



Division of STD Prevention

Program Development & Quality Improvement Branch (PDQIB)

PS19-1901 | STD Prevention and Control for Health Departments (STD PCHD)

Work Plan Template User Guide

Contents

Section	Slide
Part I: Introduction	
About this Guide	5
Work Plan Template Contents	6
Part II: STD PCHD 5 Year Plan	
Navigating the PCHD 5 Year Plan Workbook	8
Populating the PCHD 5 Year Plan Home Page	9
Navigating the PCHD 5 Year Plan Worksheet	11
Populating the PCHD 5 Year Plan Worksheet	12
Part III: STD PCHD Year 1 Work Plan	
Navigating the PCHD Year 1 Work Plan	15
Populating the PCHD Year 1 Work Plan Home Page	17
Populating the Program Context & Partners Worksheet	18
Populating the Strategy Area Year 1 Work Plans	21
Adding Objectives to the Strategy Area Work Plans	22

Contents Cont.'d

Section	Slide
Part IV: Saving and Submitting Your Work	
<u>Saving Your Progress</u>	24
<u>Consolidating Work Plan Templates</u>	25
<u>Running Spell Check</u>	27
<u>Preparing Your Work Plan for Submission</u>	28
Part V: Printing Your Work	
<u>How to Adjust the Print Settings in Your Workbook</u>	31
<u>How to Print Your Worksheet</u>	32
<u>How to Print to PDF</u>	33
Common Issues	
<u>Common Issues in the Excel-Based PCHD Work Plan Templates</u>	35
Appendix	
<u>Using the S.M.A.R.T. Objectives Builder Tool</u>	37

Part I: Introduction

About this Guide

This guide provides an orientation to two work plan templates developed as part of **CDC-RFA-PS19-1901, STD Prevention and Control for Health Departments (STD PCHD)**. Award applicants are encouraged to use these templates for submitting required work plan information as part of their application. These templates are two Excel-based workbooks, pictured below:

5 Year Plan

Strengthening STD Prevention and Control for Health Departments (STD PCHD)

5 Year Plan
PCHD Years 1 - 5

Project Area:

Period of Performance: 01/01/2019 - 12/31/2023

Submission Date:

[Go to PCHD 5 Year Plan >>](#)

Instructions:
You may use this document for multiple PCHD 5 Year Plans.

Complete the tab for your STD program.

PCHD 5 Year Plan
This five year planning page is an opportunity for you to step back and reflect on how your STD program's context, goals, and objectives are related to the key strategies and activities put forth in this award. Applicants will only need to complete and submit the PCHD 5 Year Plan once during the five year period of performance of the award.

Surveillance

Current Capability
What is the current capacity of your STD program, in this Strategy Area?

Strengths
What are the key strengths of your STD Surveillance program?

Weaknesses
What are the key weaknesses of your STD Surveillance program?

Year 1 Work Plan

Strengthening STD Prevention and Control for Health Departments (STD PCHD)

Work Plan
PCHD 2019 Year 1

Project Area:

Period of Performance: 1/1/2019 - 12/31/2019

Submission Date:

Click the navigation bar or a tab at the bottom of the workbook to jump to the corresponding worksheet.

The following navigation bar is available on the top of all worksheets:

Home Page	Surveillance	Disease Investigation and Intervention	Screening, Diagnosis, and Treatment	Prevention and Policy	Data Use and Utilization	
Program Context & Partners	Chlamydia Gonorrhea Syphilis	Congenital Syphilis Adverse Outcomes	Outbreak EPT Partner Services for Women Partner Services for MSM	STD Specialty Care Gonorrhea & Syphilis Tx Priority Pop. Screening & Tx	Community Health Promotion Provider Education & Reporting Policy	Analysis, Translation, Dissemination Data-Driven Planning

Instructions:
You may use this document for multiple PCHD Year 1 Work Plans.

PCHD Year 1: Strategy Area Context and Partnerships
This page is an opportunity for you to describe some of the cross-cutting issues and partners related to your workplan activities during PCHD Year 1.

Surveillance

Strategy Area Point of Contact (if different from Principal Investigator):

Strategy Area Context
Use the space below to describe the context and objectives for this Strategy Area.

Strategy Area Risks
Use the space below to describe the risks for this Strategy Area.

PCHD Year 1: Work Plan

Conduct Disease Investigation and Intervention
Strategy 9: Conduct health department syphilis disease investigation and intervention for men with syphilis

9A: Conduct follow-up on primary and secondary syphilis cases among men, to obtain more information, if needed, on treatment, sex of sex partners, HIV serostatus, HIV care status, PrEP use, and other information to ensure linkage to appropriate STD and HIV related prevention services

Objective 9A-1
Annual Objective: Describe one objective for this strategy, using the S.M.A.R.T. objectives format

Description: Briefly describe the baseline and target measures of your objective

Baseline	Target
<input type="text"/>	<input type="text"/>

Activity Description	Activity Timeframe	Output Indicator	Assigned To
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[+] Create objective
Applicants can submit up to three objectives for each sub-strategy; click again to hide if not needed

Work Plan Template Contents

There are two template *workbooks*. Each workbook contains multiple *worksheets*, where applicants can enter information. Their contents are described in the table below.

Template	Worksheet	Worksheet Description
STD PCHD 5 Year Plan	PCHD 5 Year Plan Home Page	Coversheet with instructions for navigating and completing the PCHD 5 Year Plan as well as links to relevant documents and Points of Contact. Applicants will 1) select their organization's name from the Project Area drop-down list and 2) fill in the submission date.
	PCHD 5 Year Plan	Worksheet to collect information on the applicant's programmatic capacity, strengths, challenges, planned changes, and priorities during the five year period of performance of the award.
STD PCHD Year 1 Work Plan	PCHD Year 1 Work Plan Home Page	Coversheet with instructions for navigating and completing the PCHD 2019 Year 1 Work Plan as well as links to relevant documents and Points of Contact. Applicants will 1) select their organization's name from the Project Area drop-down list and 2) fill in the submission date.
	Program Context & Partnerships	Worksheet to collect information on the applicant's context, cross-cutting issues and partners related to work plan activities during PCHD Year 1.
	Strategy Area Work Plan Worksheets	Worksheets to collect information on specific objectives, activities, and measures to indicate the achievement of PCHD Year 1 strategies.

