



Integrated Work Plan Form Instructions

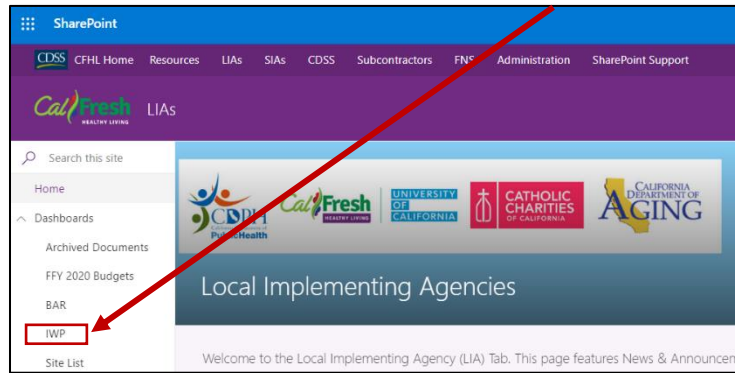
Table of Contents

| | |
|--|----|
| I. Quick Start Tips..... | 3 |
| II. IWP Dashboard..... | 5 |
| III. Section A..... | 6 |
| Edit Section A..... | 6 |
| IV. Section B: Start New or Edit Existing Section B Activity Setting | 11 |
| Shopping Cart..... | 11 |
| Direct-Ed ActivitiesTable | 13 |
| All Other Activities Table | 14 |
| Innovative Activities Table | 15 |
| V. Additional IWP Form Functions and Tools..... | 17 |
| Phase Management | 17 |
| Approval Tool | 17 |
| Alert Tool..... | 17 |
| Edit Tool | 18 |
| Copy Tool..... | 19 |
| Comment Tool..... | 21 |
| Comment Tool Print Log Function..... | 23 |
| Generate Document Tool | 24 |
| Export Content Tool..... | 26 |
| Help Guide..... | 28 |
| Activity Identification Numbers..... | 29 |
| VI. Revision Process | 30 |
| VII. Appendix | 35 |
| Item No. 1: IWP Form Section A Workflow Chart | 35 |
| Item No. 2: IWP Form Section B Workflow Chart | 36 |
| Item No. 3: Five Report Options: Available Datasets..... | 37 |

I. Quick Start Tips

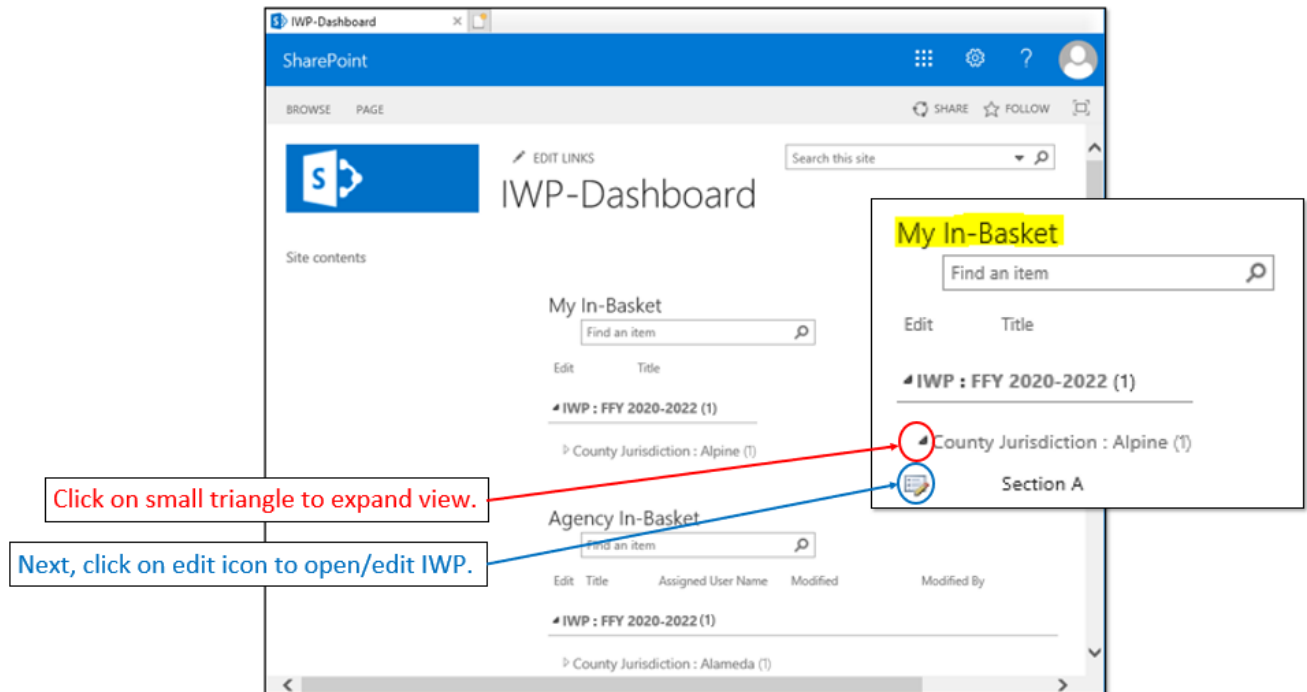
Users have access to Intergrated Work Plans (IWP) based on their level of permissions. For example, Local Implementing Agencies (LIAs) only have access to the County/Jurisdiction they have been assigned by their State Implementing Agency (SIAs). Next, SIAs only have access to the County/Jurisdiction where their LIAs are doing CalFresh Healthy Living (CFHL) activities.

To begin, log onto the CFHL SharePoint Site [LIA Dashboard](#) and click on the navigation link to the [IWP Dashboard](#), as illustrated below.



Check to see if there is anything in **My In-Basket**, these are IWPs which have been **Checked-Out** to the user.

If there is something in **My In-Basket**, then click the **small triangle** to view the IWP, as illustrated below.



If there is nothing in **My In-Basket**, then scroll down to the **Agency In-Basket** and click the **small triangle** to view the IWP, as illustrated below.

The screenshot shows the SharePoint IWP-Dashboard interface. It features two main sections: 'My In-Basket' and 'Agency In-Basket'. The 'My In-Basket' section is currently empty, with a message: 'There are no items to show in this view of the "IWP Sections" list.' The 'Agency In-Basket' section displays a list of items. The first item is 'IWP : FFY 2020-2022 (83)'. Below it, there are four expandable items: 'County Jurisdiction : Alameda (1)', 'County Jurisdiction : Alpine (1)', 'County Jurisdiction : Amador (2)', and 'County Jurisdiction : Berkeley (1)'. A red circle highlights the small triangle icon next to the 'County Jurisdiction : Alpine (1)' item. A red arrow points from a text box to this triangle. A blue arrow points from another text box to the edit icon (a pencil) next to the 'Section A' item in the expanded view. The expanded view shows a search bar, an 'Edit Title' link, and a list of items: 'IWP : FFY 2020-2022 (2)', 'County Jurisdiction : Alameda (1)', 'County Jurisdiction : Alpine (1)', 'County Jurisdiction : Amador (2)', and 'County Jurisdiction : Berkeley (1)'. The 'Section A' item is highlighted with a blue circle.

Click on small triangle to expand view.

Next, click on edit icon to open/edit IWP.

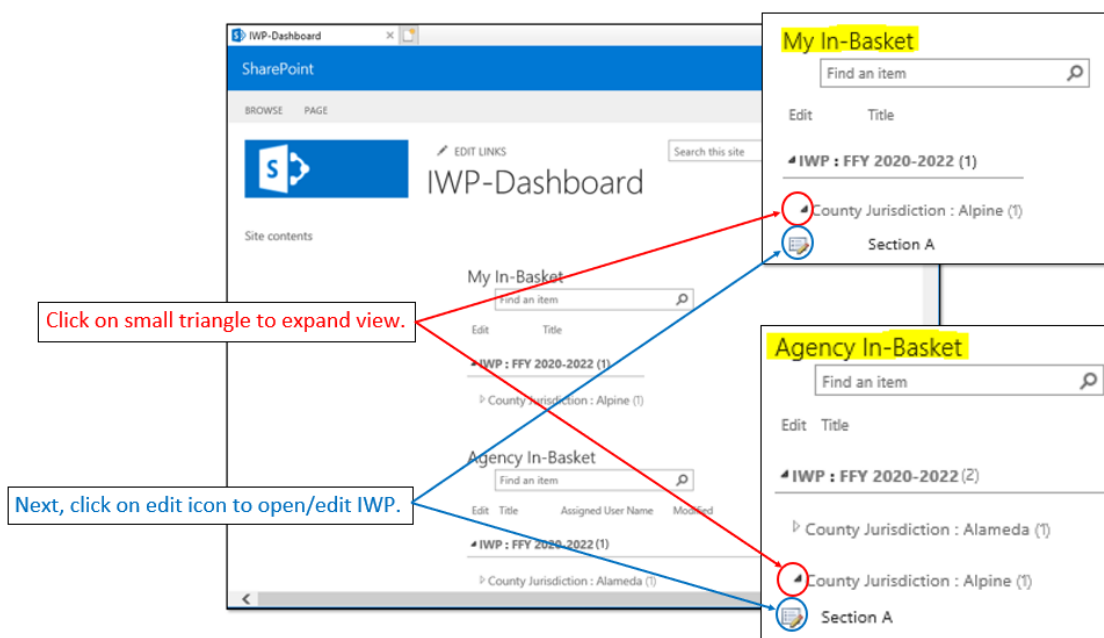
II. IWP Dashboard

LIAs are responsible for creating, completing and updating each county/jurisdiction Section A and B. IWPs start with a Section A, then Section B Activity Settings are added by LIAs.

After logging onto the LIA Dashboard, as illustrated in the [Quick Start Tips](#) above, click on the IWP Dashboard navigation link to view the contents of the **My In-Basket** and the **Agency In-Basket**.

My In-Basket contains IWPs checked-out by the user. When an IWP is checked-out, others cannot edit it. Only the user that has it checked-out may edit it. Users must check-in an IWP to allow others to edit it.

NOTE: California Department of Social Services (CDSS) can override a checked-out IWP. But unsaved edits may be lost.



Agency In-Basket contains IWPs assigned to a county/jurisdiction. Use this basket to view, open and checkout IWPs.

As LIAs save changes to Section A and add Section B settings, users will see the IWP Dashboard navigation options begin to expand. Thus, the IWP Dashboard allows users to navigate to any Section A or B to view, open, checkout and make edits.

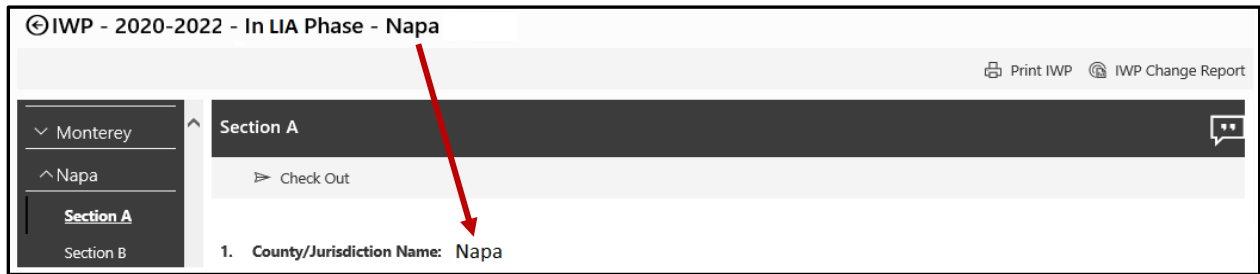
III. Section A

Edit Section A

Each county/jurisdiction IWP first starts by editing Section A. **NOTE:** The IWP Form Section A workflow chart is found in the [Appendix as Item No. 1](#) for reference.

1. County/Jurisdiction Name

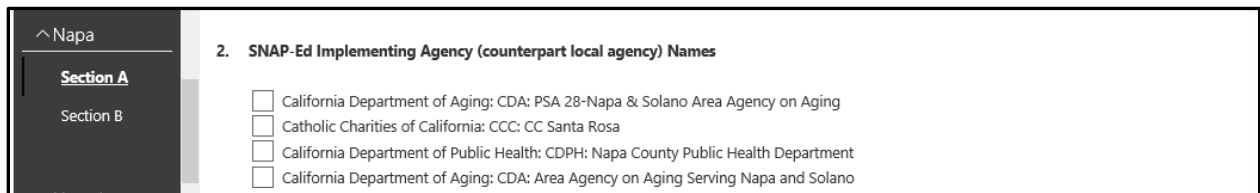
The county/jurisdiction name is auto-filled by the IWP Form. Users cannot change or modify the county/jurisdiction name.



The screenshot shows the IWP Form interface for 'IWP - 2020-2022 - In LIA Phase - Napa'. The left sidebar shows a navigation menu with 'Monterey', 'Napa', 'Section A', and 'Section B'. The main content area is titled 'Section A' and contains a 'Check Out' button. Below the button, the text '1. County/Jurisdiction Name: Napa' is displayed. A red arrow points from the top of the page to the 'Napa' text in the field.

2. CalFresh Healthy Living (CFHL) Implementing Agency (counterpart local agency) Names

Check box for all Local Implementing Agency(ies) (LIAs) that will be participating in the CalFresh Healthy Living (CFHL) activities as a part of this integrated work plan. User must select at least one participating LIA.



