

Guidance for Completing and Submitting a PPA 7721 Suggestion

To begin you will need to access the PPA 7721 Suggestion Submission System currently maintained on a Metastorm web-based Business Process Management (BPM) platform. Metastorm is accessed at the following link: <https://bpm.aphis.usda.gov/Metastorm>

When using the PPA 7721 Suggestion Submission System, please note the following:

- Metastorm works best with Google Chrome or Microsoft Edge 80.
- To avoid any system disruption you should close all other programs on your computer as well as any other IE windows that may be open.
- There are many content windows that pop-up navigating Metastorm so please turn off your computers Pop-up blocker.
- Because Metastorm has a 60 minute session time-out due to inactivity, it is recommended that your suggestion be composed in a word processing program so the text content can subsequently be cut and pasted into the PPA 7721 Suggestion Submission System form—especially for larger fields.

Registering to Use Metastorm BPM and Log-in

You must be registered as a Metastorm BPM user to access the PPA 7721 Suggestion Submission System. If you need to register, you can be granted access the Metastorm BPM Application Registration screen through the following link:

https://bpm.aphis.usda.gov/MetaStorm/eForm.aspx?Map=APHIS_Proc_Reg&Client=External

Fill out the Metastorm BPM Application Registration screen. On this screen, as on all following Metastorm BPM screens, fields with a red asterisk must be completed before you can proceed to the next screen.

For “Select application you are requesting access to”, use the pull down tool to select “**PPQ_PPA 7721-Suggestion1**”

For “Indicate your relationship to APHIS”, use the pull down tool to select the option that best describes your relationship. Options include:

- APHIS Employee
- External Customer (*this option will be selected if you do not work for APHIS, AMS or GIPSA*)
- FAS Employee
- Other MRP Agency Employee

As an External Customer, you will next be asked to enter a desired login name (i.e., user name). APHIS employees will enter their Windows network login name as instructed.

The Metastorm BPM Application Registration will then be completed by filling in all personal contact information requested in the fields provided. To submit the Metastorm BPM Application Registration, click on “OK” at the bottom right of the screen. There will be no immediate registration confirmation screen. Rather, new users who register will receive three e-mails from APHIS within a 48 hour period. One e-mail will confirm your User ID, another provides an initial password, and the last will notify you that access is granted to “PPQ PPA 7721 Suggestion”.

These e-mails will be addressed from the sender: donotreply@usda.gov make sure to check junk mail or spam folder if you did not see three emails within 48 hours.

Users with Prior or New Metastorm Account with User ID and Password, or a USDA Level 2 eAuthentication Account

Access the Metastorm Welcome screen by login to the system: <https://bpm.aphis.usda.gov/Metastorm>.

Enter your username and password. Once you are in PPA 7721 Suggestion Submission System, you should change your password because:

- As a new user you should change the initially assigned password to something personalized that you can remember
- As a prior user your old password is likely to expire soon.

To change your password, click on the Administrative Forms button, then select Manage Metastorm User Acct.

If you have a **USDA Level 2 eAuthentication** account, you can use it to log into the PPA 7721 Suggestion Submission System, which operates on the Metastorm platform. However, you will need to have a Metastorm username and password to establish the use of your Level 2 eAuthentication account to log into the PPA 7721 Suggestion Submission System.

Completing PPA 7721 Suggestion On-line Form

Upon logging in to Metastorm, you will be land on the main menu page entitled “Open Text MBPM”. On the top menu bar select the ‘Blank Forms’ tab. In the subsequent list of options, click on the row for “PPQ PPA 7721 Suggestion”. Doing so will open the first screen, entitled “Suggestion Information”, of the PPA 7721 Suggestion on-line form you must complete.

In the body of the screen, fill out all the **Applicant Information**. Be sure to include the name of your organization under “Cooperator Name” and use the pull-down tool to identify “Cooperator Type” by selecting the option provided that best describes the organization you represent.

Next, fill out the **Basic Suggestion Information** providing a descriptive project title and selecting the PPA 7721 goal area your suggestion best aligns with; check the Goal Area Guidance within this Implementation Plan, pages 8–27, to determine what Goal Area your project is most closely aligned with.

The **Cooperators** section at the bottom of the screen, if you have a cooperator(s) supporting your project, identify who the cooperator is, what state they are in, and how much total funding will be set aside for cooperators and how much each individual cooperator will need if more than one cooperator.

The last section at the bottom of the screen asks you to answer questions that provide **Additional Information** that helps in reviewing suggestions. The questions consist of five “Yes – No” questions related to whether your suggestions has an information technology (IT) component, is affiliation with a Tribal Nation(s), has a citrus health component, includes work that will be conducted offshore from U.S. States or Territories or in foreign countries, and involves research or applied methods development.

Click on “OK” in the bottom right corner of the screen to proceed to the next screen. If you do not complete required fields on this or any subsequent screen, you will be prompted to do so by a pop-up message asking you to complete the field you missed.