Note: All strategies outlined in the templates are **required** by all applicants. Applicants can request to opt out of selected required activities by providing a strong justification, which must be based on program priorities, resources, and/or policies.

Part II: STD PCHD 5 Year Plan

Navigating the 5 Year Plan Workbook

The PCHD 5 Year Plan template contains two different worksheets. Think of these worksheets as individual pages of the template. You can navigate between the two worksheets by using the tabs at the bottom of the Excel-based template.

Strengthening STD Prevention and Control for Health Departments (STD PCHD)

5 Year Plan
PCHD Years 1 - 5

Project Area: [Choose your Project Area...]

Period of Performance: 01/01/2019 - 12/31/2023

Submission Date: []

[Go to PCHD 5 Year Plan >>](#)

Instructions:
You may use this template to prepare a PCHD 5 Year Plan for DSTDP. Please refer to the supplemental guidance document for more information.

Notes on Data Entry:
All light yellow cells are available for user input. You can type your responses directly into the yellow cells, or copy and

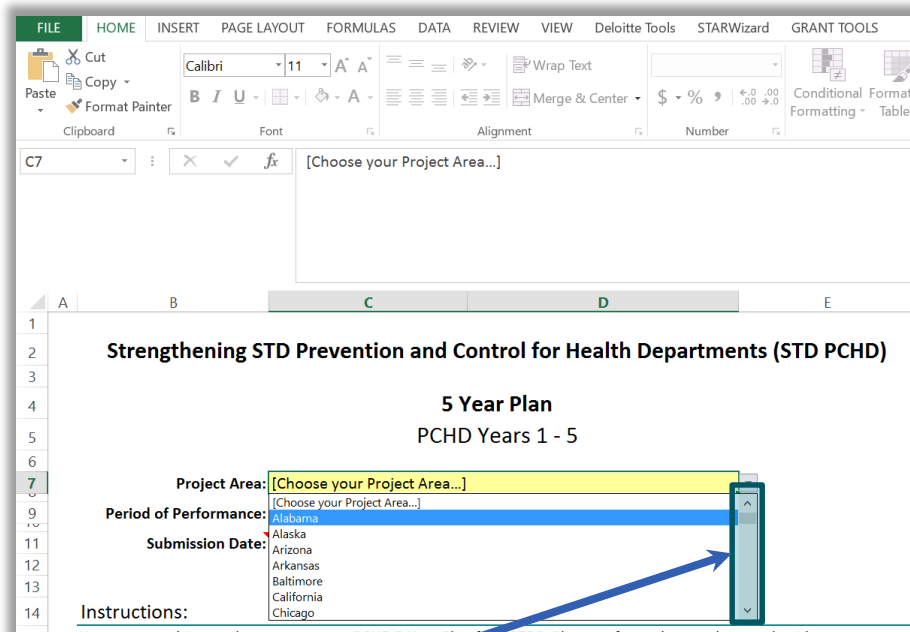
STD_PCHD@cdc.gov


Home Page | PCHD 5 Year Plan



Click on the **navigation tabs** at the bottom of the PCHD 5 Year Plan template to navigate between worksheets.

Populating the PCHD 5 Year Plan Home Page (1/2)

The PCHD 5 Year Plan Home Page is the first section in the PCHD 5 Year Plan template. Applicants will select the appropriate response from the “Choose your Project Area” drop-down list at the top of the PCHD 5 Year Plan Home Page.



Step 1: Click the  to the right of the yellow cell that says [Choose your Project Area...].

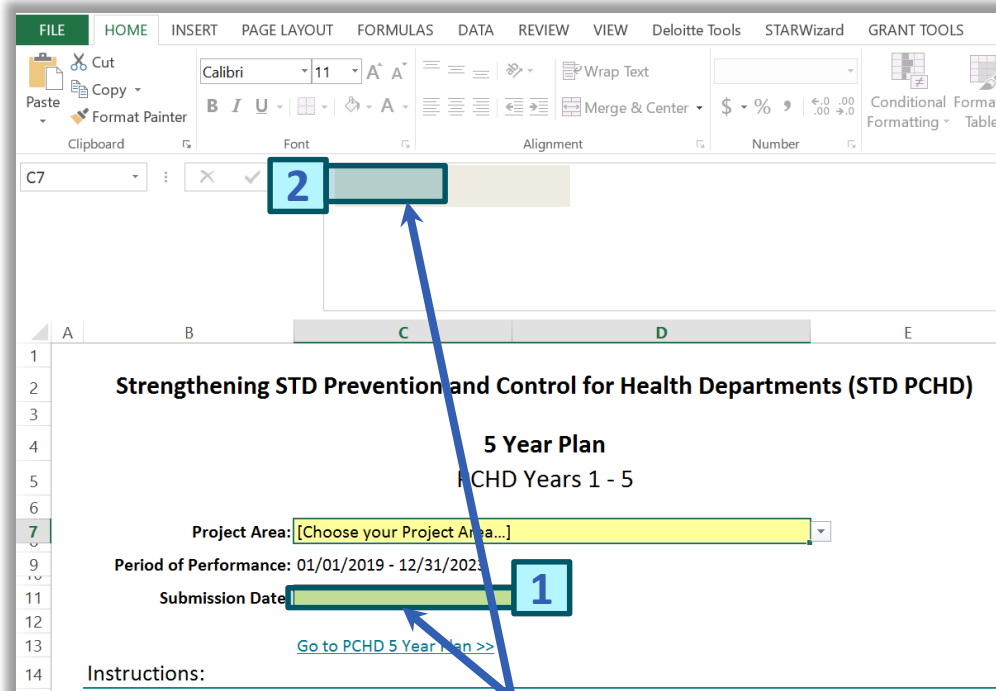
Step 2: Use   to scroll up and down the list to find the appropriate response for your organization.

Step 3: Click on the Project Area name to select

Step 4: Click outside the [Choose your Project Area...] cell to stop editing.

Populating the PCHD 5 Year Plan Home Page (2/2)

Applicants will populate the worksheet with the Submission Date.



Step 1: Click on the yellow cell to the right of **Submission Date**.

Step 2: Begin typing the date of the Submission Date, using the MM/DD/YYYY format (e.g., 10/01/2018). You will notice that the space above the worksheet will populate with the date range you enter.

