CDMIS

CHRONIC DISEASE

Management Information System

Action Plan Module

Version 2.0

CDC

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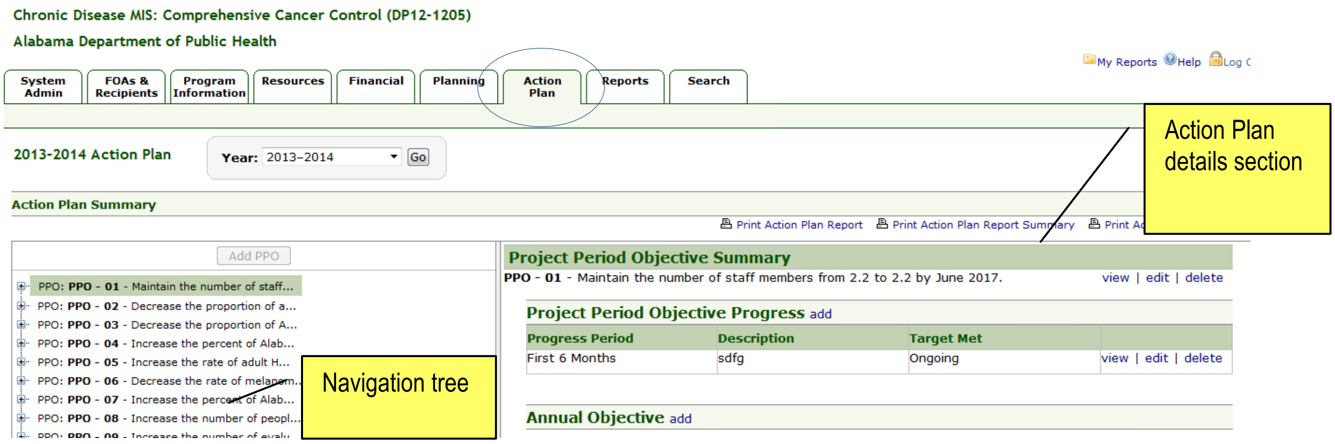
Contents

Introduction

An action plan is a comprehensive plan to attain your program's goals. Use the Action Plan section to manage your programs goals on a yearly basis, track the progress of the work, and document the results. An action plan consists of project period objectives (PPOs), annual objectives (AOs), activities, products and progress information for both the PPO and AO.

Action Plan Summary Page

The Action Plan Summary page is divided into two sections. The left side contains a multi-level navigation tree that displays a summarized view of the PPOs and their associated PPO Progress entries, AOs, AO Progress entries, Activities, and Products. The right side displays the action plan details and has links to view, add, edit or delete the various components.



The Action Plan section consists of the following components.

1. **Project Period Objective** (PPO) – Describes the long term 5-year objective. The PPO must be added first before any other action plan components can be added.

    1.1. **Project Period Objective Progress** – Used to document the progress made toward the PPO during the interim or annual reporting period.

    1.2. **Annual Objective** (AO) **–** Describes the short term annual objective required to meet the longer term PPO. An Annual Objective must be added before Annual Objective Progress, Activity, and Product can be added.

        1.2.1. **Annual Objective Progress –** Used to document the progress made toward the Annual Objective during the interim or annual reporting period.

        1.2.2. **Activity –** Describes the actual work or action taken to meet the goals of the Annual Objective.

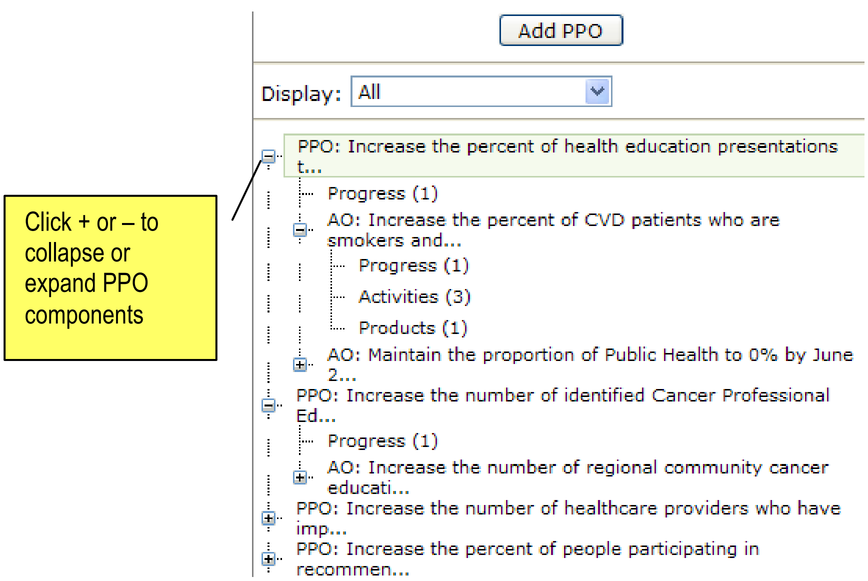
        1.2.3. **Products –** Tangible output or artifact resulting from an activity.

The Action Plan navigation tree

The tree on the left side of the page displays PPOs that have been entered for the action plan. For each PPO, the system displays the number of progress entries and also displays the PPO's annual objectives. If annual objectives have been entered for the project period objective, the system displays the annual objective in SMART statement format and displays the number of progress entries, activities, and products that have been entered for the AO. To view associated information for a PPO or AO in the right display pane, click on the PPO or AO.

The navigation tree displays information using the following hierarchy:

- Project Period Objective
  - Progress
  - Annual Objective
    - Progress
    - Activities
    - Products



SMART Objective

When you enter objective information, the system converts information entered into a SMART format, i.e. Specific, Measurable, Achievable, Relevant, and Time-specific. The system assists you to make your objectives SMART by dividing the fields for entering objective information into the components of a SMART objective.

Specific - Identifies a specific event or action that will take place and answers the question: Is there a description of a precise or specific behavior/outcome which will take place?

Measurable - A system, method, or procedure that allows the tracking and recording of the behavior or action upon which the objective is focused and answers the question: Is there a reliable system in place to measure and quantify progress towards the achievement of the objective?

Achievable - The objective should be capable of being reached; there is a likelihood of success but that does not mean easy or simple. The objectives should be agreed to by the parties involved and answers the question: Can the objective be achieved with a reasonable amount of effort?

Relevant - The objective relates to and supports the associated program goal and also represents the most cost effective use of resources (money, staff, time, in-kind, etc.) to accomplish the associated program goal and answers the questions: Will accomplishing this objective help to achieve program goals? Is this the best use of our resources to reach our goals, versus alternative approaches?

Time based - There must be a date for when the objective has to be started and finished and answers the question: Is there a finish and a start date clearly stated or defined?

Adding a Project Period Objective (PPO)

1. Click the **Add PPO** button on the navigation tree.
   Result: The system displays the *Project Period Objective Summary* in the right display pane.

Note

- The fields displayed are specific to each FOA. Please see the What do I do differently for my FOA? section at the end of this procedure for detailed information on adding a PPO for your specific FOA.
- For SODPP FOA, the **Add PPO** button is not available if the Funding Level has not been selected on the *Program Summary* page.

2. In the *Related Program* field, select the program related to the project period objective. You can make only one selection in this field. If the related program is not included in the list, select *Other*, and enter it in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words.
3. In the *Objective ID* field, enter an objective ID or number that will be assigned to the PPO. Maximum text is 15 characters.
4. In the *Related Program Goal* field, select the appropriate related program goal from the list.
5. In the *Priority Area* field, select the appropriate priority area(s) from the list.
6. In the *Describe the objective and how it will impact the problem* field, enter a description for the objective and describe the impact that the objective will have on the problem that is addressed by the PPO. Maximum text is 2000 characters, about 400 words.
7. Complete the Measurement fields as follows:
   a. In the *Direction of Change* field, select the direction of change that will be measured to indicate if you plan to increase, decrease, or maintain the figure.
   b. In the *Unit of Measurement* field, select the unit of measurement that will be used to measure the PPO.

c. In the *What will be Measured?* field, enter a brief description of what will be measured in this objective, for example, “Outdoor public recreation areas adopting 24/7 tobacco-free policies”. Maximum text is 300 characters, about 60 words.

d. In the *Baseline* field, enter the baseline figure for what will be measured in the text box. Maximum text is 10 numeric digits.

Note

- If you do not know the baseline, select the *Unknown* check box. If you select *Unknown*, the *Baseline* field is not required.

e. In the *Target* field, enter the target figure for what will be measured in the text box. Maximum text is 10 numeric digits.

f. In the *Data Source* field, select the desired data source from the list. The list of data sources is based on the selections made in the Planning Tab – Data Sources section. If the data source is not in included in the list, select *Other*, and enter it in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words.

8. In the *Timeframe* field, notice the start date and the end date for the annual objective. The timeframe displayed defaults to the FOA project period.
9. In the second *Timeframe* field, inspect the PPO start and end dates for the PPO’s five-year time frame. The PPO end date will display in the SMART statement
10. Click **Save** to save the information entered.
Result: The system saves the PPO information. If any fields on the page are incomplete or invalid when you click **Save**, the system displays an error. Correct all errors and click **Save** again

What do I do differently for my FOA when adding a PPO?

Click on your FOA to find out.

CCC | CCC Policy DP-1017 | Collaborative | CTG | CTG-SC | CTG National | SODPP

Adding a PPO: CCC FOA

1. In the *Related Program Goal* field enter the related program goal in the text box. Maximum text is 2000 characters, about 400 words.
2. In the *Cancer Focus* field, select the areas on which the cancer focuses. If the focus area is not included in the list, select *Other*, and enter it in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words.

Adding a PPO: CCC Policy DP-1017 FOA

1. In the *Cancer Focus* field, select the areas on which the cancer focuses. If the focus area is not included in the list, select *Other*, and enter it in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words.

Adding a PPO: Collaborative FOA

1. In the *Programs Involved* field, select the program(s) that will be involved in the PPO.
2. In the *Long Term Outcome Indicator* field under the Measurement section, select the indicator that will be used for measuring the Project Period Objective.

Note

- The *Long Term Outcome Indicator, Measurement Type,* and *Intermediate and Short Term Outcome Measurements/Target* fields are available only if the program involved is Tobacco Control.

3. Complete the *Intermediate and Short Term Outcome* fields as follows:

Note

- The *Intermediate and Short Term Outcome* field is available only if the program involved is Tobacco Control.

   a. In the *Measurement Type* field, indicate if this outcome measurement is intermediate or short by selecting the type from the drop-down list.
   b. In the *Intermediate and Short Term Outcome Measurements/Target* field, enter the target figure for the intermediate or short term outcome measurement in the text box. Maximum text is 10 numeric digits.
   c. In the *Intermediate and Short Term Outcome Measurements/National Program Indicator* field, select the indicator that will be used for measuring the intermediate or short term indicator. Maximum text is 10 numeric digits.
   d. In the *Intermediate and Short Term Outcome Measurements/Data Sources* field, select the desired data source from the list. If the data source is not in included in the list, select *Other*, and enter it in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words.
   e. Click **Save** to save the information entered in the Intermediate and Short Term Outcome Measurements section.

4. Inspect the information displayed in the *Intermediate and Short Term Outcome Measurements* field. This field displays the information entered in the Intermediate and Short Term Outcome Measurements section.

Adding a PPO: CTG FOA

1. In the *Related Program Goal* field, select the appropriate related program goal from the list. If the related program goal is not included in the list, select *Other*, and enter it in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words.
2. In the *Priority Area* field, select the appropriate priority area(s) from the list. If the priority area is not included in the list, select *Other*, and enter it in the Other text box. Maximum text for the *Other* field is 50 characters, about 10 words.
3. In the *Timeframe* field, click the calendar icon in the *Start Date* field to select the PPO start date and click the calendar icon in the *End Date* field to select the PPO end date.

4. In the second *Timeframe* field, click the calendar icon in the *Start Date* field to select the PPO start date and click the calendar icon in the *End Date* field to select the PPO end date for the five-year time frame. The PPO end date will display in the SMART statement.

Adding a PPO: CTG SC FOA

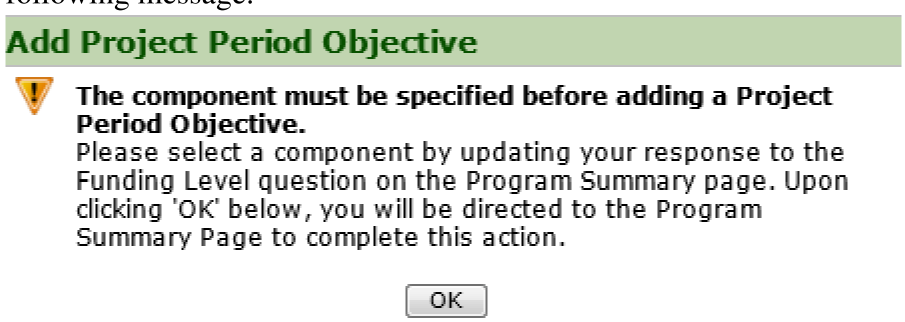
1. In the *Related Program Goal* field, select the appropriate related program goal from the list. If the related program goal is not included in the list, select *Other*, and enter it in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words.

Adding a PPO: CTG National FOA

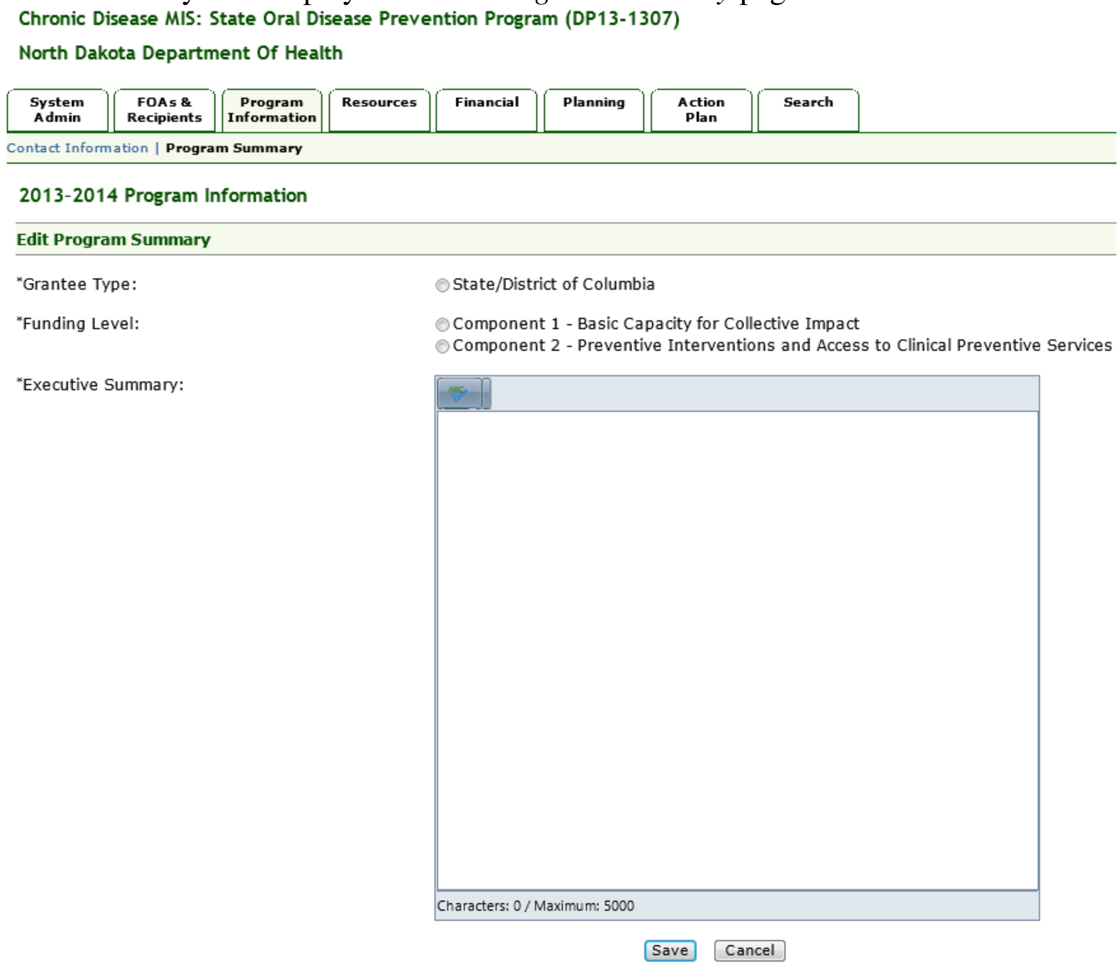
1. In the *Priority Area* field, select the appropriate priority area(s) from the list. If the priority area is not included in the list, select *Other*, and enter it in the Other text box. Maximum text for the *Other* field is 50 characters, about 10 words.
2. In the second *Timeframe* field, click the calendar icon in the *Start Date* field to select the PPO start date and click the calendar icon in the *End Date* field to select the PPO end date for the five-year time frame. The PPO end date will display in the SMART statement.

