

## **IDPH IowaGrants Site Visit Component Guide**

**Purpose:** This guide provides guidance on the use of the site visit component in IowaGrants, as well instructions to all users of IDPH IowaGrants sites (internal and external to IDPH) for completion of and fulfillment of the site visit component form.





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## Overview

Programs shall use the Site Visit Component to conduct a review to assess and monitor contractor compliance to the project/contract requirements. The use of the Site Visit Component does not exempt continual, regular monitoring of a contractor's performance through progress reports, claims, technical assistance, and other activities. Reviews may occur on-site or off-site per the following definitions:

## Type of Review

**On-Site Review-** This type of review occurs at the Contractor's (grantee) site of operations.

**Off-Site (Desk) Review-** This type of review does not occur at the Contractor's (grantee) site of operations.

## Recommendations for use

The Type of Review used (on-site vs. off-site) and the frequency shall be at the discretion of the program, based on Service Contract Policy, Administrative Rules, Federal Requirements, and potential risk.

## Examples of items to review

Examples of items a program may consider including in a review could be, but are not limited to the following:

- Administrative Rules compliance
- Personnel items: qualifications and FTE levels
- Expenditure support documentation/receipts for a claim
- Evidence of completion of activities for work and services- 'above and beyond' progress report monitoring
- Compliance with any applicable IT Standards
- Policies or compliance with data storage, confidentiality, and protection
- Policies in place for processes such as hiring, procurement, data, record retention
- Policies and practices for subcontracting- how do they monitor subcontractors?
- Inventory Control/Equipment
- Verification of Licenses, whether it be professional or business
- For Clinic Visits/Direct Care: Chart audits/visit



## Scheduling

The first step is Scheduling a review with a specific Grantee/Contractor via the Site Visit Component of IowaGrants. Upon scheduling a review, this initiates the process. IDPH staff must have the following items prepared and available when scheduling:

- Determine the Type of Review
- Know the dates for the planned review (whether on-site or off-site)
- Know the date for completion of the review/closure
- A review notification letter
- Knowledge of who at the Grantee/Contractor agency should receive notification of the review, as well as check if these individuals are registered and linked to the specific contract/grant site.
- Documents, forms, and report templates

Scheduling the review is the prompt to the system to activate the form, see below. Upon scheduling, the form is live to all parties assigned.

## Form/Review Structure and Summary

A single site visit component review form with multiple sections will be used for fulfilling a site review process within the Site Visit Component. The form has multiple sections, some will be completed by IDPH staff (Internal User), and some of the fields/sections will be completed by the Grantee/Contractor (External User). This form will be used for the entire review process. Summary of steps are listed here, refer to the specific instructions and steps, including screen shots further down in this guide:

1. **Review Type and Scheduling Information and Documentation Templates:**
  - a. Immediately upon scheduling a review the IDPH staff will complete the two sections of the form identifying information such as a review notification letter, and other documentation/templates and details about the review that the contractor (grantee) needs to know.
  - b. NOTE: Internal User staff will NOT mark the form as complete (until the entire review is complete and you are ready to approve the site visit). Marking it as complete too early will lock the contractor (grantee) out and they will not be able to complete their areas.
2. **Review Acknowledgement and Requested Documentation:** This step (these two sections of the form) are completed by the Contractor (Grantee). It is a review acknowledgement and submission of required documents, as applicable to instructions provided by IDPH.
  - a. NOTE: The Contractor will access a scheduled Site Visit through this Component located on their Main Menu (and not from within their grant site)
  - b. NOTE: the Contractor (Grantee) MUST mark the form as complete in order to submit this information to IDPH.
  - c. If, upon IDPH's review of this portion of the review form, information is found to be incomplete, IDPH will negotiate the form to the Contractor (Grantee) to fix and resubmit.



3. **Results:** The next step is completion of the Results section of the form by IDPH; after completion of the review process. IDPH staff will upload a review report (identifying results/requirements and the corresponding letter, as well as any other items that need documented).
  - a. NOTE: IDPH staff will access the form from within the Contractor's grant site by clicking on the Site Visit component.
  - b. After completing the results section of the form, IDPH staff must then *negotiate* the form to the contractor (grantee) for them to respond in the next section of the form.
4. **Grantee/Contractor Response:** This section of the form is completed by the Contractor (Grantee) following the review and upon IDPH uploading the results. The Grantee/Contractor must respond in the manner directed by IDPH in the Results section.
  - a. The Contractor will access the review form/Site Visit through the 'My Site Visit' Component located on their Main Menu (and not from within their grant site)
  - b. The site visit will be in Correcting status.
  - c. Upon completion of this section of the form per IDPH instructions in the Results, the Grantee/Contractor MUST mark the form as complete and submit it to IDPH.
  - d. If, upon IDPH's review of this portion of the review form, information is found to be incomplete, IDPH will negotiate the form to the Contractor (Grantee) to fix and resubmit.
5. **Internal Use Only:** There is a section of the form where IDPH staff can make notes or comments that are visible only to internal staff. This is available throughout the entire site review process.
6. **Negotiations:** After the Grantee/Contractor submits the form to IDPH (following their completion of the Review Acknowledgement and Requested Documentation sections), IDPH staff must use the "Negotiate" function of the form to open it to the Grantee/Contractor. This is the function that puts the form into 'Correcting' status.
  - a. Note: When the form is in Correcting status, it is unavailable for editing by IDPH staff.
  - b. The Grantee/Contractor must mark the form as complete and submit to IDPH after every completion of each requested activity/section.
7. **Closure:** When the IDPH staff is satisfied with the response/follow-up provided by the Grantee/Contractor, the review is ready to 'Close' and approve the review.
  - a. IDPH staff will upload a closure letter into the form.
8. **Site Visit Approval:**
  - a. Do not approve until all items are satisfactory, but be careful about selecting **Not Approved**; this will not allow any further editing or processing. It will end the site visit and record it *permanently* as Not Approved.
  - b. IDPH staff will 'Approve' the Review/Site Visit. This will officially close the visit and it will only be available as a view-only, flat version.
  - c. Both Internal and External Users will have continual access to a view only version of the submitted/approved review/site visit within IowaGrants.



## **Additional Tips/Reminders:**

### Internal and External Users:

Use this guide to schedule reviews until you are comfortable working within the component and form.

Do not provide or request identifiable health information of clients in the form. If a Grantee/Contractor inputs PHI (protected health information), IDPH staff shall have them remove it immediately.

Add your name and the date to any comments that you input throughout the form throughout the process.

Do not delete any documents or comments input by another person unless specifically directed to do so in writing from an IDPH staff; throughout the entire process.

### Internal Users:

IDPH staff must schedule the site visit for each Grantee/Contractor individually for each review.

IDPH staff will NOT mark the form as complete or submit the form throughout the process.

IDPH staff accesses the site visit form from within the grant site.

IDPH Staff must have all documents, templates, notification letter, and due dates ready upon *scheduling* a review via Site Visit.

### External Users:

The Grantee/Contractor accesses the site review form from their main menu '**My Site Visit**'.

The Grantee/Contractor **MUST** mark the form as complete and submit after fulfilling each required step/section of the form in the process.



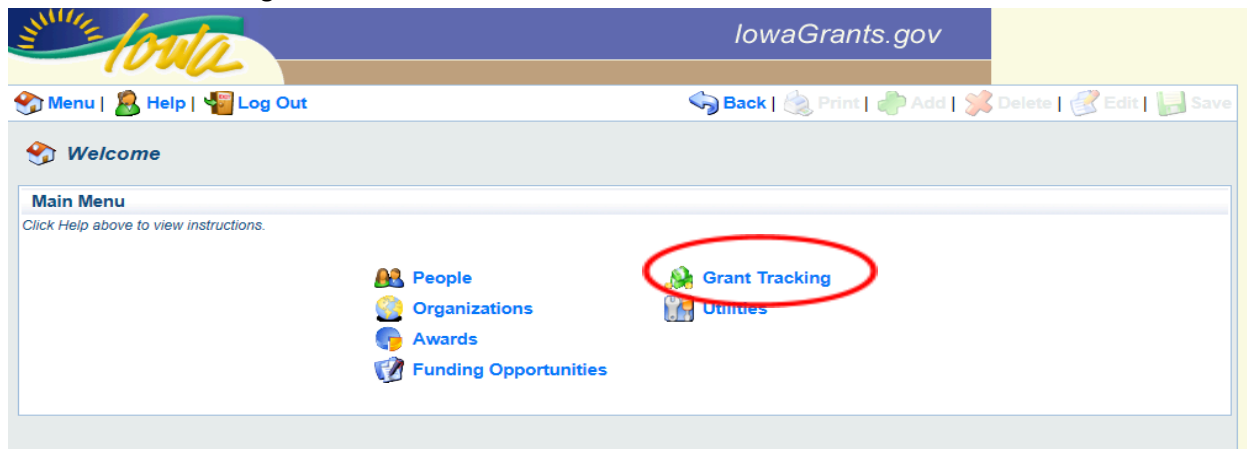
## Site Visit Manual

Follow this guide to schedule and complete a review within the Site Visit Component of IowaGrants.