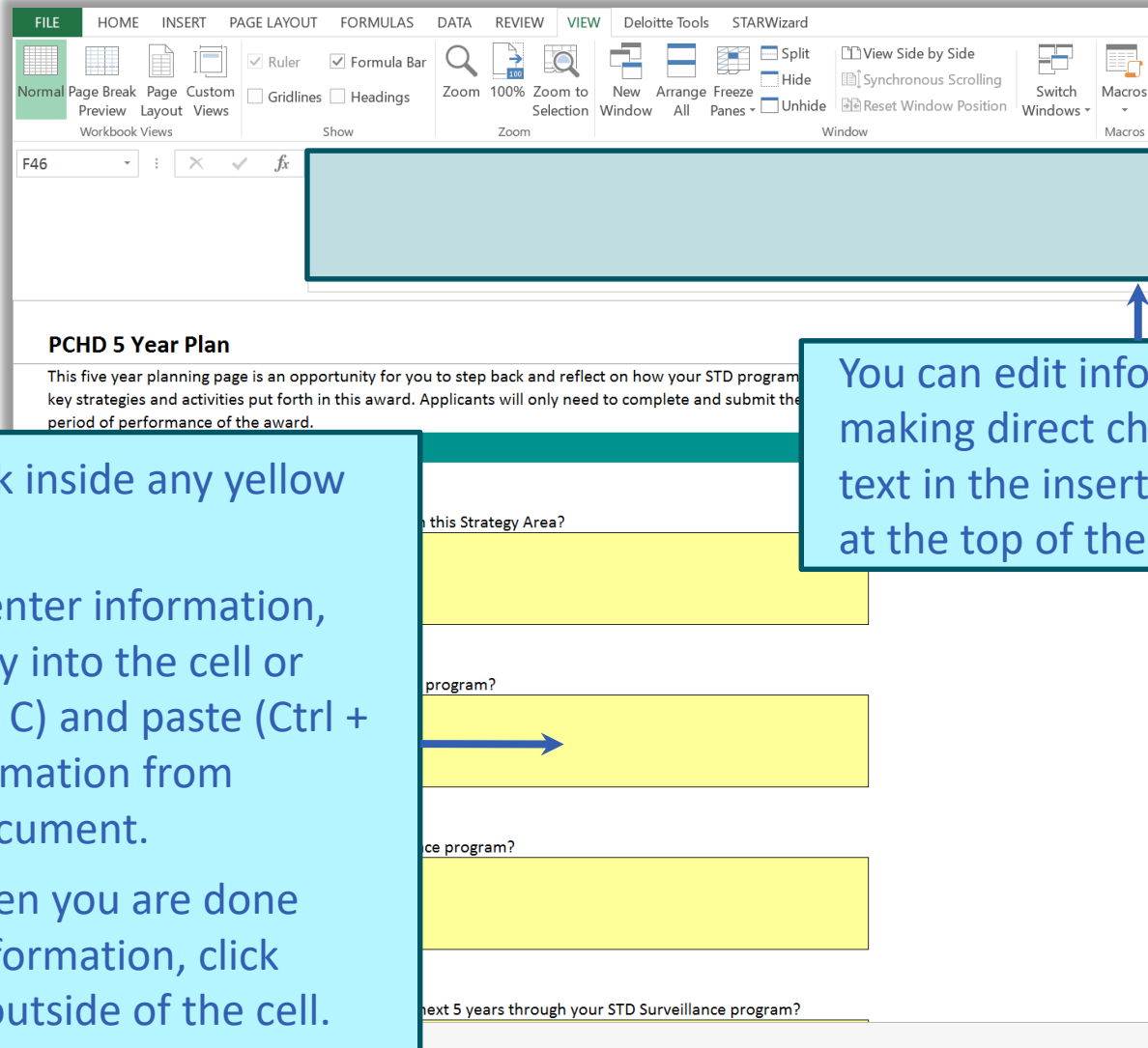
Navigating the PCHD 5 Year Plan Worksheet

The PCHD 5 Year Plan worksheet is broken into five color-coded sections for each strategy area. To navigate back to the top of the 5 Year Plan, click the “Back to Top” link.

The screenshot displays the Microsoft Excel interface with the 'VIEW' tab selected. The ribbon includes options for 'Workbook Views', 'Show', 'Zoom', and 'Window'. The active cell is F46. The worksheet content is titled 'PCHD 5 Year Plan' and features a purple header for the 'Disease Investigation and Intervention' section. Below the header are three sections: 'Current Capability' (with a yellow text box), 'Strengths' (with a yellow text box), and 'Weaknesses' (with a yellow text box). A blue callout box with a black border points to a 'Back to Top' link in the top right corner of the purple header. The callout box contains the text: 'Click the “Back to Top” link to return to the top of the worksheet.' At the bottom of the worksheet, the 'PCHD 5 Year Plan' tab is active in the tab bar.

Populating the PCHD 5 Year Plan Worksheet (1/2)

To fill out the PCHD 5 Year Plan worksheet, click on the [tab](#) labeled “PCHD 5 Year Plan” and click inside any of the yellow cells to begin entering or editing text.



Step 1: Click inside any yellow cell.


Step 2: To enter information, type directly into the cell or copy (Ctrl + C) and paste (Ctrl + V) the information from another document.

Step 3: When you are done entering information, click anywhere outside of the cell.

You can edit information by making direct changes to the text in the insert function bar at the top of the worksheet

Populating the PCHD 5 Year Plan Worksheet (2/2)

To fill in the Program Priorities table, select the appropriate response from Importance and Implementation drop-down lists. If needed, use the comments section to provide additional information to CDC.

Scroll over cells with  for additional guidance

Step 1: Click inside any yellow cell from the Program Priorities table.

Step 2: Select the appropriate response for the Rating and Priority questions.

Step 3: If needed, use the comments section to provide additional information to CDC.

Surveillance Primary Strategy	Importance: Among Surveillance strategies, how would you rate the relative importance of this strategy to your STD program, based on your resources, morbidity, and local priorities?	Implementation
Conduct Chlamydia (CT) surveillance		
Conduct Gonorrhea (GC) surveillance		
Conduct syphilis surveillance		
Conduct congenital syphilis (CS) surveillance		
Conduct surveillance of adverse outcomes of STDs		

Part III: STD PCHD Year 1 Work Plan

Navigating the PCHD Year 1 Work Plan (1/2)

In addition to [navigation tabs](#), all PCHD Year 1 Work Plan include hyperlinked buttons that allow users to navigate quickly from worksheet to worksheet.