The screenshot shows the IWP Form interface for 'Napa' in 'Section A'. The main content area is titled '2. SNAP-Ed Implementing Agency (counterpart local agency) Names'. It contains a list of four agencies with checkboxes next to them:

- California Department of Aging: CDA: PSA 28-Napa & Solano Area Agency on Aging
- Catholic Charities of California: CCC: CC Santa Rosa
- California Department of Public Health: CDPH: Napa County Public Health Department
- California Department of Aging: CDA: Area Agency on Aging Serving Napa and Solano

3. Community Goals

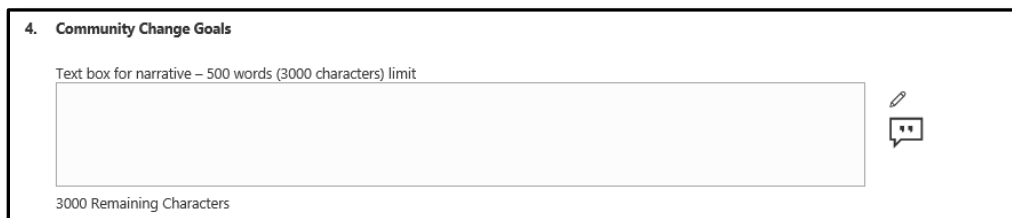
Text box for narrative – 2000 words (12000 characters) limit.

The intention of the community goals section is to understand the broader context of community need where you work. To gather information needed to complete this section, LIAs should review existing community assessments as well as community health improvement plans, general plans, community models/frameworks, and health coalition initiatives, among other resources, to identify long-term community priorities and goals in your region, county, and cities.

Describe the following components in your summary narrative:

- The long-term community goals (around community health and/or broader community priorities) in your county/city;
- How do the community goals connect to existing county, city or regional plans or established priorities (name the documents and/or plans);
- How can CFHL best support identified community goals and/or leverage work funded through other programs to support these needs.

NOTE: Although community goals may have non-CFHL components, the CFHL role is to support the CFHL-eligible population impacted by/included in the goals.



4. Community Change Goals

Text box for narrative – 500 words (3000 characters) limit

3000 Remaining Characters

4. Addressing Equity

Text box for narrative – 2000 words (12000 characters) limit.

CFHL has determined that addressing racial and health equity is a priority for the IWP. This section should indicate how your IWP aims to address inequities and expand/elevate existing efforts to improve equity within your community. This can include information about who you are engaging to develop and implement your IWP, it can point to identified inequities as rationale for strategy or intended population selection, existing health equity work and partnerships, and/or planned communication or accountability efforts. The CDC Guide on Advancing Health Equity is a good resource to reference when incorporating equity into program design and implementation.

Use the narrative section below to provide specific information about how your work plan will address inequities and aims to create conditions where inequities do not exist.

5. Partnerships and Collaborative Efforts [this can include the County Nutrition Action Plan (CNAP) Partners or comparable partners and coalitions you participate in or convene]

Text box for narrative – 2000 words (12000 characters) limit.

Enter a summary description of your county/city partnerships and collaborative efforts to achieve the identified CFHL goals and objectives. Include details about multi-sectoral coalitions or other larger partnership entities that involve proactive, broad, and diverse engagement from both non-funded and funded CFHL partners; this may be your CNAP, or if one does not exist for your local county/city, indicate a comparable or similar entity (i.e., council, coalition, consortium, and/or collaborative) recognizing that you may include more than one partnership. Describe the work and goals of these partnership groups/coalitions in your community. Provide specific details indicating how these partnerships will work together and describe the roles of the CFHL program and other partners/sectors in the implementation and support of community health strategies, specifically healthy eating, physical activity, and nutrition security in your county/jurisdiction.

6. Community Jurisdiction

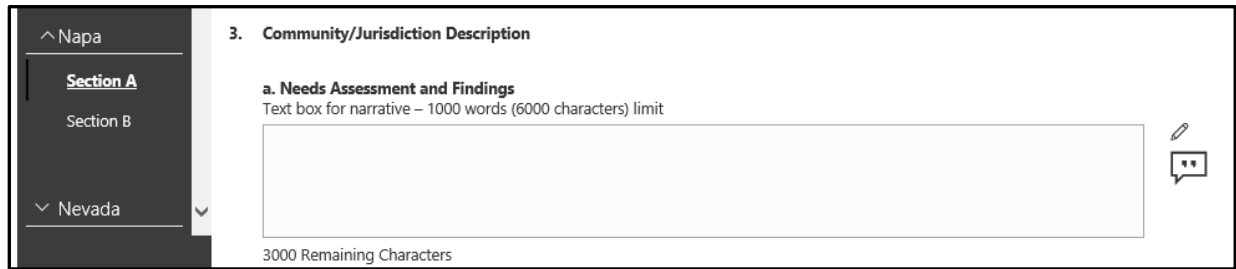
a. Needs Assessment and Findings

Text box for narrative – 2000 words (12000 characters) limit.

The intention of this section is to describe assessments and/or data sources used to identify the needs and assets of the county/jurisdiction focused on CFHL eligible

populations. This can include references to CFHL-specific information found in existing, broader community assessments (like those used in question 3 above) as well as CFHL specific assessments (including site-level assessments, community input, community led assessments like photovoice, etc.) This section should indicate how that combination of data connects to the IWP being submitted.

In this narrative, identify what was learned from the assessments and/or data sources and the unmet need in your county/jurisdiction. Include how this data is used to develop this three-year IWP.



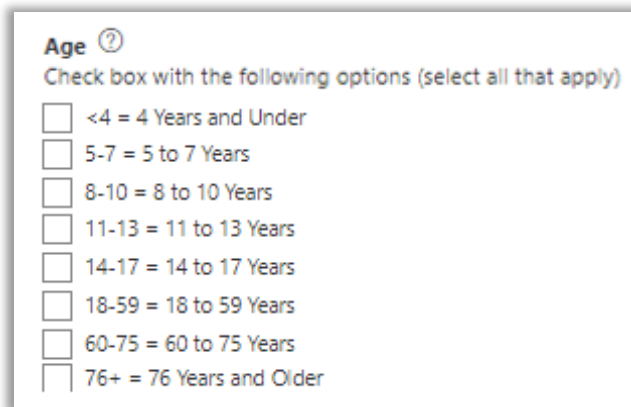
The screenshot shows a web form interface. On the left is a dark sidebar with navigation options: 'Napa' (expanded), 'Section A', 'Section B', and 'Nevada' (collapsed). The main content area is titled '3. Community/Jurisdiction Description' and contains a sub-section 'a. Needs Assessment and Findings'. Below this is a large text input box with the placeholder text 'Text box for narrative – 1000 words (6000 characters) limit'. At the bottom of the text box, it says '3000 Remaining Characters'. To the right of the text box is a small icon of a speech bubble with two dots inside.

b. Intended Audience

Check box to identify CFHL participants and low-income individuals eligible to receive CFHL benefits or other means-tested Federal assistance as the audience age targeted in the CFHL activities for the county/jurisdiction.

- Age

Users are required to select at least one audience age targeted. All applicable age groups targeted in Direct Education Activities and PSE Strategies throughout the County/Jurisdiction must be selected here in order to populate the Direct Education Activity Tables in Section B.



The screenshot shows a form titled 'Age' with a help icon. Below the title is the instruction 'Check box with the following options (select all that apply)'. There are seven checkboxes, each followed by an age range: '<4 = 4 Years and Under', '5-7 = 5 to 7 Years', '8-10 = 8 to 10 Years', '11-13 = 11 to 13 Years', '14-17 = 14 to 17 Years', '18-59 = 18 to 59 Years', '60-75 = 60 to 75 Years', and '76+ = 76 Years and Older'.

- Ethnicity and Race

Check boxes are provided to select audience ethnicity/race targeted in the CalFresh activities. Users must select at least one audience ethnicity/race.

Ethnicity and Race
Check box with the following options (select all that apply)

- American Indian/Alaskan Native
- Black or African American
- Hispanic/Latino
- Multiple/Other
- Native Hawaiian/Other Pacific Islander
- Spanish
- White

- Languages

Check boxes are provided to identify languages used in targeting CFHL activities. If a language is not listed, then type each language into the text box beneath the “Other” caption by adding a comma after each language: Example, *Bosnian*, Chechen, Swahili, etc.

Languages (Interventions and Materials) ⓘ
Check box with the following options (select all that apply)

- Arabic
- Armenian
- Bosnian
- Cantonese
- English
- Farsi
- Hmong
- Khmer (Cambodian)
- Korean
- Lao
- Mandarin
- Russian
- Spanish
- Tagalog
- Vietnamese
- Other (specify comma-delimited)

7. Intervention and Evaluation Plan Narrative Executive Summary



Text box for narrative – 2000 words (12000 characters) limit.

The IWP Blueprint was designed to allow counties and cities to plan and implement comprehensive, multi-level approaches at multiple complementary organizational and institutional levels of the Social Ecological Model. A mix of strategies and sub-strategies need to be used across settings to work towards achieving policy, systems, and environmental (PSE) related changes in your county/jurisdiction. Program implementation should be sustained by establishing measures to ensure the changes put in place are maintained over time.

Your narrative should be the summation of all the information shared above. It should be a comprehensive look at the plan you have designed, with clear statements about how the work was selected and how it all fits together. Describe the PSE change strategies that have been selected from the [FFY24-26 IWP Blueprint Packet](#) and how and where they will be implemented. Describe how community engagement will be utilized across different CFHL intended audiences and various organizations to address racial and health equity and include the number of CFHL eligible residents estimated to engage in program planning and implementation. Describe sustainability measures put in place to ensure support for the healthy eating and physical activity changes are maintained over time.

6. Intervention and Evaluation Plan Narrative Executive Summary

Text box for narrative – 1000 words (6000 characters) limit

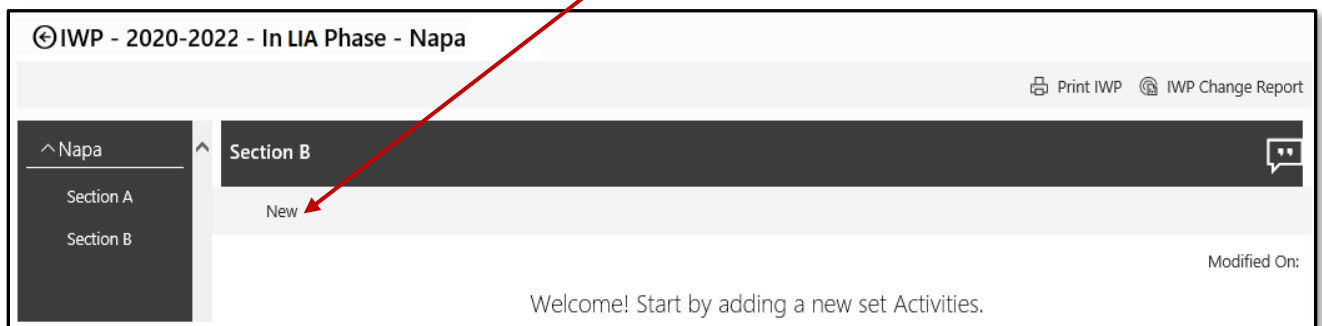
3000 Remaining Characters

IV. Section B: Start New or Edit Existing Section B Activity Setting

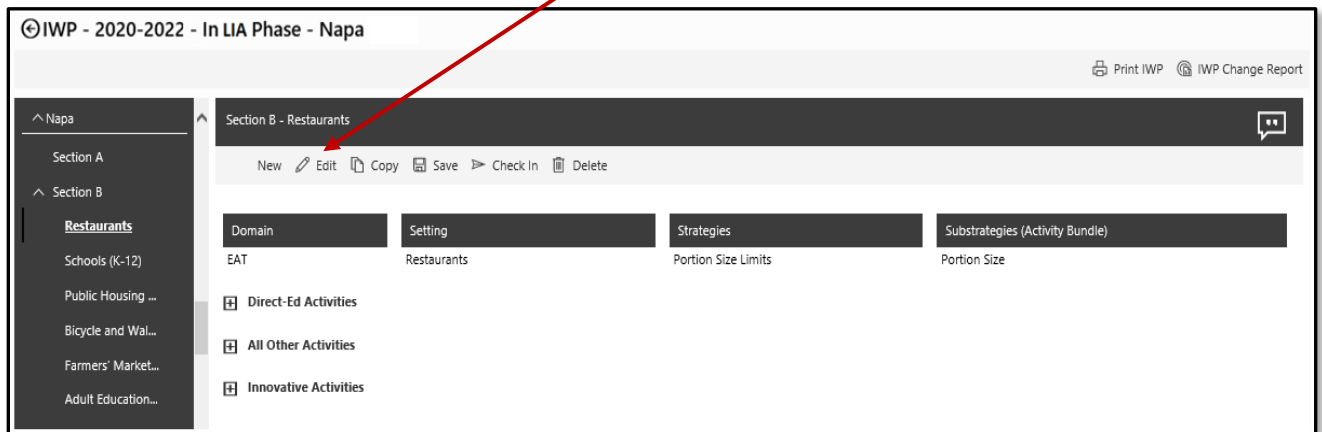
The IWP Form Section B workflow chart is found in the [Appendix as Item No. 2](#) for reference. Section B begins by either starting a new or editing an existing Section B. After choosing to either create a new or edit an existing Section B, the IWP Form workflow is completed using four modules in the order listed below:

- Shopping Cart
- Direct Education Activity
- All Other Activities
- Innovative Activities

Create New IWP Section B Activity Setting



Edit Existing IWP Section B Activity Setting



1. Shopping Cart

The Cart has four components which are bound together in relationships with one another:

- Domain
- PSE Setting
- Strategies
- Sub-Strategies (Activity Bundle)

Example Shopping Cart

Shopping Cart components are interrelated. As each component is selected along the workflow, subsequent component choices are impacted. For example, when the Domain “Learn” is selected, the four applicable PSE Setting choices as seen below become available. If the PSE Setting “Schools (K-12)” is selected, the ten applicable Strategies choices below become available. If the Behavioral Economics Strategy is selected, the six applicable Sub-Strategies below become available to select. This example helps illustrate the relationship between Domains, PSE Settings, Strategies and Sub-Strategies as demonstrated in the screenshot below.