Adding a PPO: SODPP

1. To display the fields for adding a PPO, do the following:
    a. Click the **Add PPO** button.
    Result: If you have not specified a component, the system displays the following message.

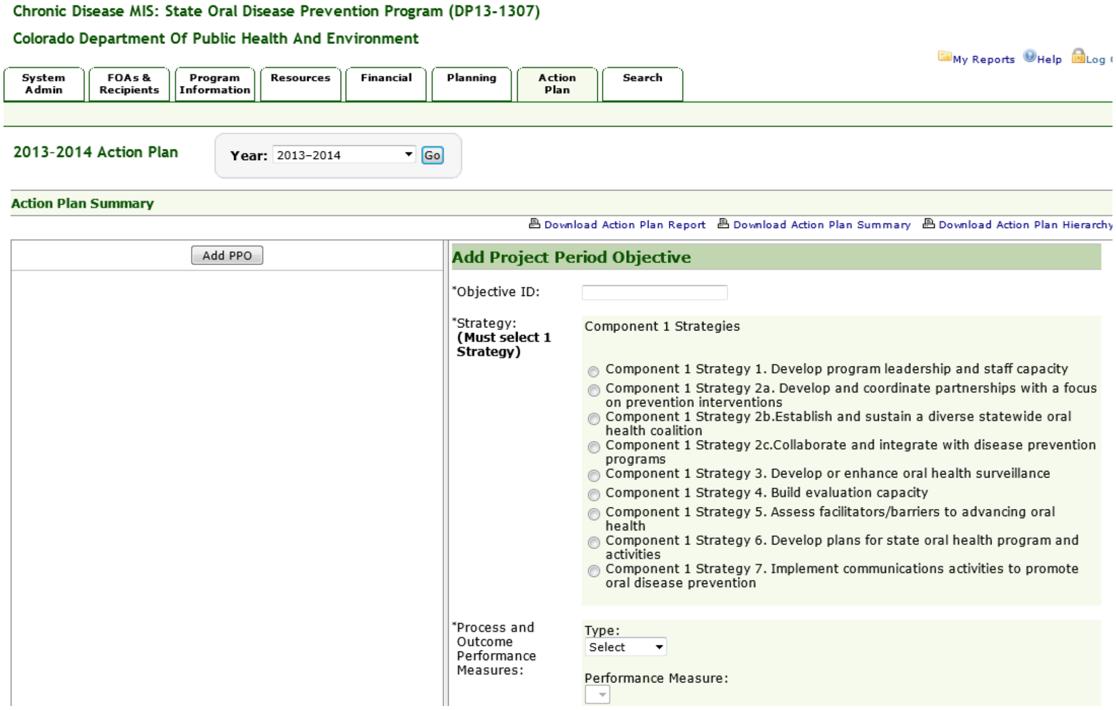


b. Click **OK** in the message.
Result: The system displays the *Edit Program Summary* page.



c. In the *Funding Level* field, select the appropriate component.
d. Complete all fields on the page if you have not done so.
e. Click **Save**.
Result: The system saves the entered information.

f. Return to the *Action Plan* page and click **Add PPO**.
Result: The system displays the fields for adding a PPO.

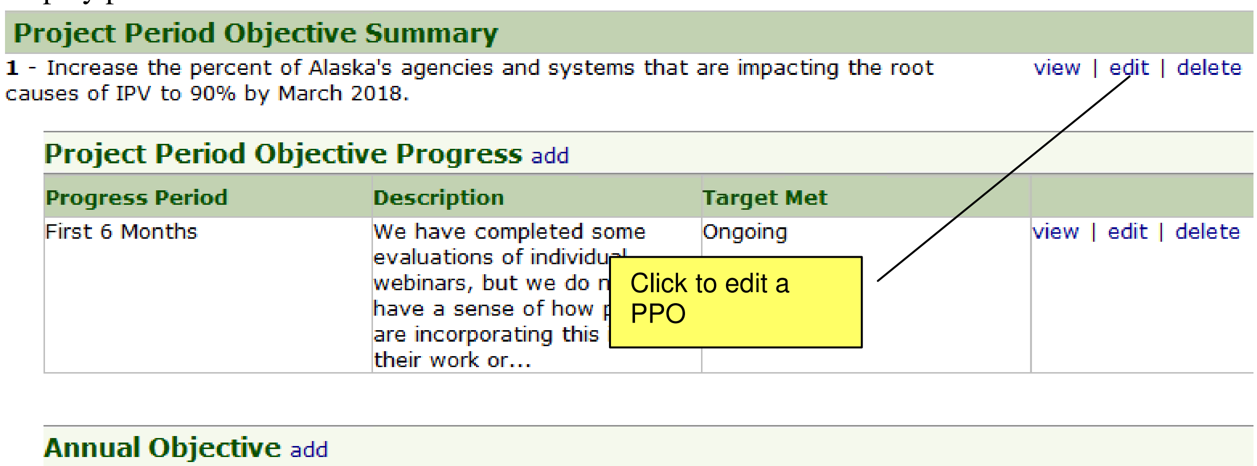


2. In the *Domain* field, select the domain(s) associated with this PPO.
3. Complete the fields in the *Process and Outcome Performance Measures* field as follows:
    a. In the Type field, select the type of process and outcome measurement that will be used. The response option values displayed in this field are determined by the Strategy selected at the top of the page.
    b. In the *Performance Measure* field, select the performance measure that will be used for the process and outcome measurement. The response option values displayed in this field are determined by the Strategy selected at the top of the page.
    c. In the *Baseline* field, enter the baseline figure for what will be measured in the text box. Maximum text is 10 numeric digits. 0 is a valid value for this field.
    d. In the *Target* field, enter the target figure for what will be measured in the text box. Maximum text is 10 numeric digits. 0 is a valid value for this field.
    e. In the *Unknown* field, if you do not know the Baseline and the Target information, select the Unknown check box. If you select Unknown, the Baseline and Target fields are not required.
    f. In the *Timeframe* field, enter the date that the performance measure will start in *the Start Date* field or click the calendar icon and select a date. In the *End Date* field, enter the date that the performance measure will end or click the calendar icon and select a date.
    g. Click **Add Performance Measure** to add a new performance measure to the PPO. If any fields on the page are incomplete or invalid, when you

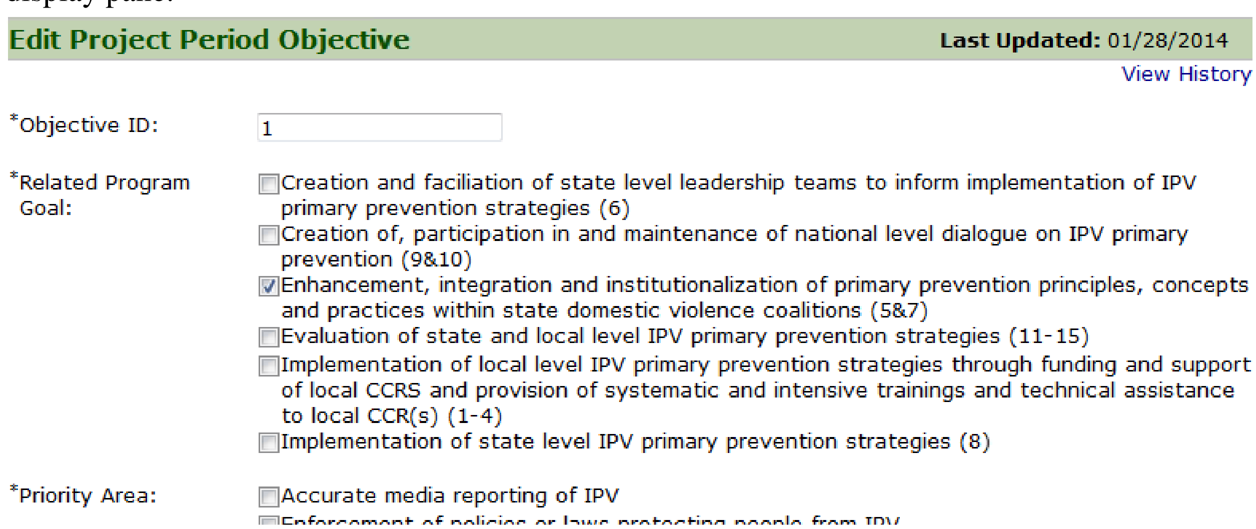
click **Save**, the system displays an error. Correct all errors and click **Save** again.

Editing PPO information

1. On the navigation tree, select the PPO that you want to edit.
   Result: The system displays the *Project Period Objective Summary* in the right display pane.



2. Click the **edit** link on the same row as the PPO that you want to edit.
   Result: The system displays the *Edit Project Period Objective* section in the right display pane.



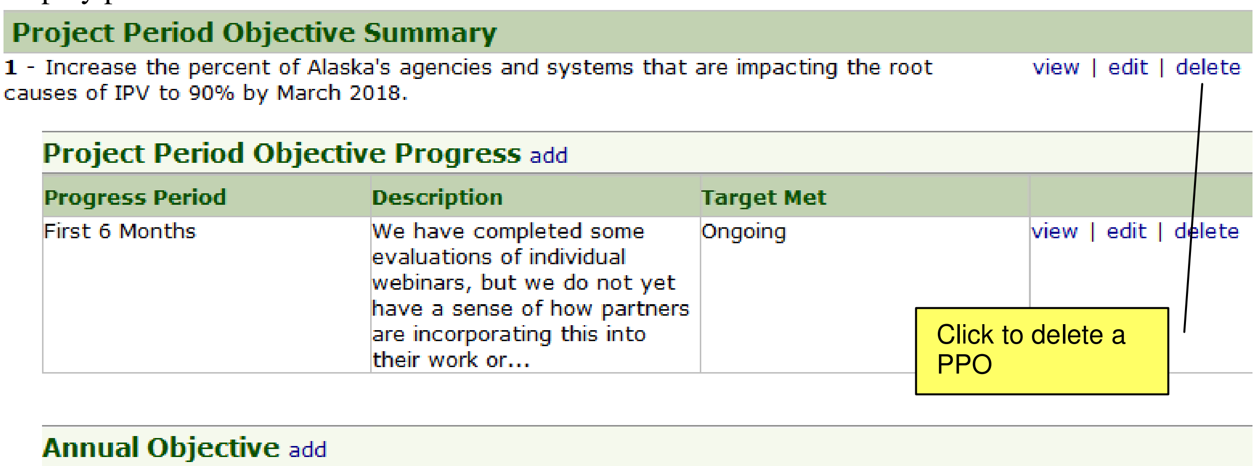
Note

- The page for entering initial PPO information and modifying existing are identical. The only difference is that the Edit page displays the existing information for the PPO while the fields in the page for entering initial information are blank.

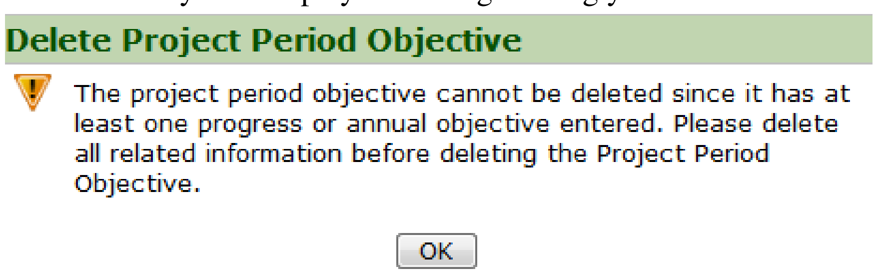
3. Modify the fields as necessary.
4. In the *Describe Revisions* field, enter notes or comments for the revision.
5. Click the **Save** button to save the information.
   Result: The system saves the modified information. If any fields on the page are incomplete or invalid when you click **Save**, the system displays an error. Correct all invalid fields and click **Save** again.

Deleting a PPO

1. On the navigation tree, select the PPO that you want to delete.
   Result: The system displays the *Project Period Objective Summary* in the right display pane.



2. Click the **delete** link for the PPO.
   Result: The system displays a message asking you to confirm the delete action.



3. Click the **OK** button to confirm your decision to delete the PPO.
   Result: The system deletes the PPO.

Important

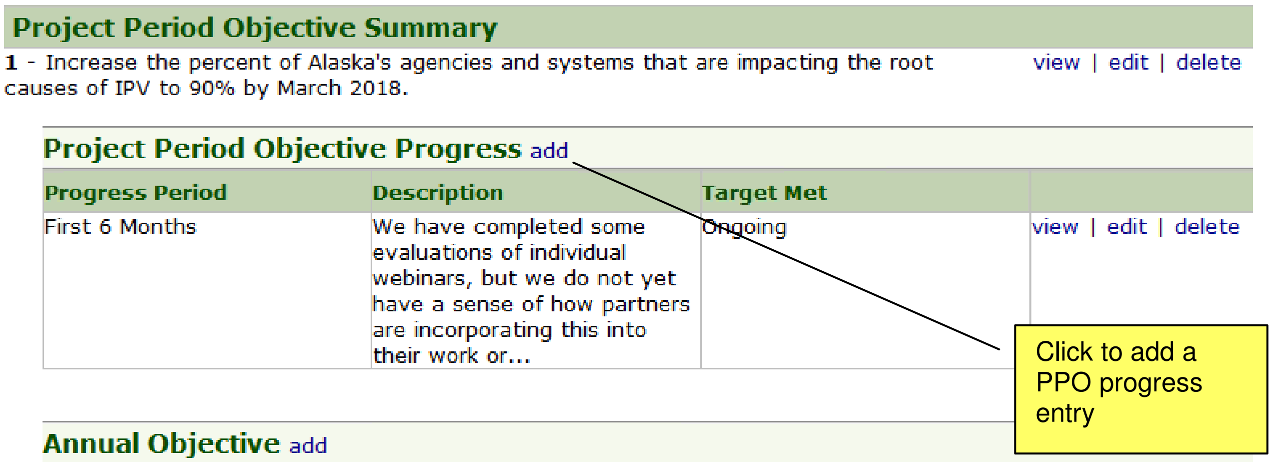
- A PPO with associated progress and annual objective information cannot be deleted. You must first delete the associated information before you can delete the PPO.
- Once a PPO is deleted it is no longer available in the system.
- If a PPO which is assigned to action plan activities is deleted, the PPO will be removed from that action plan activity as well.

Project Period Objective Progress

The Project Period Objective Progress section allows you to track and record the progress of the PPO.

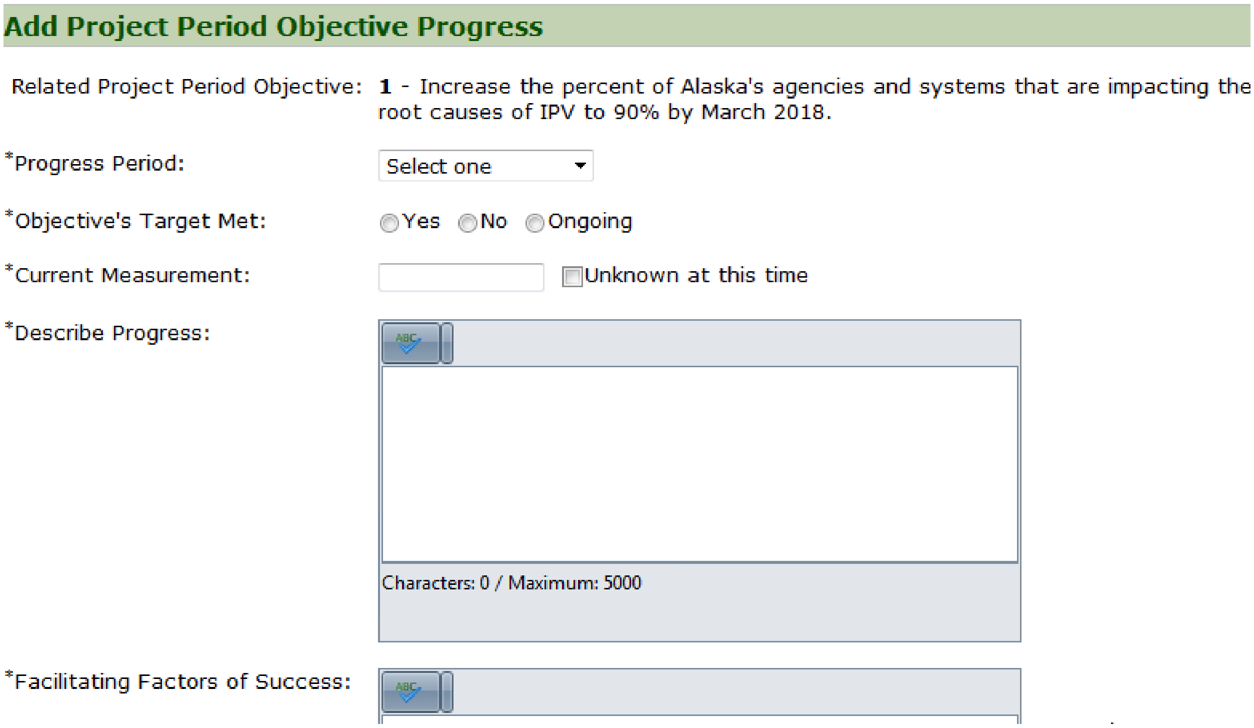
Adding PPO Progress information

1. On the navigation tree, select the PPO to which you want to add a progress entry.
   Result: The system displays the PPO Summary in the right display pane.