Strengthening STD Prevention and Control for Health Departments (STD PCHD)

Work Plan

PCHD 2019 Year 1

Project Area: [Choose your Project Area...]

Period of Performance: 1/1/2019 - 12/31/2019

Submission Date: []

Click the navigation bar or a tab at the bottom of the workbook to jump to the corresponding worksheet.
The following navigation bar is available on the top of all worksheets:

Home Page	Surveillance		Disease Investigation and Intervention		Screening, Diagnosis, and Treatment	Prevention and Policy	Data Use and Utilization
Program Context & Partners	Chlamydia	Congenital Syphilis	Outbreak	EPT	STD Specialty Care	Community Health Promotion	Analysis, Translation, Dissemination
	Gonorrhea	Adverse Outcomes	Partner Services for Women		Gonorrhea & Syphilis Tx	Provider Education & Reporting	Data-Driven Planning
	Syphilis		Partner Services for MSM		Priority Pop. Screening & Tx	Policy	

Navigation tabs

Hyperlinked buttons

Applicants will complete and submit a PCHD work plan each year during the five year period of performance of the award.

Navigating the PCHD Year 1 Work Plan (2/2)

Click on the button that corresponds to the specific worksheet you would like to view or edit. You know you are on the desired worksheet when the selected button changes color.

PCHD Year 1: Work Plan

Conduct Disease Investigation and Intervention Strategy

9A: Conduct HIV care

Objective

Annual Objective

using the

of sex partners, HIV serostatus,

baseline and target measures of

Target

Activity Description	Activity Timeframe	Output Indicator	Assigned To

[+] Create objective
Applicants can submit up to three objectives for each sub-strategy; click again to hide if not needed

[+] Create objective
Applicants can submit up to three objectives for each sub-strategy; click again to hide if not needed

Home Page | Program Context & Partners | **Partner Services for MSM**

Populating the PCHD Year 1 Home Page

Similar to the PCHD 5 Year Plan Home Page, applicants must populate the PCHD Year 1 Home Page with the NOFO and work plan information listed below.

Strengthening STD Prevention and Control for Health Departments (STD PCHD)

Work Plan
PCHD 2019 Year 1

Project Area: [Choose your Project Area...] **1**

Period of Performance: 1/1/2019 - 12/31/2019

Submission Date: **2**

Click the navigation bar or a tab at the bottom of the workbook to view the content of the selected tab. The following navigation bar is available on this page:

Home Page	Surveillance	Disease Investigation and Intervention	Screening
Program Context & Partners	Chlamydia	Outbreak	STI
	Gonorrhea	EPT	Gonorrhea
	Syphilis	Partner Services for Women	Priority
		Partner Services for MSM	

Instructions:
You may use this template to prepare a 2019 PCHD Year 1 Work Plan for DSTDP. Please refer to...
Complete each tab in this workbook. On the Program Context & Partners tab, you will be asked... cutting issues and partners related to your work plan activities during PCHD Year 1. On the Str... measures and target goals, and activities that will support the achievement of the annual obje...
Applicants will complete and submit the PCHD work plan each year during the five year period...

Step 1: Select the Project Area for your organization from the drop-down menu (click [here](#) for detailed instructions).

Step 2: Enter the **Submission Date** (click [here](#) for detailed instructions).

Populating the Program Context & Partners Worksheet (1/3)

The Program Context & Partners worksheet is broken into five color-coded sections for each strategy area. To navigate back to the top of the Program Context & Partners worksheet, click the “Back to Top” link.

The screenshot displays the Microsoft Excel interface for the 'Program Context & Partners' worksheet. The ribbon is set to the 'REVIEW' tab, showing various review-related tools. Below the ribbon, a navigation bar provides access to different strategy areas. The 'Disease Investigation and Intervention' section is currently active, and the 'Back to Top' link is highlighted with a blue callout box.

Home Page	Surveillance	Disease Investigation and Intervention	Screening, Diagnosis, and Treatment	Prevention and Policy	Data Use and Utilization
Program Context & Partners	Chlamydia Gonorrhea Syphilis	Outbreak EPT Partner Services for Women Partner Services for MSM	STD Specialty Care Gonorrhea & Syphilis Tx Priority Pop. Screening & Tx	Community Health Promotion Provider Education & Reporting Policy	Analysis, Translation, Dissemination Data-Driven Planning

PCHD Year 1: Strategy Area Context and Partnerships

Disease Investigation and Intervention

Strategy Area Point of Contact (if different from Principal Investigator)

Strategy Area Context
Use the space below to describe any contextual factors, cross-cutting issues, changes, or priorities that impact your PCHD 2019 Year 1.

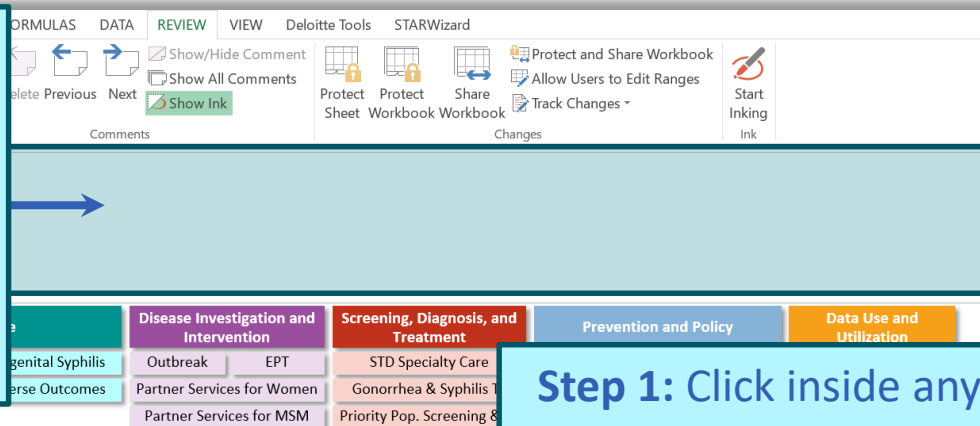
Strategy Area Risks
Use the space below to describe any major risks that impact your PCHD 2019 Year 1.

Click the “Back to Top” link to return to the top of the worksheet.

Populating the Program Context & Partners Worksheet (2/3)

To fill out the Program Context & Partners worksheet, click on the [tab](#) labeled “Program Context & Partners” and click inside any of the yellow cells to begin entering or editing text.


You can edit information by making direct changes to the text in the insert function bar at the top of the worksheet



Step 1: Click inside any yellow cell.