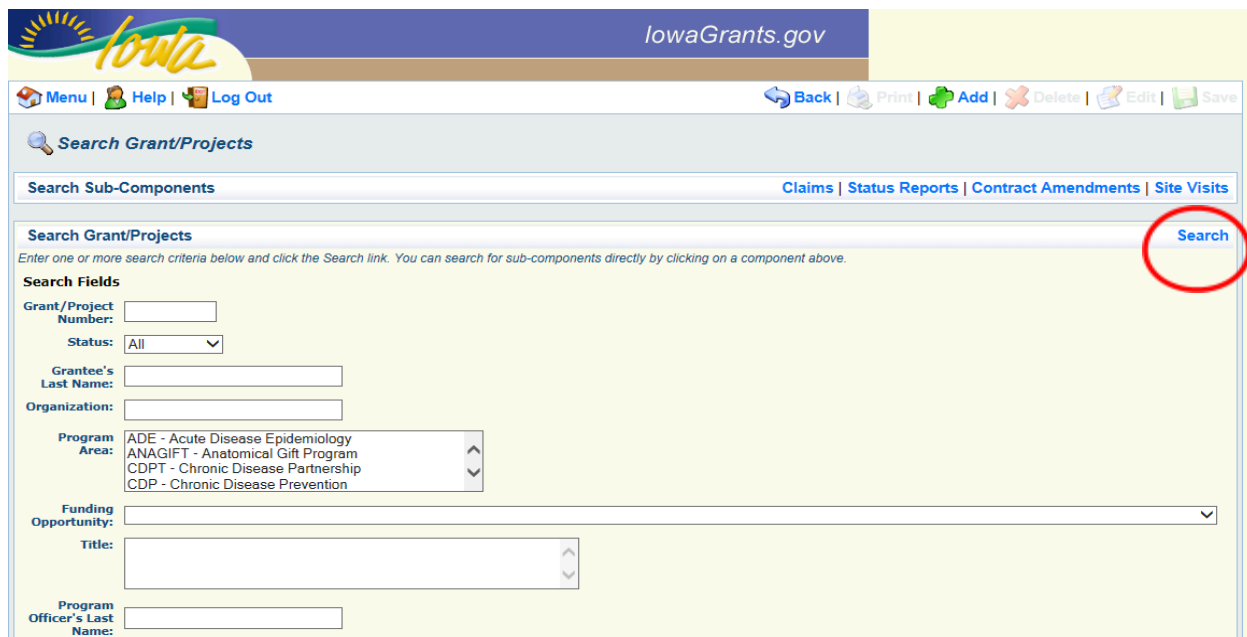
### I. Internal User: Scheduling a Review

Log in to the grant/contract in IowaGrants that you want to schedule the visit for.

Click on Grant Tracking:







Search/find the grant site you want to schedule the review for by entering the Contract number into the Grant/Project Number field or any other means of opening the grant site for the review to be scheduled.






Open the grant site by clicking on the Grant Title:

 [IowaGrants.gov](http://IowaGrants.gov)

 [Menu](#) |  [Help](#) |  [Log Out](#)  [Back](#) |  [Print](#) |  [Add](#) |  [Delete](#) |  [Edit](#) |  [Save](#)

 **Grant/Project Tracking**

**Search Criteria**

Program Areas: All  
Grant Number: Test WIC

Showing 1 - 1 of 1










**Grant/Projects**


The Grant/Projects that match your criteria appear below. You can click on the Grant/Project title to view the details. You may also select multiple Grant/Projects at once and mark the all as Underway.

Grant Number	Status	Year	Grant Title	Program Area	Organization	Grantee	Program Officer	Funding Opportunity	Budget Total
Test WIC	Underway	2015	Stacey Hewitt TEST for WIC pre-post	Nutrition	Public Health, Iowa Department of	StaceyM Hewitt	Bruce Brown	77411 - Iowa WIC Program (Special Supplemental Nutrition Program for Women, Infants, and Children) Request for Application (RFA) Federal Fiscal Year 2015	\$3,600.00

Showing 1 - 1 of 1

Select the Site Visits Component:

 [Menu](#) |  [Help](#) |  [Log Out](#)  [Back](#) |  [Print](#) |  [Add](#) |  [Delete](#) |  [Edit](#) |  [Save](#)

 **Grant Tracking**

**Grant/Project: Test WIC - Stacey Hewitt TEST for WIC pre-post - 2015**

Status: Underway  
Program Area: Nutrition  
Grantee Organization: [Public Health, Iowa Department of](#)  
Program Officer: Bruce Brown  
Awarded Amount: \$3,600.00  
Last Site Visit: 12/11/2014

**Instructions**  
The grant forms appear below.

**Associated Forms** [Status Report](#) | [Site Visit](#) | [Contract Amendment](#)

**Grant/Project Components** [Alerts](#) | [Copy](#) | [Annotations \(0\)](#) | [Export Grant/Project Data](#)

The components below are associated with the current Funding Opportunity. You can change these components in the Funding Opportunity module. You may associate specific forms in the Associated Forms section above. You can define your own alerts in the Alerts section. You can make notes by clicking Annotations. You can copy this grant and you can export the raw data.

Component	Last Edited
General Information	11/12/2014
Claims	
Progress Reports	
Site Visits	
Correspondence	
Appropriations	09/15/2014
Contract Holds	
Authorized Official and Financial Contact Information	07/31/2014
WIC Key Personnel	10/15/2014





To create a review , click Add within the Site Visit grant component:

**Grant/Project Tracking**

Grant/Project: Test WIC FY16 - WIC FY16 TEST- Official - 2016

Status: Underway

Program Area: Nutrition

Grantee Organization: Public Health, Iowa Department of

Program Officer: Stacey Hewitt

Awarded Amount: \$263,475.00

ID	Type	Status	Title	Due Date	Site Visit Date	Assigned To
Test WIC FY16 - 01	Comprehensive On-Site Visit	Editing	Test New Site Visit form	06/01/2015	05/26/2015	Bof Tester
Test WIC FY16 - 02	Comprehensive On-Site Visit	Editing	admin on-site Bruce	06/30/2015	05/28/2015	Jill Lange


Last Edited By:

Complete all the fields that open in the General Information Component:




- o Site Visit Type: The only option for this field is: Comprehensive Site Visit. This selection will tell the system to use the standard/universal form created for IDPH.
- o Assigned To: Select the green arrow to open the entire People Database. Type the last name of the desired Grantee/Contractor staff person to whom you wish to assign the form in the search box in the right hand corner of the screen. Highlight the correct name which will take you back to the previous screen. Note: the person you wish to assign the site visit must be registered in IowaGrants and attached to the Grant Site. If the person you assign is not the Executive Director of the Grantee/Contractor Agency, you need to inform them of the review/visit via another means, preferably through IowaGrants Correspondence.
- o Site Visit Date: Assign the site visit date, as applicable – the actual date you will be at the agency (on-site review) or the due date/deadline for submissions from the external grantee/contractor (off-site review).
- o Site Visit Status: Always keep in editing status.
- o Due Date: Assign a due date – the due date should be when you expect all steps of the entire visit to be complete (this may be 30-60 days following the actual on-site visit).
- o Title: Add a title to further identify the review as applicable to your program or terminology. (i.e.: Clinic Visit/Review, Office Visit/Review, Administrative Review/Visit, Chart Audit, Service Note Review, etc.)







Upon clicking save, this will generate an email alert to the external local agency user that was assigned the review/visit. The Review/Site Visit is now scheduled and set up in the system for this grant site/contractor.