2. Click the **add** link in the *Project Period Objective Progress* section.
   Result: The system displays the *Add Project Period Objective Progress* section in the right display pane. Notice that the system displays the related PPO in the *Related*

Project Period Objective field in SMART format.



3. Inspect the PPO displayed in the *Related Project Period Objective* field to ensure that it is the right PPO to which you want a progress entry.
4. In the *Progress Period* field, select the period for the project period objective progress, *First 6 months* or *Second 6 months*, from the drop-down list.

Note

- A progress period warning message displays if you select a time period ("First 6 months" or "Second 6 months") that is not within the current reporting period. The warning allows you to keep the selection you made or change it.
- For the SODPP FOA, this field is view-only and displays the FOA date range.

5. In the *Objective's Target* Met field, indicate if the project period objective's target has been met, not met, or still ongoing by selecting *Yes*, *No*, or *Ongoing*.
6. In the *Current Measurement* field, enter the current measurement used for the progress information. Maximum text is 10 numeric digits. If you do not know the current measurement, select the *Unknown* check box. If you select *Unknown*, the *Current Measurement* field is not required.
7. In the *Describe Progress* field, enter a description for the PPO progress. Maximum text is 5000 characters, about 1000 words.
8. In the *Facilitating Factors of Success* field, describe the factors that will facilitate the success of the PPO. Maximum text is 5000 characters, about 1000 words.
9. In the *Barriers/Issues Encountered* field, describe the barriers or issues encountered in the process of achieving success. Maximum text is 5000 characters, about 1000 words.

10. In the *Plans to Overcome Barriers/Issues Encountered* field, describe the plans or strategy that you will use to overcome the barriers or issues encountered. Maximum text is 5000 characters, about 1000 words.
11. In the *Unanticipated Outcomes Resulting from the* field, describe any unanticipated outcomes that have resulted from the project period objective. Maximum text is 5000 characters, about 1000 words.
12. Click the **Save** button to save the information.
    Result: The system saves the modified information. If any fields are incomplete or invalid when you click **Save**, the system displays an error. Correct all invalid fields and click **Save** again.

What do I do differently for my FOA when adding PPO progress information?

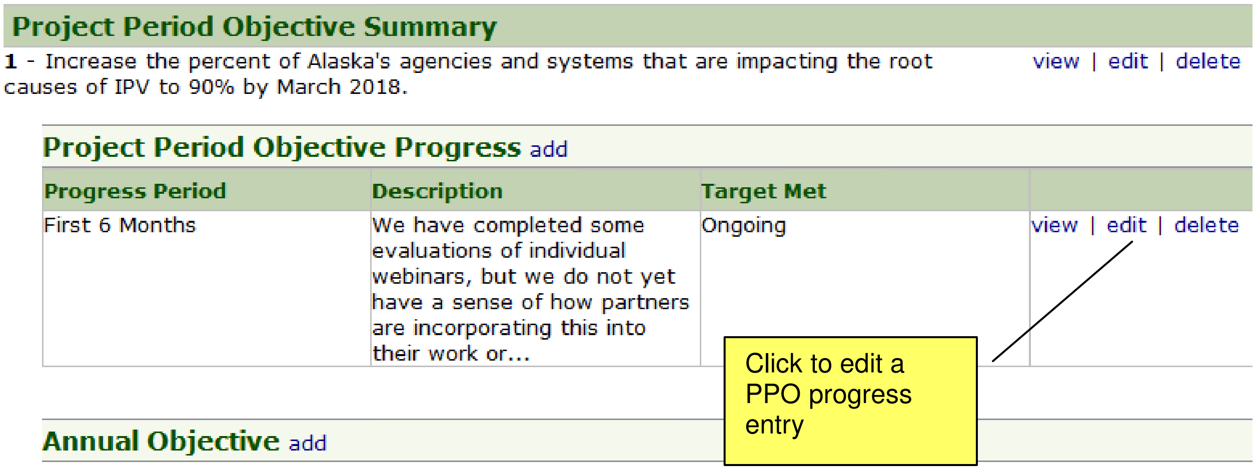
Click on your FOA to find out.
CCC Policy DP-1017 | CCC 1205

Adding PPO progress information: CCC Policy DP-1017 and CCC 1205 FOAs

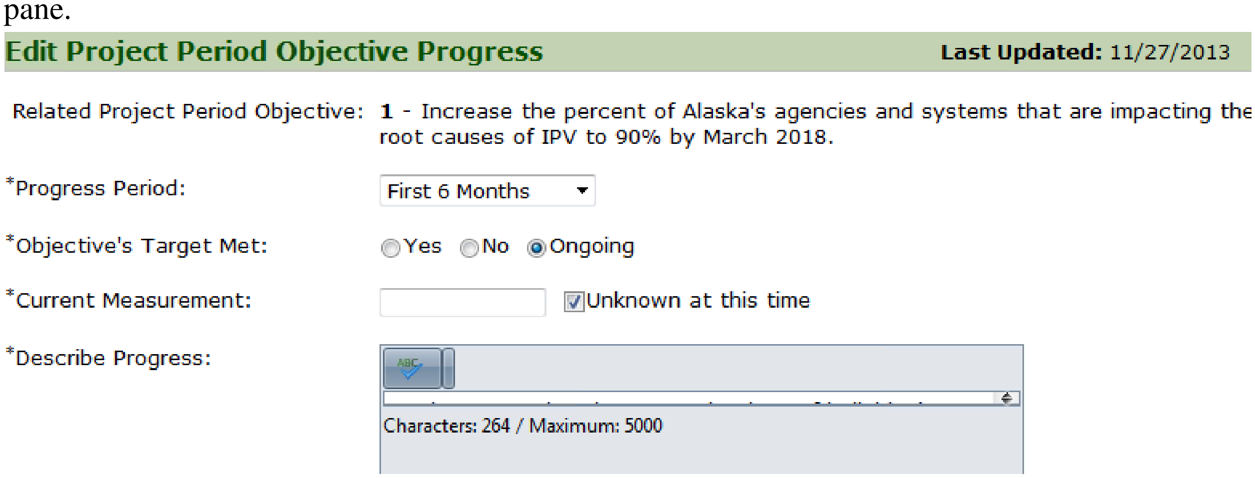
1. In the *Is this objective related to a PSE change?* field, specify by selecting *Yes* or *No* if the specific objective is related or not related to a Policy, System, and Environmental (PSE) change.
2. In the *Status* field, select the status that best describes the objective.
3. In the *Policy Title* field, enter the title of your policy. Maximum text is 300 characters, about 60 words.
4. In the *Estimated number of people reached* field, enter the estimated number of people reached by this objective in the format #,###,###,###.
5. Complete the fields under the *Estimated number of people reached* field as follows:
    a. In the *Data source* field, select all the data sources used in program planning, implementation, and evaluation. If the desired data source is not included in the list, select *Other*, and enter the data in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words.
    b. In the *Most Recent Data Set Year* field, for each data source selected, enter the most recent year of data available for each data source, for example, 2004. Year entered must be between 1990 and the current year.

Editing PPO progress information

1. - On the navigation tree, select the PPO for which you want to edit a progress entry.
   Result: The system displays the *Project Period Objective Summary* in the right display pane.



2. On the *Action Plan Summary* page, click the **edit** link on the same row as the PPO progress entry to edit.
   Result: The system displays the *Edit Project Period Objective* section in right display pane.



Note

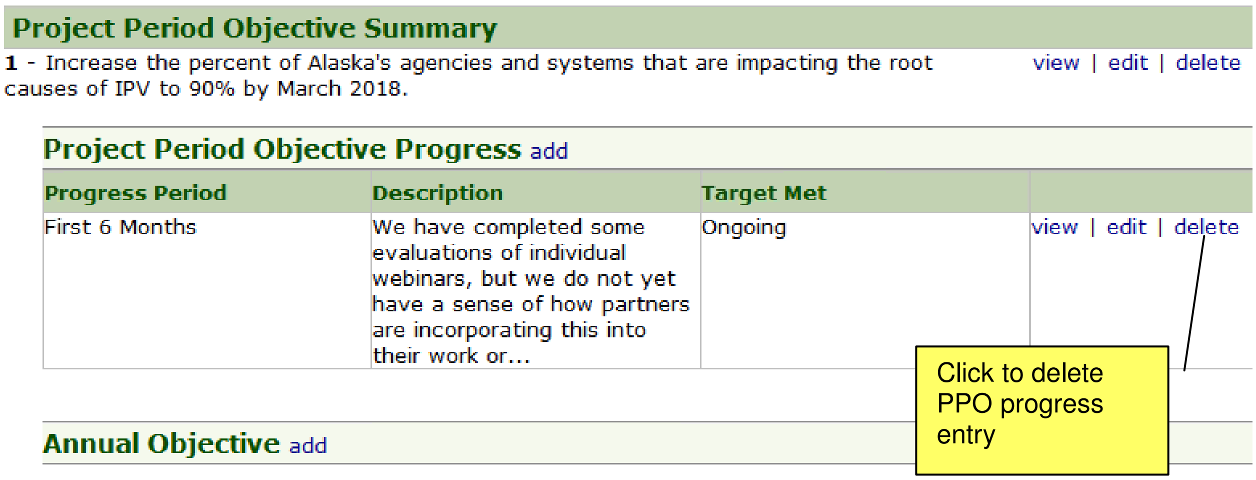
- The page for entering initial PPO progress information and modifying existing information are identical. The only difference is that the *Edit* page displays the existing PPO progress information, while the fields in the page for entering initial information are blank.

3. Modify the fields as necessary.
4. Click the **Save** button to save the information.
   Result: The system saves the modified information. If any fields on the page are

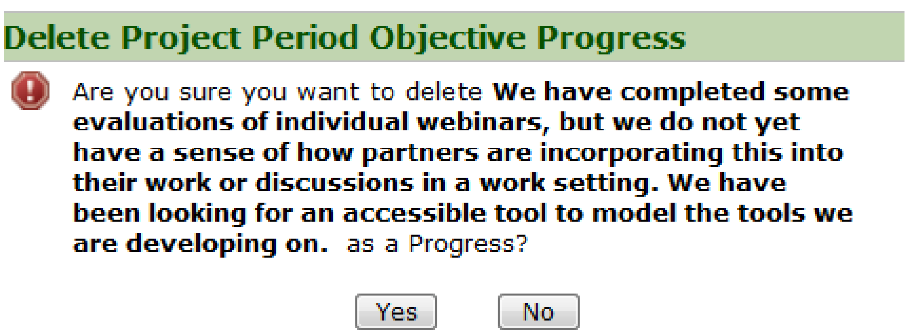
incomplete or invalid when you click **Save**, the system displays an error. Correct all invalid fields and click **Save** again.

Deleting PPO progress information

1. Click the *Action Plan* tab.
   Result: The system displays the Action Plan Summary page.



2. Click the **delete** link for the progress entry.
   Result: The system displays a confirmation message asking you to confirm the delete action.



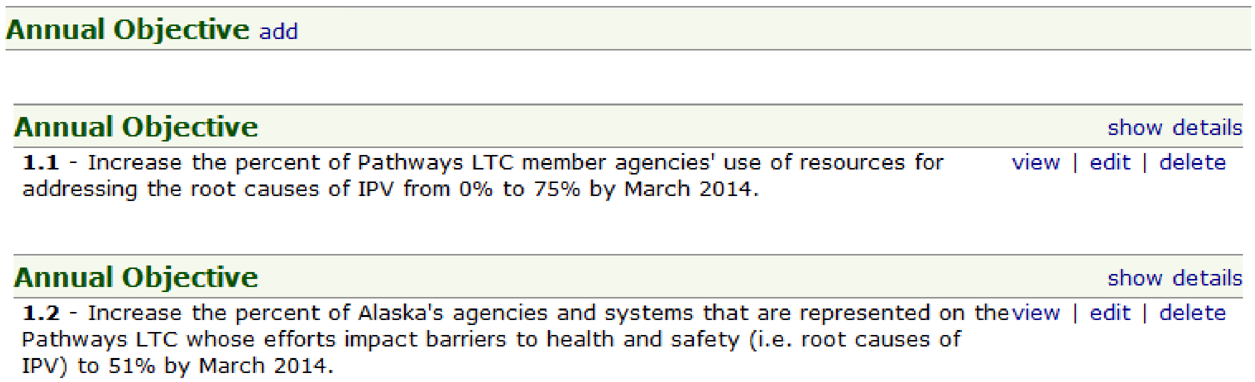
3. Click the **Yes** button to confirm your decision to delete the PPO progress entry.
   Result: The system deletes the PPO progress entry.

Important

- Once a PPO progress entry is deleted, it is no longer available in the system.

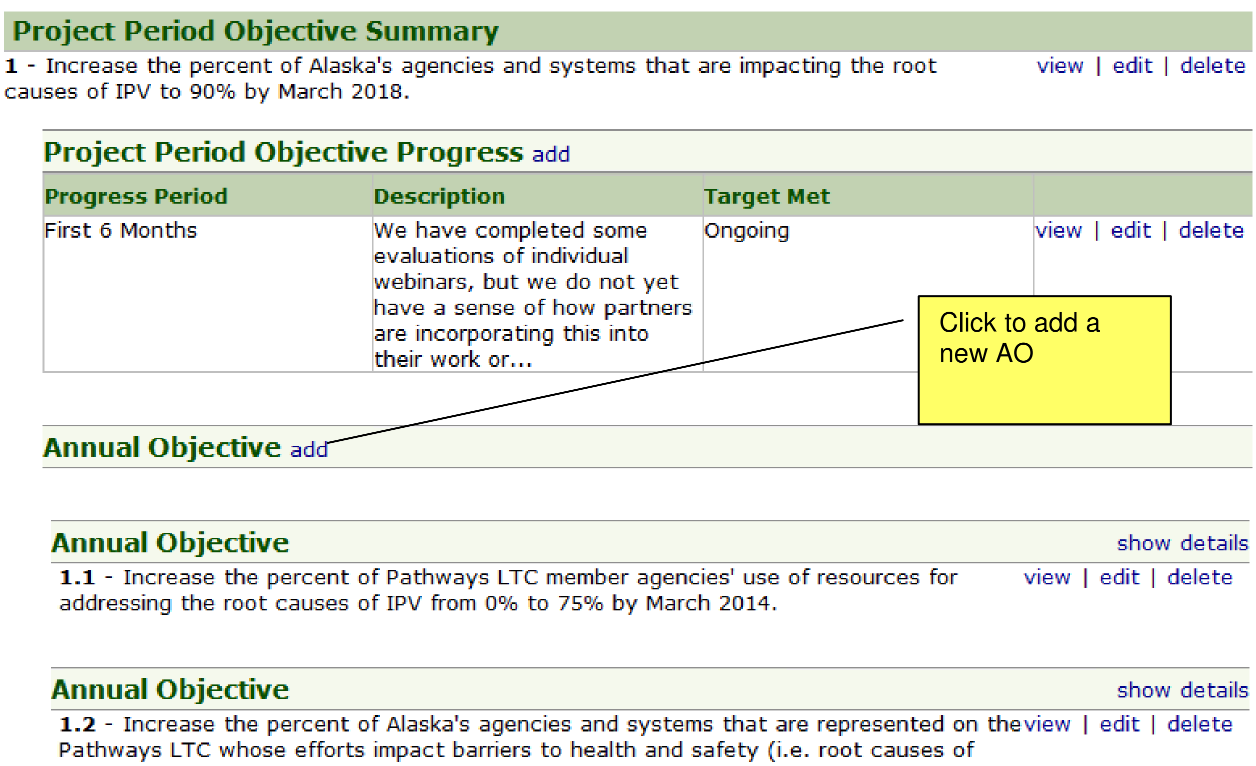
Annual Objective Summary

The *Annual Objective Summary* section displays the annual objective information and associated progress information, activities, and product and allows you add, edit, and delete the information.