Step 2: To enter information, type directly into the cell or copy (Ctrl + C) and paste (Ctrl + V) the information from another document.

Step 3: When you are done entering information, click anywhere outside of the cell.

Scroll over cells with  for additional guidance

PCHD Year 1: Strategy Area Context and Partnerships

Disease Investigation and Intervention

Strategy Area Point of Contact (if different from Principal Investigator)

Strategy Area Context

Use the space below to describe any contextual factors, cross-cutting issues, changes, or priorities that impact

Use the space below to describe any major risks associated with implementation of the objectives under this Year 1.

Populating the Program Context & Partners Worksheet (3/3)

To fill in the Partnerships table, select the appropriate response from Partner Type and New Partnership drop-down lists. Briefly describe each partner in the Partner Details field.

Home Page | **Surveillance** | **Disease Investigation and Intervention**

Chlamydia | Congenital Syphilis | Outbreak | EPT
Gonorrhea | Adverse Outcomes | Partner Services for Women
Syphilis | Partner Services for MSM

PCHD Year 1: Strategy Area Context and Partnerships

Strategy Area Risks
Use the space below to describe any major risks associated with implementation of the program in Year 1.

Strategy Area Partnerships
What partners (funded and unfunded) are key and essential to meeting the strategies and activities proposed in this area?

Partner Type	Brief Partner Details	Is this a New Partnership for Your Program?
Behavioral Health/Social Services		
Community-Based Organizations		
Correctional Facility		
HIV/AIDS Service Orgs.		
Labs		
Local Health Dept		
Maternal/Child Health		
Private Health Care Providers		

Strategy Area Point of Contact (if different from Principal Investigator)

Step 1: Click inside any yellow cell from the Partnerships table.

Step 2: Select the appropriate response from the Partner Type and New Partnership drop-down lists.

Step 3: Describe each partner in the Brief Partner Details field.

Populating the Strategy Area Year 1 Work Plans

To fill out the work plans for the individual strategies, click on one of the strategy [tabs](#) and click inside any of the yellow cells to begin entering or editing text.

Step 1: Click inside any yellow cell.

Step 2: To enter information, type directly into the cell or copy (Ctrl + C) and paste (Ctrl + V) the information from another document.

Step 3: When you are done entering information, click anywhere outside of the cell.

	Baseline	Target	
Activity Description	Activity Timeframe	Output Indicator	Assigned To

[\[+\] Create objective](#)
Applicants can submit up to three objectives for each sub-strategy; click again to hide if not needed

[\[+\] Create objective](#)
Applicants can submit up to three objectives for each sub-strategy; click again to hide if not needed

Adding Objectives to Strategy Area Work Plans

To add an objective to your work plan, click “Create Objective” link. Clicking the link automatically generates another set of cells for annual objectives, baseline measurements, and accompanying activities. Clicking the link again hides the objective.

Click “Create Objective” to add space for up to 3 objectives per substrategy.

Home Page | **Surveillance** | **Disease Investigation and Intervention** | **Treatment** | **Utilization**

Home Page	Surveillance	Disease Investigation and Intervention	Screening, Diagnosis, and Treatment	Prevention and Policy	Data Use and Utilization
Program Context & Partners	Chlamydia Gonorrhea Syphilis	Congenital Syphilis Adverse Outcomes	Outbreak EPT Partner Services for Women Partner Services for MSM	Community Health Promotion Provider Education & Reporting Policy	Analysis, Translation, Dissemination Data-Driven Planning

PCHD Year 1: Work Plan

Conduct Disease Investigation and Intervention
Strategy 9: Conduct health department syphilis disease investigation and intervention for men with syphilis

9A: Conduct follow-up on primary and secondary syphilis cases among men, to obtain HIV care status, PrEP use, and other information to ensure linkage to appropriate care

Objective 9A-1
Annual Objective: Describe one objective for this strategy, using the S.M.A.R.T. objectives format

Objective 9A-2
Annual Objective: Describe one objective for this strategy, using the S.M.A.R.T. objectives format

Description: Briefly describe the baseline and target measures of your objective

Baseline	Target

Activity Description	Activity Timeframe	Output Indicator	Assigned To

[\[+\] Create objective](#)
Applicants can submit up to three objectives for each sub-strategy; click again to hide if not needed

[\[+\] Create objective](#)
Applicants can submit up to three objectives for each sub-strategy; click again to hide if not needed

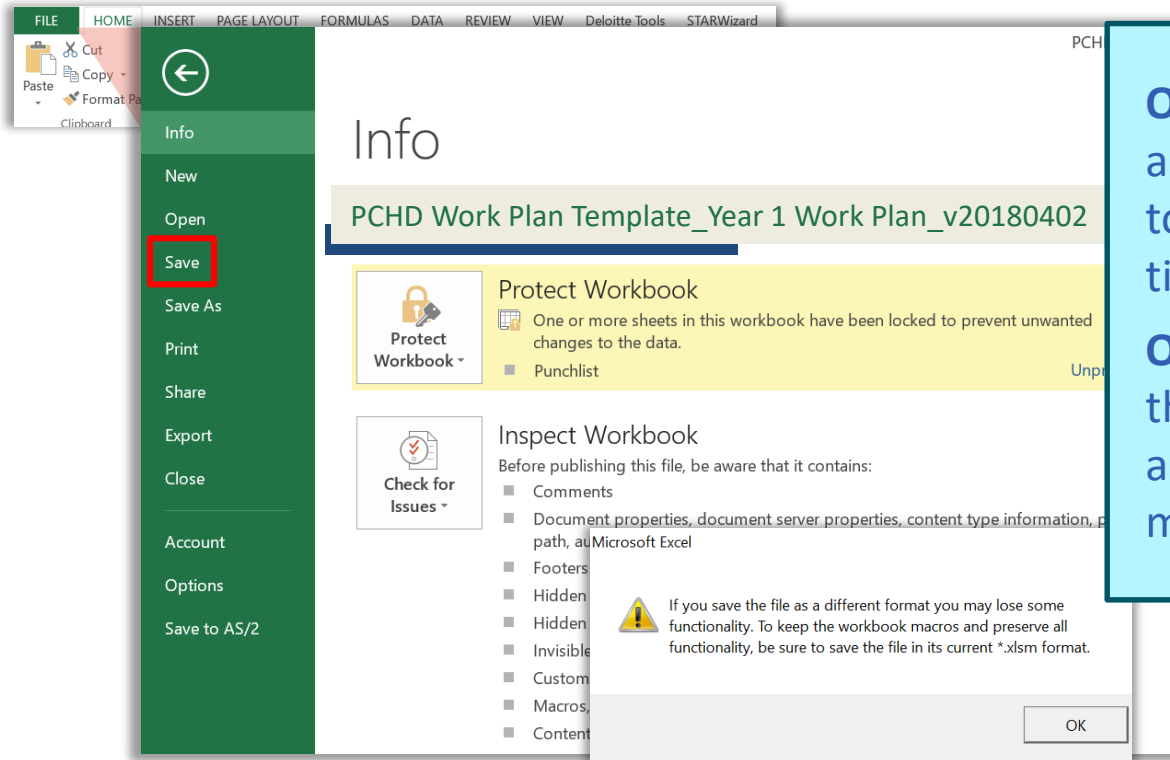
[\[+\] Create objective](#)
Applicants can submit up to three objectives for each sub-strategy; click again to hide if not needed

