

Adding, Editing, and Submitting Descriptive, Operational, and Planning Forms to Meet Budget Period 4 Requirements

December 2022

To ensure all Budget Period 4 (BP4) data are captured accurately, it is critical that recipients follow these instructions. BP4 program requirements consist of:

1. Updating the **Critical Contact Sheet form**,
2. Entering additional or updated information in the **Workforce Development and Training form**,
3. Submitting all **15 preparedness and response capability planning forms**,
4. Adding and submitting the annual PHEP exercise via the **Access and Functional Needs form**, and
5. Adding and submitting the **Emergency Operations Center Activation form**.

Access the ORR module within PORTS to complete the outlined steps for each of the following forms. Users should verify their roles, jurisdictions, and the budget period designation before completing the following steps. Users should select “GO” when toggling between Budget Period 3 (BP3) and BP4 forms. Users should also leave forms unlocked if other jurisdictional users are entering data.

Critical Contact Sheet (CCS) Form – Edit Only

The CCS form is automatically added to the BP4 ORR main dashboard in the Descriptive Requirements section. It is populated with BP3 data, and edits to the CCS form will only be required if information has changed. Start editing CCS data using the following steps.

1. Locate the **CCS form** in the Descriptive Requirements section.
2. At the end of the row, select **Edit** from the three-dot drop-down menu in the Actions column.
3. Complete all fields (**CCS1.a-CCS23.g**), saving frequently.
4. Click **Save**.
5. Click **Submit for Internal Supervisory Review**.
 - Reminder: The Submit for Review user must verify data, edit as appropriate, and submit to CDC Reviewer. If edits are needed, follow the preceding steps.
 - The Submit for Review user submits the CCS form to CDC Reviewer by June 30 and December 30. The CDC Reviewer reviews and returns the CCS form to the recipient.

Workforce Development and Training (WDT) Form – Edit Only

The WDT form is automatically added to the BP4 ORR main dashboard in the Descriptive Requirements section. Users only need to edit the information. Start or continue entering WDT data using the following steps.

1. Locate the **WDT form** in the Descriptive Requirements section.
2. At the end of the row, select **Edit** from the three-dot drop-down menu in the Actions column.
3. Complete all fields (**WDT1 through WDT3**), saving frequently.
4. Click **Save**.
5. Click **Submit for Internal Supervisory Review**.
 - Reminder: The Submit for Review user must verify data, edit as appropriate, and submit to CDC Reviewer. If edits are needed, follow the preceding steps.
 - The CDC Reviewer reviews and returns the WDT form to recipient.



50 Capability Planning Forms - Editing Only

1. Locate the **50 capability planning forms** in the Planning Requirements section.
2. At the end of each capability form row, select **Edit** from the three-dot drop-down menu in the Actions column.
3. Complete all fields, saving frequently. The number of data fields required will vary among capability forms.
4. Select **Save**.
5. Select **Submit for Internal Supervisory Review**.
 - Reminder: The Submit for Review user must verify data, edit as appropriate, and submit to CDC Reviewer. If edits are needed, follow the preceding steps.

The following forms need to be added to the recipient's BP4 ORR main dashboard first, and then the forms will be available for editing. Please note only one form can be added at a time.

Annual PHEP Exercise (AFN) Form – Adding and Entering Data

1. From the ORR dashboard, click **Add BP4 Forms** in the left navigation bar.
2. Click the **Select BP Form Name**.
3. Check the box to the left of **Annual PHEP Exercise (AFN)**.
4. Click **Add BP Form**. This will automatically redirect users to the jurisdiction's ORR dashboard where users can access and edit the AFN form in the Operational Requirements section. The AFN form can only be added once.
5. To enter data, locate the Operational Requirements section and the **Annual PHEP Exercise (AFN)** form.
6. At the end of the row, select **Edit** from the three-dot drop-down menu in the Actions column.
7. Complete all fields (**AFN1 through AFN11**).
8. Click **Save**.
9. Click **Submit for Internal Supervisory Review**.
 - Reminder: The Submit for Review user must verify data, edit as appropriate, and submit to CDC Reviewer. If edits are needed, follow the preceding steps.

Emergency Operations Center (EOC) Activation Form – Adding and Entering Data

1. From the ORR dashboard, click **Add BP4 Forms** in the left navigation bar.
2. Click the **Select BP Form Name**.
3. Check the box to the left of **EOC Activation**.
4. Click **Add BP Form**. This will automatically redirect users to the jurisdiction's ORR dashboard where users can access and edit the EOC Activation form in the Operational Requirements section. Add an additional EOC Activation form for every EOC activation.
5. To enter data, locate the Operational Requirements section and the **EOC Activation** form.
6. At the end of the row, select **Edit** from the three-dot drop-down menu in the Actions column.
7. Complete all fields (**EOC1 through EOC6**).
8. Click **Save**.
9. Click **Submit for Internal Supervisory Review**.
 - Reminder: The Submit for Review user must verify data, edit as appropriate, and submit to CDC Reviewer. If edits are needed, follow the preceding steps.