*IowaGrants.gov*

 Menu |  Help |  Log Out

 Back |  Print |  Add |  Delete |  Edit |  Save


 **Grant Tracking**

**General Information**

Site Visit Type:\* Comprehensive Site Review ▼


Assigned To:\*

Tester, Bof



Site Visit Date:

09/29/2017




Site Visit Status:\*

Editing ▼

Due Date

10/06/2017



Title\*

Insert a title here: On-site review test

Iowa.gov – The Official Website of the State of Iowa.

Dulles Technology Partners Inc.



### A. Internal User: (IDPH) Modifying the scheduled review/site visit details

If you need to edit the due date or other information after the review/site visit is created, return to the General Information component of the site visit.

Open the Grant Site

Open the Site Visit Component

Click on the Site Visit ID

Click Edit

**IowaGrants.gov**

Menu | Help | Log Out | Back | Print | Add | Delete | **Edit** | Save

### Site Visits

**Instructions**  
*Print to PDF will convert the Site Visit plus any PDF attachments into a single PDF file. Edit Approval allows internal approval. Negotiation will allow you to unlock one or more sections of the Site Visit and route the Site Visit back to the Site Visitor for further editing. Versions will display all component versions that were created as a result of the negotiation process. Withdraw changes the status of the Site Visit to Withdrawn and removes the Site Visit from further processing.*

**Site Visit Details** [Print to PDF](#) | [Negotiation](#) | [Versions](#) | [Withdraw](#)

**Test WIC FY16-WIC FY16 TEST- Official**

**Nutrition**

Site Visit ID:	03	Status:	Editing
Site Visit Date:	06/01/2015	Approved Date:	
Assigned To:	Bof Tester	Approved By:	
Due Date:	06/30/2015	Approval Notes:	
Submitted Date:			
Title	Test New Form for Site Visit- Office Visit		



Click on the General Information Component link.

Menu | Help | Log Out | Back | Print | Add | Delete | Edit | Save

### Site Visit

Site Visit: 01

Grant: [199767-PREP TEST Addie Rasmusson](#)

Status: Editing

Program Area: Family Health

Grantee Organization: [Public Health, Iowa Department of](#)

Program Manager: Elizabeth Host-Buchmeier

Submitted Date:

Components		Preview   Submit
Name	Complete?	Last Edited
<a href="#">General Information</a>	✓	09/21/2017
<a href="#">IDPH Comprehensive Site Review Form</a>	-	
<a href="#">Opportunity Application</a>	-	

Click Edit.

Menu | Help | Log Out | Back | Print | Add | Delete | **Edit** | Save

### Grant Tracking

General Information [Return to Components](#)

ID: 229403

Site Visit Type: Comprehensive Site Review

Assigned To: Bof Tester

Site Visit Date: 09/29/2017

Due Date: 10/06/2017

Title\* Insert a title here: On-site review test

Last Edited By: Stacey Hewitt, 09/21/2017



Make the changes in the fields and click Save.

The screenshot shows the IowaGrants.gov website with the 'Grant Tracking' section. The 'General Information' form contains the following fields:

- Site Visit Type:** Comprehensive Site Review (dropdown menu)
- Assigned To:** Tester, Bof (text field with a green arrow icon)
- Site Visit Date:** 09/29/2017 (calendar icon)
- Site Visit Status:** Editing (dropdown menu)
- Due Date:** 10/06/2017 (calendar icon)
- Title:** Insert a title here: On-site review test (text field)

The 'Save' button in the top right navigation bar is circled in red. The footer of the page includes 'Iowa.gov – The Official Website of the State of Iowa.' and 'Dulles Technology Partners Inc.'



## II. Internal User: IDPH Selection of Review Type and additional scheduling information/working within the form

Upon scheduling a review through the site visit component, IDPH staff shall *immediately* complete the first two sections of the form.

### A. Open the Form within the Site Visit Component, if not already open.

Open the Grant Site

Open the Site Visit Component

Click on the Site Visit ID

Click Edit

Click on the form title

### B. Complete the Review Type and Scheduling Information section of the form.

Type of Review Selection:

Open the form

Click edit

Select the type of review from the drop down field in accordance with the definitions:

- On-Site Review- This type of review occurs at the Contractor's (grantee) site of operations.
- Off-Site (Desk) Review- This type of review does not occur at the Contractor's (grantee) site of operations.

Review Notification Letter: This letter shall serve as official notification to the agency/contractor in regards to the review and any required action on their behalf. While in Edit mode, click on 'Choose File' button, browse your files for the electronic letter, select the document, click open. Be sure to save. The letter should now be attached.

IDPH Comments: This field is optional. If comments are inserted, add your name and the date.

Click save.

### C. Complete the Documentation Templates section of the form, as applicable.

Click on the 'Add' button on the right side of the section title to upload any templates for assessments or documents required to be completed by the Grantee/Contractor for this review process.

In the fields that open: Provide a description of the document. Then click on 'Choose File' button, browse your files for the electronic letter, select the document, click open. Click save. Repeat as many times as necessary to input all necessary templates and documents.



These sections of the form will now be complete and look something like this:

**Instructions**

This form will be used by both the contractor/grantee and IDPH employee(s). Follow the Site Visit Component guide for additional instructions/assistance.

This is a multi-section form with multiple methods for inputting information into the sections and fields. Some information will be input by clicking on the Edit button at the top of the form, some information will be input by clicking on the Add button next to the section, and to upload documents/attachments, click on the Green Plus Sign icon next to the field.

**NOTICE: Do not provide identifiable health information of clients in this form.**

**Review Type and Scheduling Information**[Create New Version](#) | [Mark as Complete](#) | [Return to Components](#)

IDPH staff will select either On-Site Review or Off-Site (Desk) Review in compliance with the following:  
On-Site Review- This type of review occurs at the Contractor's site of operations.  
Off-Site (Desk) Review- This type of review does not occur at the Contractor's site of operations.

IDPH will also upload the Review Notification Letter and insert any applicable comments about the upcoming visit immediately upon scheduling a Site Visit Review.

NOTE: IDPH Staff shall NOT mark this form as complete (this action will lock out the Grantee/Contractor).

**Type of Review\*** On-Site Review

Upload the official letter notifying the agency of the upcoming review and any required action.

**Review Notification Letter (from IDPH to Contractor)** [Contractor A Site Review Notification Letter Sept 2017.docx](#)

If applicable, input comments about the review/scheduled site visit and include your name and date of the comment(s). Do not delete previously submitted comments.

**IDPH Comments** Please read the notification letter, download the form templates, and complete the acknowledgement by September 28. Thanks, Stacey Hewitt 9/21/17.

**Documentation Templates, if needed** [Add](#)

IDPH will use this section only if there are templates or forms the grantee/contractor needs to complete. If there are forms in this section, the grantee/contractor shall click on the document to open it and save it to their computer. Grantee/Contractor will complete the necessary forms and upload them in the 'Requested Documentation' section of this form.

Description	Documentation
Template A- for Test	<a href="#">TEMPLATE.docx</a>
Template B- for test	<a href="#">TEMPLATE.docx</a>

**Review Acknowledgement**

D. Internal Use Only Section: Optional, adding comments to the Internal Use Only section of the form.

There is a section at the bottom of the form titled 'Internal Use Only'. Comments and notes entered into this field are NOT visible by the Grantee/Contractor. IDPH Staff may enter notes or comments into this field at any time the form is editable to IDPH staff during the review process. This field/section is not required.

To insert comments: Open the form, click edit, and insert comments. If comments are inserted, add your name and the date. Do not delete previously inserted comments.



#### Internal Use Only

*This section is for Internal Use Only. All Comments and notes entered into this section are only visible by internal staff. The Grantee/Contractor can NOT see them. IDPH staff may enter notes or comments into this field at any time the form is editable to IDPH staff during the site visit process. This field/section is not required.*

**Internal IDPH Notes only:** Comments in this section are optional and will only be visible to internal IDPH staff. Contractor/Grantee will not see these comments.

Last Edited By: Stacey Hewitt, 09/21/2017

### **NOTICE: INTERNAL USER/IDPH staff will NOT mark this form as complete!**

Marking it complete at this stage will lock the Grantee/contractor out and they will not be able to input their information as required.

The information just entered and uploaded into the form is immediately available to the Grantee/Contractor (except the internal use only section information).

IDPH staff may choose to send a correspondence to the appropriate Grantee/Contractor staff regarding the assignment of the Site Review and prompt for any required action for their completion.