Home Page | Program Context & Partners | **Partner Services for MSM**

Part IV: Saving and Submitting Your Work

Saving Your Progress

As you go through the work plan template, make sure to save your progress frequently. There are a few different options for saving progress.



Option 1: Hold down Ctrl and hit S on the keyboard to save progress at any time.

Option 2: Click “File” at the top of the workbook and select “Save” from the menu on the left.

*If you are saving the file for the first time, Excel will prompt you to save it somewhere on your local computer. **Please save this file as a [ProjectAreaName] 5YearPlan yy-mm-dd OR [ProjectAreaName] WorkplanY1 yy-mm-dd AND as an .xslm version.** (Note: you will see a warning message reminding you that if you change the format of the document, you may lose some of the functionality. Click "Ok" and save the file in your preferred location.)*

Consolidating Work Plan Templates (1/2)

If you created copies of the workplan template so multiple people could work on the file, you will need to consolidate their contributions into a final workbook before submitting.

Home Page | **Surveillance** | **Disease Investigation and Intervention** | **Screening, Diagnosis, and Treatment** | **Prevention and Policy**

Program Context & Partners | Chlamydia | Congenital Syphilis | Outbreak | EPT | STD Specialty Care | Community Health Promo
Gonorrhea | Adverse Outcomes | Partner Services for Women | Gonorrhea & Syphilis Tx | Provider Education & Repo
Syphilis | Partner Services for MSM | Priority Pop. Screening & Tx | Policy

PCHD Year 1: Workplan

Conduct Surveillance

Strategy 1: Conduct Chlamydia (CT) surveillance

1A: Collect, manage, analyze, interpret and disseminate data on identified cases of chlamydia, ensuring timely capture of core epidemiologic v laboratory reports: age, sex, county, diagnosing facility type, specimen collection date, and anatomic site(s) of infection

Objective 1A-1

Annual Objective: Describe one objective for this strategy, using the S.M.A.R.T. objectives format

Description: Briefly describe the baseline your objective

Sample objective text appears here.	Baseline	Target
	Sample baseline	Samp

Activity Description	Activity Timeframe	Output Indicator	Assigned To
Sample Activity No. 1	January - March	Sample indicator 1	John
Sample Activity No. 2	February - April	Sample indicator 2	Jane Doe
Sample Activity No. 3	May - June	Sample indicator 3	Jane Doe/John Doe
Sample Activity No. 4	July - August	Sample indicator 4	John Doe/Jane Doe

[+ Create objective](#)
Applicants can submit up to three objectives for each sub-strategy; click again to hide if not needed

[+ Create objective](#)

Home Page | Program Context & Partners | Chlamydia | Gonorrhea | Syphilis | Congenital Syphil ... | Count: 16

To copy data from the source workplan, first select a contiguous region of yellow cells by clicking and dragging the mouse, then press Ctrl + C on the keyboard to copy the values.

Note - the locked template will not let you copy and paste entire sheets or multiple regions. This means that you will have to copy and paste three areas per objective: (1) the objective description, (2) baseline and target values, and (3) the activity/timeframe/output/assigned to table. If you try to copy a range larger than the yellow cells, you will receive an error message when you try to paste.

Consolidating Work Plan Templates (2/2)

Once you have copied the data, switch to the corresponding tab in the consolidated template, where you can paste the information into the final file.

Home Page | **Surveillance** | **Disease Investigation and Intervention** | **Screening, Diagnosis, and Treatment**

Program Context & Partners | Chlamydia | Congenital Syphilis | Outbreak | EPT | STD Specialty Care | Com
Gonorrhea | Adverse Outcomes | Partner Services for Women | Gonorrhea & Syphilis Tx | Prov
Syphilis | Partner Services for MSM | Priority Pop. Screening & Tx

PCHD Year 1: Workplan

Conduct Surveillance

Strategy 1: Conduct Chlamydia (CT) surveillance

Activity Description	Activity Timeframe	Output Indicator
Sample objective text appears here.		Sample baseline

[+] Create objective
Applicants can submit up to three objectives for each sub-strategy; click again to hide if not needed

To paste data, Click on the **upper left hand cell** of the region where you want to paste the data. Then press **Ctrl + V** on the keyboard to paste the data from the source workbook to the final workbook.

PCHD Year 1: Workplan | Spell Check this Sheet

Conduct Surveillance

Strategy 1: Conduct Chlamydia (CT) surveillance

Activity Description	Activity Timeframe	Output Indicator
Sample objective text appears here.		Sample baseline
Sample Activity No. 1	January - March	Sample indicator 1
Sample Activity No. 2	February - April	Sample indicator 2
Sample Activity No. 3	May - June	Sample indicator 3
Sample Activity No. 4	July - August	Sample indicator 4

[+] Create objective
Applicants can submit up to three objectives for each sub-strategy; click again to hide if not needed

[+] Create objective
Applicants can submit up to three objectives for each sub-strategy; click again to hide if not needed

The data that you copied will then appear in the consolidated workbook.

Running Spell Check

As you go through the work plan template, make sure to run spell check frequently.