To see the correlation between Domains, PSE Settings, Comprehensive Setting-based approaches, Strategies, and Sub-Strategies review the IWP Blueprint Structure in the [IWP Blueprint Packet](#).

The screenshot displays the 'IWP - 2020-2022 - In LIA Phase - Napa' interface. The left sidebar shows a navigation tree with 'Section B' expanded, listing 'Restaurants', 'Public Housing ...', 'Bicycle and Wal...', 'Farmers' Market...', and 'Adult Education...'. The main content area is titled 'Section B' and contains a 'Save' button and a 'Cancel' button. Below these are four columns of options:

| Domain | Setting | Strategies | Substrategies (Activity Bundle) |
|--|---|--|--|
| <input type="radio"/> EAT | <input type="radio"/> Before-and-After School | <input type="checkbox"/> Nutrition Standards | <input type="checkbox"/> Water Access and Appeal |
| <input checked="" type="radio"/> LEARN | <input type="radio"/> ECE | <input checked="" type="checkbox"/> Behavioral Economics | <input type="checkbox"/> Gardens |
| <input type="radio"/> LIVE | <input type="radio"/> Family Resource Centers | <input type="checkbox"/> Active Transportation | <input type="checkbox"/> School Wellness Policy |
| <input type="radio"/> PLAY | <input checked="" type="radio"/> Schools (K-12) | <input type="checkbox"/> Daily Quality Physical Activity | <input type="checkbox"/> Site or Organizational Wellness Policy |
| <input type="radio"/> SHOP | | <input type="checkbox"/> Access to Physical Activity Opportunities | <input type="checkbox"/> Places that Serve Food & Beverages(Core) |
| <input type="radio"/> WORK | | <input type="checkbox"/> Access to Healthy Food | <input type="checkbox"/> Places that Sell or Distribute Food & Beverages(Core) |
| | | <input type="checkbox"/> Comprehensive Setting-Based Approach: ECE | |
| | | <input type="checkbox"/> Comprehensive Setting-Based Approach: Schools | |
| | | <input type="checkbox"/> Comprehensive Setting-Based Approach: Food Banks and Pantries | |
| | | <input type="checkbox"/> Comprehensive Setting-Based Approach: Community Sites | |

Domain

To begin, the user must select a Domain from the list of six displayed.

PSE Settings

Users will only have the option of selecting from the PSE Settings that apply to the Domain previously chosen. Since Strategy and Sub-strategy selection is specific to each Setting, users will only be able to choose one Setting at a time. If work in multiple Settings within the same Domain is intended, the user will repeat this step again for each additional Setting where work will take place.

Strategies

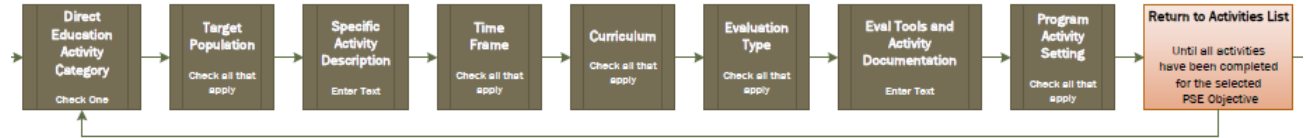
Users may select only the Strategy(ies) that apply to the PSE Setting previously chosen.

Sub-Strategies

Strategies and Sub-Strategies are interrelated, only the Sub-Strategy(ies) related to the previously chosen Strategy(ies) will appear as options. Select all core Sub-Strategies that apply and any applicable complementary Sub-Strategies .

2. Direct-Ed Activities Table

The Direct-Ed Activities table has eight components which can be repeated until activities for each target population have been completed for each Section B Activity Setting. Each of the eight steps are illustrated in the diagram below.



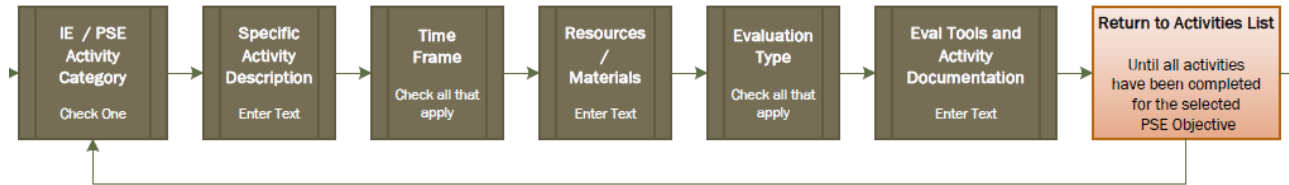
- **Activity Category:** A Direct-Ed Activity row can be completed for each of the five age group categories (0-4 years, 5-7, 8-10, 11-13, 14-17, 18-59 years, and 60-75, and 76+ years).
- **Target Population:** Target Population options are pre-populated base on those selected in Section A and will automatically appear in the Direct-Ed Activity table. If more Target Population options are required, return to Section A and select additional Intended Audience Age options.
- **Specific Activity Description:** Text box for narrative – 2000 words (12000 characters) limit: Provide an activity description for the Direct-Education activities you plan to implement based on the PSE Setting, Strategy(ies) and Sub-strategy(ies)and the target population selected. The specific activity description should include the work of all LIAs involved, combine activity descriptions where appropriate to reduce redundancies, include number of sites, and total reach.
- **FFY (Year):** Each LIA participating in the activity row during the workplan time frame (i.e., FFY 2024, 2025, and 2026) must select the appropriate fiscal year(s) during which each LIA will implement the Direct-Ed Activity.
- **Curriculum:** The curriculum dropdown menu pre-populates options from the [CalFresh Healthy Living Integrated Curricula List](#) based on the selected Target Population. Select the appropriate curriculum/curricula for the activity row.
- **Evaluation Type:** The Evaluation Type “Process (PEARS)” is auto-selected as this type of data collection is required. Check the appropriate box(es) to identify any additional Evaluation type that will be completed for the Direct-Ed Activity.

- **Evaluation Tool Documentation:** Text box for narrative – 2000 words (12000 characters) limit: Provide a narrative and/or list evaluation tools that will be used and documentation collected to complete the type(s) of evaluation identified above.
- **Program Activity Setting:** The intention of this column is to capture any additional setting(s) where the population targeted by the identified PSE Setting, Strategies, and Sub-Strategies are reached with Direct-Ed Activities. In the Direct-Ed Activity Table, the “Program Activity Setting” Column (titled to match PEARS), is the place to identify where the complementary Direct-Ed Activities will take place. Select as many settings as apply. Refer to the IWP Blueprint Packet for the list of possible Program Activity Settings for Direct-Ed Activities.

Example: The selected PSE Setting is Restaurants (strategy work is focused on healthy default beverages for kid’s meals), but Direct-Ed Activities are taking place in a local community center and faith-based setting to reach the parents and Early Childhood settings to reach the kids. The Program Activity Settings selected should be “Community and Recreation Centers”, “Faith-Based Centers/Places of Worship” and “Early Care and Education Facilities”.

3. All Other Activities Table

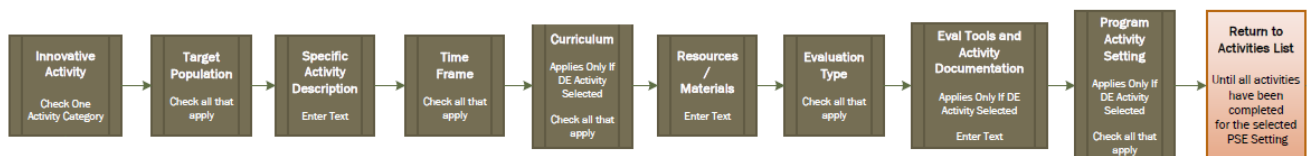
The All Other Activity table has six components which can be repeated until the activities have been completed. Each of the six components of the table are illustrated in the diagram below.



- **Activity Category:** The All Other Activity table is pre-populated with options for all Activity Category types. To “opt out” of a specific activity category, uncheck the box in the far left column titled “Include?”. For Activity Category definitions and additional information review the [IWP Blueprint Packet](#).
- **Specific Activity Description** – Text box for narrative – 2000 words (12000 characters) limit: Enter text that applies to each activity across all Sub-Strategies within the PSE Setting for all LIAs completing this activity. Refer to the [IWP Blueprint Packet Sub-Strategy Activity Tables](#) for example activity descriptions for each sub-strategy. Modify activity descriptions as needed to reflect the specific work of your county/city, combine activity descriptions where appropriate to reduce redundancies, include number of sites, and total reach.
- **FFY (Year):** Each LIA participating in the activity row during the workplan time frame (i.e., FFY 2024, 2025, and 2026) must select the appropriate fiscal year(s) during which each LIA will implement the activity.
- **Resources / Materials:** Text box for narrative – 2000 words (12000 characters) limit: List resources/materials planned for use during the activity(ies). Refer to the [IWP Blueprint Resource List](#) for a list of possible resources for each sub-strategy. Additional, relevant resources can be included for the activity selected as well.
- **Evaluation Type:** The Evaluation Type “Process (PEARS)” is auto-selected as this type of data collection is required. Check the appropriate box(es) to identify any additional Evaluation Type that will be completed for the selected Activity Category .
- **Evaluation Tools Documentation:** Text box for narrative – 2000 words (12000 characters) limit: Provide a narrative and/or list the of selected evaluation tools that will be used and documentation collected to complete the types of evaluation identified above.

4. Innovative Activities Table

The Innovative Activities table has various components, depending upon which Activity Category (i.e., Direct-Ed or All Other Activities) is selected, and can be repeated until all activities have been completed for the Innovative Activity Strategy. Each of the various components of the table are illustrated in the diagram below.





Activity Strategy: Enter a descriptive name for the innovative PSE Strategy and/or activities.

Justification: Describe how the strategy is entirely new, meets a need in the community, and differs from a current PSE Strategy and/or Sub-Strategy within the IWP Blueprint structure (12000 character limit).

- **Activity Category:** Select the activity type for this innovative PSE Strategy or activity.
- **Target Population:** Select the appropriate target population(s) for this innovative PSE Strategy and/or activity.
- **Specific Activity Description –** Text box for narrative – 2000 words (12000 characters) limit: The specific activity description should include the work of all LIAs involved in this innovative PSE Strategy and/or activity, combine activity descriptions where appropriate to reduce redundancies, include number of sites, and total reach.
- **FFY (Year):** Each LIA participating in the activity row during the workplan time frame (i.e., FFY 2024, 2025, and 2026) must select the appropriate fiscal year(s) during which each LIA will implement the activity.
- **Curriculum:** The curriculum dropdown menu pre-populates options from the [CalFresh Healthy Living Integrated Curricula List](#) based on the selected Target Population. Select the appropriate curriculum/curricula for the activity row.
- **Resources / Materials -** Text box for narrative – 2000 words (12000 characters) limit: List resources/materials planned for use during the activity(ies). Refer to the IWP Blueprint Packet Sub-Strategy Activity Tables for a list of possible resources for each sub-strategy. -Additional, relevant resources can be included for the activity selected as well.
- **Evaluation Type:** The Evaluation Type “Process (PEARS)” is auto-selected as this type of data collection is required. Check the appropriate box(es) to identify any additional Evaluation Type that will be completed for the Activity.
- **Evaluation Tools & Activity Documentation:** Text box for narrative – 2000 words (12000 characters) limit: Provide a narrative and/or list the of selected evaluation tools that will be used and documentation collected to complete the types of evaluation identified above.

V. Additional IWP Form Functions and Tools

Phase Management

The phase management function controls which users have privileges to create and edit the IWP. The IWP phase management is organized by dividing users into groups, such as LIA, SIA, and CDSS. Each group has privileges to create and edit IWPs during timelines set by CDSS. When a group has privileges activated, other groups can only view or make comments. The IWP Form has the phase management flagged (i.e., In LIA/SIA Collaboration Phase, In SIA Phase, In CDSS Phase, Not In Phase and Finalized) in the header of Sections A & B as seen in the illustrations below.

Flag - IWP in LIA Phase




Approval Tool

CDSS and SIAs approve Section A and B workplans by using the approval tool located at the top of each section. Each LIA listed as active in the county in Section A will be listed for approval. LIAs may choose not to participate in a Section B Activity. When viewing a Section A or B, look at the top border to see Check or Cross marks indicating Yes or No (respectively) approval by the SIA. Unless the LIA is not participating in a Section B Activity, the SIA must select a checkmark to indicate approval.

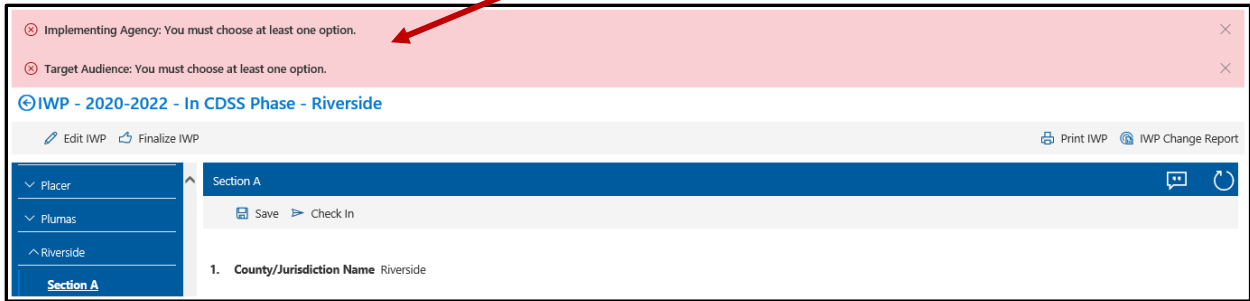


Alert Tool

Alert tool symbols  help users quickly identify issues ranging from verification requirements to changes made by other users.