It is now the Grantee/Contractor's responsibility to provide information within the form. Refer to the External User guidance below as necessary to assist them; otherwise, continue to the next Internal User guidance sections of this guide.





### III. External User: Grantee/Contractor's steps in Review Acknowledgement and Required Documentation sections:

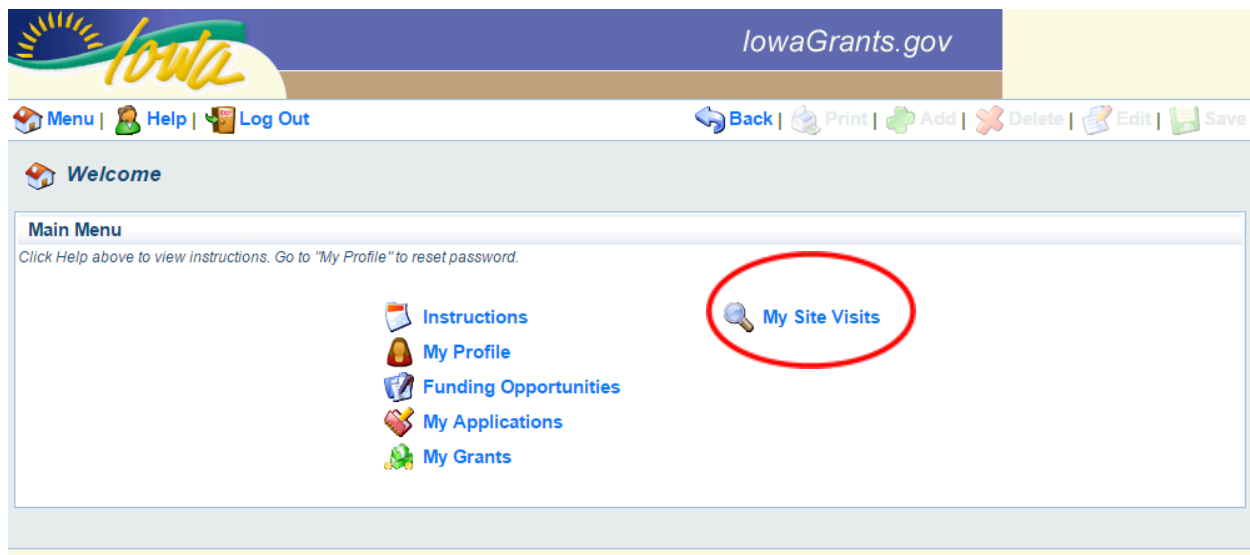
The Site Visit Component information entered into the form initially by the IDPH staff is immediately available to the Grantee/contractor upon scheduling. There are three sections of the form that will be completed by the Grantee/Contractor:

1. Review Acknowledgement
  - a. This section of the form will need to be completed by the Grantee/Contractor right away. It is a confirmation that they are aware that the review is occurring.
2. Requested Documentation
  - a. Typically this section of the form will be completed in the early stages of the review process, along with the Review Acknowledgement section and will be based on direction provided by the IDPH within the notification letter.
3. Grantee/Contractor Response
  - a. This section of the form will be completed by the Grantee/Contractor after IDPH conducts the review and completes the Results section of the form.

#### A. Access to the Site Visit Information in IowaGrants by the Grantee/Contractor:

The Grantee/Contractor will access the site visit via the **"My Site Visits"** link on their main menu – DO NOT go in through the grant tracking (My Grants) area.

Log in to IowaGrants. From the Main Menu, click on 'My Site Visits':





Click on the applicable Site Visit ID:

IowaGrants.gov						
Menu   Help   Log Out   Back   Print   Add   Delete   Edit   Save						
Site Visits						
Site Visits						
Submitted Site Visits						
Site Visits assigned to you personally appear below.						
ID	Organization	Grant Title	Program Officer	Site Visit Type	Status	Due Date
0_Test WIC FY16-08	Public Health, Iowa Department of	WIC FY16 TEST- Official	Marilyn Jones	Comprehensive Site Review	Editing	
0_Test WIC FY16-07	Public Health, Iowa Department of	WIC FY16 TEST- Official	Marilyn Jones	Comprehensive Site Review	Editing	11/07/2016
0_Test WIC FY16-06	Public Health, Iowa Department of	WIC FY16 TEST- Official	Marilyn Jones	Comprehensive Site Review	Correcting	
0_Test WIC FY16-05	Public Health, Iowa Department of	WIC FY16 TEST- Official	Marilyn Jones	Internal Monitoring Site Visit	Editing	
0_Test WIC FY16-04	Public Health, Iowa Department of	WIC FY16 TEST- Official	Marilyn Jones	Comprehensive Site Review	Correcting	06/15/2015
150921-01	Public Health, Iowa Department of	FY17 Tobacco CP - TEST Lucille	Sieglinde Prior	Comprehensive Site Review	Editing	
154902-01	Public Health, Iowa Department of	Test 2 - FY17 MH, CAH & I-Smile - Lucille	Elizabeth Host-Buchmeier	Comprehensive Site Review	Editing	11/18/2016
176789-01	Public Health, Iowa Department of	Title X Test Application DENISE WHEELER	Misty Cook	Comprehensive Site Review	Editing	
196277-01	Public Health, Iowa Department of	DianeKAnderson Test	Diane M Anderson	Comprehensive Site Review	Editing	
199767-01	Public Health, Iowa Department of	PREP TEST Addie Rasmusson	Elizabeth Host-Buchmeier	Comprehensive Site Review	Editing	10/06/2017
1_Test WIC Edgerton FO-01	Public Health, Iowa Department of	Stacey Hewitt WIC REPOST for Edgerton pre-post TEST	Stacey Hewitt	Comprehensive Site Review	Correcting	11/21/2014
1_TESTTESTEST-01	Test Company IDPH only	Residential Treatment for Pregnant and Postpartum Women	Jennifer Robertson	Comprehensive Site Review	Correcting	04/01/2016
5887TS17-01	Area Substance Abuse Council, Inc.	Tobacco Community Partnership FY17	Sheri Stursma	Comprehensive Site Review	Editing	
CFy Test FY16-03	Public Health, Iowa Department of	Care For Yourself TEST SH FY16	Lindsey Jones	Comprehensive Site Review	Editing	11/24/2015

Click on the Form title to open it.

IowaGrants.gov		
Menu   Help   Log Out   Back   Print   Add   Delete   Edit   Save		
Site Visit		
Site Visit: 01		
Grant: 199767-PREP TEST Addie Rasmusson		
Status: Editing		
Program Area: Family Health		
Grantee Organization: Public Health, Iowa Department of		
Program Manager: Elizabeth Host-Buchmeier		
Submitted Date:		
Components		
Preview   Submit		
Name	Complete?	Last Edited
General Information	✓	09/21/2017
IDPH Comprehensive Site Review Form	✓	09/21/2017
Opportunity	-	
Application	-	



Contractor/Grantee shall review the Notification letter and information entered by the IDPH Staff.

To open the Notification letter, click on the title of the form. The form will download to your computer.  
Open it to view it.

Contractor/Grantee shall download any necessary templates and forms provided by IDPH within the form  
(Documentation Templates section)

Click on the document title to open it.

The form will download to your computer.

Open it to view it and save it to your electronic files for completion.

Grantee/Contractor may rename the document.

The Grantee/Contractor must complete any tasks requested in the letter by the deadlines provided.



B. External User: Instructions for the Grantee/Contractor to complete the **Review Acknowledgement** section of the form.

After reviewing the information provided by IDPH staff, the Grantee/Contractor shall complete the Acknowledgement section of the form.

Open the form.

Click Edit at the top of the form.

Complete the fields of the Review Acknowledgement section of the form.

- o Grantee shall mark 'Yes' that they have read the review notification letter and acknowledge the visit.
- o Grantee may input comments, if applicable.
- o Click Save at the top of the form.

