INFORMATION AND ACTION LOG

These guides provide instructions on how to use the information and action log section of the SAA.SP

OVERVIEW AND SUMMARY

- In January 2020, the Grants Management Bureau released the Information and Action Log (IAL) section of SAA.SP. The IAL captures pertinent information related to each subaward, including:
  - Notes
  - Guidelines
  - Restrictions
  - Budget Establishment Forms (District subrecipients only)
  - Environmental and Historic Preservation (EHP) forms
  - Quarterly Status Report (QSR)
  - Corrective Actions, and more.

OVERVIEW AND SUMMARY

- The IAL section is located within the subaward details page of SAA.SP
- Users will see the five (5) most recent updates, but can view all IAL entries by selecting the "View All Information and Action Logs" link at the bottom of the section

Information and Action Log

Action #	Title	Category	Status	Comments	Due Date	Updated	Updated By	Details
2	Please ensure a completed EHP form is provided to the SAA within at least 60 days of the planned full scale exercise. Also, ensure that details regarding the inventory system are provided to the SAA prior to purchase.	Note				10/15/2018	Shackelford, Jerica	
1	FY18_NCR Solution Development Worksheet_MRC__Finaldraft4_2_18(2).pdf	Attachment				8/1/2018	Reed, Tristan	📄

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CREATE A NEW ENTRY

TITLE, CATEGORY, ACTION ITEM, CORRECTIVE ACTION, DELIVERABLE, ENVIRONMENTAL AND HISTORIC PRESERVATION, NOTE, STATUS, DUE DATE, ATTACHMENTS, COMMENTS

CREATE A NEW ITEM

- To create a new item in the Log, subrecipients and/or Program Managers should select the "Add" button on the Log page.

Action #	Title	Category	Status	Comments	Due Date	Updated	Updated By	Details
2	Please ensure a completed EHP form is provided to the SAA within at least 60 days of the planned full scale exercise. Also, ensure that details regarding the inventory system are provided to the SAA prior to purchase.	Note				10/15/2018	Shackelford, Jerica	
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Information and Action Log

View All Information and Action Logs | Add
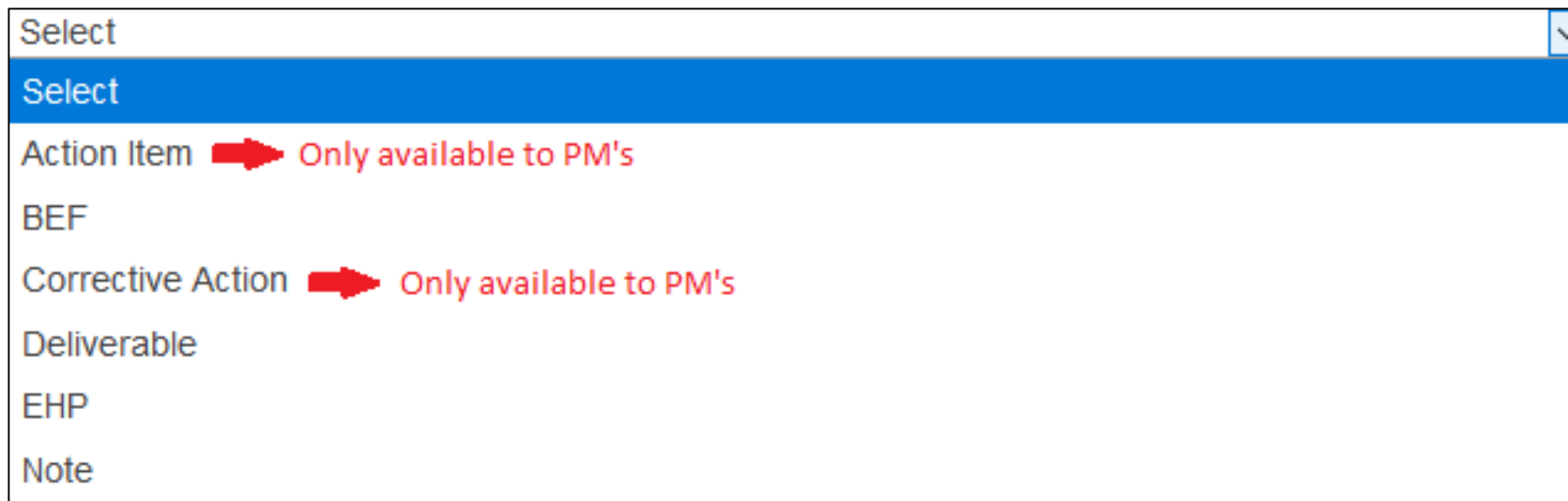
Section 1: Title – All Users

- Users must then enter a **Title** for the entry, define the category, assign a due date, and upload any necessary attachments and comments
- The title should concisely describe the entry (less than 100 characters).

SECTION 2: CATEGORY – ALL USERS

- Predefined categories have been identified for the Information and Action Log.