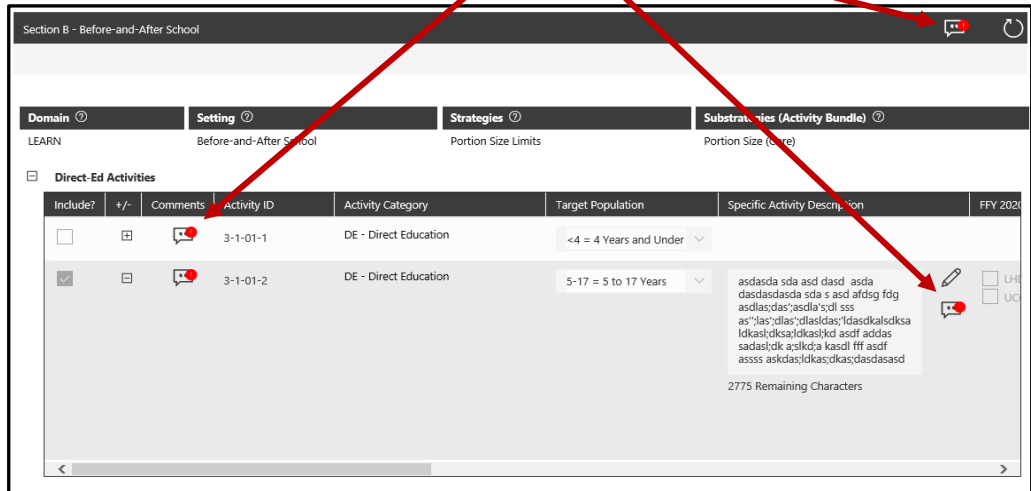
For example, before a user can move past Section A into Section B, the Implementing Agency and Intended Audience must be selected. After completing the required planning, the alert tool disappears. These types of alerts are illustrated below.

“Alert” Tips for form Verification



Another example, when new comments are made by a user, others see alerts. After reviewing the changes, the alerts disappear. These types of alerts are illustrated below.

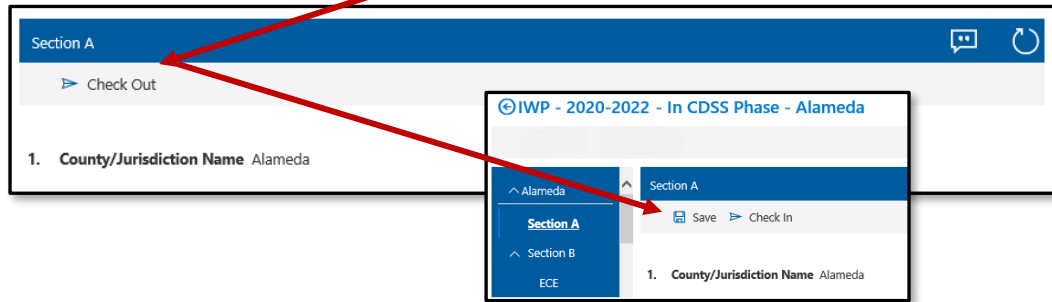
“Alert” Tips for Changes Made by Other Users



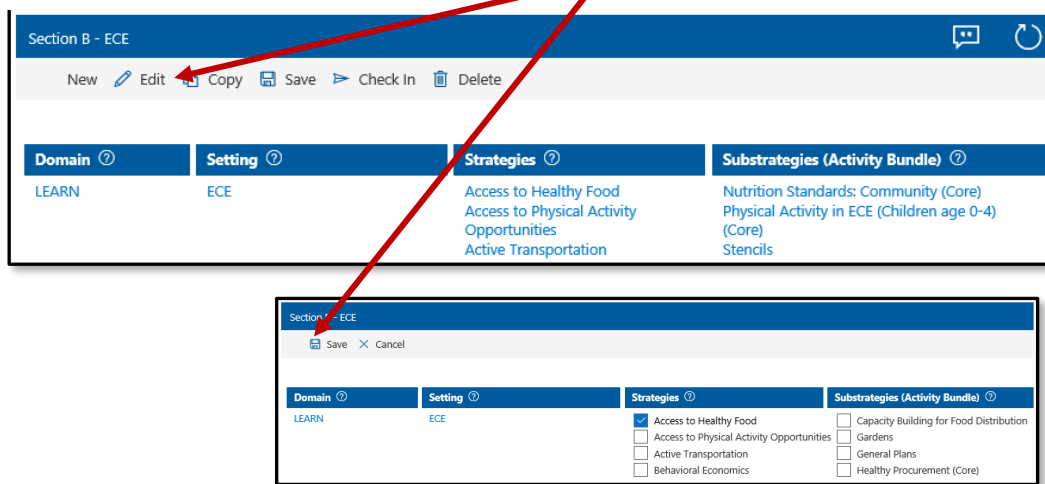
Edit Tool

After an IWP is created, an IWP may be edited until phase management disables the user’s access to the IWP. There are two options to edit an existing IWP. First, Section A has an edit function allowing a user to make changes to any planning option *only* when a user selects to “Check Out” an IWP. Section B has an edit function for either the Shopping Cart or Activity Tables. The user must select the edit function to modify the Shopping Cart, and select “Check Out” to edit the Direct Ed, All Other Activities, and Innovative Tables. An IWP. editing is completed by using the “Save” and/or “Check In” functions. Illustrations for Section A and B edit functions are presented below.

Section A – Check Out Required to Edit



Section B – Shopping Cart Edit Tool

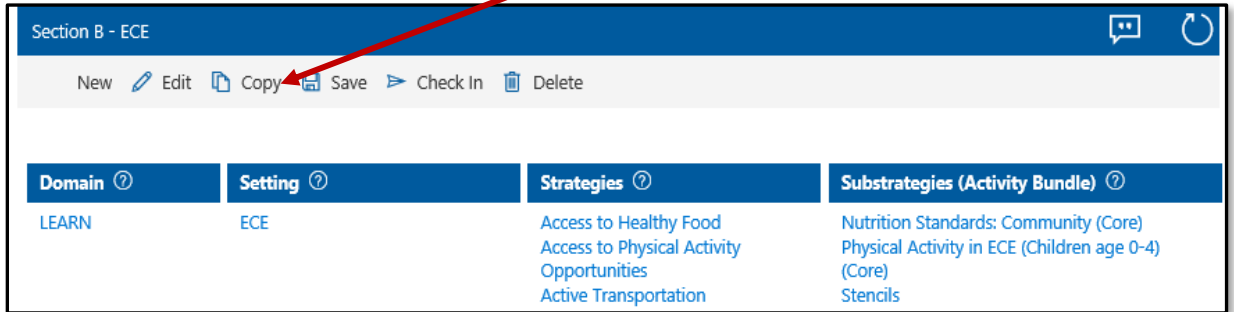


Copy Tool

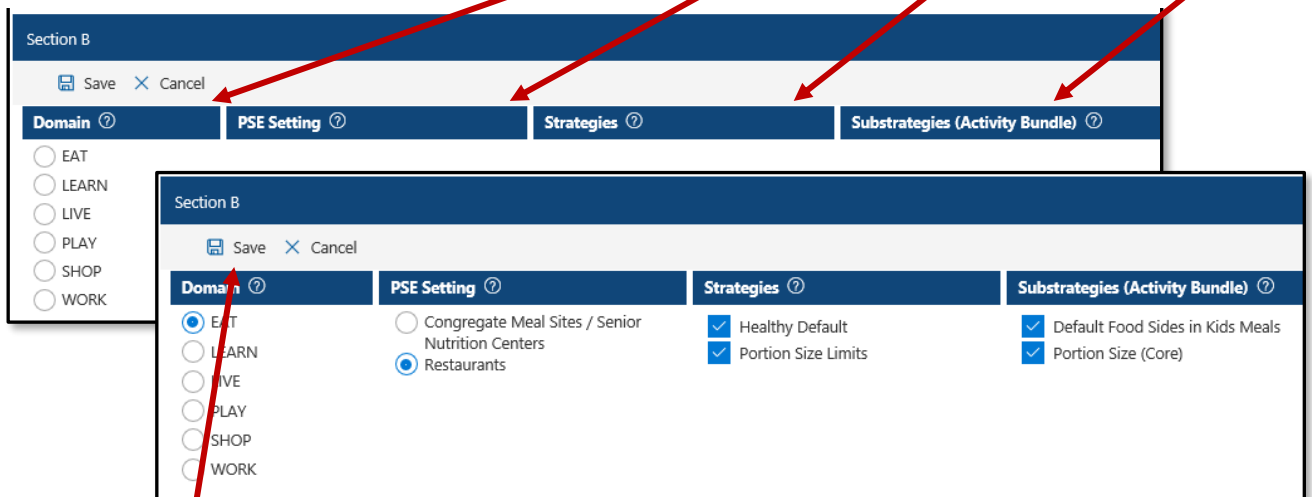
The intention of the copy tool is to allow users to avoid re-entering data already created. The copy tool allows users to “paste” the previously created data into a new, nearly identical, Section B Activity using a different Domain and PSE Setting.

This tool will copy a complete Section B Activity, including each Direct Ed, All Other Activities and Innovative Activity Rows with Activity Category, Target Population, Specific Activity Description, Curriculum, etc. (i.e., everything previously created, except for comments). Complete using the copy tool by clicking on the “Save” function. Illustrations for copy tool functions are presented below.

Click Copy Tool to Start Process




Allows User to Select Different Domain, PSE Setting, Strategies and Sub-Strategies



Click Save to End Copy

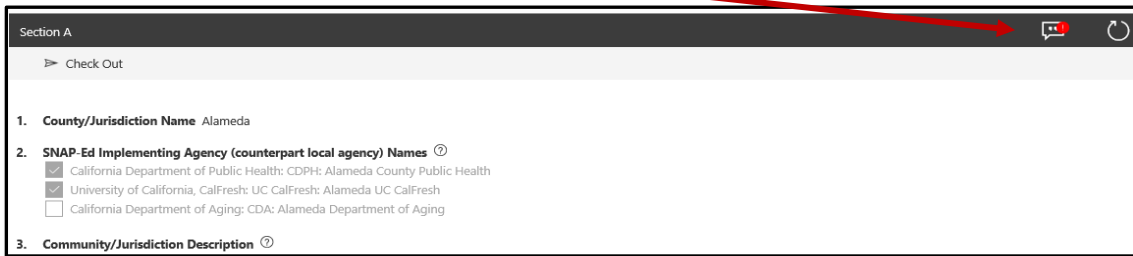
Comment Tool

To enhance user collaboration, comment tool symbols  are placed throughout the IWP Form. Multiple comment tools are provided to allow optimum flexibility for LIA collaboration on an entire IWP Section or a specific workplan detail. The comment tools allow users to focus on broad or specific discussions throughout the IWP Form.

There are four different types of Comment Tools located within Section A & B workplans as listed below:

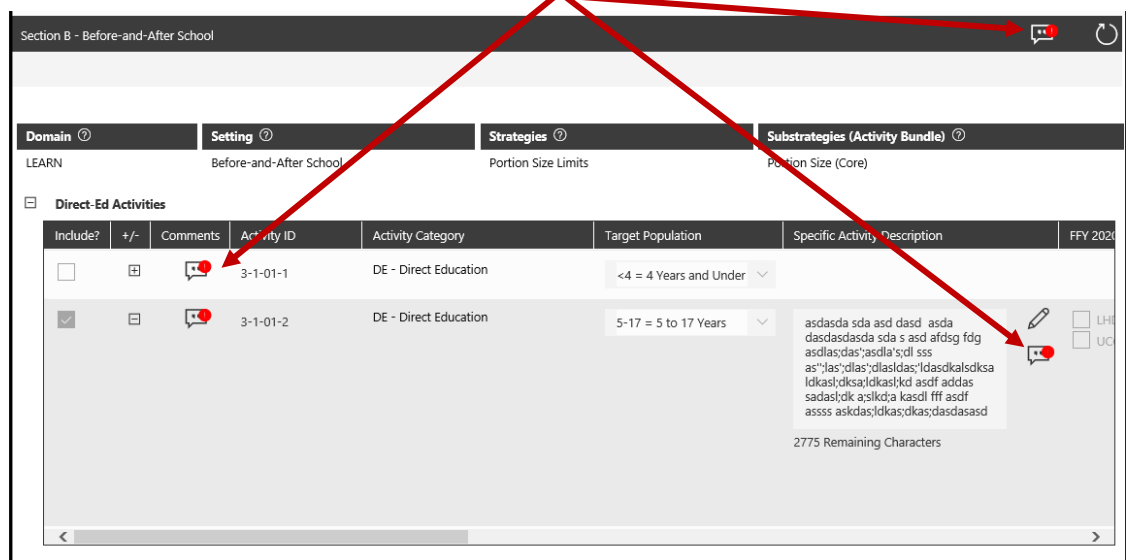
- Section Comment Tool – Located at the top right corner of Sections A & B
- Section Field Comment Tool – Located adjacent to Section A narrative text boxes
- Activity Comment Tool – Located at the beginning of each Section B Activity Row
- Activity Field Comment Tool – Located within each Section B Activity Row adjacent to text boxes.

Section A -Header Comment tool to discuss the entire Section



The screenshot shows the header of Section A. At the top right, there is a comment icon with a red notification bubble. A red arrow points from the text above to this icon. The form content includes a 'Check Out' button and three numbered sections: 1. County/Jurisdiction Name (Alameda), 2. SNAP-Ed Implementing Agency (counterpart local agency) Names (with checkboxes for CDPH, UC CalFresh, and CDA), and 3. Community/Jurisdiction Description.