Adding an Annual Objective (AO)

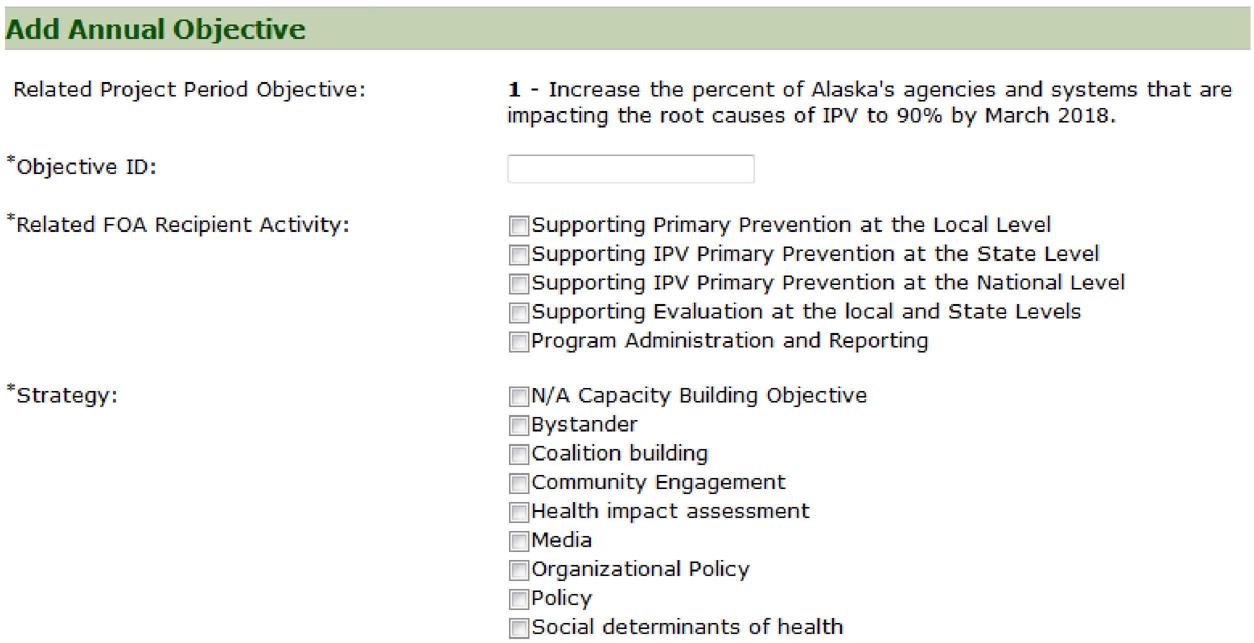
1. On the navigation tree, click the PPO for which you want to add the AO on the navigation tree.
   Result: The system displays the *Project Period Objective Summary* in the right display pane.



2. Click the **add** link in the *Annual Objective* section.
   Result: The system displays the *Add Annual Objective* page.

Note

- The fields displayed are specific to each FOA. Please see the What do I do differently for my FOA? section at the end of this procedure for detailed information on adding a PPO for a specific FOA.



3. Check the PPO displayed in the *Related Program* field to ensure that the PPO is the right one to which you want to add an AO.
4. In the *Objective ID* field, enter an objective ID or number that will be assigned to the AO. Maximum text is 15 characters.
5. In the *Related FOA Recipient Activity* field, select the recipient activity or activities that are related to the annual objective.
6. In the *Related Program Goal* field, select the program goal that is related to this AO from the list.
7. In the *Describe the objective and how it will impact the problem* field, enter a description for the objective and describe the impact that the objective will have on the problem that is addressed by the AO. Maximum text is 2000 characters, about 400 words.
8. In the *Setting* field, select the setting for the AO from the list.
9. In the *Population Focus* field, select the type of population on which AOA focuses. You can select *General Population* as a whole or select *Specific Population* and then specify the population by selecting all that apply. If the desired population focus for a particular section is not in included in the list, select *Other (specify)*, and enter it in the *Other* text box. Maximum text for the *Other* field is 100 characters, about 20 words. You can enter more population information, if necessary, in the *Additional*

Population Details field. Maximum text for the *Additional Population Details* field is 500 characters, about 100 words.

10. Complete the fields in the Measurement section as follows:
    a. In the *Direction of Change* field, select the direction of change that will be measured and indicate if you plan to increase, decrease, or maintain the objective.
    b. In the *Unit of Measurement* field, select the unit of measurement that will be used to measure the annual objective.
    c. In the *What will be Measured* field, enter what will be measured in the annual objective in the text box. Maximum text for the field is 300 characters, about 60 words.
    d. In the *Baseline* field, enter the baseline figure for what will be measured in the text box. Maximum text is 20 numeric digits. If you do not know the baseline, select the *Unknown* check box. If you select *Unknown*, the *Baseline* field is not required.
    e. In the *Target* field, enter the target figure for what will be measured in the text box. Maximum text is 20 numeric digits.
    f. In the *Data Source* field, select the desired data source from the list. If the desired data source is not in included in the list, select *Other (specify)*, and enter it in the *Other* text box. Maximum text for the *Other* field is 100 characters, about 20 words.
11. In the *Timeframe* field, notice that the field displays the one-year time frame for the annual objective.

Note

- The AO end date will display in the objective SMART statement.

12. Click **Save** to save the information entered.
    Result: The system saves the AO information. If any fields on the page are incomplete or invalid when you click **Save**, the system displays an error. Correct all errors and click **Save** again

What do I do differently for my FOA when adding an AO?

Click on your FOA to find out.
CCC | CCC 1205 | CCC Policy DP-1017 | Collaborative | CTG | CTG National | CTG-SC | DELTA Focus | OSH Tribal | REACH Demo | SODPP

Adding an Annual Objective: CCC FOA

1. In the *Related Program Goal* field, enter the related program goal in the text box. Maximum text 2000 characters, about 400 words.
2. In the Strategy field, select the strategy or strategies related to the annual objective. If the related strategy is not included in the list, specify a strategy by

selecting the *Other* (specify) option and entering a strategy. Maximum text for the *Other* (specify) field is 50 characters, about 10 words.

3. In the *Describe the evidence/practice base for the strategy* field, describe in detail the evidence or practice used as the basis for the strategy. Maximum text is 2000 characters, about 400 words.
4. In the *Identify the Rationale/Approach for the Strategy* field, select the appropriate rationale or approach that will be used for the strategy. If the rationale/approach is not in included in the list, enter the information in the *Other Sources* text box. Maximum text for the *Other* Sources field is 100 characters, about 20 words. If you want to specify your own program, enter the information in the *Your own program* text box. Maximum text for the field is 100 characters, about 20 words.
5. In the *Scope* field, select the scope for the annual objective.
6. In the *Level of Change* field, select the level of change that will be addressed by the annual objective. If the level of change is not in included in the list, enter the information in the *Other* text box. Maximum text for the *Other* field is 100 characters, about 20 words.
7. In the *Type of Change* field, select the type of change that will be addressed by the annual objective. If the type of change selected is Policy, the system displays more options to choose from.
8. In the *Cross-Cutting Issues* field, select the cross-cutting options for this annual objective. If the desired cross-cutting issue is not in included in the list, enter the information in the *Other* text box. Maximum text for the *Other* field is 100 characters, about 20 words.

Adding an Annual Objective: CCC 1205 FOA

1. In the Strategy field, select the strategy or strategies related to the annual objective. If the related strategy is not included in the list, specify a strategy by selecting the *Other* (specify) option and entering a strategy. Maximum text for the *Other* (specify) field is 50 characters, about 10 words.
2. In the *Describe the evidence/practice base for the strategy* field, describe in detail the evidence or practice used as the basis for the strategy. Maximum text is 2000 characters, about 400 words.
3. In the *Identify the Rationale/Approach for the Strategy* field, select the appropriate rationale or approach that will be used for the strategy. If the rationale/approach is not in included in the list, enter the information in the *Other Sources* text box. Maximum text for the *Other* Sources field is 100 characters, about 20 words. If you want to specify your own program, enter the information in the *Your own program* text box. Maximum text for the field is 100 characters, about 20 words.
4. In the *Scope* field, select the scope for the annual objective.
5. In the *Level of Change* field, select the level of change that will be addressed by the annual objective. If the level of change is not in included in the list, enter the information in the *Other* text box. Maximum text for the *Other* field is 100 characters, about 20 words.

6. In the *Type of Change* field, select the type of change that will be addressed by the annual objective. If the type of change selected is Policy, the system displays more options to choose from.

Adding an Annual Objective: CCC Policy DP-1017 FOA

1. In the *Strategy* field, select the strategy or strategies related to the annual objective. If the related strategy is not included in the list, specify a strategy by selecting the *Other* (specify) option and entering a strategy. Maximum text for the *Other* (specify) field is 50 characters, about 10 words.
2. In the *Describe the evidence/practice base for the strategy* field, describe in detail the evidence or practice used as the basis for the strategy. Maximum text is 2000 characters, about 400 words.
3. In the *Identify the Rationale/Approach for the Strategy* field, select the appropriate rationale or approach that will be used for the strategy. If the rationale/approach is not in included in the list, enter the information in the *Other Sources* text box. Maximum text for the *Other* Sources field is 100 characters, about 20 words. If you want to specify your own program, enter the information in the *Your own program* text box. Maximum text for the field is 100 characters, about 20 words.
4. In the *Scope* field, select the scope for the annual objective.
5. In the *Level of Change* field, select the level of change that will be addressed by the annual objective. If the level of change is not in included in the list, enter the information in the *Other* text box. Maximum text for the *Other* field is 100 characters, about 20 words.
6. In the *Type of Change* field, select the type of change that will be addressed by the annual objective. If the type of change selected is Policy, the system displays more options to choose from.
7. In the *Cross-Cutting Issues* field, select the cross-cutting options for this annual objective. If the desired cross-cutting issue is not in included in the list, enter the information in the *Other* text box. Maximum text for the *Other* field is 100 characters, about 20 words.
8. In the *Setting* field, select the setting for the annual objective from the list. If the desired setting is not included in the list, select *Other (specify)*, and enter it in the *Other* text box. Maximum text for the *Other* field is 100 characters, about 20 words.

Adding an Annual Objective: Collaborative FOA

1. In the *Programs Involved* field, select the program(s) that will be involved in the PPO.
2. If you selected *Tobacco Control* in the *Programs Involved* field, in the *Strategy* field, select the appropriate strategy from the list.
3. In the *Describe the evidence/practice base for the strategy* field, describe in detail the evidence or practice used as the basis for the strategy. Maximum text is 2000 characters, about 400 words.

Adding an Annual Objective: CTG FOA

1. In the Strategy field, select the strategy or strategies related to the annual objective. If the related strategy is not included in the list, specify a strategy by selecting the *Other* (specify) option and entering a strategy. Maximum text for the *Other* (specify) field is 50 characters, about 10 words.
2. In the *Describe the evidence/practice base for the strategy* field, describe in detail the evidence or practice used as the basis for the strategy. Maximum text is 2000 characters, about 400 words.
3. In the *Related Strategies* field, select the appropriate related strategy(ies) from the list. For options where you have to further specify the related strategy enter it in the Specify text box. Maximum text for the *Specify* field is 50 characters, about 10 words. If the related strategy is not in included in the list, select *Other*, and enter it in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words.
4. In the *Setting* field, select the setting for the annual objective from the list. If the desired setting is not included in the list, select *Other (specify)*, and enter it in the *Other* text box. Maximum text for the *Other* field is 100 characters, about 20 words.
5. In the *For innovative or other strategy, describe the evidence/practice base for the strategy* field, if you selected or specified an innovative or *Other* strategy in the *Related Strategies* field, describe in detail the evidence or practice used as the basis for the strategy. Maximum text is 2000 characters, about 400 words.
6. In the *Timeframe* field, click the calendar icon in the *Start Date* field to select the AO start date and click the calendar icon in the *End Date* field to select the AO end date.

Note

- The annual objective end date will display in the objective SMART statement.

Adding an Annual Objective: CTG-National FOA

1. In the *Setting* field, select the setting for the annual objective from the list. If the desired setting is not included in the list, select *Other (specify)*, and enter it in the *Other* text box. Maximum text for the *Other* field is 100 characters, about 20 words.
2. In the *Timeframe* field, click the calendar icon in the *Start Date* field to select the AO start date and click the calendar icon in the *End Date* field to select the AO end date.

Note

- The annual objective end date will display in the objective SMART statement.

Adding an Annual Objective: CTG SC FOA

1. In the Strategy field, select the strategy or strategies related to the annual objective. If the related strategy is not included in the list, specify a strategy by selecting the *Other* (specify) option and entering a strategy. Maximum text for the *Other* (specify) field is 50 characters, about 10 words.
2. In the *Describe the evidence/practice base for the strategy* field, describe in detail the evidence or practice used as the basis for the strategy. Maximum text is 2000 characters, about 400 words.
3. In the *Setting* field, select the setting for the annual objective from the list. If the desired setting is not included in the list, select *Other (specify)*, and enter it in the *Other* text box. Maximum text for the *Other* field is 100 characters, about 20 words.

Adding an Annual Objective: DELTA Focus FOA

1. In the Strategy field, select the strategy or strategies related to the annual objective. If the related strategy is not included in the list, specify a strategy by selecting the *Other* (specify) option and entering a strategy. Maximum text for the *Other* (specify) field is 50 characters, about 10 words.
2. In the *Describe the Strategy (e.g. Components, Implementation, Adaptation* field, enter a detailed description of the strategy for this annual objective, for example, Components, Implementation, and Adaption. Maximum text is 2000 characters, about 400 words.
3. In the *Describe the evidence/practice base for the strategy* field, describe in detail the evidence or practice used as the basis for the strategy. Maximum text is 2000 characters, about 400 words.

Adding an Annual Objective: OSH Tribal FOA

1. In the *Scope* field, select the scope for the annual objective.
2. In the *Setting* field, select the setting for the annual objective from the list. If the desired setting is not included in the list, select *Other (specify)*, and enter it in the *Other* text box. Maximum text for the *Other* field is 100 characters, about 20 words.

Adding an Annual Objective: REACH Demo FOA

1. In the Strategy field, select the strategy or strategies related to the annual objective. If the related strategy is not included in the list, specify a strategy by selecting the *Other* (specify) option and entering a strategy. Maximum text for the *Other* (specify) field is 50 characters, about 10 words.
2. In the *Describe the evidence/practice base for the strategy* field, describe in detail the evidence or practice used as the basis for the strategy. Maximum text is 2000 characters, about 400 words.

Adding an Annual Objective: SODPP

1. In the *Related FOA Recipient Activity* field, select the *Not Applicable* check box.

Editing an Annual Objective

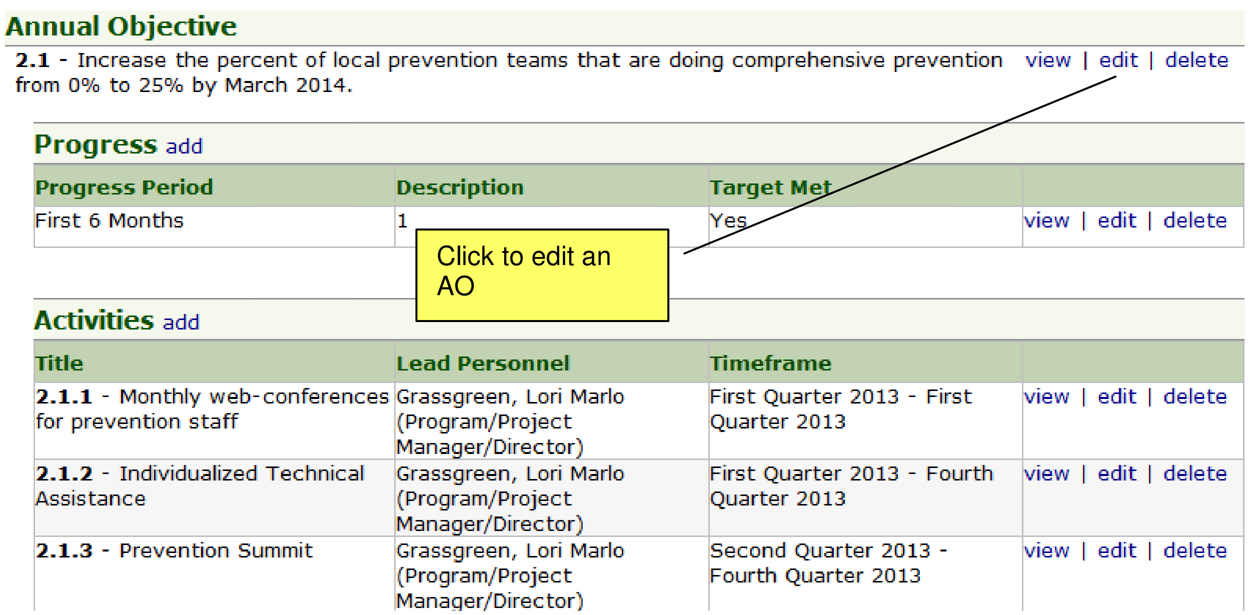
Important note on editing an Annual Objective

If you have to change one of the AO components listed below or other similar components, then you are most likely changing the original intent of the AO. it is recommended that you create a new AO instead of editing an existing one.