The screenshot shows a web application interface with a navigation menu at the top. The menu includes categories like 'Home Page', 'Surveillance', 'Disease Investigation and Intervention', 'Screening, Diagnosis, and Treatment', 'Prevention and Policy', and 'Data Use and Utilization'. Under 'Surveillance', there are sub-items for 'Chlamydia', 'Gonorrhea', and 'Syphilis'. A callout box with a blue background and white text says: "Click 'Spell Check this Sheet' to run spell check on the current tab you are working on". An arrow points from this callout to a button labeled 'Spell Check this Sheet' in the top right corner of the main content area.

The main content area is titled 'PCHD Year 1: Work Plan' and 'Conduct Surveillance'. It contains a strategy description: 'Strategy 1: Conduct Chlamydia (CT) surveillance'. Below this is 'Objective 1A-1' with an 'Annual Objective' and a 'Description'. The 'Description' section includes a table with 'Baseline' and 'Target' columns.

Activity Description	Activity Timeframe	Output Indicator	Assigned To

At the bottom of the interface, there is a breadcrumb trail: Home Page > Program Context & Partners > Chlamydia > Gonorrhea > Syphilis > Congenital Syphilis > Adverse Outcomes > Outbreak > Partner Servi...

Note: if you click "Cancel", you may not check all of the fields

Preparing Your Work Plan for Submission (1/2)

When you are finished with the work plan templates, you have multiple options to prepare them for submission. Option 1: You can use the “Save a copy to submit” button to save it as the appropriate file type for CDC. Before you submit, remember to run spell check.

Saving and Submitting Your Work:

Click "File" from the ribbon above and then "Save" from the menu. If this is your first time saving, you will be prompted to choose a location for where this file will be saved. **Please save this file as "[ProjectAreaName]_5YearPlan_yy-mm-dd" and as an .xslm version.** (Note: you will be prompted to save the file as a macro-enabled workbook. Note you that if you change the format of the document, you may lose some of the functionality of your preferred location.)

When you are finished with this document, there are two ways to package it for submission. Below, select a folder for where you would like the final file saved, and the file will be saved with the generated filename. You will no longer be able to edit any text, but you will be able to view the document.

Save a copy to submit

Option 2 - click "File" from the ribbon above and then "Save As" from the menu or click "Save As" from the ribbon. Select the .xlsx file type from the "Save as type" drop-down menu. You will see a warning saying "The file cannot be saved in macro-free workbooks: VB project". Click "Yes" to save the file as a macro-enabled workbook. You will be able to edit light yellow cells, but a few features from this workbook will no longer be available.

To submit this document, attach the file ending in .xls or .xlsx to your application for review.

Step 1: Click “Save a copy to submit” at the bottom of the Home Page

Step 2: Choose the appropriate location to save the file

The file will be saved with following naming convention:

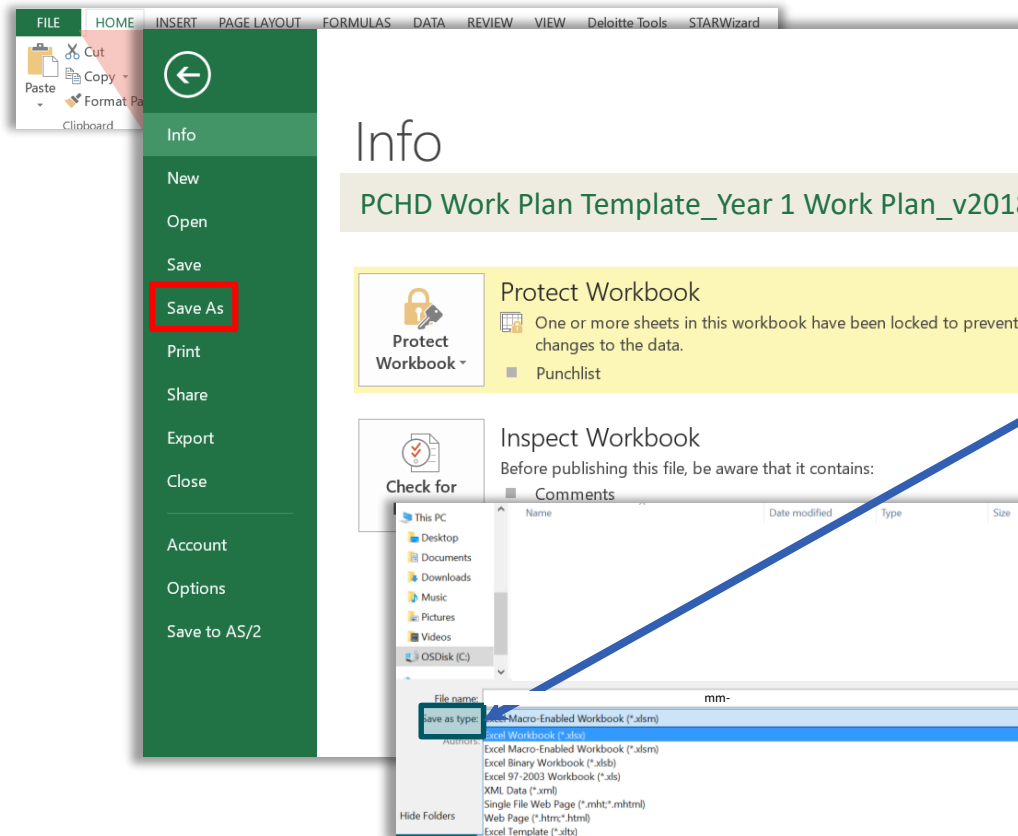
[ProjectAreaName]_5YearPlan_yy-mm-dd.xlsx

[ProjectAreaName]_WorkplanY1_yy-mm-dd.xlsx

Note: you will not be able to edit the light yellow cells in this version of the document – it will say “Note: This workbook has been marked for submission and is no longer editable.”

Preparing Your Work Plan for Submission (2/2)

Option 2: You can also follow the steps below to save the work plan template as the appropriate file type for CDC. Before you submit, remember to run spell check.



Step 1: Click “File” at the top of the workbook and select “Save As” from the menu on the left.

Step 2: Choose the .xls or .xlsx file type from the "Save as type" drop-down menu.

Step 3: Save file with the following naming convention:
[ProjectAreaName]_5YearPlan_yy-mm-dd.xlsx
[ProjectAreaName]_WorkplanY1_yy-mm-dd.xlsx

You will see a warning sign that says "The following features cannot be saved in macro-free workbooks: VB project". **Click "Yes" to save the file as a .xls or .xlsx file type.** (Note: you will still be able to edit light yellow cells, but a few features from this workbook will no longer be available).