The screenshot displays the 'Site Visits' form interface. At the top, a navigation bar includes links for Menu, Help, Log Out, Back, Print, Add, Delete, **Edit** (circled in red), and Save. The main content area is titled 'Site Visits' and shows details for 'Site Visit: 01'. The details include: Grant: 199767-PREP TEST Addie Rasmusson, Status: Editing, Program Area: Family Health, Grantee Organization: Public Health, Iowa Department of, Program Manager: Elizabeth Host-Buchmeier, and Submitted Date: (blank). Below this is an 'Instructions' section with text explaining the form's purpose and a red 'NOTICE: Do not provide identifiable health information of clients in this form.' The 'Review Type and Scheduling Information' section includes links for 'Create New Version', 'Mark as Complete', and 'Return to Components'. The 'Review Acknowledgement' section is highlighted with a red border and contains the following text: 'Grantee/Contractor shall read the information entered by IDPH and complete this section. To complete this section, click Edit at the top of the form, complete the fields that open in this section and click Save.' It features a section titled 'I have read the review notification letter and acknowledge the review process' with radio buttons for 'Yes' and 'No'. Below this is a text area for 'Comments, if applicable:' with a note to 'Input comments if desired. Include your name and date of the comment(s). Do not delete any prior comments entered.'



C. External User: Instructions for the Grantee/Contractor to complete **Requested Documentation** section of the form.

As instructed by the IDPH, the Grantee/Contractor shall submit all requested documentation, forms, information, etc. in the Requested Documentation section of the form. This must be completed in accordance with any templates and deadlines provided.

Make sure the form is open (refer to guidance above).

Click on the 'Add' button on the right side of the section title.

In the fields that open:

- Provide a description of the document.
- Click on 'Choose File' button.
- Browse your files for the electronic file and select the document.
- Click open.
- Input any comments desired and as applicable into the Comments field.
- Click save at the top of the form.

Repeat as many times as necessary to input all requested documents.

**Requested Documentation** Add

*This section is for the grantee/contractor to upload any requested information/assessment(s) from IDPH as outlined in the notification letter or comment section above. Use any templates required by IDPH, as applicable. If templates or specific forms are required, they will be available for you to download by clicking on the attachment included in the Documentation Templates section above.*

*When the Grantee/Contractor has completed their acknowledgement and uploaded any requested documentation (if applicable), they will click on Mark as Complete, and Submit the form.*

*To complete this section, click Add and enter a brief description of the upload document and comments, if applicable. Click Save. Then click on the green plus sign icon and attach/upload the document.*

Description	Upload/Attachment	Comments, if applicable
Required document using Template A	TEST.docx	This is the completed template. Thanks.

These sections of the form will now be complete and look something like this:

**Review Acknowledgement**

*Grantee/Contractor shall read the information entered by IDPH and complete this section.*

*To complete this section, click Edit at the top of the form, complete the fields that open in this section and click Save.*

**I have read the review notification letter and acknowledge the review process** Yes

*Input comments if desired. Include your name and date of the comment(s). Do not delete any prior comments entered.*

**Comments, if applicable:** We will complete the requested templates and upload by the deadline provided.  
Contract User Name 9/22/17

**Requested Documentation** Add

*This section is for the grantee/contractor to upload any requested information/assessment(s) from IDPH as outlined in the notification letter or comment section above. Use any templates required by IDPH, as applicable. If templates or specific forms are required, they will be available for you to download by clicking on the attachment included in the Documentation Templates section above.*

*When the Grantee/Contractor has completed their acknowledgement and uploaded any requested documentation (if applicable), they will click on Mark as Complete, and Submit the form.*

*To complete this section, click Add and enter a brief description of the upload document and comments, if applicable. Click Save. Then click on the green plus sign icon and attach/upload the document.*

Description	Upload/Attachment	Comments, if applicable
Required document using Template A	TEST.docx	This is the completed template. Thanks.
Test 2	TEST.docx	
Test 3	TEMPLATE.docx	

**Results** Add




D. External User: Grantee/Contractor **must** mark the form as complete and submit the form.

Upon fulfilling all the requirements of IDPH and completing the required sections of the form; the Grantee/Contractor must mark the form as complete and submit the form to IDPH for review. Only complete the sections of the form requested by the IDPH. For example, do not complete the Response portion of the form until after IDPH conducts the review and uploads information into the Results section.

Clicking submit will notify the state office of the Grantee/Contractors fulfillment of the required activities thus far for this review process.

- When you click submit, a verification screen will pop up. If you are ready to submit, click Okay.
- A confirmation screen will then appear.

Notice: When the form is in Submitted Status it is NOT editable by the Grantee/Contractor. It must be in Editing or Correcting status to be modified by the Grantee/Contractor. Once the form is initially submitted by the Grantee/Contractor, and each time the Grantee/Contractor submits the form to IDPH; the Site Visit Review will not display in your My Visits listing and you will not be able to edit or input information again until IDPH staff negotiates it to you for additional information (either to update one of the first sections or to move on to the Response section).

 **Site Visits**

**Site Visit: 01**

**Grant:** 199767-PREP TEST Addie Rasmusson

**Status:** Editing

**Program Area:** Family Health

**Grantee Organization:** Public Health, Iowa Department of

**Program Manager:** Elizabeth Host-Buchmeier

**Submitted Date:**

**Instructions**

*This form will be used by both the contractor/grantee and IDPH employee(s). Follow the Site Visit Component guide for additional instructions/assistance.*

*This is a multi-section form with multiple methods for inputting information into the sections and fields. Some information will be input by clicking on the Edit button at the top of the form, some information will be input by clicking on the Add button next to the section, and to upload documents/attachments, click on the Green Plus Sign icon next to the field.*

**NOTICE: Do not provide identifiable health information of clients in this form.**

**Review Type and Scheduling Information**


IDPH staff will select either On-Site Review or Off-Site (Desk) Review in compliance with the following:  
On-Site Review- This type of review occurs at the Contractor's site of operations.  
Off-Site (Desk) Review- This type of review does not occur at the Contractor's site of operations.

IDPH will also upload the Review Notification Letter and insert any applicable comments about the upcoming visit immediately upon scheduling a Site Visit Review.

**NOTE: IDPH Staff shall NOT mark this form as complete (this action will lock out the Grantee/Contractor).**

[Mark as Complete](#) | [Return to Components](#)



 **Site Visit**

Site Visit: 01

Grant: 199767-PREP TEST Addie Rasmusson

Status: Editing

Program Area: Family Health

Grantee Organization: Public Health, Iowa Department of

Program Manager: Elizabeth Host-Buchmeier

Submitted Date:

**Components** [Preview](#) | [Submit](#)

Name	Complete?	Last Edited
General Information	✓	09/21/2017
IDPH Comprehensive Site Review Form	✓	09/21/2017
Opportunity	-	
Application	-	

ov/siteVisitComponents.do?documentPk=1506007932676

ted From I


www.iowagrants.gov says:

Submitting the Site Visit will lock all sections from further editing. Have you completed all sections? Are you sure you are ready to submit this Site Visit?

**OK** Cancel

 IowaGrants.gov

 Menu |  Help |  Log Out

 Back |  Print |  Add |  Delete |  Edit |  Save

 **Contracts**

**Site Visit Submitted Confirmation**

You have successfully submitted your Site Visit numbered 08 for Grant titled: Stacey Hewitt TEST for WIC pre-post. You can return to the Grant forms by clicking [here](#)



#### E. Review Form Corrections or Negotiations throughout the Site Visit Review Process

Throughout the process (after the Grantee/Contractor's initial submission when the review process starts), the IDPH may 'negotiate' the form to the Grantee/Contractor for additional information, clarification, or to complete the next section within the form. The Grantee/Contractor is expected to provide this information in a timely manner.

The Grantee/Contractor will access the Site Visit Review form via the **"My Site Visits"** via the main menu. The "negotiation" will put the form in *Correcting* Status for the Grantee/Contractor. When the form is in Correcting status it is unavailable to IDPH staff for editing.

Follow the instructions in this guide and within the form to edit the form and provide all requested information per IDPH's negotiation directions. The Grantee/Contractor must always mark the form as complete and submit it to the IDPH every time they have fulfilled a correction/negotiation or upon fulfilling a section requirement.

#### F. External User: completion of the Grantee/Contractor **Response** section of the form.

Upon IDPH's review of all information submitted by the Grantee/Contractor, and following IDPH's fulfillment of the review (on-site or off-site); the state will upload a results letter and other documentation (as applicable) in the Results section of the form.

The Grantee/Contractor shall review the Results letter and complete the Response section of the form from within the Site Visit Component. This section is where the Grantee/Contractor will comment and upload a response letter, correction action plan, or other documentation or action as requested by IDPH as a result of the review and as outlined in the Results section of the form.

##### Access the form and review the Results:

Access the form by logging in to IowaGrants and enter through the **'My Site Visits'** on the main menu.