- Settings
- Target Population
- Intervention
- Reach
- Geographic area
- Organization Type
- Unit of Measurement
- Direction of Change
- What will be measured

Important: If you have to change information such as the setting, geographic area, etc. for an AO, add a new one.

1. On the navigation tree, select the AO that you want to edit.
   Result: The system displays the AO details in the right display pane.

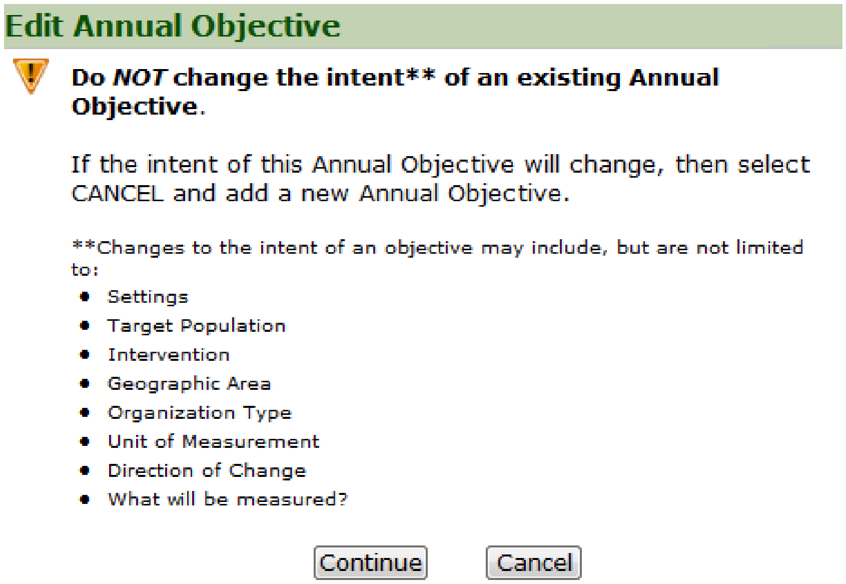


Note:

- The page for entering initial AO information and modifying existing information are identical. The only difference is that the Edit page displays the existing AO progress information, while the fields in the page for entering initial information

are blank.

2. Click the **edit** link for the AO.
   Result: The system displays a pop-up window asking you to confirm that you do indeed want to change the AO.



3. Click **Continue** to proceed and edit the AO.
4. Modify the fields as necessary.
5. In the *Describe Revisions* field, enter notes or comments for the revision. Maximum text is 2000 characters, about 400 words.
6. Click the **Save** button to save the information.
   Result: The system saves the modified information. If any fields on the page are incomplete or invalid when you click **Save**, the system displays an error. Correct all invalid fields and click **Save** again.

Deleting an Annual Objective

1. On the navigation tree, select the AO that you want to delete.
   Result: The system displays AO details in the right display pane.

2. Click the **delete** link for the AO.
3. Click the **OK** button to confirm your decision to delete the AO.
   Result: The system deletes the AO.

Important

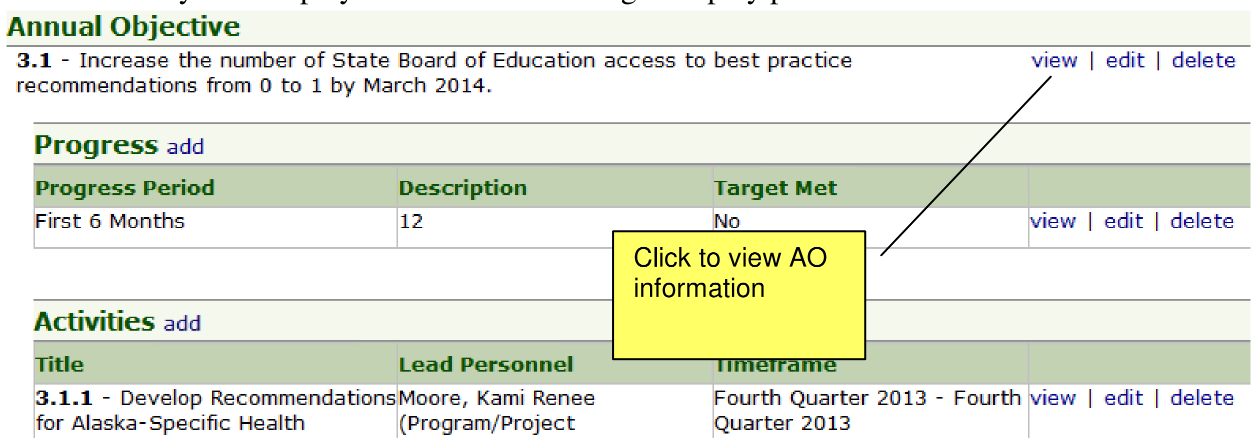
- An AO with associated progress information, activities, and products cannot be deleted. You must first delete associated information before you can delete the AO.
- You cannot delete an AO if performance monitoring components, such as status ratings or notes exist for the AO.
- Once an AO is deleted, it is no longer available in the system.

Viewing Annual Objective history

You can view the details of changes that have been made to an AO by clicking the **View History** link when viewing or editing the AO.

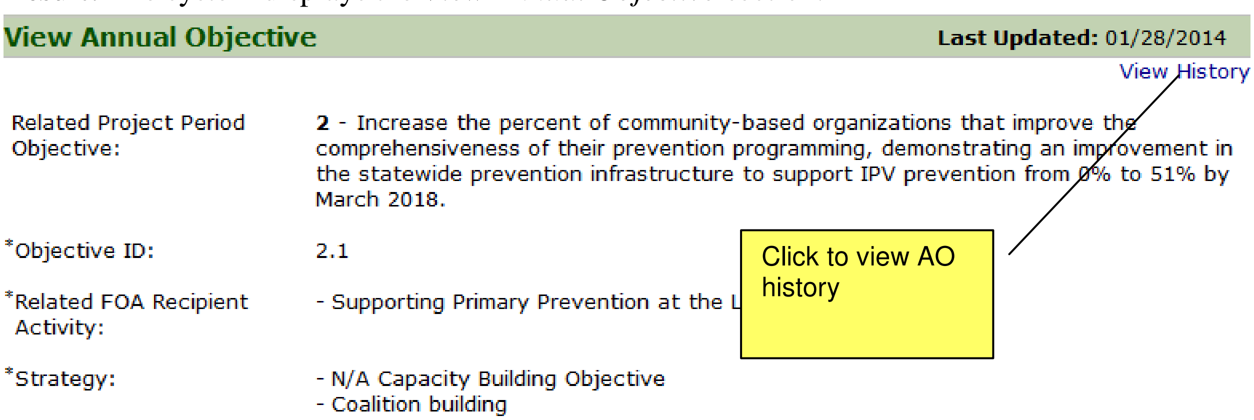
1. On the navigation tree, select the AO for which you want to view historical information.

   Result: The system displays AO details in the right display pane.



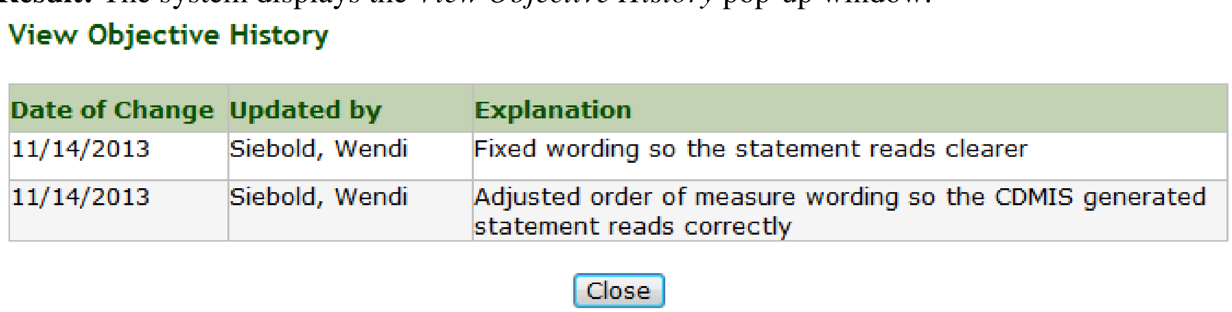
2. Click the **view** link for the AO.

   Result: The system displays the *View Annual Objective* section.



3. Click the **View History** link.

   Result: The system displays the *View Objective History* pop-up window.



The following information is displayed in the section.

Date of change	This column displays the date a change was made to AO.
Updated by	This column displays the name of the user who made the change to the AO.
Explanation	This column displays the description of the change that was made to the AO.

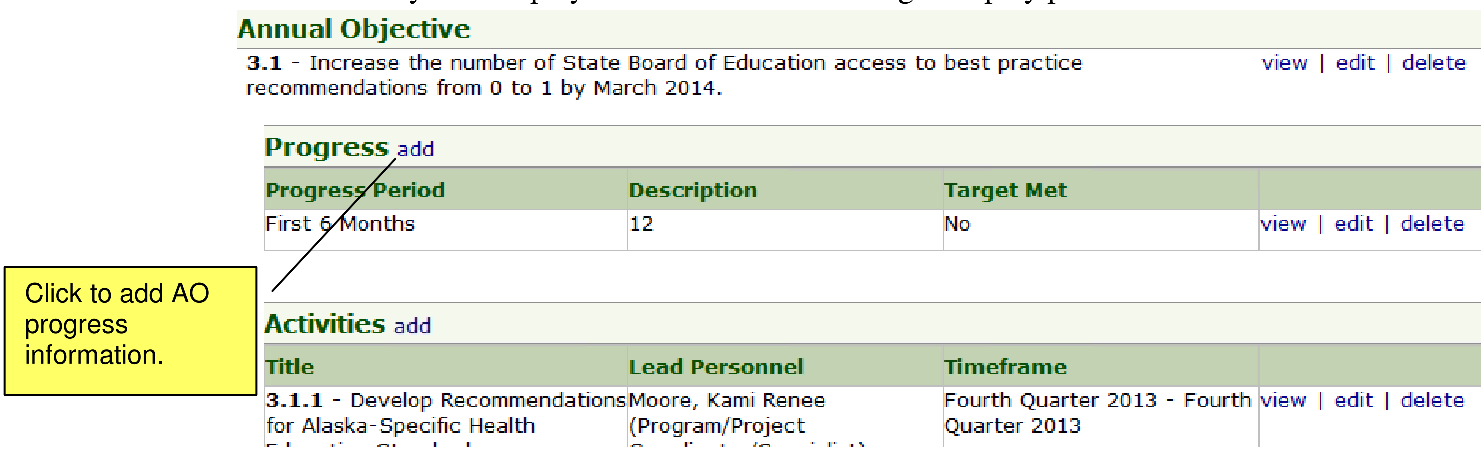
4. After viewing objective history, click the **Close** button.
   Result: The system closes the *View Objective History* pop-up window and returns to the *Annual Objective Summary*.

Annual Objective Progress

The Annual Objective Progress section allows you to track and record progress information for an AO.

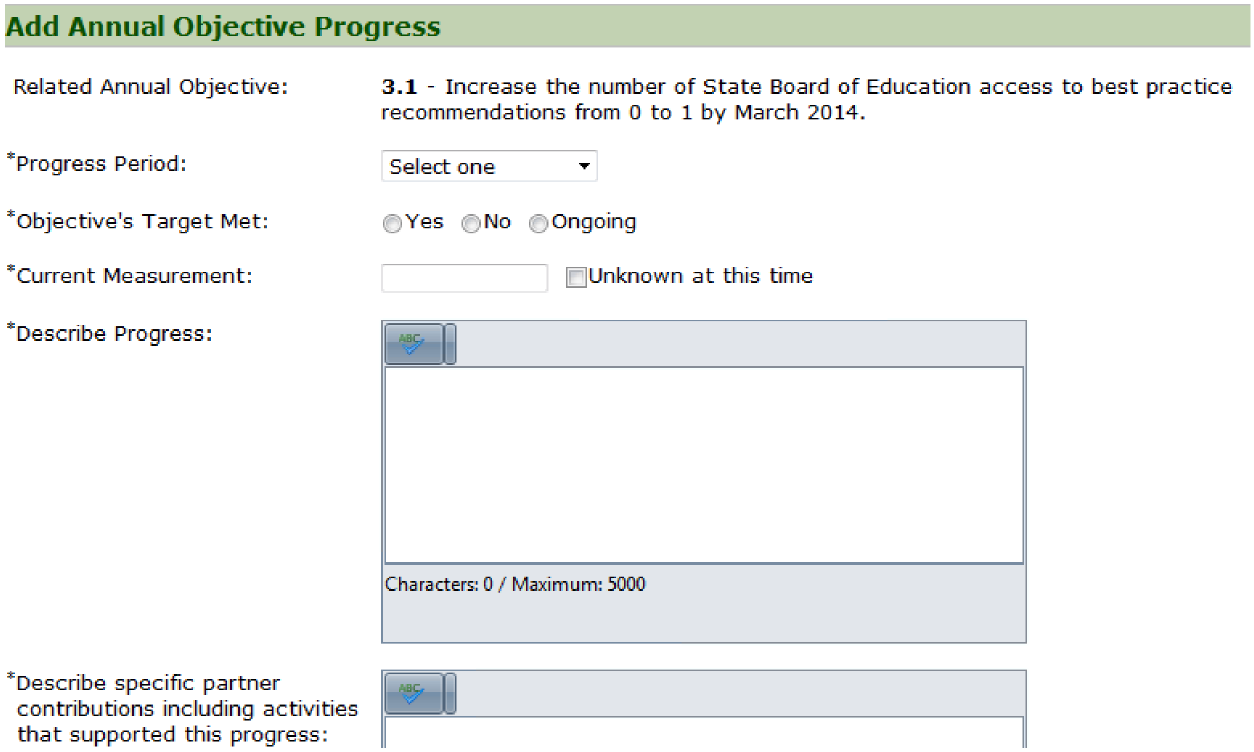
Adding AO Progress information

1. On the navigation tree, select the AO for which you want to add a progress entry.
   Result: The system displays the AO details in the right display pane.



2. Click the **add** link in the *Progress* section.
   Result: The system displays the *Add Annual Objective Progress* section in the right display pane. Notice that the system displays the related AO in the *Related Annual*

Objective field in SMART format.



3. Check the AO displayed in the *Related Annual Objective* field, to ensure that the AO is the right one to which you want to add a progress entry. This information is view only and cannot be modified.
4. In the *Progress Period* field, select the period for the annual objective progress, *First 6 months* or *Second 6 months*, from the drop-down list.

Note

- A progress period warning message displays if you select a time period ("First 6 months" or "Second 6 months") that is not within the current reporting period. The warning message allows you to keep the selection you made or change it.
- For some FOAs, this field is not editable.

5. In the *Objective's Target* Met field, indicate by selecting *Yes*, *No*, or *Ongoing* if the annual objective's target has been met, not met, or still ongoing.
6. In the *Current Measurement* field, enter the current measurement used for the progress information. Maximum text is 10 numeric digits. If you do not know the current measurement, select the *Unknown* check box. If you select *Unknown*, the *Current Measurement* field is not required.
7. In the *Describe Progress* field, enter a description for the annual objective progress. Maximum text is 5000 characters, about 1000 words.
8. In the *Describe specific partner contributions including activities that supported this progress* field, describe how the partner's contributions have supported the annual objective's progress. Be sure to include activities. Maximum text is 5000 characters, about 1000 words.