Section B - Header Comment tool to discuss the entire Section or adjacent to each textbox in the Activity Rows



The screenshot shows the header and activity rows of Section B. The header includes tabs for Domain (LEARN), Setting (Before-and-After School), Strategies (Portion Size Limits), and Substrategies (Activity Bundle) (Portion Size (Core)). Below the header is a table of Direct-Ed Activities. A red arrow points from the text above to a comment icon in the 'Comments' column of the first activity row (3-1-01-1). Another red arrow points from the text above to a comment icon in the 'Comments' column of the second activity row (3-1-01-2). The second activity row is expanded to show a text input field with placeholder text and a character count of 2775 Remaining Characters.

| Include? | +/- | Comments | Activity ID | Activity Category | Target Population | Specific Activity Description | FFY 202 |
|-------------------------------------|-----|----------|-------------|-----------------------|------------------------|---|---------|
| <input type="checkbox"/> | | | 3-1-01-1 | DE - Direct Education | <4 = 4 Years and Under | | |
| <input checked="" type="checkbox"/> | | | 3-1-01-2 | DE - Direct Education | 5-17 = 5 to 17 Years | asdasda sda asd dasd asda dasdasdasda sda s asd afdsg fdg asdla;s;d l sss as";las";dlas";dlasldas;"ldasdkalsdksa ldkas;dkas;ldkas;kd asdf addas sadas;dk a;slkd;a kasdl fff asdf assss askdas;ldkas;dkas;dasdasasda | |

The comment tool allows users to capture feedback within a dialogue box, and to email comments to others. Users can choose not to email others by not using the “To” function, but still have their comments saved in the Comment Log. Alternatively, when users choose to email others by using the “To” function, each recipient will receive an email with a link back to the IWP Form where the specific comments are kept in the comment log, as seen in the illustrations below.


Comment tool to discuss the entire Section WITHOUT sending email using the

The screenshot shows a dialog box titled "Section Comment". It features a "To:" field which is currently empty. Below the "To:" field is a large text area containing the following text: "The comment tool allows users to capture feedback within a dialogue box, and to email comments to others. Users can choose to not email others by not using the 'To' function. Alternatively, when users choose to email others by using the 'To' function, then each recipient will receive an email with a link back to the IWP UI where the entire comments are kept in the comment log, as seen in the illustrations below." At the bottom left of the dialog is a printer icon. At the bottom right are two buttons: "Save" and "Cancel". Two red arrows point from the underlined text above to the "Section Comment" label and the "To:" field.

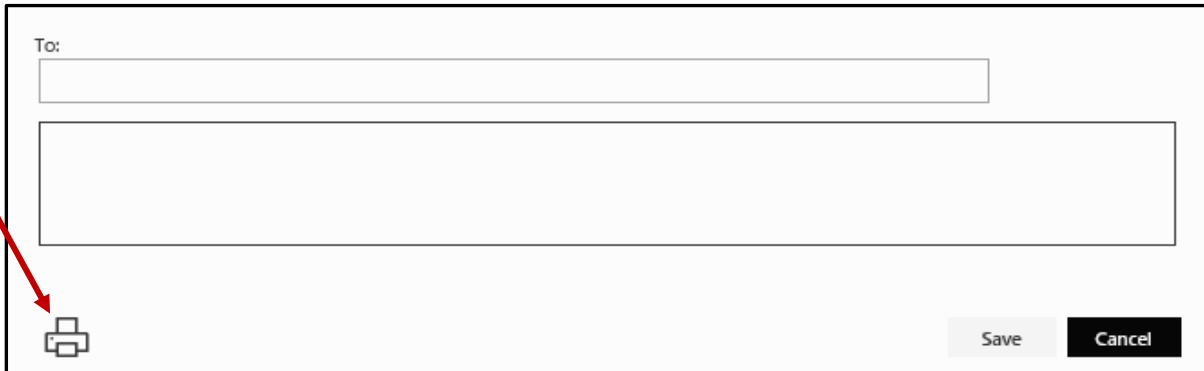
Comment tool to discuss the entire Section AND sending email using the “To”

The screenshot shows the same dialog box as above, but with a dropdown menu open under the "To:" field. The dropdown is titled "Suggested People" and lists three contacts: "snaped-alameda1-...", "mandy.hauck@cdp...", and "hmpatel@acgov.org". The text area below the dropdown contains the same sample comment text as in the previous screenshot. The "Save" and "Cancel" buttons are visible at the bottom right. Two red arrows point from the underlined text above to the "Section Comment" label and the "To:" field.

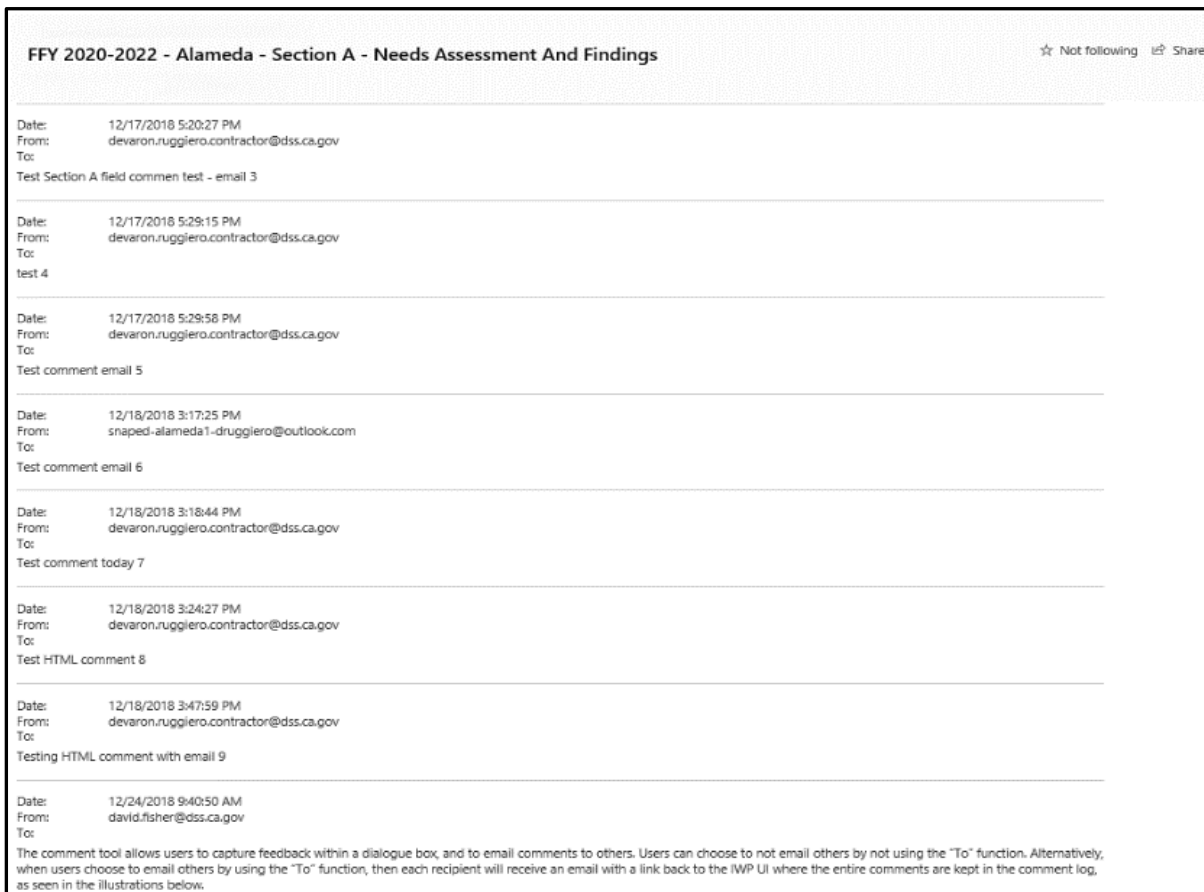
Comment Tool Print Log Function


 The comment tool has a print log function allowing users to view the history of previous comments. To view the comment tool print log function, open the Comment Tool and click the printer symbol as seen in the illustration below.

Comment Tool Print Log Function – Click the Printer Symbol



The screenshot shows a form with a 'To:' label above a text input field. Below the input field is a larger text area. In the bottom left corner, there is a printer icon. In the bottom right corner, there are two buttons: 'Save' and 'Cancel'. A red arrow points to the printer icon.



FFY 2020-2022 - Alameda - Section A - Needs Assessment And Findings ☆ Not following  Share

Date: 12/17/2018 5:20:27 PM
From: devaron.ruggiero.contractor@dss.ca.gov
To:
Test Section A field commen test - email 3

Date: 12/17/2018 5:29:15 PM
From: devaron.ruggiero.contractor@dss.ca.gov
To:
test 4

Date: 12/17/2018 5:29:58 PM
From: devaron.ruggiero.contractor@dss.ca.gov
To:
Test comment email 5

Date: 12/18/2018 3:17:25 PM
From: snaped-alameda1-druggiero@outlook.com
To:
Test comment email 6

Date: 12/18/2018 3:18:44 PM
From: devaron.ruggiero.contractor@dss.ca.gov
To:
Test comment today 7

Date: 12/18/2018 3:24:27 PM
From: devaron.ruggiero.contractor@dss.ca.gov
To:
Test HTML comment 8

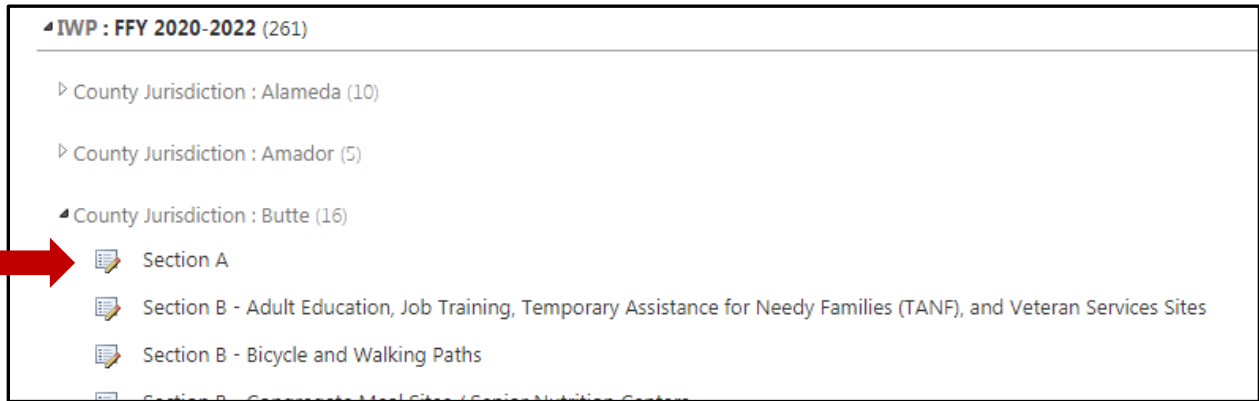
Date: 12/18/2018 3:47:59 PM
From: devaron.ruggiero.contractor@dss.ca.gov
To:
Testing HTML comment with email 9

Date: 12/24/2018 9:40:50 AM
From: david.fisher@dss.ca.gov
To:

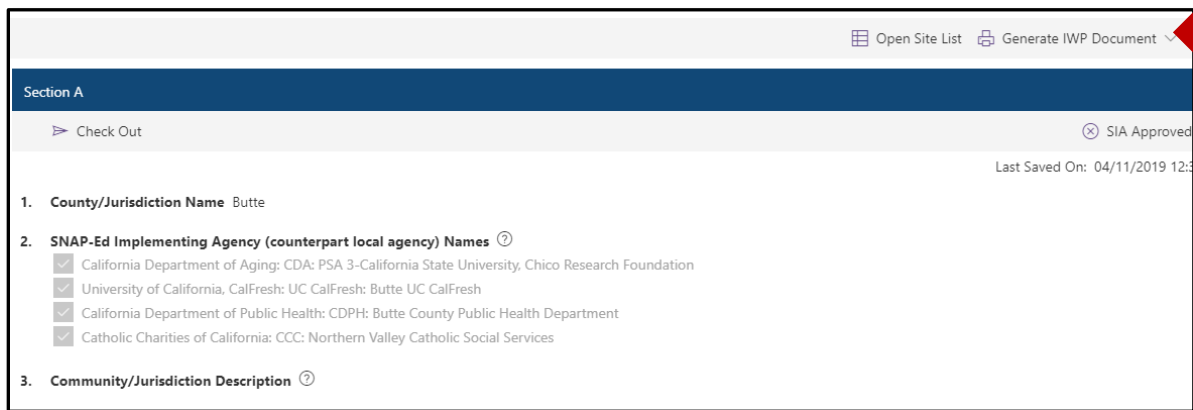
The comment tool allows users to capture feedback within a dialogue box, and to email comments to others. Users can choose to not email others by not using the "To" function. Alternatively, when users choose to email others by using the "To" function, then each recipient will receive an email with a link back to the IWP UI where the entire comments are kept in the comment log, as seen in the illustrations below.