Part V: Printing Your Work

How to Adjust the Print Settings in Your Worksheet

If you would like to print your work, follow the steps below.

The screenshot shows the Microsoft Excel interface with the 'VIEW' ribbon selected. The 'Page Break Preview' view is active, showing a worksheet with a dashed blue line indicating the print area. A callout box on the right provides instructions for three steps:

- Step 1: Set your print area by clicking "View" from the ribbon
- Step 2: Select "Page Break Preview"
- Step 3: Click on the dashed blue line to adjust the print area

The worksheet content includes the following sections:

- PCHD 5 Year Plan**
- Program Priorities**
Use the space below to rate the importance of the primary strategies to your STD Prevention and Policy program, and your program's level of strength in them.
- Prevention and Policy Primary Strategy**

Primary Strategy	Importance: Among Prevention and Policy strategies, how would you rate the relative importance of this strategy to your STD program, based on your resources, morbidity, and local priorities?	Implementation: How strong or weak would you say your STD program is in implementing the following strategies?	Comments (Optional): Use the space below to provide additional information on the strategy implementation.
Promote STD prevention to the public			
Promote STD prevention and reporting to provider community			
Monitor STD-related policies and policy			
- Data Use and Utilization**
- Current Capability**
What is the current capacity of your STD program, in this Strategy Area?
- Strengths**
What are the key strengths of your program in the STD Data Use and Utilization Strategy Area?
- Limitations**
What are the key limitations of your program in the STD Data Use and Utilization Strategy Area?
- Page 4**
- Progress and Change**

How to Print Your Worksheet

If you would like to print the current sheet you are working on, follow the steps below.

The screenshot shows the Microsoft Excel interface. The 'FILE' menu is open, and the 'Print' option is highlighted with a red box. The 'Print' dialog box is visible, showing 'Copies: 1'. Below the dialog, a list of printers is shown, with 'HP Universal Printing PCL 6' selected and highlighted with a blue box. To the right, a worksheet titled 'Strengthening STD Prevention and Control for Health Departments (STD PCHD)' is visible, showing a 'Work Plan' for 'PCHD 2019 Year 1'. A blue callout box with white text contains the following instructions:

Step 1: Select "File" then "Print"
Step 2: Select the appropriate printer

- You can select multiple worksheets by holding Shift and clicking on the individual tabs you would like to print
- You can print all worksheets by selecting "Print Entire Workbook" under "Settings"

Note that it may take several seconds to print the entire workbook.

How to Print to PDF

If you would like to save your work in a non-editable format, such as PDF, follow the steps below.

The screenshot shows the Microsoft Excel Print dialog box. The 'File' menu is open, and the 'Print' option is highlighted with a red box. The 'Printer' dropdown menu is open, showing 'Adobe PDF' as the selected printer. The 'Settings' section is expanded, and the 'Print Entire Workbook' option is highlighted with a blue box. A blue box with four steps is overlaid on the right side of the dialog box. A blue arrow points from the 'Print' button in the dialog box to the 'Print' button in the 'Save as PDF' dialog box.

Step 1: Select “File” then “Print”

Step 2: Select Adobe PDF under “Printer”

Step 3: Click Print

Step 4: Save PDF

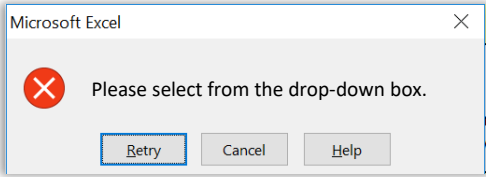
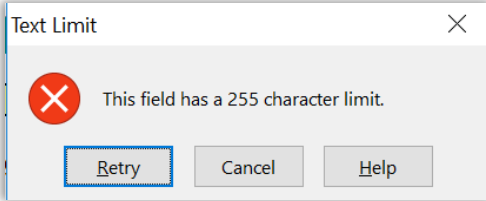
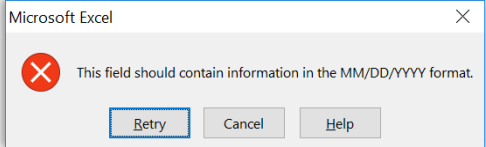
- You can select multiple worksheets by holding Shift and clicking on the individual tabs you would like to print
- You can print all worksheets by selecting “Print Entire Workbook” under “Settings”

Note that it may take several seconds to print the entire workbook.

Common Issues

Common Issues for the Excel-Based PCHD Work Plan Templates

The following items are common issues that users may run into when completing the PCHD 5 Year Plan and Year 1 Work Plan.

Issue	Issue Description	Issue Resolution
	User typed a response into cell with a drop-down menu instead of selecting the appropriate response from the drop-down menu.	Click “Cancel” and select the appropriate response from the drop-down menu.
	User typed or copied a response into a cell that is limited to 255 characters.	Click “Cancel” and retype the response in less than 255 characters. If you are copying the response from another document, highlight the response and click Word Count under the Review Ribbon. Edit response so that it does not exceed 255 characters.
	User typed or copied a response into a cell that is not in the MM/DD/YYYY format.	Click “Cancel” and retype the response in the MM/DD/YYYY format.

Appendix

Using the S.M.A.R.T. Objectives Builder Tool

The S.M.A.R.T. Objectives Builder Tool enables you to build objectives that are specific, measurable, achievable, realistic and time-bound. Follow the instructions below to generate a S.M.A.R.T. annual objective.

Strategy	Objective	Calculated SMART Objective Statement	Directionality	Measurement Unit	What are you measuring?	Numerate Count
1	Conduct Surveillance					
1A	1	By December 2018, increase the number of STD surveillance from 0 to 0. [data source:]	increase	number of	STD surveillance	
	2			number of		
	3			percent of		
	proportion of					
2A	1					
	2					
	3					
2B	1					
	2					
	3					
3A	1					
	2					
	3					
3B	1					
	2					
	3					
4A	1					
	2					
	3					
4B	1					
	2					
	3					
4C	1					
	2					
	3					

Step 1: Follow the instructions in the boxes with red arrows for additional guidance

Step 2: Select or type in relevant information into the yellow cells

Step 3: Type in or copy/paste the Calculated S.M.A.R.T. Objective Statement into Year 1 Work Plan

You can copy (Ctrl + C) and paste (Ctrl + V) the Calculated S.M.A.R.T. Objective Statement into Year 1 Work Plan

For more information, please contact
std_pchd@cdc.gov