9. In the *Facilitating Factors of Success* field, describe the factors that will facilitate the success of the annual objective. Maximum text is 5000 characters, about 1000 words.
10. In the *Barriers/Issues Encountered* field, describe the barriers or issues encountered in the process of achieving success. Maximum text is 5000 characters, about 1000 words.
11. In the *Plans to Overcome Barriers/Issues Encountered* field, describe the plans or strategy that you will use to overcome the barriers or issues encountered. Maximum text is 5000 characters, about 1000 words.
12. In the *Unanticipated Outcomes Resulting from the* field, describe any unanticipated outcomes that have resulted from the project period objective. Maximum text is 5000 characters, about 1000 words.
13. Click the **Save** button to save the information.
    Result: The system saves the progress. If any fields are incomplete or invalid when you click **Save**, the system displays an error. Correct all invalid fields and click **Save** again.

What do I do differently for my FOA when adding PPO progress information?

Click on your FOA to find out.
CCC Policy DP-1017 | CCC 1205 | SODPP

Adding AO progress information: CCC Policy DP-1017 and CCC 1205 FOAs

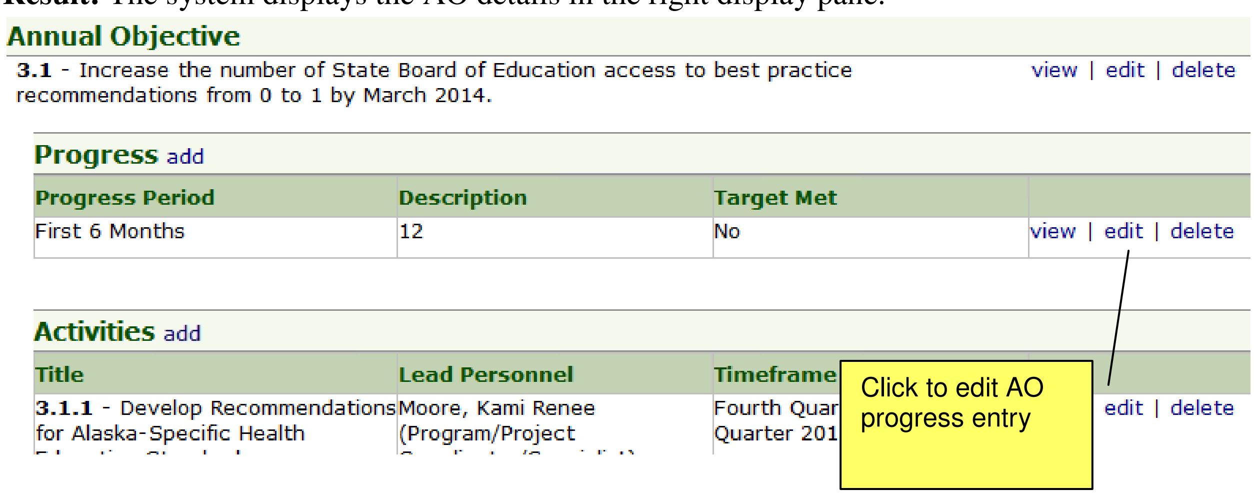
1. In the *Is this objective related to a PSE change?* field, specify by selecting *Yes* or *No* if the specific objective is related or not related to a Policy, System, and Environmental (PSE) change.
2. In the *Status* field, select the status that best describes the objective.
3. In the *Policy Title* field, enter the title of your policy. Maximum text is 300 characters, about 60 words.
4. In the *Estimated number of people reached* field, enter the estimated number of people reached by this objective in the format #,###,###,###.
5. Complete the fields under the *Estimated number of people reached* field as follows:
    a. In the *Data source* field, select all the data sources used in program planning, implementation, and evaluation. If the desired data source is not included in the list, select *Other*, and enter the data in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words.
    b. In the *Most Recent Data Set Year* field, for each data source selected, enter the most recent year of data available for each data source, for example, 2004. Year entered must be between 1990 and the current year.

Adding AO progress information: SODPP

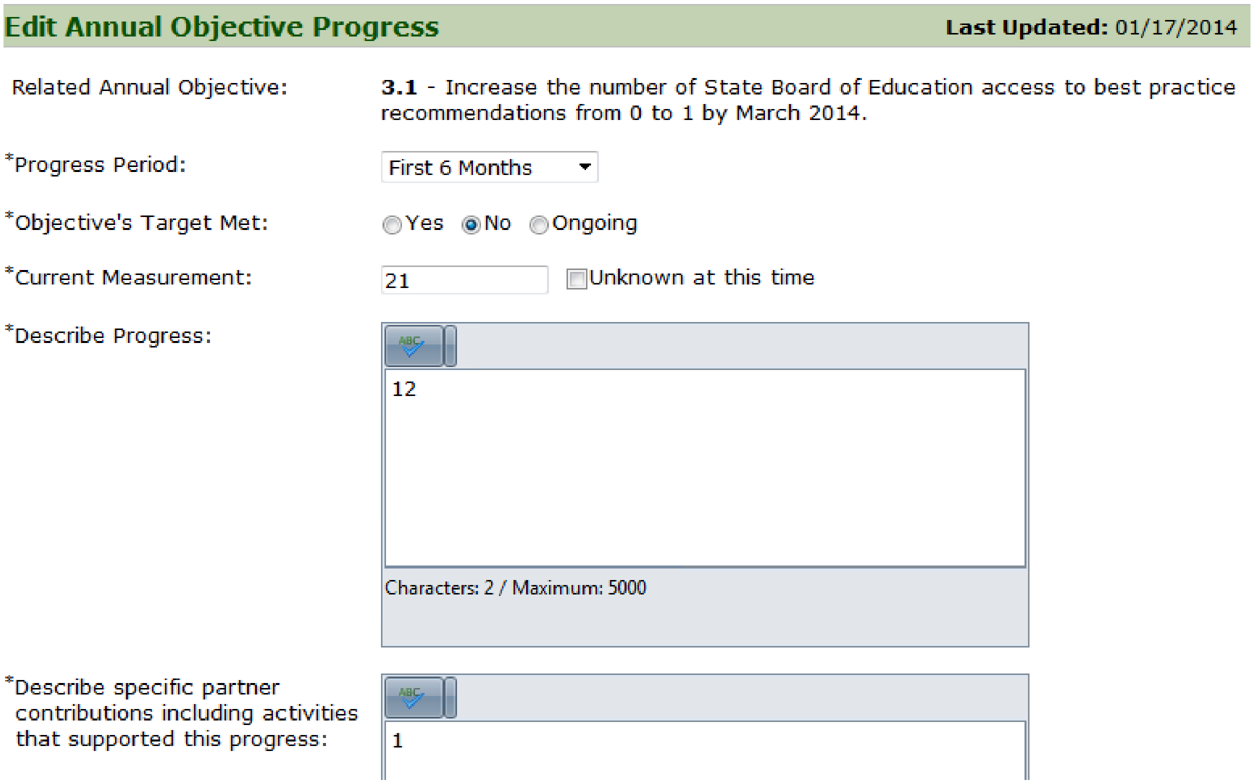
1. In the *Describe specific partner contributions including activities that supported this progress* field, describe how the partner's contributions have supported the annual objective's progress. Be sure to include activities. Maximum text is 5000 characters, about 1000 words.
2. In the *Is this objective related to a PSE change?* field, specify by selecting *Yes* or *No* if the specific annual objective progress is related or not related to a Policy, System, and Environmental (PSE) change.
3. In the *Status* field, select the status that best describes the objective.
4. In the *Policy Title* field, enter the title of your policy. Maximum text is 300 characters, about 60 words.
5. In the *Estimated number of people reached* field, enter the estimated number of people reached by this objective in the format #,###,###,###.
6. Complete the fields under the *Estimated number of people reached* field as follows:
    a. In the *Data source* field, select all the data sources used in program planning, implementation, and evaluation. If the desired data source is not included in the list, select *Other*, and enter the data in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words.
7. In the *Most Recent Data Set Year* field, for each data source selected, enter the most recent year of data available for each data source, for example, 2004. Year entered must be between 1990 and the current year.

Editing an Annual Objective progress entry

1. - On the navigation tree, select the AO for which you want to edit a progress entry.
   Result: The system displays the AO details in the right display pane.



2. Click the **edit** link on the same row as the AO progress information to edit.
   Result: The system displays the *Edit Annual Objective Progress* section in the right display pane.

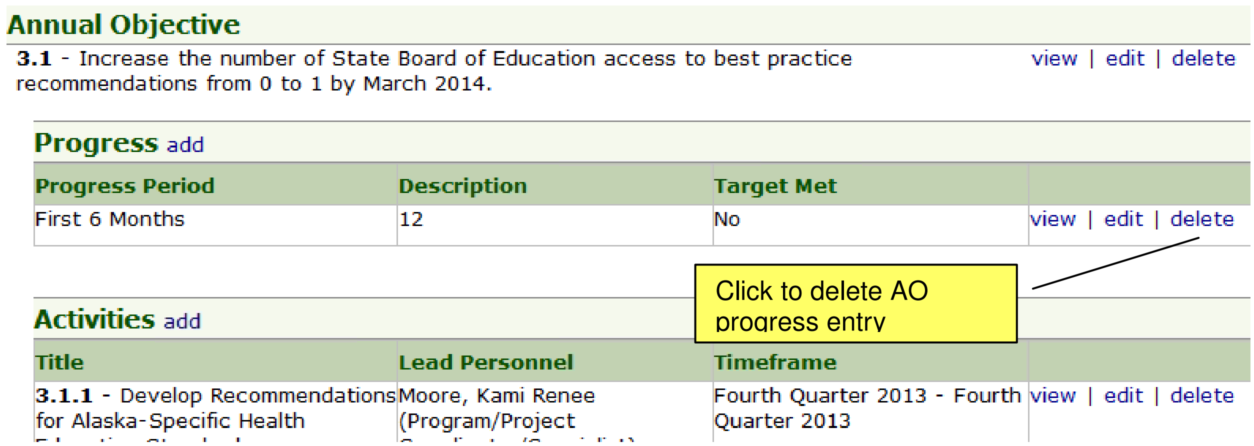


- The page for entering initial AO progress information and modifying existing information are identical. The only difference is that the *Edit* page displays the existing PPO progress information, while the fields in the page for entering initial information are blank..

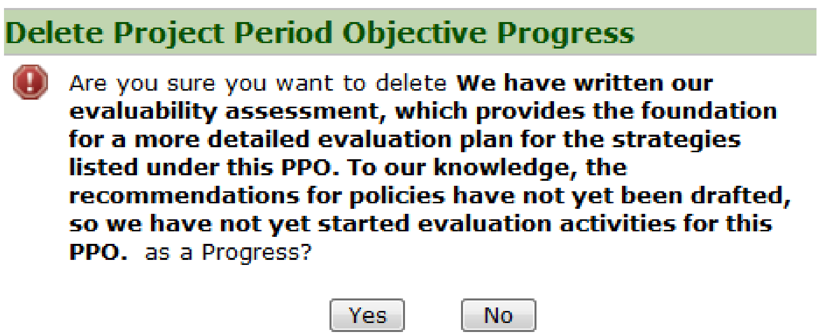
3. Modify the fields as necessary.
4. Click the **Save** button to save the information.
   Result: The system saves the modified information. If any fields on the page are incomplete or invalid when you click **Save**, the system displays an error. Correct all invalid fields and click **Save** again.

Deleting an Annual Objective progress entry

1. On the navigation tree, select the AO for which you want to delete a progress entry.
   Result: The system displays the AO details in the right display pane.



2. Click the **delete** link for the progress entry.
   Result: The system displays a confirmation message.



3. Click the **Yes** button to confirm your decision to delete the AO progress entry.
   Result: The system deletes the AO progress entry.

Important

- Once an AO progress entry is deleted, it is no longer available in the system.

Activities

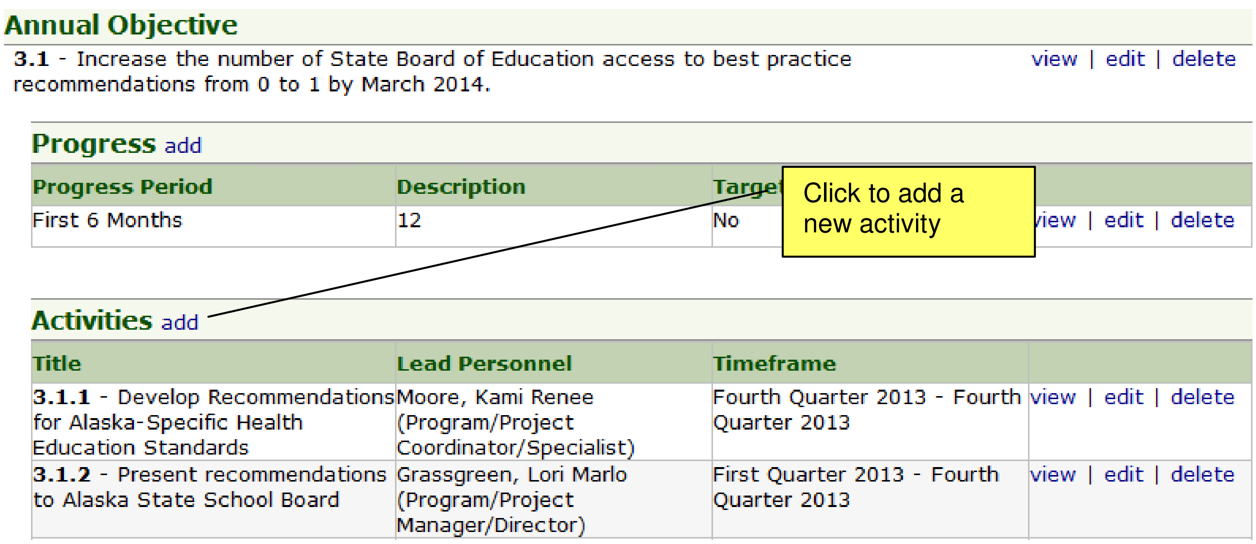
Use the *Activities* section to add activities to your AO and track activity information. You can add up to 4 activities for an AO.

Note

- REACH, REACH Demo, and CTG-SC FOAs can add up to 10 activities for an AO.

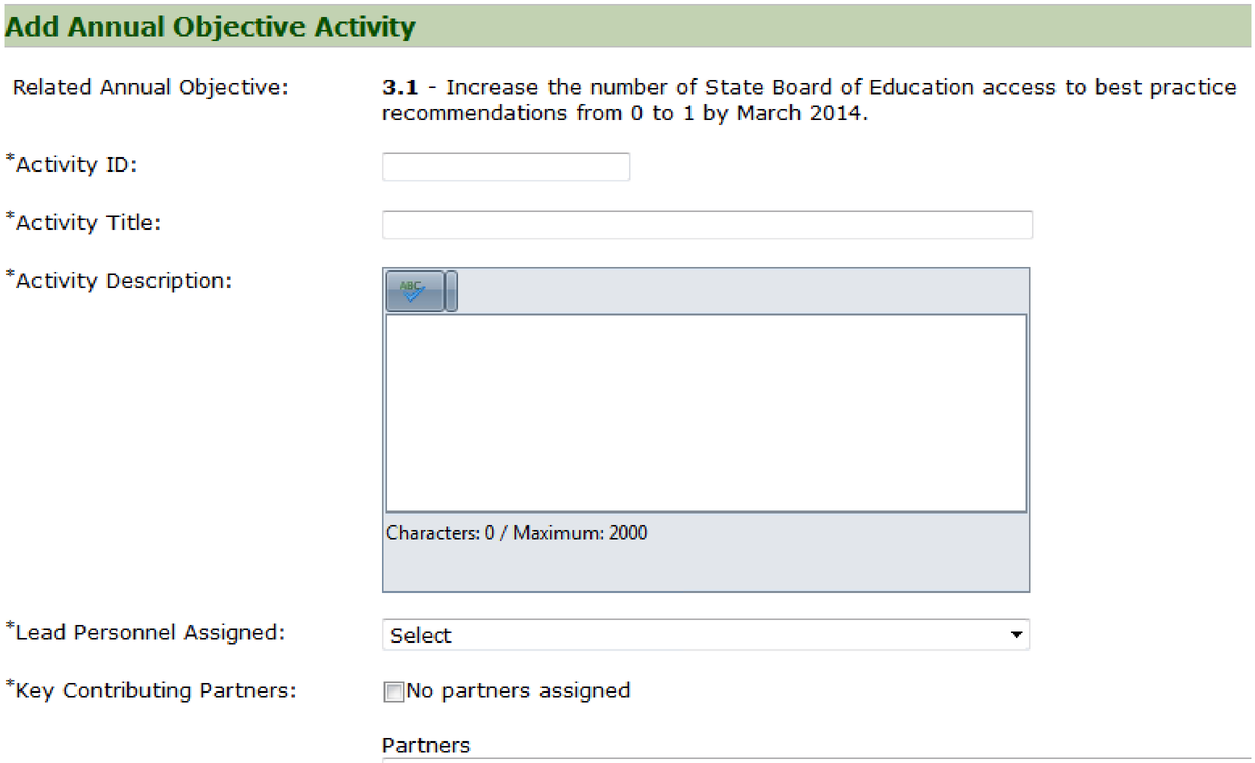
Adding an Activity

1. On the navigation tree, click the AO for which you want to add an activity.
   Result: The system displays the *Annual Objective Summary* section in the right display pane.