Generate Document Tool

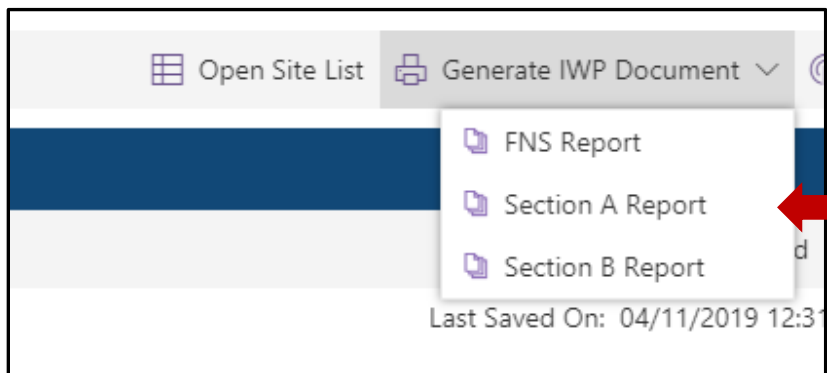
Step 1: Users may download any section of their workplan by visiting the IWP Dashboard, selecting the county, and then opening up the section they want to generate



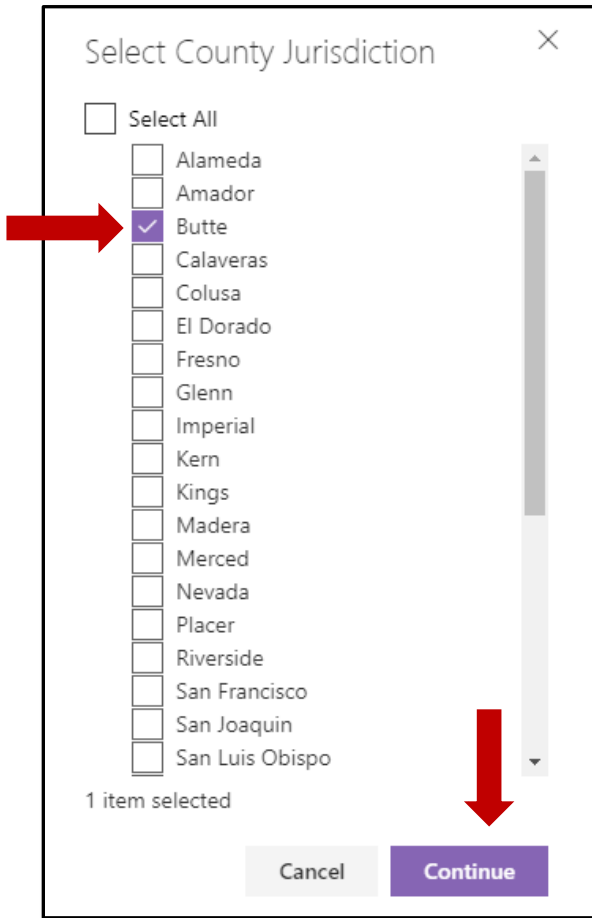
Step 2: Once the section is open, click on the “Generate Document” in the upper right-hand corner command bar.



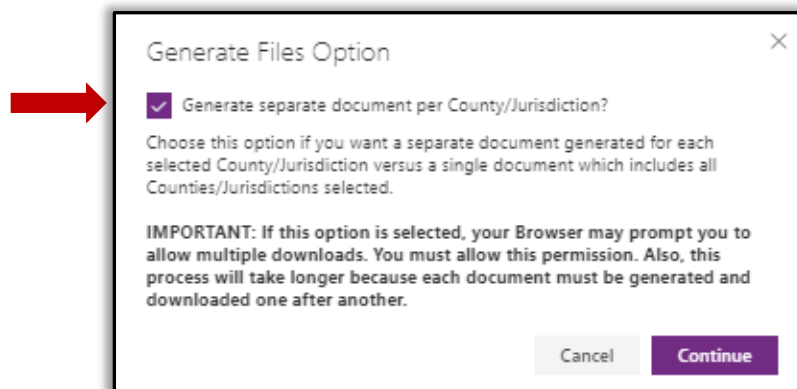
Step 3: Select “Section A or B Report”.



Step 4: Select the county/jurisdiction and click continue. A word document will download from your browser which may be printed or saved. **NOTE:** County/jurisdiction access is limited to your level of permissions.



NOTE: Users may select multiple county/jurisdiction reports to download as their access allows. And, users have the option to download a single combined report of all the selected counties/jurisdictions or a separate report for each county/jurisdiction. The option to select either a single combined or a separate report is displayed in the dialogue box below.



Export Content Tool

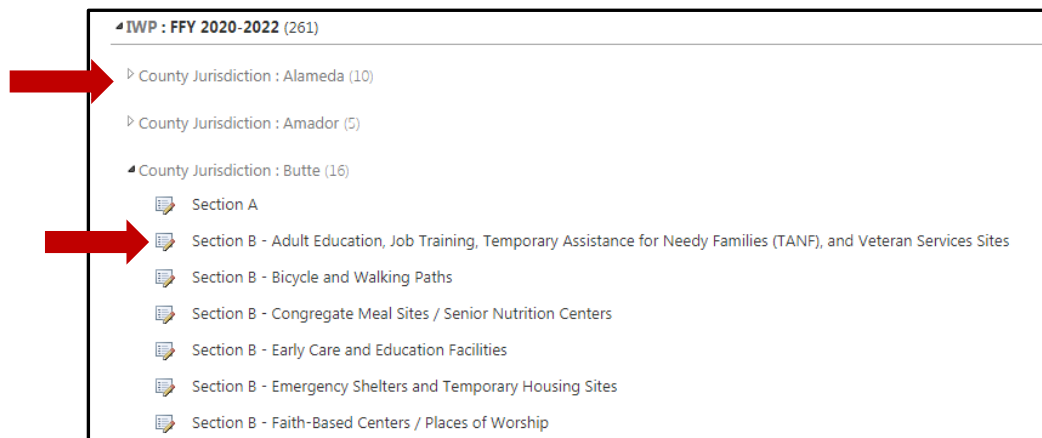
The purpose of the Export Content tool is to allow users to extract preset datasets from the Integrated Work Plan (IWP) Form for statistical analysis. The Export Content tool produces five different Excel files containing data extracted from Section A or B.

NOTE: Details about the five different Excel files is found in the [Appendix Item No. 3](#). After exporting datasets, users can use Excel functionality to create reports which compile, sort, filter and tally datapoints.

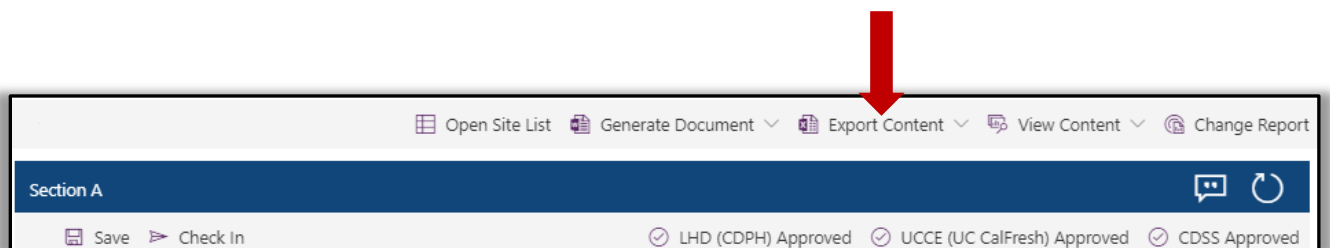
The following instructions will walk through how to use the Export Content tool to create a Section A or B report for statistical analysis.

How to Use the Export Content Tool

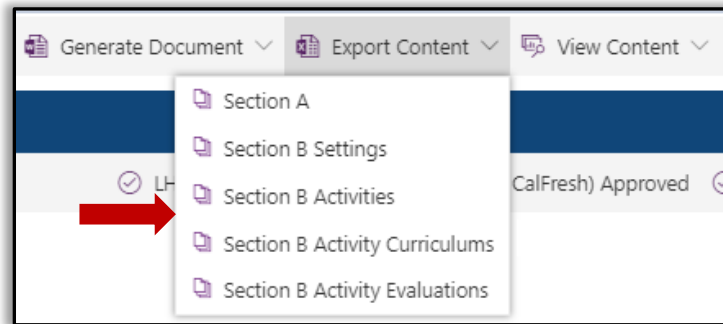
Step 1: To access the Export Content tool, visit the IWP Dashboard, select the county and click on the arrow icon to open a dropdown menu of the Section A and B(s). Click on the paper/pencil icon adjacent to any Section A or B to open it in your browser.



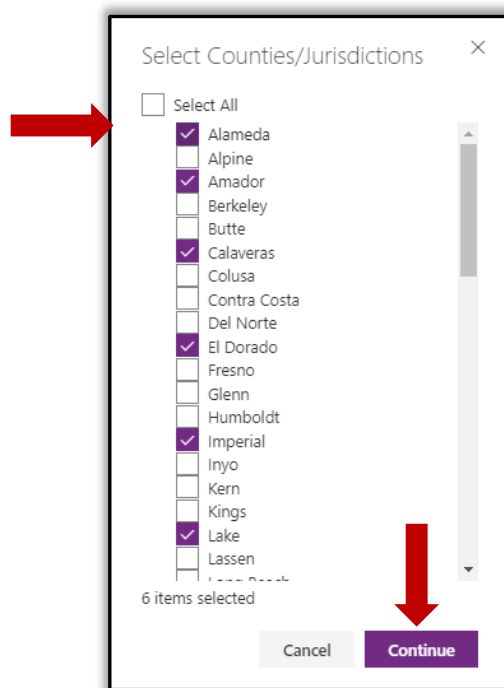
Step 2: After opening the selected Section A or B, click on the Export Content tool button in the command bar found at the upper right.



Step 3: Select the preferred type of report from the list of options available in the dropdown menu as displayed below:



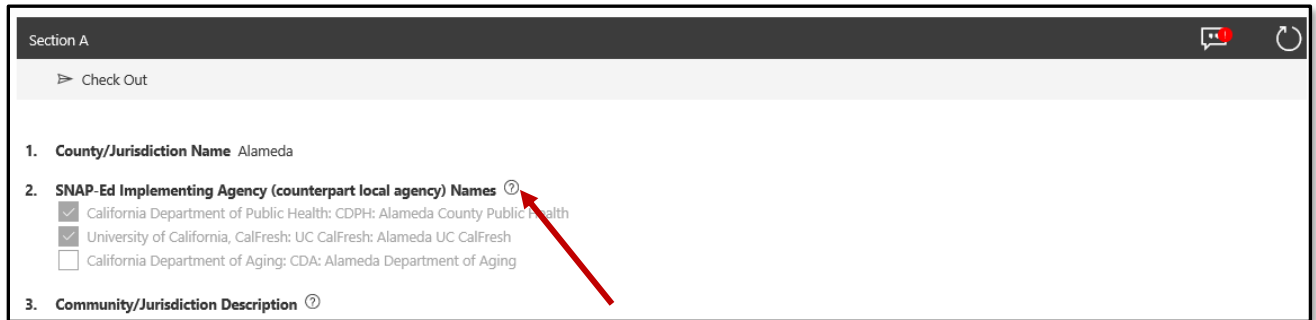
Step 4: Select the desired county (or counties) as user access allows, then click the “Continue” button.



Step 5: After clicking the “Continue” button, your selected section A or B report will automatically download from the browser as an Excel file.

Help Guide

Program guidance within the IWP Form helps reinforce the IWP Blueprint and IWP resources. However, there is limited IWP Form functionality which can be used to access IWP Blueprint guidance. For example, the IWP Form can take users to a Wiki Page with guidance when they click on a “Help” symbol [?] Also, the IWP Form has “Hover Tips” which open dialogue boxes when the mouse is placed over certain text. Examples of Wiki Page Help Icons [?] and Hover Tips and functionality are seen in the illustrations below.

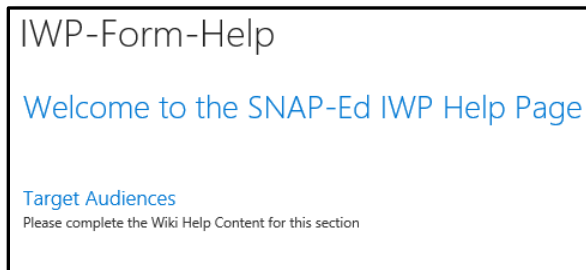


Section A

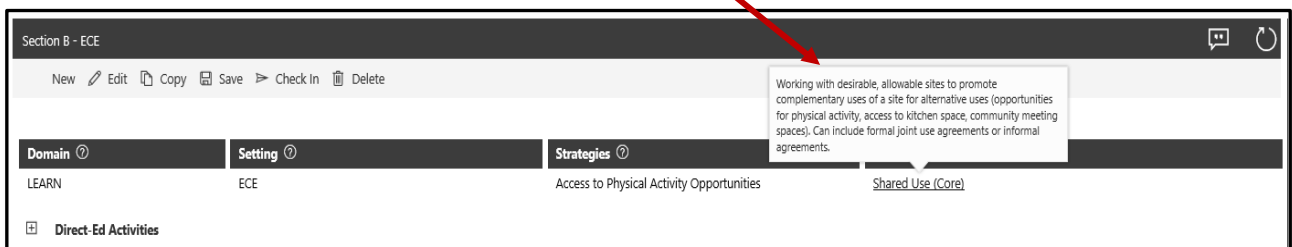
Check Out

1. **County/Jurisdiction Name** Alameda
2. **SNAP-Ed Implementing Agency (counterpart local agency) Names** [?]
 - California Department of Public Health: CDPH: Alameda County Public Health
 - University of California, CalFresh: UC CalFresh: Alameda UC CalFresh
 - California Department of Aging: CDA: Alameda Department of Aging
3. **Community/Jurisdiction Description** [?]

Wiki Page “Help” symbol opens the “Help Document” webpage.



“Hover” Tips Open Dialogue Box when Mouse Placed Over Text.