Open the Site Visit form by clicking on the ID (Note, the form will be in *correcting* status).

Open the form by clicking on the title.

The Grantee/Contractor will review the completed Results document(s) by clicking on the [blue link](#) to the document in the Upload/Attachment column. Do NOT remove/Delete any documents or comments from this form!





### Complete the Grantee/Contractor Response section of the form.

The Grantee will now complete the Grantee/Contractor Response portion of the form by clicking on the Add button next to that section title.

In the fields that open:

- Response Upload field:
  - Click on 'Browse' button.
  - Browse your files for the electronic file and select the document.
  - Click open.
- Comments field: Add Comments.
- Click Save at the top of the form.

Repeat as many times as necessary to input sufficient response and all requested information.

Grantee/Contractor Response <span style="float: right;">Add</span>	
<i>This section is for the Grantee/Contractor to upload comments and response or corrective action plan, as a result of IDPH findings presented in the Results section and letter. Fields in this section will open by clicking on the Add button next to the section. If there are no findings for the Grantee/Contractor to report/respond to, the Grantee/Contractor shall insert a comment to acknowledge receipt of the findings/results.</i>	
<i>To complete this section, click Add and enter a comment, if applicable. Click Save. Then click on the green plus sign icon and attach/upload the document.</i>	
<i>After all response documents and comments are included by the Grantee/Contractor, click on Mark as Complete, and Submit the form.</i>	
<i>IDPH will negotiate this form to the Grantee/Contractor, if needed, until the response is satisfactory. Once the response is satisfactory, IDPH will complete the Closure section below.</i>	
Response Upload	Comments
<a href="#">Response.docx</a>	Here is the requested response.

After all response documents are included, the Grantee/Contractor must mark the form as complete and submit.

### G. Closure

The final section of the form is completed by IDPH once the entire review is considered satisfactory by IDPH. Completion of this section will close this Site Review and it will be available as view-only in a flat copy version.



#### IV. Internal User: IDPH Review of initial submissions and negotiation

##### A. IDPH Review of Grantee/Contractor's Acknowledgement and Documents

After the Grantee/Contractor completes their initial sections of the Site Visit form and submits it; it is then available for IDPH staff to review. The status of the Site Visit must be 'Submitted'. If it is 'Editing', this means the Grantee/Contractor has not submitted the form.

ID	Type	Status	Title	Due Date	Site Visit Date	Assigned To
Test WIC FY16 - 01	Comprehensive On-Site Visit	Submitted	Test New Site Visit form	06/01/2015	05/26/2015	Bof Tester
Test WIC FY16 - 02	Comprehensive On-Site Visit	Editing	admin on-site Bruce	06/30/2015	05/28/2015	Jill Lange
Test WIC FY16 - 03	Comprehensive On-Site Visit	Correcting	Test New Form for Site Visit- Office Visit	07/15/2015	06/15/2015	Bof Tester

At this phase, IDPH is reviewing the Grantee/Contractor's acknowledgement and document uploads, as applicable. IDPH staff may negotiate it back to the Grantee if there are required edits. Otherwise, it is ready for IDPH to upload/ input information in the next section of the form following completion of the review: Results. If negotiation at this stage is not required, skip to section V.



## **B. Negotiation steps (If necessary):**

To negotiate the form back to the Grantee/Contractor to make edits, IDPH staff enters the Grant Site by clicking on the Site Visit Component within the grant. Click on the Site Visit ID to access the specific visit form. Then click 'Negotiation'.

NOTE: if the Negotiation button is not available, this means the Grantee/Contractor has not **submitted** the form. You must have them submit.

**IowaGrants.gov**

Menu | Help | Log Out | Back | Print | Add | Delete | Edit | Save

### Site Visits

**Instructions**  
*Print to PDF will convert the Site Visit plus any PDF attachments into a single PDF file. **Edit Approval** allows internal approval. **Negotiation** will allow you to unlock one or more sections of the Site Visit and route the Site Visit back to the Site Visitor for further editing. **Versions** will display all component versions that were created as a result of the negotiation process. **Withdraw** changes the status of the Site Visit to Withdrawn and removes the Site Visit from further processing.*

**Site Visit Details** [Print to PDF](#) | [Negotiation](#) | [Edit Approval](#) | [Versions](#) | [Withdraw](#)

**Test WIC-Stacey Hewitt TEST for WIC pre-post**

#### Nutrition

Site Visit ID:	08	Status:	Submitted
Site Visit Date:	12/08/2014	Approved Date:	
Assigned To:	Bof Tester	Approved By:	
Due Date:	01/30/2015	Approval Notes:	
Submitted Date:	12/11/2014		

#### Primary Contact and Organization

<b>Primary Contact</b>		<b>Organization Information</b>	
AnA User Id	STACEY.HEWITTTEST@IOWAID	Organization Name:*	Public Health, Iowa Department of
First Name*	StaceyM	Organization Type:*	State Government
	First Name Middle Name Last Name	Tax ID:	1-42-6004571-A3
Title:		DUNS:	80-834-5920
Email:*	Stacey.hewitt@idph.iowa.gov	Organization Website:	http://www.idph.state.ia.us/
Address:*	3407 Ash Drive SW	Address:	321 E. 12th St.



(Negotiation, continued)

Unlock the forms for the grantee by checking the boxes.

Set the alert.

Insert a message for the negotiation. Provide specific instructions for the edits you are requesting.

Click Save (this will notify the Grantee).

A screenshot of a web application interface for "Grant/Project Tracking". The page has a header with navigation links: "Menu", "Help", "Log Out", "Back", "Print", "Add", "Delete", "Edit", and "Save". The "Save" button is circled in red. Below the header, the main content area is titled "Negotiation". It contains a paragraph of instructions: "Select the components you wish to unlock. Unchecked components will remain locked. To setup a due date notification alert for the grantee, enter a negotiation due date. Enter a message for the grantee, the grantee will receive this message via email. Also, you may upload a file which will reach the grantee via email." Below this, there are three sections: "Unlock Section:" with two checked checkboxes, "Alert:" with a checked checkbox and a dropdown menu set to "5" days, and "Message:" with a text area containing the text "Input specific instructions for the edits that are needed by the Grantee/Contractor.".

The Site Visit Status has now changed to Correcting. This means the form is editable by the Grantee/Contractor and will not be editable by IDPH staff until resubmitted by the Grantee/Contractor.



[Menu](#) | [Help](#) | [Log Out](#) [Back](#) | [Print](#) | [Add](#) | [Delete](#) | [Edit](#) | [Save](#)

**Grant/Project Tracking**

**Grant/Project: 199767 - PREP TEST Addie Rasmusson - 2018**

Status: Underway

Program Area: Family Health

Grantee Organization: [Public Health, Iowa Department of](#)

Program Officer: Elizabeth Host-Buchmeier

Awarded Amount: \$46,587.00

Last Site Visit: 09/25/2017

**Site Visits** [Add](#)

ID	Type	Status	Title	Due Date	Site Visit Date	Assigned To
<a href="#">199767 - 01</a>	Comprehensive Site Review	Correcting	Insert a title here: On-site review test	10/06/2017	09/29/2017	<a href="#">Bof Tester</a>

Last Edited By:

The Grantee/Contractor shall now make requested edits to the document, mark all the forms as complete and submit.

Once the fixes have been made and the form re-submitted, then IDPH staff will review and can either move to the next stage (see below) or negotiate the form again. Negotiation can occur until the form sections under review are satisfactory to IDPH.



## V. INTERNAL USER: COMPLETING THE RESULTS SECTION

### A. Internal User: IDPH Staff Completion

Once the Review Acknowledgement section and the Required Documents section is satisfactory to IDPH; IDPH staff will complete the review.

After completing the review, the state staff will upload the Results report identifying review results, as well as any other document.

IDPH Staff enters the Grant Site by clicking on the Site Visit Component within the grant/contract site.

Click on the Site Visit ID to access the form.

Open the Form by clicking on the title (Note, it will be in *Submitted* status)

Click Edit

Click on the Add button next to the Results section to upload the report and any additional documents. You may add as many documents as needed.

In the fields that open:

- Report Name: Enter a name for each report/document.
- Report Description: Enter a brief description of the document/report.
- Upload/Attachment:
  - Click on 'Browse' button.
  - Browse your files for the electronic file and select the document.
  - Click open.
- Comments: Add comments as desired.

Click save at the top of the form.