The next screen to complete will ask **Preliminary Questions** based upon the PPA 7721 Goal Area you selected as most aligned to your project in the prior screen. The Preliminary Questions serve to verify that you have selected the correct Goal Area aligned to your project by confirming that the project share one or more of the implementation strategies associated with the selected PPA 7721 Goal Area. If you answer “No” to all questions, upon clicking on the pop-up proceed button you will receive the red pop-up message forcing you to go back and reevaluate your Goal Area selection. Once you answer “Yes” to at least one of the questions, you can click on the pop-up proceed button to advance to the next page in the form.

The next screen allows you to enter an **Abstract** of your project. You are required to provide a brief summary or abstract of the project in 500 words or less. Be sure to include a short description of your project’s purpose, objectives, methodology, intended beneficial outcome, and identification of the other cooperator(s) and their role on the project. Click on “OK” in the bottom right corner of the screen to proceed to the next screen.

The next screen allows you to input the **Suggestion Body**. Please note, if you are submitting a Goal 1 Survey suggestion, you are required to complete and upload a separate Survey Suggestion Template and can complete Parts I, II, III, and IV of the **Suggestion Body** by just entering “See Survey Template”. The Survey Template will be uploaded in Part V: Budget.

Part I of this screen seeks you to enter a narrative explaining the **Purpose, Expected Benefits and Accomplishments** of the project. In so doing, briefly describe the purpose of your project, including the impacts (benefits) expected and their estimated value as return on the amount of funding being requested, and the specific project objectives and subsequent accomplishments anticipated upon meeting these objectives. If appropriate, include information on anticipated trade impacts and benefits.

Part II asks for information on your **Prior Experience** with this project receiving PPA 7721 Section 10007 or PPA 7721 funds. If the suggestion received these funds in prior years, you are asked to select the year(s) you received prior PPA 7721 10007 or PPA 7721 funds, upload your most recent Accomplishment Report, and include a brief description in the area provided how the use of this funding provided a return on investment with measurable accomplishments (accomplishments should show that any prior funding to support earlier stages of the project were spent and supported beneficial outcomes).

If you had not received prior funds, you are requested to provide briefly specific information offering examples of relevant past performance, best practices, and innovation for each cooperator listed as participating in your project.

Part III: Budget allows you to download using the links provided a PPA 7721 budget template or a Goal 1 Survey Suggestion Template to fill-out and upload in accordance with the instructions provided. Please provide all of this information requested.

Part IV of the Suggestion Body ask you to describe the **Technical Approach** to be employed, including a description of the methodology and a summary of the various tasks to be undertaken. You should include any quantitative and qualitative performance measures based on the project’s

objectives. Also, you should note and information technology (IT) system development involved in the project and why such IT development is required beyond existing databases or applications; are they not fulfilling current IT needs or satisfying requirements.

Finally, **Part V** of the Suggestion Body ask you to outline **Milestones** that list timelines and incremental steps of achievement that successfully completes your project's goal(s) and/or objective(s).

On this final screen of the Project Suggestion form, clicking "OK" will save the suggestion as a draft. Upon doing so, a unique suggestion number is assigned, which is always visible in the top right corner of the suggestion screen. This project number will begin with the fiscal year, 2019, followed by a hyphen and a unique 4 digit identification number.

Saved Drafts can be found by returning to the main menu page entitled "Open Text MBPM" and clicking on the "To Do List" tab on the top menu bar. In the subsequent list of existing draft suggestions, click on the row for your draft suggestion indicated by the unique project suggestion number assigned. Doing so will open your saved draft. Using the function keys at the top of the screen you can navigate the different sections of your suggestion (e.g., Suggestion Information, Abstract, Suggestion Body, etc.) and using the function keys at the bottom of the screen you can edit, add notes, or select to **Submit Completed Suggestion**.

If you do click on the "**Submit Completed Suggestion**" button, you will be asked in a pop-up window "Are You Sure?" If you are ready to submit the suggestion, just click on "Yes" and the suggestion is submitted.

Project Work Plan and Financial Plan Templates Used for a PPA 7721 Funded Project to Obtain a Cooperative Agreement and Progress Report for Submission to ADODR at least Semi-Annually, or Quarterly upon ADODR's Request. These templates will be completed working with an APHIS assigned Authorized Departmental Officer's Designated Representative (ADODR) who will become your primary point-of-contact in the event that your project suggestion is approved for funding. The Project Work Plan Template will be completed along with a Project Financial Plan Template for submission via the ezFed Grants system for processing into a cooperative agreement with APHIS to obligate funds to conduct the project's work. Cooperative agreements require routine progress reporting; for PPA 7721 funded projects the Progress Report Template should be used at least semi-annually, unless instructed by the ADODR to report quarterly.

The National Clean Plant Network (NCPN)

NCPN issues its own Request for Proposals (RFP) process annually as can be found on the USDA/APHIS website at the page covering PPA 7721 for the National Clean Plant Network.