Section B - ECE

New Edit Copy Save Check In Delete

| Domain [?] | Setting [?] | Strategies [?] |
|---------------------|----------------------|---|
| LEARN | ECE | Access to Physical Activity Opportunities |

Shared Use (Core)

Direct-Ed Activities

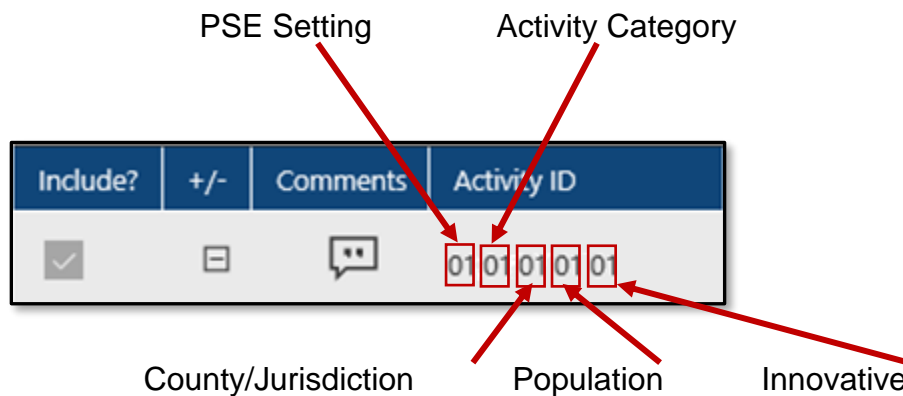
Working with desirable, allowable sites to promote complementary uses of a site for alternative uses (opportunities for physical activity, access to kitchen space, community meeting spaces). Can include formal joint use agreements or informal agreements.

Activity Identification Numbers

Direct-Ed and All Other Activities have identification numbers composed of 8 digits. There are 2 digits for each element in the sequence laid out below:

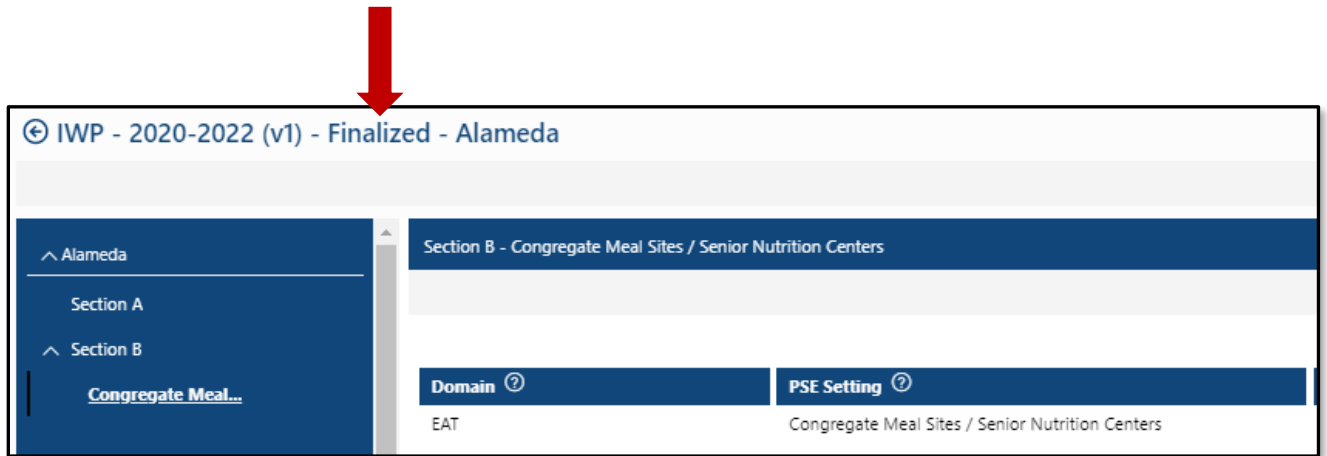
- PSE Setting
- Activity Category
- County/Jurisdiction: Starting with Alameda as digits 01 through Yuba as 61
- Population:
 - 01 = <4 Years and under
 - 02 = 5 to 17 Years
 - 03 = 8-10 Years
 - 04 = 11-13 Years
 - 05 = 14-17 Years
 - 06 = 18-59 Years
 - 07 = 60-75 Years
 - 08 = 76+ Years

NOTE: Innovative Activities have 10 digits because the last 2 digits are used to identify the activity as innovative.

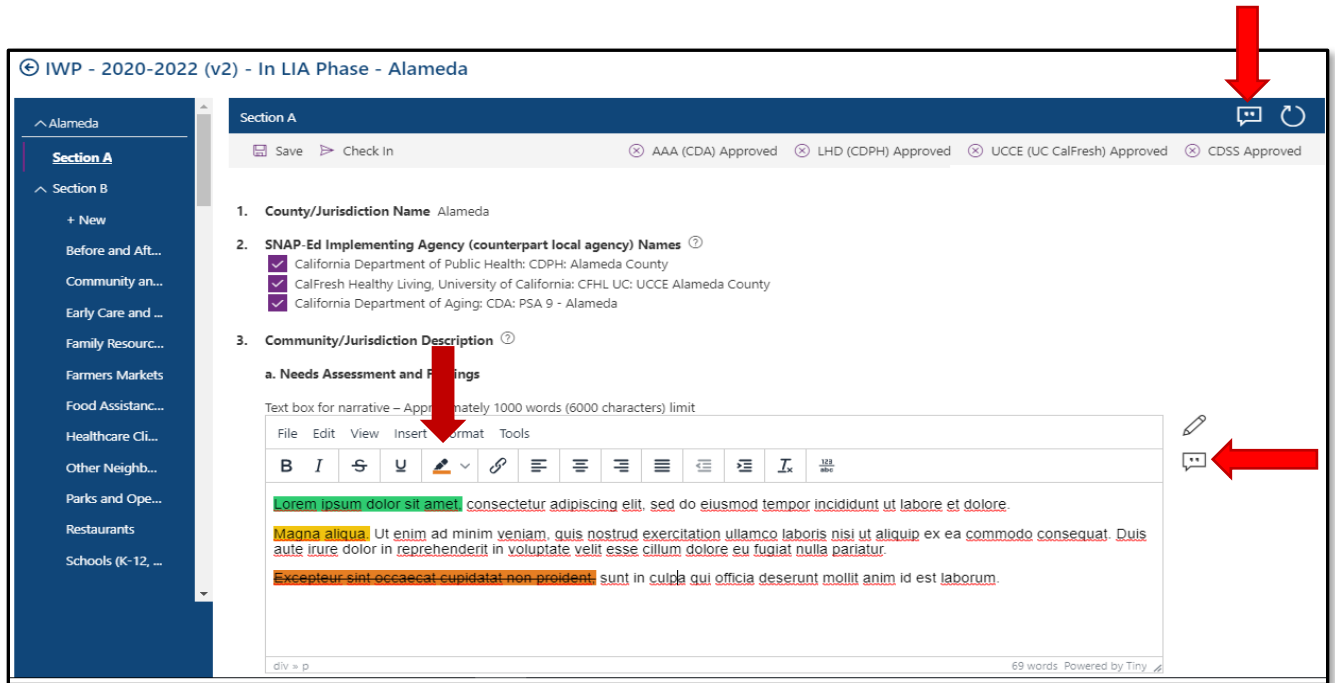


VI. Revision Process

After the collaboration phase between LIAs and SIAs is completed, the IWP Form is locked to avoid additional editing. Next, CDSS reviews and approves IWPs and the IWPs are finalized when we receive final approval from the United State Department of Agriculture, Food Nutrition Services (USDA, FNS). This is the “*Finalized*” phase – no further significant and major revisions may be done. Also, note the caption at the top left displays (v1) to indicate this is the original version of this workplan.



LIAs can make minor revisions at any time after FNS approval. The IWP will be “*In LIA/SIA Collaboration Phase*” when revisions are allowed. Please use the [LIA Revision Process Guide](#) for additional IWP revision instructions and timeline. Also, note the Section A workplan displayed below has a caption at the top left now displays (v2) to indicate this is the second version of this workplan.



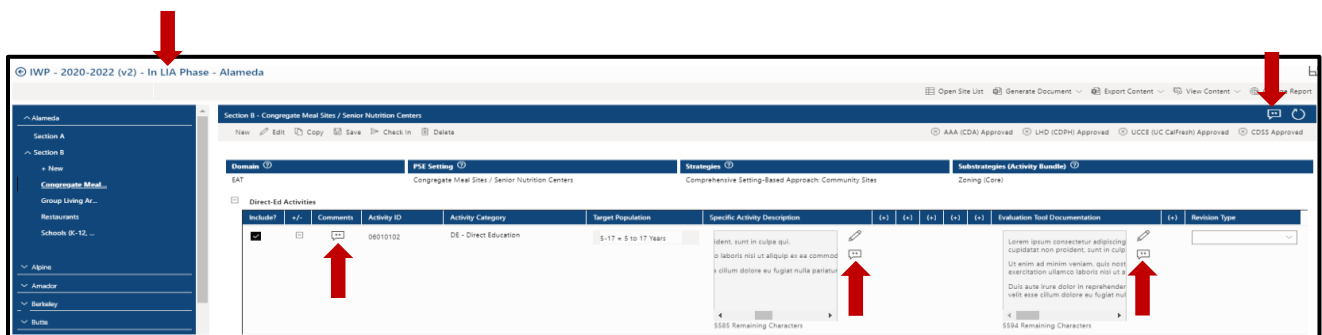
Step 1: Within the IWP Form, there are different types of Comment Tools located in Section A & B workplans. Those tools are also used to provide justification for IWP revisions.

The Section A workplan displayed above shows the location of the Comment Tools.

- In Section A, use the **Section Comment** tool located at the top right of the IWP Form to make changes and provide justifications when revising **Age, Ethnicity and Race, and Languages**.
- In Section A, use the **Section Field Comment** tools adjacent to the textboxes for the **Community Goals, Addressing Equity, Community Jurisdiction, Partnerships and Collaborative Efforts, and Intervention and Evaluation Plan Narrative Executive Summary**.

The Section B workplan displayed below shows the location of the Comment Tools.

- In Section B, use the **Section Comment** tool located at the top right of the IWP Form to make changes and provide justifications for your SIA representative if your revisions include removing an entire **Setting, Strategy or Sub-Strategy**. **DO NOT DELETE** the **Setting, Strategy or Sub-Strategy** in the IWP Form during the LIA IWP Revision period. Instead, after your SIA has approved this change, your SIA representative will delete it from the IWP Form. Alternatively, if you add a new **Setting, Strategy or Sub-Strategy**, use the **Section Comment** tool when noting the **Setting, Strategy or Sub-Strategy** is new to the workplan and provide justification. Lastly, use the **Section Comment** tool **Email Function** to send your comments to your SIA representative if you add or intend to delete an entire **Setting, Strategy or Sub-Strategy**.
- In Section B, use the **Activity Field Comment** tools located adjacent to the text boxes for the **Specific Activity Description, Resources/Materials, and Evaluation Tool Documentation** to provide justifications for these changes.
- In Section B, use the **Activity Comment** tool located at the beginning of the Activity Row to note changes and provide justification if the column being revised does not have an adjacent **Edit** tool or **Activity Field Comment** tool.



Step 2: Within the IWP Form, there are **Edit** tools located within Section A & B workplans. When using the Edit tool to highlight changes, follow the *most recent LIA Process Guide* and apply colors appropriate to each revision using the categories: Minor (GREEN) / Significant (YELLOW) / Major (RED).

NOTE: Use the Edit tool strikethrough function to show text intended to be deleted. Text with strikethrough must also be highlighted using the appropriate revision category color: Minor (GREEN) / Significant (YELLOW) / Major (RED).

The Section A workplan displayed above shows the location of the Edit tools.

In Section A, begin making revisions by selecting the Edit tool pencil icon adjacent to the text boxes for the items listed below:

Item 3. Community Goals

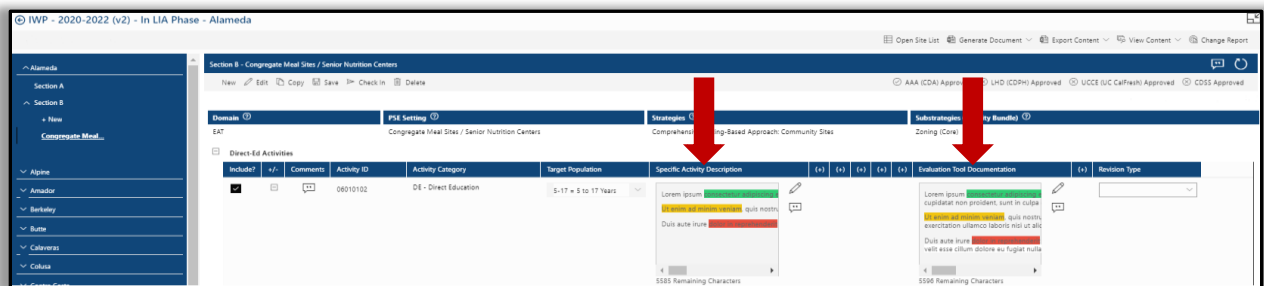
Item 4. Addressing Equity

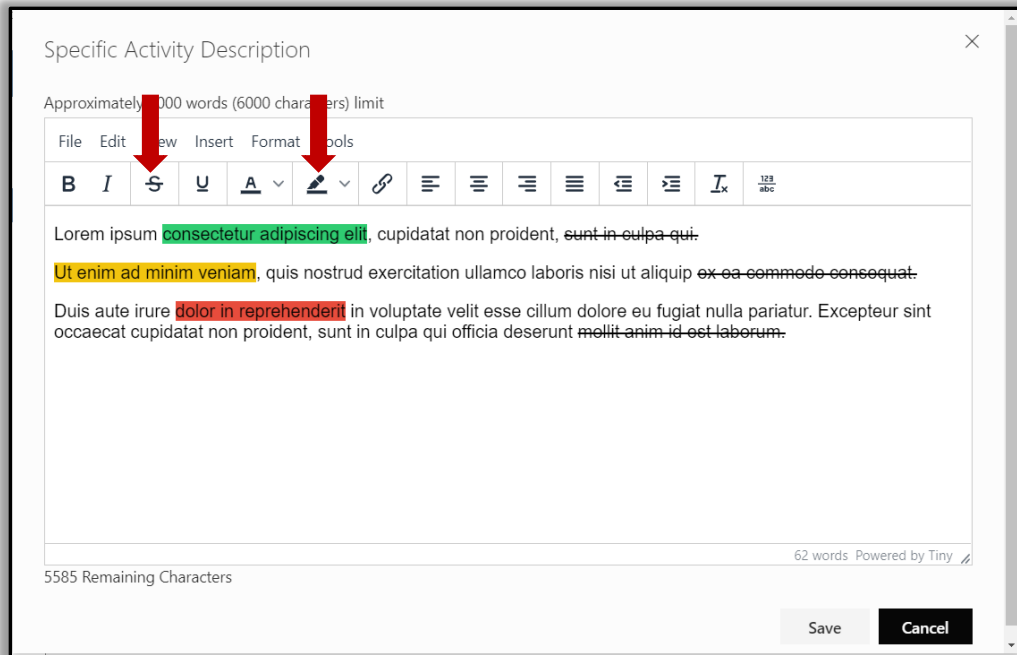
Item 5. Partnerships and Collaborative Efforts [County Nutrition Action Plan (CNAP) Partners or comparable partners and coalitions you participate in or convene]