Repeat as necessary until all 'Results' reports/documents are uploaded. Each report must be uploaded and saved separately.

Report Name	Report Description	Upload/Attachment	Comments
Results of review completed 9.25.17	Please refer to the attached report for items resulting from this review.	RESULTS.docx	Please respond by 10.15.17 with items as outlined in the letter.



Example of open fields:

**Results**

*This section is used by IDPH to report the findings/results/requirements of the grantee/contractor following the 'Review' (whether it is On-Site or Off-Site Review). IDPH will upload a Results letter, as well as any other additional items to be documented.*

*After all review information is uploaded, the IDPH employee negotiates the form back to the local agency for their response. Refer to the next section.*

*Provide a report name. Example: "ABC Clinic Visit (date)"*

**Report Name\***

*Optional, brief description of report contents. Example: "Please refer to the attached report for items resulting from this review."*

**Report Description**

**Upload/Attachment**

*Provide any additional comments as desired. Example: "As outlined in the attached letter, action is required by (insert date)."*

**Comments**

[Return to Top](#)

After all visit information is uploaded to the Results portion of the form, the IDPH staff negotiates the form back to the local agency for them to complete the Response portion. Refer to the Negotiation section above.

If the site visit site is open, click the negotiation button.

If not, log in to the Grant Site, click on Site Visit component and click on the Site Visit ID.



**VI. INTERNAL USER: IDPH Review of the Grantee/Contractor Response and Closure of the Site Visit**

**A. Internal User: IDPH Review of Grantee/Contractor Response**

Once the Response section is completed and the form is submitted by the Grantee/Contractor, the IDPH staff will access the form and review the information. If Grantee/Contractor Response is not satisfactory, the IDPH may negotiate the form to the Grantee/Contractor for fixes (refer to the Negotiation section of this guide if necessary), or IDPH staff may opt other measures to address unsatisfactory results as applicable.

If the Response section is satisfactory, the IDPH staff will proceed to Closure, refer to the next section.

Access the Site Visit Review form

IDPH Staff enters the Grant Site by clicking on the Site Visit Component within the grant/contract site. The status of the Site Visit must be ‘Submitted’. If it is ‘Editing’, this means the Grantee/Contractor has not submitted the form.

Click on the Site Visit ID to access the form.

Open the Form by clicking on the title (Note, it will be in *Submitted* status)

IDPH staff will review the completed Response section information and document(s) included by clicking on the [blue link](#) to the document in the Upload/Attachment column. Do NOT remove/Delete any documents or comments from this form!

Proceed with Negotiation or Closure

Grantee/Contractor Response		Add
<small>This section is for the Grantee/Contractor to upload comments and response or corrective action plan, as a result of IDPH findings presented in the Results section and letter. Fields in this section will open by clicking on the Add button next to the section. If there are no findings for the Grantee/Contractor to report/respond to, the Grantee/Contractor shall insert a comment to acknowledge receipt of the findings/results.</small>		
<small>To complete this section, click Add and enter a comment, if applicable. Click Save. Then click on the green plus sign icon and attach/upload the document.</small>		
<small>After all response documents and comments are included by the Grantee/Contractor, click on Mark as Complete, and Submit the form.</small>		
<small>IDPH will negotiate this form to the Grantee/Contractor, if needed, until the response is satisfactory. Once the response is satisfactory, IDPH will complete the Closure section below.</small>		
Response Upload	Comments	
<a href="#">Response.docx</a>	Here is the requested response.	





#### B. Internal User: IDPH completion of the Closure Section of the form

If the state is satisfied with the response and review results, proceed with completing the Closure section of the form.

The review form must be open.

Click Edit at the top of the form. Note: clicking Edit at the top of the form will open additional fields previously completed during the process. Do not change any of the previous comments or information.

Scroll to the Closure section.

In the fields that open:

- Closure Letter Upload field:
  - Click on 'Browse' button.
  - Browse your files for the electronic file and select the document.
  - Click open.
- Comments field: Add Comments.

Click save at the top of the form.

Here is an example of what this section of the form will look like when completed:

**Closure**

*When the IDPH employee is satisfied with the response/follow-up provided by the Grantee/Contractor, the visit is ready to 'Close' and approve the review/visit/form.*

*IDPH employee will upload a closure letter for the review; and provide any comments as applicable.*

*After this section is completed, the IDPH employee will 'Approve' the visit, which will officially close it.*

**Closure Letter** [Closure Letter.docx](#)

**Comments** Please refer to the attached closure letter. Thank you for your participation in this review.



### C. Internal User: IDPH Approval of the Review/Site Visit

Approving a site visit closes it completely for any revisions by the Grantee/Contractor and IDPH staff. IDPH staff must verify all information is correct and appropriate before entering approval of the review/site visit.

From within the form, click on Return to Components:

**IowaGrants.gov**

[Menu](#) | [Help](#) | [Log Out](#) | [Back](#) | [Print](#) | [Add](#) | [Delete](#) | [Edit](#) | [Save](#)

**Site Visits**

**Site Visit: 01**

**Grant:** 199767-PREP TEST Addie Rasmusson  
**Status:** Submitted  
**Program Area:** Family Health  
**Grantee Organization:** Public Health, Iowa Department of  
**Program Manager:** Elizabeth Host-Buchmeier  
**Submitted Date:** 09/25/2017

**Instructions**  
This form will be used by both the contractor/grantee and IDPH employee(s). Follow the Site Visit Component guide for additional instructions/assistance.  
This is a multi-section form with multiple methods for inputting information into the sections and fields. Some information will be input by clicking on the Edit button at the top of the form, some information will be input by clicking on the Add button next to the section, and to upload documents/attachments, click on the Green Plus Sign icon next to the field.  
**NOTICE: Do not provide identifiable health information of clients in this form.**

**Review Type and Scheduling Information** [Create New Version](#) | [Versions](#) | [Return to Components](#)

IDPH staff will select either On-Site Review or Off-Site (Desk) Review in compliance with the following:  
On-Site Review- This type of review occurs at the Contractor's site of operations.  
Off-Site (Desk) Review- This type of review does not occur at the Contractor's site of operations.  
IDPH will also upload the Review Notification Letter and insert any applicable comments about the upcoming visit immediately upon scheduling a Site Visit Review.  
NOTE: IDPH Staff shall NOT mark this form as complete (this action will lock out the Grantee/Contractor).

**Type of Review\*** On-Site Review

Upload the official letter notifying the agency of the upcoming review and any required action.

**Review Notification Letter (from IDPH to Contractor)** [Contractor A Site Review Notification Letter Sept 2017.docx](#)

If applicable, input comments about the review/scheduled site visit and include your name and date of the comment(s). Do not delete previously submitted comments.



Click on Preview:

Menu | Help | Log Out | Back | Print | Add | Delete | Edit | Save

### Site Visit

Site Visit: 01

Grant: [199767-PREP TEST Addie Rasmusson](#)

Status: Submitted

Program Area: Family Health

Grantee Organization: [Public Health, Iowa Department of](#)

Program Manager: Elizabeth Host-Buchmeier

Submitted Date: 09/25/2017

[Preview](#) | [Submit](#)

Name	Complete?	Last Edited
General Information	✓	09/21/2017
IDPH Comprehensive Site Review Form	✓	09/25/2017
Opportunity	-	
Application	-	

Click on Edit Approval:

Menu | Help | Log Out | Back | Print | Add | Delete | Edit | Save

### Site Visits

**Instructions**

*Print to PDF* will convert the Site Visit plus any PDF attachments into a single PDF file. *Edit Approval* allows internal approval. *Negotiation* will allow you to unlock one or more sections of the Site Visit and route the Site Visit back to the Site Visitor for further editing. *Versions* will display all component versions that were created as a result of the negotiation process. *Withdraw* changes the status of the Site Visit to Withdrawn and removes the Site Visit from further processing.

[Print to PDF](#) | [Negotiation](#) | [Edit Approval](#) | [Versions](#) | [Withdraw](#)

**Site Visit Details**

**199767-PREP TEST Addie Rasmusson**

**Family Health**

Site Visit ID: 01 Status: Submitted



Select **Approved** from the dropdown menu and enter notes/comments if applicable and click Save. Once approved the review/visit is officially closed.