2. Click the **add** link in the *Activities* section.
   Result: The system displays the *Add Annual Objective Activity* page. Notice that the system displays the related AO in the *Related Annual Objective* field in SMART

format.



Note

- The fields displayed are specific to each FOA. Please see the *What do I do differently for my FOA?* section at the end of this procedure for detailed information on adding a PPO for a specific FOA.

3. Check the AO displayed in the *Related Annual Objective* field, to ensure that the AO is the right one to which you want to add an activity. This information is view only and cannot be modified.
4. In the *Activity ID* field, enter an activity ID or number that will be assigned to the activity. Maximum text is 15 characters.
5. In the *Activity Title* field, enter a title for the activity. For example, Develop Training Program. Maximum is 200 characters, about 40 words.
6. In the *Activity Description* field, enter a concise description for the activity. Maximum is 2000 characters, about 400 words.
7. In the *Lead Personnel Assigned* field, select the lead personnel for this activity from the list of active personnel displayed in the list. The personnel listed in this list are from the active personnel in the Resources section. Any changes to personnel will be reflected in this section.
8. In the *Key Contributing Partners* field, select the partners assigned to this activity from the *Available* list and move them to the *Selected* list.

Note

- Any number of partners can be selected.
- The partners listed in this section are from the partners you entered in the Resources section.
- Any changes to partners will be reflected in this section.
- If no contributing partners have been assigned to this activity, select the *No Partners Assigned* check box.
- For the CCC, CCC-1205, and SODPP FOAs, this list also includes the Partnership/Coalition entries.
- For the CCCP FOA, this list also includes the Policy Taskforce/Workgroup entries.
- For the HCP: SAH, CTG, CTG-SC, REACH-Demo, or DELTA FOCUS FOAs, this list also includes the Partnership/Coalition entries.
- For the DELTA FOCUS FOA, this list also includes the SDVC Governing Board.

9. In the *Key Contributing Contracts/Consultants Assigned* field, select the contracts or consultants assigned to this activity from the *Available* list and move them to the *Selected* list. Any number of contracts/consultants can be selected.

Note

- Any number of contracts/consultants can be selected.
- The contracts/consultants listed in this section are from the contracts/consultants you entered in the Resources section.
- Any changes to contracts/consultants will be reflected in this section.
- If no contributing contracts/consultants have been assigned to this activity, select the *No Contracts/Consultants Assigned* check box.

10. In the *Timeframe* field, select the time frame of initiation for the activity from the drop-down lists. In the Start drop-down field, select the quarter that starts the time frame of initiation for the activity — first, second, third, or fourth quarter and then select the year from the drop-down list. In the End drop-down field, select the quarter that ends the time frame of initiation for the activity — first, second, third, or fourth quarter and then select the year from the drop-down list.

Important

- You cannot change the activity start date if a Performance Monitoring rating exists for the activity.
- You cannot change the activity end date if the activity has a performance monitoring rating of "Complete" or "Cancelled”.

11. Click **Save** to save the information entered.
    Result: Click *Save* to save the information you entered. The system saves the information and returns you to the *Annual Objective Summary* section.

What do I do differently for my FOA when adding an activity?

Click on your FOA to find out.
DELTA Focus

Adding an Activity: DELTA Focus FOA

1. In the *Primary Contributions* field under the *Key Contributing Partners* field, for each key contributing partner, select the options in which the partner has contributed to the activity. If the desired option is not included in the list, select *Other*, and enter the description in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words.

2. In the *Primary Contributions* field under the *Key Contributing Contracts/Consultants Assigned* field, for each key contributing contract/consultant, select the options in which the contract/consultant has contributed to the activity. If the desired option is not included in the list, select *Other*, and enter the description in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words.
3. In the *Describe community input beyond Leadership Team and partners* field, Describe in detail how the community input has gone beyond Leadership Team and partners' input. Maximum is 5000 alphanumeric characters, about 1000 words.
4. In the *Implementation Workgroups* field, select at least one implementation workgroup for each partner selected for an activity.
5. In the *Describe community input beyond Leadership Team and partners* field, describe in detail how the community input has gone beyond Leadership Team and partners' input. Maximum is 5000 alphanumeric characters, about 1000 words.
6. In the *Describe community input beyond your Policy Taskforce/Workgroup and partners* field, describe in detail the ways that the community has contributed to activity beyond your Policy Task Force/Workgroup and partners. Maximum is 5000 alphanumeric characters, about 1000 words.
7. In the *Primary Contribution* field, for each key contributing contract/consultant, select the options in which the contract/consultant has contributed to the activity. If the desired option is not included in the list, select *Other*, and enter the description in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words.

Editing an activity

Important note on editing an activity

If you have to change one of the activity components listed below or other similar components, then you are most likely changing the original intent of the activity. It is recommended that you create a new activity instead of editing an existing one.

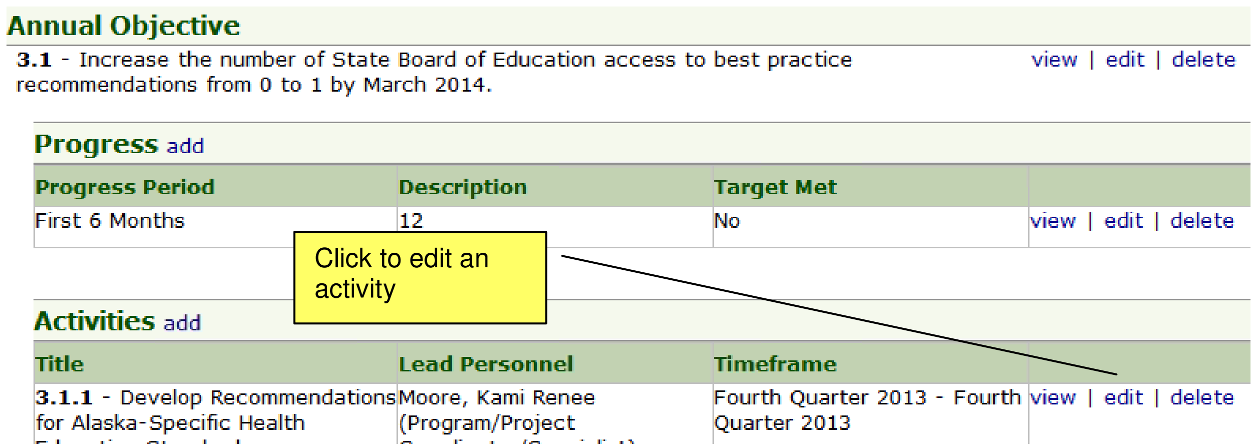
- Language of the activity so that it becomes a completely different activity
- Changing the target recipients or participants (e.g. a shift from working with a Chamber of Commerce to working with a professional society)
- Changing the status of the activity (e.g. implement vs. evaluate; sign agreement vs. establish agreement, etc.)

Important

If you have to change information such as the language, target recipients or participants, status, etc., add a new one.

Editing an activity

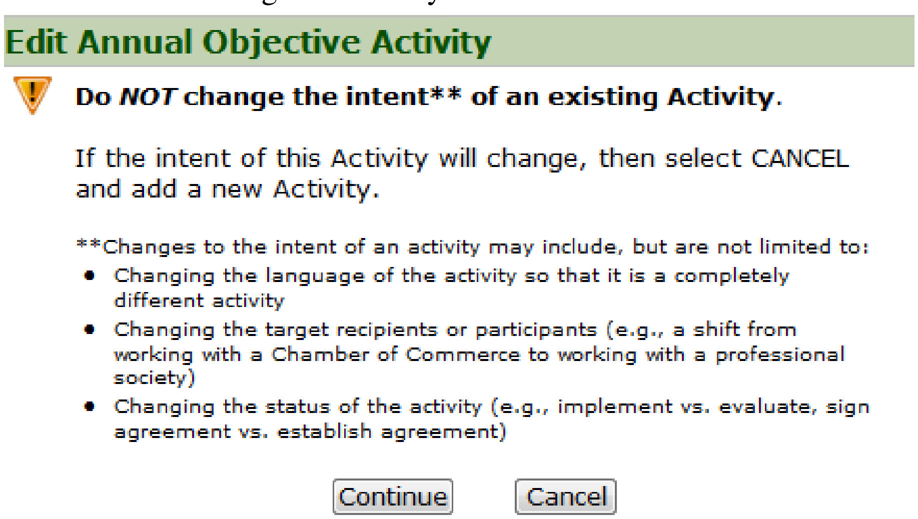
1. On the navigation tree, select the AO for which you want to edit an activity.
   Result: The system displays the AO details in the right display pane.



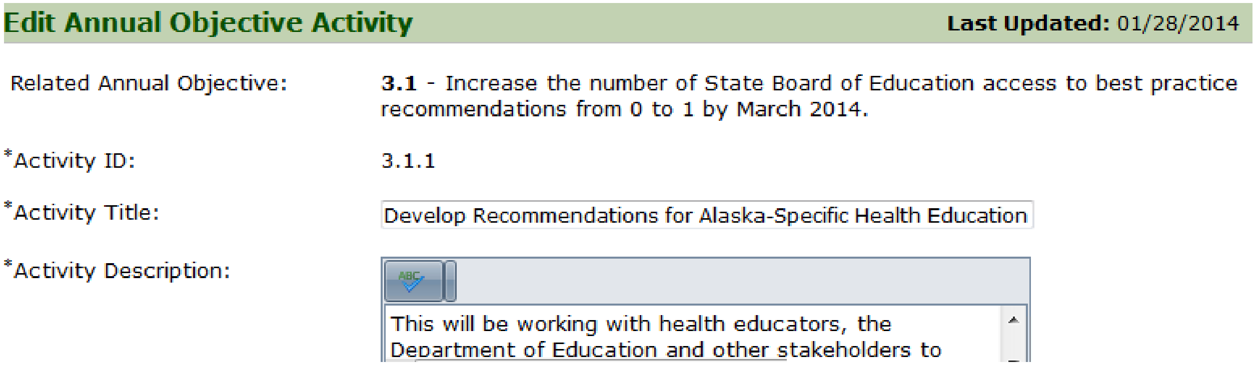
Note

- The pages for entering initial activity information and modifying existing information are identical. The only difference is that the *Edit* page displays the existing activity information, while the fields in the page for entering initial information are blank.

2. Click the **edit** link for the activity.
   Result: The system displays a pop-up window asking you to confirm that you do indeed want to change the activity.



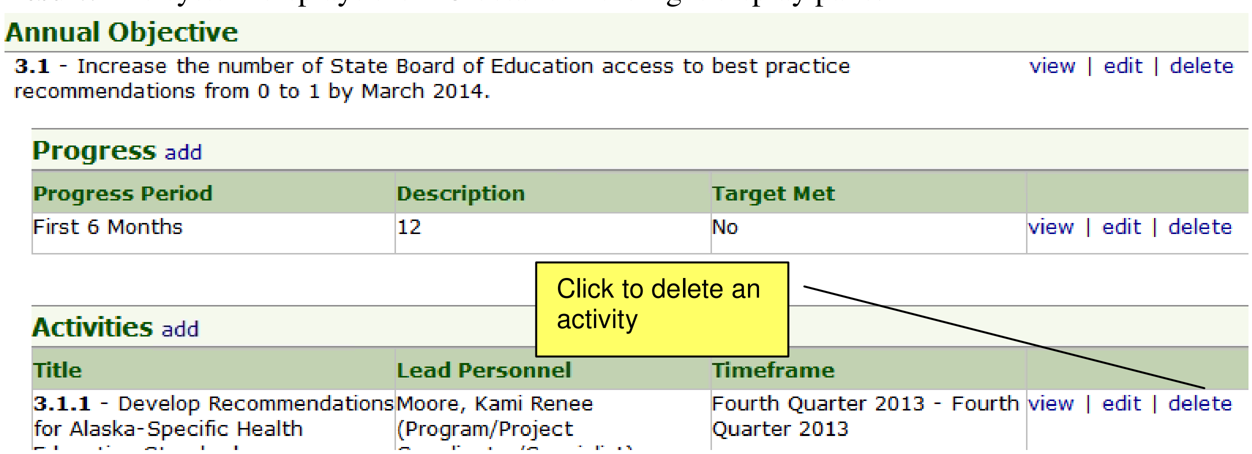
3. Click **Continue** to proceed and edit the activity.
   Result: The system displays the *Edit Annual Objective Activity* page.



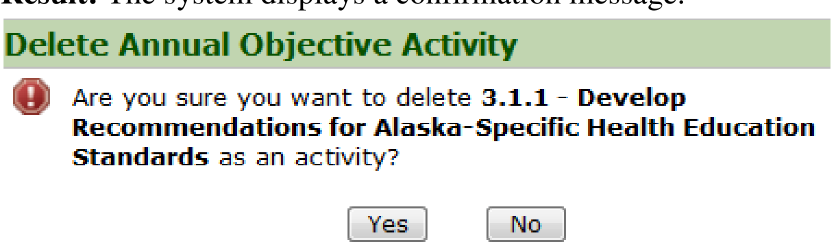
4. Modify the fields as necessary.
5. Click the **Save** button to save the information.
   Result: The system saves the modified information. If any fields on the page are incomplete or invalid when you click **Save**, the system displays an error. Correct all invalid fields and click **Save** again.

Deleting an activity

1. On the navigation tree, select the AO for which you want to delete the activity.
   Result: The system displays the AO details in the right display pane.



2. Click the **delete** link for the activity.
   Result: The system displays a confirmation message.



3. Click the **Yes** button to confirm your decision to delete the activity.
   Result: The system deletes the activity.

Important

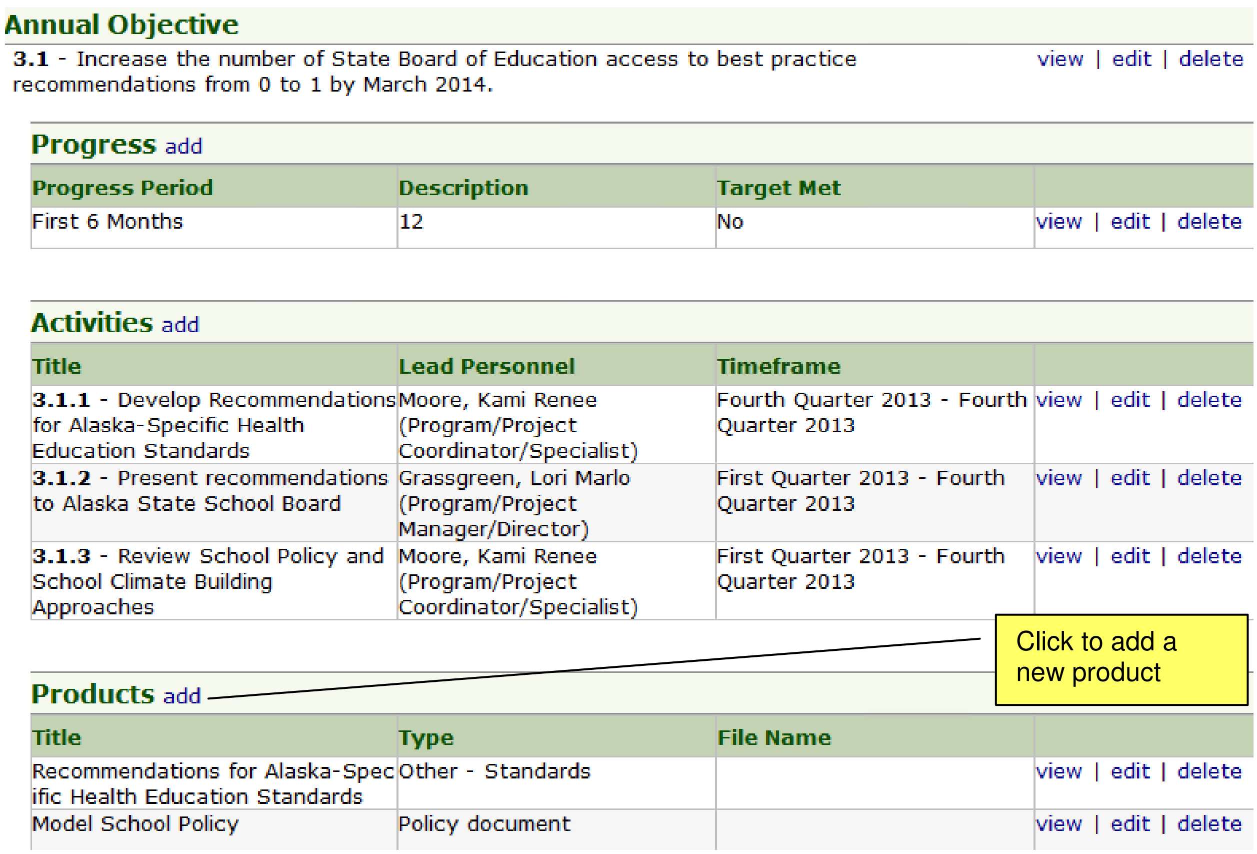
- Activities with a Performance Monitoring Rating cannot be deleted. Contact your Project Officer if you need to delete an activity that has a Performance Monitoring Rating.
- Once an activity is deleted it is no longer available in the system.