Item. 6. Community Jurisdiction

Item 7. Intervention and Evaluation Plan Narrative Executive Summary

In Section B, begin making revisions by selecting the Edit tool pencil icon adjacent to the text boxes for the **Specific Activity Description, Resources/Materials, and Evaluation Tool Documentation**



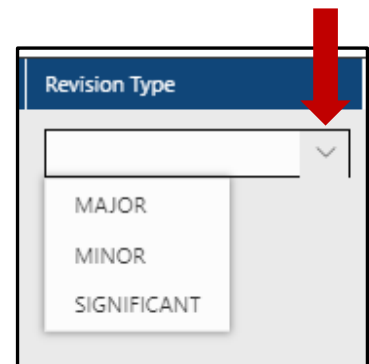
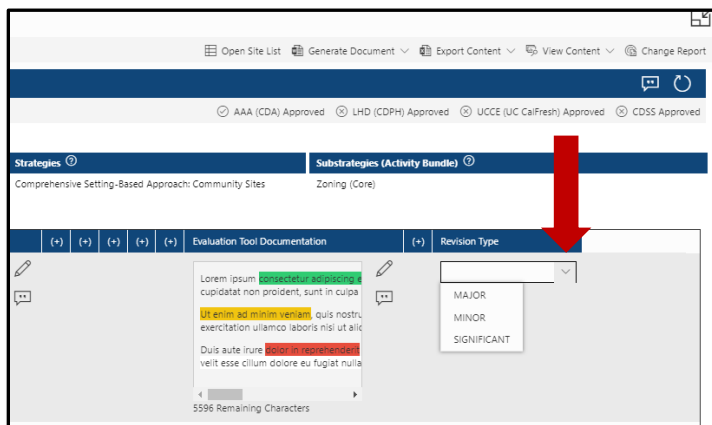


Step 3: After completing your Section B activity changes, you must indicate the **Revision Type** in the last column of Activity Row using the dropdown menu to select the appropriate category: Minor / Significant / Major.

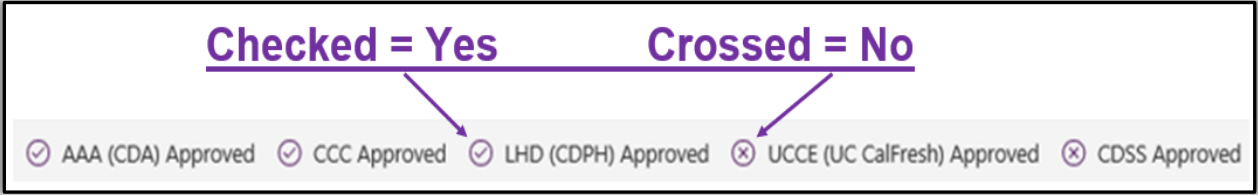
- You must select the appropriate Revision Type for each activity you have changed.
- Moreover, if you are adding or removing the entire Section B, then select any activity row and select *Major* from the *Revision Type* dropdown menu.

NOTE: The revision with the highest level of approval must be selected. For example, the screenshot displayed here has **RED** highlighted revisions in the **Evaluation Tool Documentation** textbox. Therefore, select *Major* as the highest level revision type.

Before the end of the LIA revision process, LIAs may change the **Revision Type** to match the appropriate category needed after collaboration with local partners and SIAs.

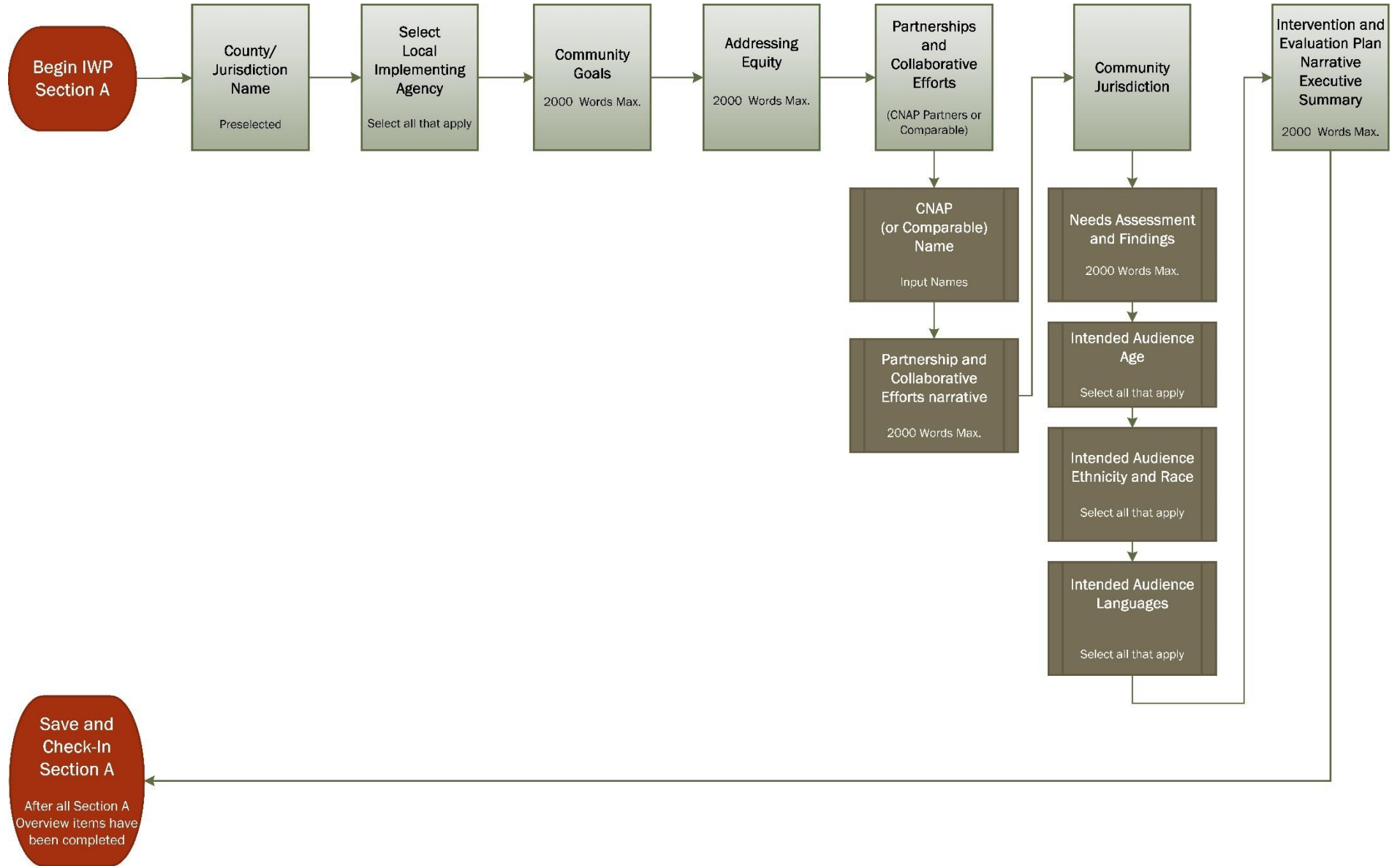


Step 4: After adding comments, making edits and selecting the appropriate Revision Type, SIAs will use the [Approval Tool](#) to track when revisions are approved. The [Approval Tool](#) is located along the top of each Section A and B workplan.

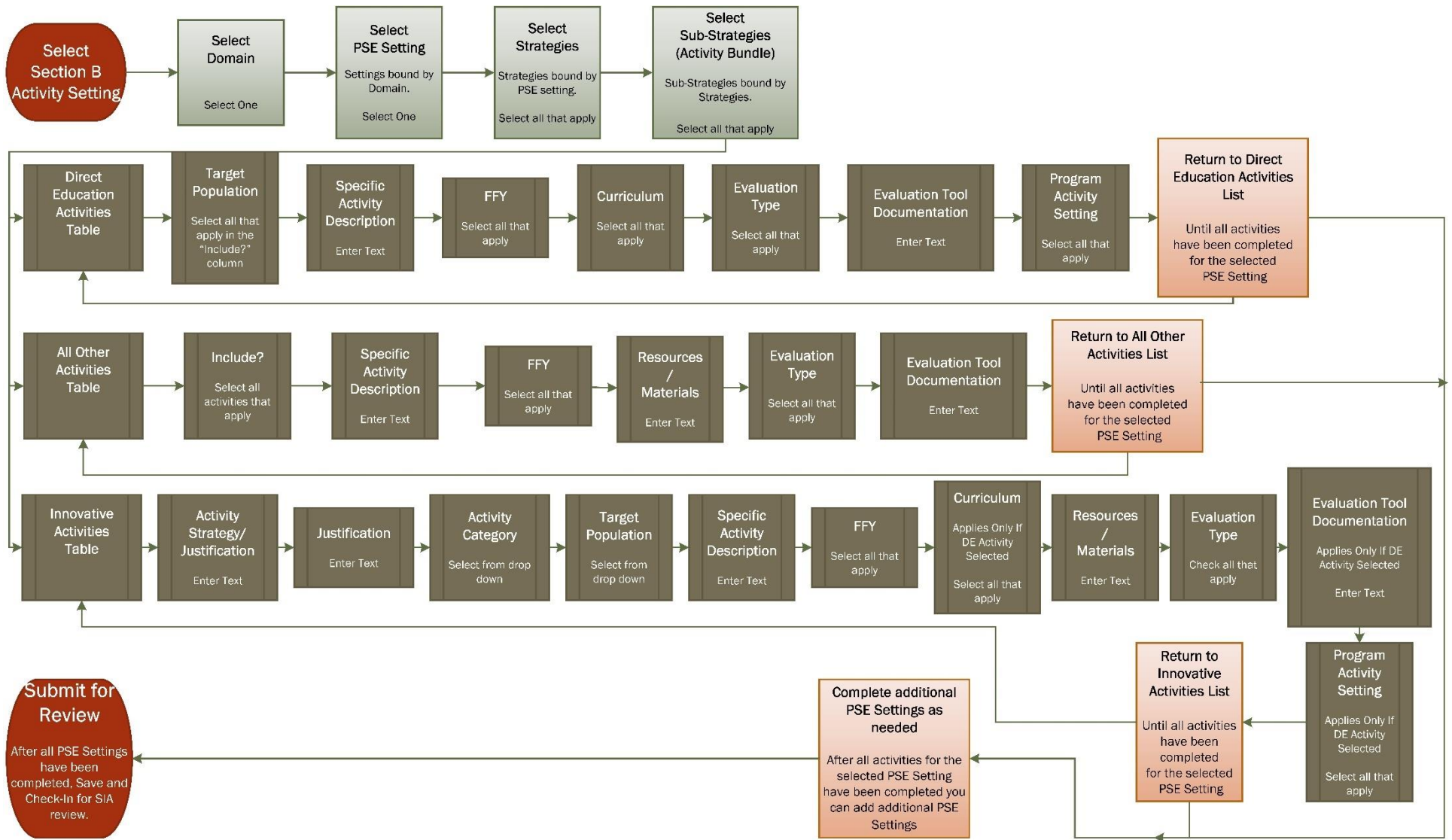


VII. Appendix

Item No. 1: IWP Form Section A Workflow Chart



Item No. 2: IWP Form Section B Workflow Chart



Item No. 3: Five Report Options: Available Datasets

There are five Excel download options available containing data extracted from Section A or B, as listed below:

- Section A Report
- Section B Settings Report
- Section B Activities Report
- Section B Activities Curriculums Report
- Section B Activity Evaluations Report

Some datasets contain a single datapoint (i.e., simple), while other datasets contain multiple datapoints which are semicolon delimited (i.e., complex). A complete list of download options with simple vs complex datasets identified is provided below.

1. Section A Report Datasets

- County
- Age
- Language
- Ethnicity
- SNAP-Ed Reach Eligible Residents
- Number of Partners
- Number of Coalitions
- Number of Eligible Sites
- List of Active LIAs

2. Section B Settings Report Datasets

- County
- Settings
- Strategies
- Sub-Strategies
- List of LIA Approvals

3. Section B Activities Report Datasets:

- County
 - Settings
 - Strategies
 - Sub-Strategies
 - List of LIA Approvals
 - Activity Type
 - Activity Category
 - Target Population
 - Activity Description
 - Activity Strategy
 - Activity Justification
 - List of Active LIAs
 - List of LIA Curriculums

- Resource/Materials
- List of LIA Evaluation Types
- Program Activity Settings
- Revision Type

4. Section B Activity Curriculum Report Datasets

- County
- PSE Setting
- Activity ID
- Curriculum
- List of Active LIAs

5. Section B Activity Evaluation Report Datasets

- County
- PSE Setting
- Activity ID
- Evaluation Type
- List of Active LIAs