

## Change Request for the Survey Summary Form

The Survey Summary Form plays a central role in the management and reporting of survey efforts across the country in the CAPS Information Systems (CAPSIS). To be fully useful and functional, it is necessary to keep the information in the Survey Summary Form up-to-date throughout the survey season. Just as it is necessary to have the Survey Summary Form match the submitted work plan, it is equally necessary to record any changes to the work plan in the Survey Summary Form as the season progresses so that the information in the Survey Summary Form is current with what was completed. The end result should be that the information in the Survey Summary Form matches the information in the Accomplishment Report at the termination of the agreement. To keep the Survey Summary Form information up-to-date, the submission of a Change Request is necessary.

A Change Request must be submitted after a Survey Summary Form has closed, and survey names and/or targeted pests need to be modified, added, or deleted. The Change Request starts by setting the [Survey Summary Page](#) to the proper year and funding source using the drop downs provided in the upper left<sup>1</sup>. *See diagram below*. Clicking on the “request a modification” link<sup>2</sup> at the top of the Survey Summary page, will produce a dialog box in which a detailed account of the change request can be written and requested<sup>3</sup>.

The Change Request interface is now the same as the Survey Summary Form interface. When Field Operations has given approval, please make the appropriate changes and save. After saving the changes, automatically generated emails will indicate whether the SPHD and Field Operations have given approval or denial. The appropriate Workflow page will show the status of the change request<sup>4</sup>. Any modification(s) made to survey names and/or targeted pests will impact and alter the specified Survey Summary, which in turn will affect All Planned Surveys, survey supplies, My Surveys, diagnostic resource planning, Metrics, Accountability Reports, State Summary Reports, and other aspects CAPSIS.

The screenshot displays the 'Cooperative Agricultural Pest Survey' interface. On the left, there are dropdown menus for the year (2018) and Farm Bill (Minnesota), with a red box and the number '1.' highlighting them. Below these are 'LINKS' and 'NAPIS' sections. A red box and the number '4.' highlight the 'Open Workflow' link in the LINKS section. At the top right, a message states: 'This plan has been approved. If it should be updated, you can request a modification from Field Operations.' A red box and the number '2.' highlight this message. On the right side, a list of pests is shown, with a red box and the number '3.' highlighting the 'Request Modification' dialog box that appears over the list. The dialog box has a title bar 'Request Modification' and a 'Reason:' label above a text input area. At the bottom of the dialog are 'Request' and 'Cancel' buttons.