CATEGORY: ACTION ITEM

- Subrecipient needs to complete an action, such as:
  - Updating the Project Management Plan (PMP)
    - The Program Manager will only utilize this option if the PMP has been rejected and no resubmitted within 5 business days
  - Revising the Quarterly Status Report (QSR)
  - Unmanned Aircraft System (UAS)
  - Uploading Subaward documentation

CATEGORY: BUDGET ESTABLISHMENT FORM

- District subrecipients only
- BEF begins the process of budget development in PASS/SOAR

CATEGORY: CORRECTIVE ACTION

- Subrecipient has been notified previously of an action that has not been resolved

- Items in this category are reported to Subaward Leadership and the City Administrator

- These items will most often be identified through one of the following:
  - QSR review
  - Monitoring visit
  - Audit report

CATEGORY: DELIVERABLE

- Prior to subaward closeout, subrecipients must upload proof of what was accomplished utilizing that subaward funding

- Deliverables can include After-Action Report, Photos of the equipment received, or link to video produced

- Each subawards proof of deliverables will be different

- The Program Manager will determine if the proof of deliverables uploaded is sufficient to close the subaward.

CATEGORY: ENVIRONMENTAL AND HISTORIC PRESERVATION SCREENING FORM

- Subrecipients receiving grant funds in part or in full must submit Environmental and Historic Preservation (EHP) screening form and documentation for review and approval before initiation of the project

- EHP exempt projects include:
  - Planning
  - Personnel
  - Classroom-based training and exercises
  - Mobile and portable equipment (PPE, radios, etc.), vehicles, and other equipment that does not require any installation

- Any project outside of the above requires EHP compliance review by FEMA

- A properly filled PMP should indicate whether an EHP is required or not

CATEGORY: NOTE

- Users will select **NOTE** when uploading documents or submitting information that is not directly linked to any of the other options. Examples include, but are not limited to
  - Detailed Budget Breakout/Projection
  - Extension Requests
  - Inventory Reports
  - Reprogramming Requests
  - Solution Development Worksheets
  - W9's and ACH forms

Section 3: Status - Program Manager

- Entries will automatically be defined as **"Active"** upon submission
- Program Manager leaves the status as **"Active"** until all actions associated with the entry is received/resolved before changing it to **"Closed"**

SECTION 4: DUE DATE – PROGRAM MANAGER

- The **Due Date** is identified by the Program Manager and dictates the items that are shown on the Program Manager's "Watch List" in SAA.SP

- If the **Due Date** needs to change, the Program Manager can adjust it at any time

SECTION 5: ATTACHMENT – ALL USERS

- All users have the option to upload an attachment
- Users can upload multiple items at one time if necessary

SECTION 6: COMMENTS

- Users must enter any additional comments to explain the information needed, documents uploaded, etc. in the comments section

- These comments go out with the email notification to users to explain the action taken, so make it precise and meaningful to other users

SAVE AND ACTION NOTIFICATIONS

- Once all fields have been completed, save the entry to be included with the subaward log

- A system-generated entry notification email is sent to all contacts/emails associated with the project

18UASI633-02 | EHP: TOMAHAWK - Tactical Entry Course

S SAA.SP <no-reply@dc.gov>   ↩ Reply
   To luke.hodgson@maryland.gov; Sumbeida, Muniru (HSEMA); lauren.collins1@maryland.gov
   Cc SAA, NCR (HSEMA)

Lauren Collins wrote:

18UASI633-02 | EHP: TOMAHAWK - Tactical Entry Course

The Tomahawk EHP Screening Form and Supplemental Information has been uploaded for FEMA review and approval.

The item is Active and due on 2/21/2020.
The item also contains attachments.

View item in SAA.SP.

For instructions on how to view or post content, please consult the Information and Action Log Guide.

VIEW, EDIT, UPDATE AND DELETE EXISTING ENTRY

VIEW ENTRY – ALL USERS

- Subrecipients and Program Managers can edit entries in the Information and Action Log by clicking the "**View**" link in the details column

- The attachment icon 📎 is an indicator that documents are attached to that entry, but not a link

Information and Action Log

Action #	Title	Category	Status	Comments	Due Date	Updated	Updated By	Details	
3	Missing EHP Documentation	EHP	Active	Please upload the completed EHP form and photos to be submitted for FEMA review.	1/31/2020	12/30/2019	Woodall, Rachel	View	📎
2	Please ensure a completed EHP form is provided to the SAA within at least 60 days of the planned full scale exercise. Also, ensure that details regarding the inventory system are provided to the SAA prior to purchase.	Note				10/15/2018	Shackelford, Jerica		
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View All Information and Action Logs

Add

EDIT ENTRY – ALL USERS

- All details associated with the entry is displayed
- Click **EDIT** to add attachments, notes etc.
- Users must enter comments to explain entries (attachments and notes, etc.)
- These comments go out with the notification to users to explain the action taken, so make it precise and meaningful to other users
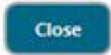
UPDATE AN ENTRY – ALL USERS

- Updated entry is shown with all comments and pertinent attachments.
- Click the [icon] icon to view uploaded documents
- Click on the **EDIT** to update the entry as needed

DELETE AN ATTACHMENT – ONLY PROGRAM MANAGERS

- Only Program Managers can remove attachments by clicking the ✕
- Only attachments that were uploaded in error, or have been replaced with more current versions of the document

CLOSING AN ENTRY – ONLY PROGRAM MANAGERS

- When all items have been uploaded and documentation is sufficient, the Program Manager can close the entry.