Note, be careful about selecting Not Approved; this will not allow any further editing or processing...**it will end the site visit and record it *permanently* as Not Approved.**

[Menu](#) | [Help](#) | [Log Out](#) [Back](#) | [Print](#) | [Add](#) | [Delete](#) | [Edit](#) | [Save](#)

**Grant/Project Tracking**

**Site Visit: 01**  
  
Grant: [199767-PREP TEST Addie Rasmusson](#)  
Status: Submitted  
Program Area: Family Health  
Grantee Organization: [Public Health, Iowa Department of](#)  
Program Manager: Elizabeth Host-Buchmeier  
Submitted Date: 09/25/2017

**Site Visit Approval**  
  
Site Visit:   
  
Notes: 

Review fully completed and approved by IDPH on (insert date). |

Last Edited By:



Flat version view:

Menu | Help | Log Out

Back | Print | Add | Delete | Edit | Save

Site Visits

Instructions

*Print to PDF* will convert the Site Visit plus any PDF attachments into a single PDF file. *Edit Approval* allows internal approval. *Negotiation* will allow you to unlock one or more sections of the Site Visit and route the Site Visit back to the Site Visitor for further editing. *Versions* will display all component versions that were created as a result of the negotiation process. *Withdraw* changes the status of the Site Visit to Withdrawn and removes the Site Visit from further processing.

Site Visit Details

Print to PDF | Negotiation | Versions | Withdraw

199767-PREP TEST Addie Rasmusson

Family Health

Site Visit ID:

01

Status:

Approved

Site Visit Date:

09/29/2017

Approved Date:

09/25/2017

Assigned To:

Bof Tester

Approved By:

Stacey Hewitt

Due Date:

10/06/2017

Approval Notes:

Review fully completed and approved by IDPH on (insert date).

Submitted Date:

09/25/2017

Due Date:

10/06/2017

Title\*

Insert a title here: On-site review test

IDPH's view within the Grant Site specific for this grant/contract:

Menu | Help | Log Out

Back | Print | Add | Delete | Edit | Save

Grant/Project Tracking

Grant/Project: 199767 - PREP TEST Addie Rasmusson - 2018

Status: Underway

Program Area: Family Health

Grantee Organization: Public Health, Iowa Department of

Program Officer: Elizabeth Host-Buchmeier

Awarded Amount: \$46,587.00

Last Site Visit: 09/25/2017

Site Visits

Add

ID	Type	Status	Title	Due Date	Site Visit Date	Assigned To
199767 - 01	Comprehensive Site Review	Approved	Insert a title here: On-site review test	10/06/2017	09/29/2017	Bof Tester
199767 - 02	Comprehensive Site Review	Pending	Test to look at form			Bof Tester

Last Edited By:



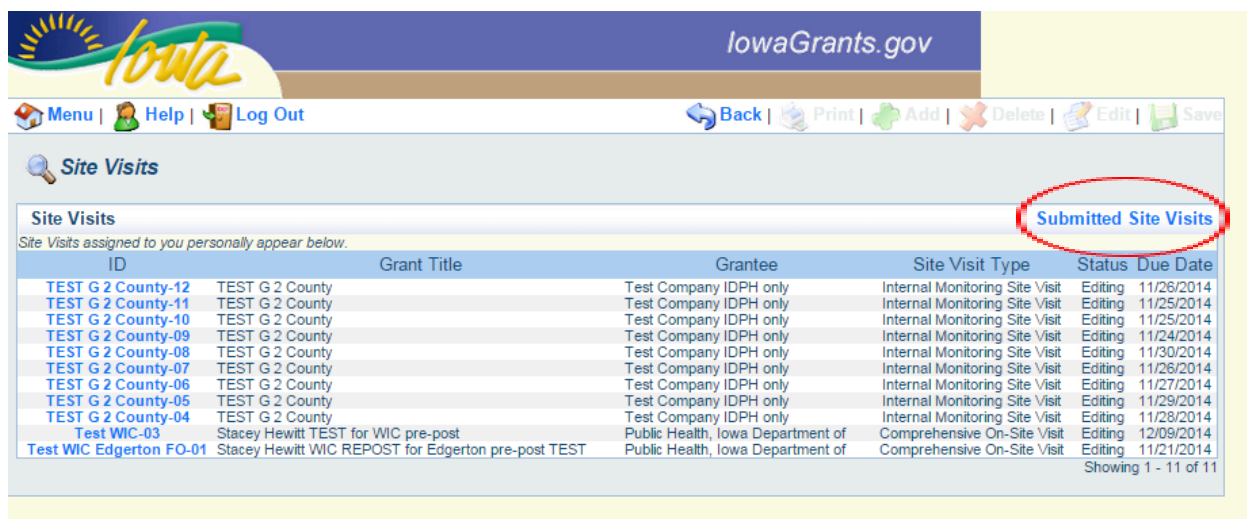
## Grantee/Contractor access to the approved site visit:

Once approved, the Site Visit will only appear in 'Submitted Site Visits' from the Grantee/Contractor 'My Site Visits' component from the main menu.

Contractor View:



Click on Submitted Site Visits:





Click on the ID to view the entire form in read-only.

Submitted Site Visits							Pending Site Visits	
ID	Organization	Grant Title	Program Officer	Site Visit Type	Status	Due Date		
<a href="#">Test for Training 1-00-15-01</a>	Test Company IDPH only	TEST application and site for training coordinators and managers	Grant Coordinator Tester	Comprehensive On-Site Visit	Submitted	02/27/2015		
<a href="#">TEST G 2 County-12</a>	Test Company IDPH only	TEST G 2 County	John McMullen	Internal Monitoring Site Visit	Approved	11/26/2014		
<a href="#">Test MCHFP-09</a>	Public Health, Iowa Department of	Pre-post TEST for MCHFP RFA Stacey Hewitt	Andrew Connet	Comprehensive On-Site Visit	Approved	02/27/2015		
<a href="#">Test WIC-16</a>	Public Health, Iowa Department of	Stacey Hewitt TEST for WIC pre-post	Bruce Brown	Comprehensive On-Site Visit	Approved	01/30/2015		
<a href="#">Test WIC-13</a>	Public Health, Iowa Department of	Stacey Hewitt TEST for WIC pre-post	Bruce Brown	Comprehensive On-Site Visit	Submitted	01/23/2015		
<a href="#">Test WIC-10</a>	Public Health, Iowa Department of	Stacey Hewitt TEST for WIC pre-post	Bruce Brown	Comprehensive On-Site Visit	Approved	01/30/2015		
<a href="#">Test WIC-09</a>	Public Health, Iowa Department of	Stacey Hewitt TEST for WIC pre-post	Bruce Brown	Comprehensive On-Site Visit	Approved	12/31/2014		
<a href="#">Test WIC-08</a>	Public Health, Iowa Department of	Stacey Hewitt TEST for WIC pre-post	Bruce Brown	Comprehensive On-Site Visit	Approved	01/30/2015		
<a href="#">Test WIC-05</a>	Public Health, Iowa Department of	Stacey Hewitt TEST for WIC pre-post	Bruce Brown	Comprehensive On-Site Visit	Approved	01/16/2015		
<a href="#">Test WIC-02</a>	Public Health, Iowa Department of	Stacey Hewitt TEST for WIC pre-post	Bruce Brown	Comprehensive On-Site Visit	Submitted	11/18/2014		
<a href="#">Test WIC FY16-03</a>	Public Health, Iowa Department of	WIC FY16 TEST- Official	Stacey Hewitt	Comprehensive On-Site Visit	Approved	07/15/2015		
<a href="#">Test WIC FY16-01</a>	Public Health, Iowa Department of	WIC FY16 TEST- Official	Stacey Hewitt	Comprehensive On-Site Visit	Submitted	06/01/2015		
							Showing 1 - 12 of 12	

Note that the uploaded documents and letters may be opened from the view-only version (flat copy) by clicking on the document:



### Review Type and Scheduling Information

Type of Review*	On-Site Review
Upload the official letter notifying the agency of the upcoming review and any required action.	
Review Notification Letter (from IDPH to Contractor)	Contractor A Site Review Notification Letter Sept 2017.docx
If applicable, input comments about the review/scheduled site visit and include your name and date of the comment. You may delete previously submitted comments.	
IDPH Comments	Please read the notification letter, download the form templates, and complete the acknowledgement by September 28. Thanks, Stacey Hewitt 9/21/17.

Click on the document name to view the letter or uploaded documentation

### Documentation Templates, if needed

Description	Documentation
Template A- for Test	TEMPLATE.docx
Template B- for test	TEMPLATE.docx