Products

Products are any outputs created as a result of performing or achieving an objective. Products may include journal articles, policy documents, survey instruments, etc.

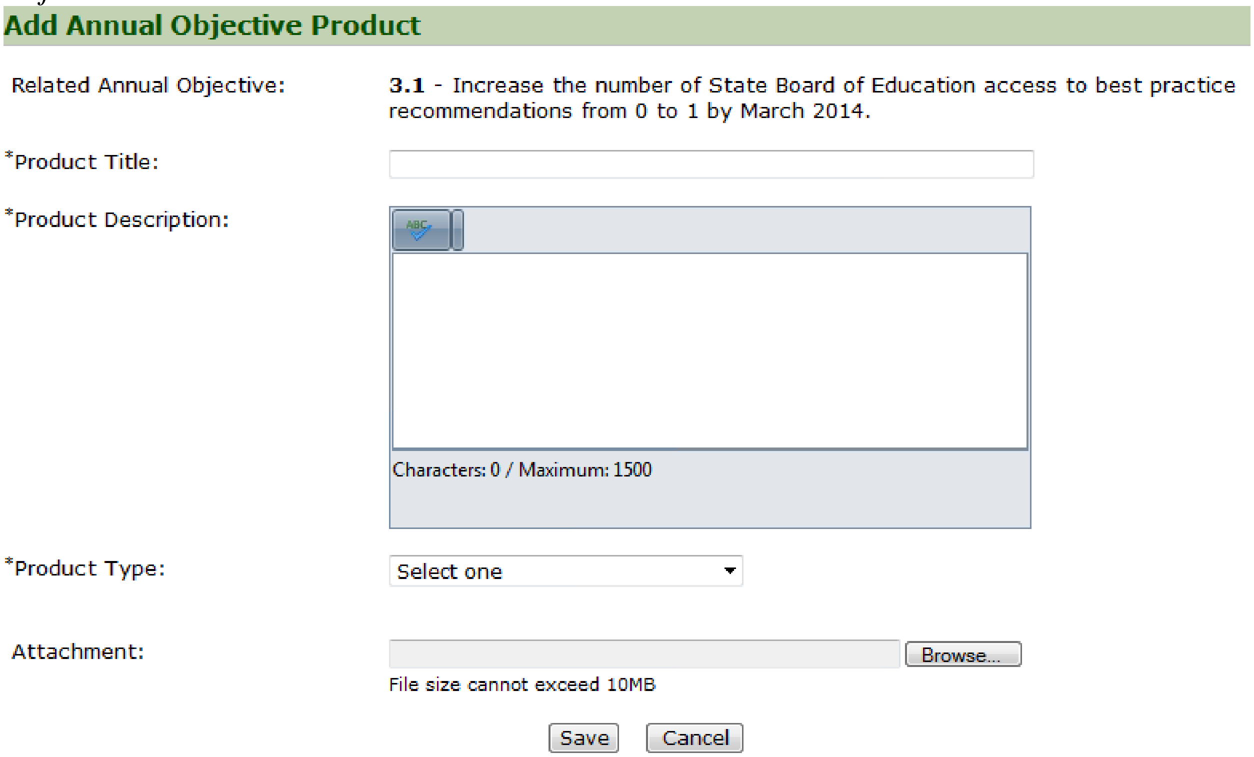
Adding a product

1. On the navigation tree, click the AO for which you want to add a product.
   Result: The system displays the AO details in the right display pane.



2. Click the **add** link in the *Products* section.
   Result: The system displays the *Add Annual Objective Products* section in the right display pane. Notice that the system displays the related AO in the *Related Annual*

Objective field in SMART format.



3. Check the AO displayed in the *Related Annual Objective* field, to ensure that the AO is the right one to which you want to add a product. This information is view only and cannot be modified.
4. In the *Product Title* field, enter a descriptive title for the product. Maximum is 200 characters, about 40 words.
5. In the *Product Description* field, enter a description for the product. Maximum is 1500 characters, about 300 words.
6. In the *Product Type* field, select a product type from the drop-down list. If the product type is not in included in the list, select *Other (specify)*, and enter it in the *Other* text box. Maximum text for the *Other* field is 100 characters, about 20 words.
7. In the *Attachment* field, click **Browse** to navigate to the location where the document is saved, and select the document.

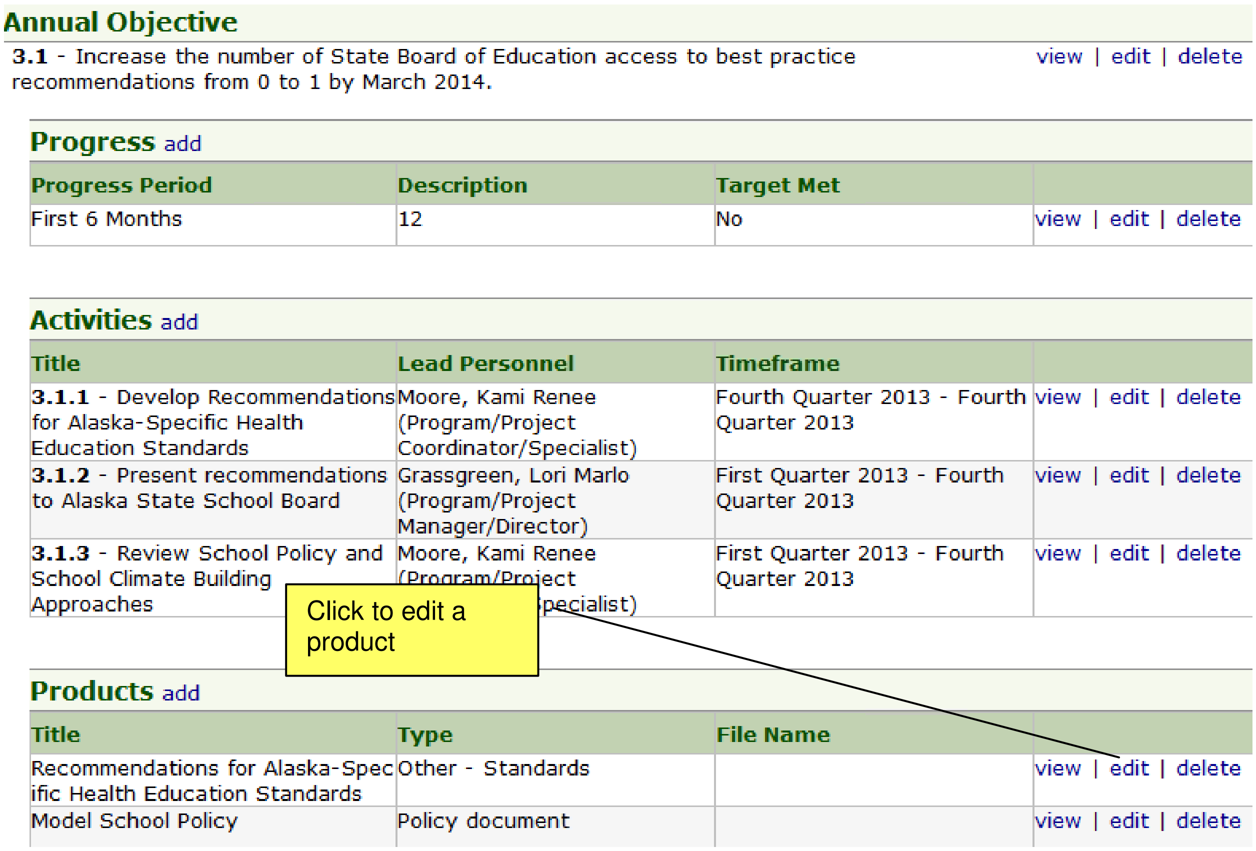

Note

- To edit an attached file, you should edit the copy of the file on your computer, then you must delete the attached file and then upload it again.

8. Click the **Save** button.
   Result: The system adds the product. If any fields on the page are incomplete or invalid when you click **Save**, the system displays an error. Correct all invalid fields and click **Save** again

Editing a product

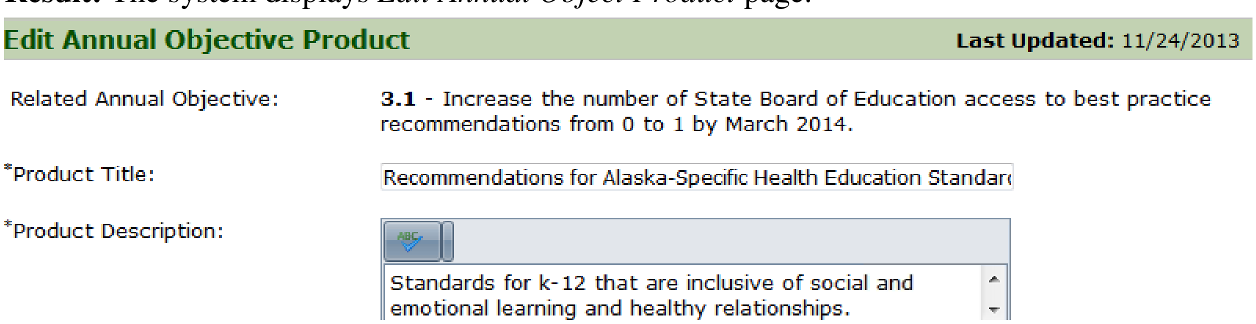
1. On the navigation tree, select the AO for which you want to edit the product.
   Result: The system displays the AO details in the right display pane.



Note

- The page for entering initial product information and modifying existing information are identical. The only difference is that the *Edit* page displays the existing product information, while the fields in the page for entering initial information are blank.

2. Click the **edit** link for the product.
   Result: The system displays *Edit Annual Object Product* page.

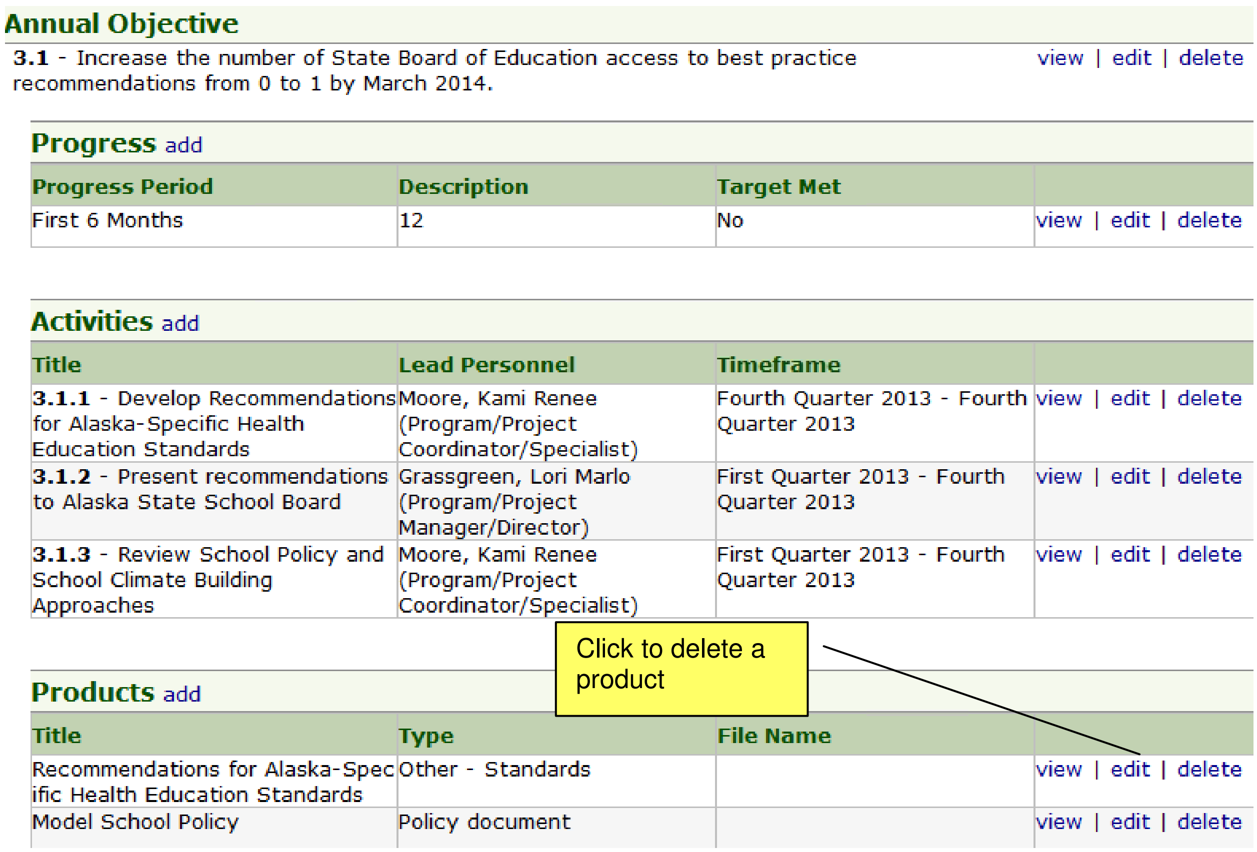


3. Modify the fields as necessary.

4. Click the **Save** button to save the information.
   Result: The system saves the modified information. If any fields on the page are incomplete or invalid when you click **Save**, the system displays an error. Correct all invalid fields and click **Save** again.

Deleting a product

1. On the navigation tree, select the AO for which you want to delete the activity.
   Result: The system displays the AO details in the right display pane.



Annual Objective

3.1 - Increase the number of State Board of Education access to best practice recommendations from 0 to 1 by March 2014. view | edit | delete

Progress add

Progress Period	Description	Target Met	
First 6 Months	12	No	view | edit | delete

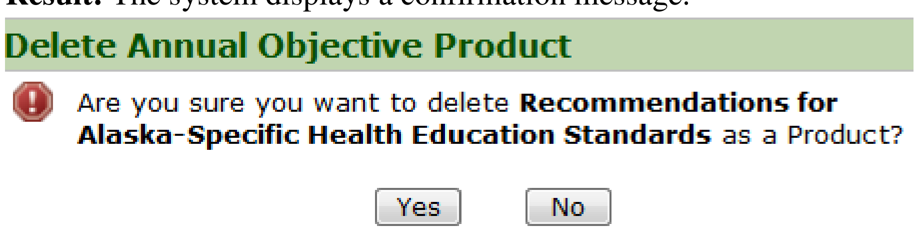
Activities add

Title	Lead Personnel	Timeframe	
3.1.1 - Develop Recommendations for Alaska-Specific Health Education Standards	Moore, Kami Renee (Program/Project Coordinator/Specialist)	Fourth Quarter 2013 - Fourth Quarter 2013	view | edit | delete
3.1.2 - Present recommendations to Alaska State School Board	Grassgreen, Lori Marlo (Program/Project Manager/Director)	First Quarter 2013 - Fourth Quarter 2013	view | edit | delete
3.1.3 - Review School Policy and School Climate Building Approaches	Moore, Kami Renee (Program/Project Coordinator/Specialist)	First Quarter 2013 - Fourth Quarter 2013	view | edit | delete

Products add

Title	Type	File Name	
Recommendations for Alaska-Specific Health Education Standards	Other - Standards		view | edit | delete
Model School Policy	Policy document		view | edit | delete

2. Click the **delete** link for the product.
   Result: The system displays a confirmation message.



Delete Annual Objective Product

Are you sure you want to delete **Recommendations for Alaska-Specific Health Education Standards** as a Product?

Yes No

3. Click the **OK** button to confirm your decision to delete the product.
   Result: The system deletes the product.

Important

- Once a product is deleted it is no longer available in the system