. Once this is complete cooperators can access the Survey Planning Tool.
  - The State Survey Coordinator (SSC) is the only person in a state who can enter the Survey Summary Form (SSF) for CAPS or PPA Goal 1 surveys.
  - Cooperators other than the SSC will have access to enter their own online work plans. They will not have access to the SSF. It is their responsibility to enter their own work plans into the online interface.

Actions to take before starting the online work plan

1. For PPA Goal 1 Surveys conducted by non-traditional cooperators (surveys that are conducted by other institutions than the typical State/SSC), the ADODR should work with the cooperator and the SSC to have the Survey Summary Form and data entered.
   - When the PPA Spending Plan is announced, the ADODR will need to:
     - Provide the contact information (name and email address) for the non-traditional cooperators to Cindy Music at clmusic@purdue.edu so that they may receive access to the online work plan interface.
     - Email the non-traditional cooperator and the SSC, effectively matching them up to work together and identifying their responsibilities.
   - The SSC will send the cooperator an Excel version of the Survey Summary Form (SSF) for them to complete.
2. The SSC and ADODR should ensure data from previous years' surveys has been entered into NAPIS. For FY2021, the National Operations Managers will not approve work plans until data has been entered for similar 2019 surveys (surveys from the same cooperator). *Note, a traditional cooperator (State/SSC) will not have work plans held up if data from a non-traditional cooperator has not been entered and vice versa.
   - The SPHD, SPRO, PSS, and SSC received an automated email on January 7, 2021 if 2019 PPA data has not been entered into NAPIS.
   - Each year, we create an Excel file that has guidance for each funded survey and whether NAPIS data is required. Here is the file for 2019: Survey Summary Form and Data Requirements for Funded Surveys. Only surveys that require NAPIS as the official database for survey data will appear in the PPA Accountability Report.
   - If there is a legitimate reason why the data has not yet been entered (no-cost extension, etc.), reach out to your National Operations Manager for Pest Detection.

- The Accountability Report can be accessed here after logging in to the CAPS Resource and Collaboration website: http://caps.ceris.purdue.edu/accountability-report.
- Please refer to the Data Entry Roles and Responsibilities for data entry responsibilities for Goal 1 Surveys throughout the timeframe of the survey agreement.

Online Work Plan Process
*Steps in red occur outside of the online work plan interface.

1. Complete the Survey Summary Form (SSF).
   - Access the SSF from the Survey Planning page.
   - The SSC will coordinate all survey entries into the SSF, including for non-traditional cooperators.

2. The survey work plan is created in the online work plan interface*..
*Link will be added when interface is available.
   a. As a survey is entered into the SSF, it unlocks a work plan in the online work plan interface. At a minimum, the SSF needs a Survey Name for the survey to be created in the online work plan interface. Note that the "Survey Summary" portion of the online workplan will not be complete until targeted pests are added to the SSF.
   b. To access the online work plan interface, after the SSF has been started, go to the lower left-hand corner of the Survey Planning page, and click on "Manage Plans":

   c. The SSF table for that survey populates into the Survey Summary portion of the work plan.

3. The cooperator enters information into the online work plan. Information entered into the online workplan is saved when the user moves from one tab to another. Note that each work plan is independent of other work plans from that state.
Example for a Grape Survey by Non-traditional Cooperator X:
   - Cooperator X sends the SSC their information for the SSF.
   - SSC enters Grape survey information into the SSF.
   - A Grape survey opens in the online work plan interface for that state.
   - Cooperator X completes the online work plan, exports the Word document, etc.
   - The National Operations Manager for Pest Detection (NOM) reviews each SSF entry (per survey) and work plan separately.
   - The Grape survey may move forward, even if the state has other surveys in various stages of review.
   - If the state had an incomplete accountability report, it would only affect the surveys under that cooperator (i.e., if State Y Dept. of Ag. had missing data, it would only affect their work plans, not work plans for the Univ. of State Y).

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- The NOM will not approve (and lock) the SSF until all survey entries are accurate.

4. Cooperator: send work plan out for review before finalizing.
    a. Export to Word document from online work plan interface.
    b. Send Word document for review to SPHD, SPRO, SSC, PSS, and others as needed.

5. Cooperator and SSC: finalize work plan and SSF.
    a. The SSC revises the SSF if needed.
    b. The final SSF is populated into the table in the work plan.
    c. The cooperator makes any revisions to the work plan in the interface.

6. SPHD/PSS reviews and approves SSF on the Survey Planning page.

7. Cooperator: create pdf.
    a. Export work plan from the online interface to a Word document.
    b. Create pdf from the Word document.

8. ADODR and ROAR sign pdf.

9. ADODR: upload pdf of work plans to PPQ Agreements SharePoint site.
    - Notify NOM, SPRO, SSC, and PSS by email that this has occurred.

10. National Operations Manager for Pest Detection (NOM) or other assigned NOM: reviews pdfs of work plans on PPQ Agreements SharePoint site.
    - The NOM reviews the work plan and SSF.
    - Each work plan and SSF entry are reviewed and approved separately.

11. If revisions are requested by the NOM:
    - There may be a back and forth with revisions to the SSF and/or work plan.
    - The cooperator performs revisions in the SSF (go back to step 1). This would follow the current process for revisions to the SSF:
        1) NOM rejects the SSF.
        2) The SSC revises the SSF.
        3) The SPHD/PSS approves the SSF, sending it back to the NOM.
    - Revisions to the SSF would also populate in the work plan.
    - Cooperator follows steps 3-8 again.
    - ADODR follows step 8-9 again. ADODR uploads revised work/financial plan to PPQ Agreements SharePoint site.
    - The NOM deletes older version from PPQ Agreements SharePoint site.

12. NOM approves work plan.
    - The NOM approves the work plan on the PPQ Agreements SharePoint site.
    - The NOM locks the work plan (approves).
    - The work plan is now locked from change.
    - The SPHD is notified that the work plan has been approved.

13. The work plan for that year is now locked.

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- Changes will not be made to the work plan, unless something changes to the financial portion.
- If there are changes made to the pest list in the work plan, this will not warrant a change to the work plan.
- Any changes made to the survey (pests, time frame of survey, etc.) will be documented in the SSF and in the Accomplishment Report. These changes will not be made in the online work plan.

14. PPQ Agreements Specialist reviews work plan.
   - If revisions are needed, the PPQ Agreements Specialist reaches out to the ADODR.
   - Edits are made and a revised version is sent via email to the PPQ Agreements Specialist.
   - No edits are made in the online interface.
   - A new version does not need to be posted to the PPQ Agreements SharePoint site.

15. PPQ Agreements Specialist: creates the opportunity in ezFedGrants.