CDMIS
CHRONIC DISEASE
Management Information System

Action Plan Module

Release 7.6

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), Evidence-Based Intervention (EBI) 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, EBI 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

Add PPO

PPO: **1.00** - Increase the number of health in...
PPO: **2.00** - Decrease the percent of timely b...
    Progress (0)
    AO: **2.01** - Decrease the rate of incidence o...
        Progress (1)
        Activities (4)
        Products (0)
        EBIs (6)
    AO: **2.10** - Increase the percent of timely b...
PPO: **3.00** - Increase the number of adequacy ...
PPO: **4.00** - Increase the percent of adequacy...

Click + or – to collapse or expand PPO components
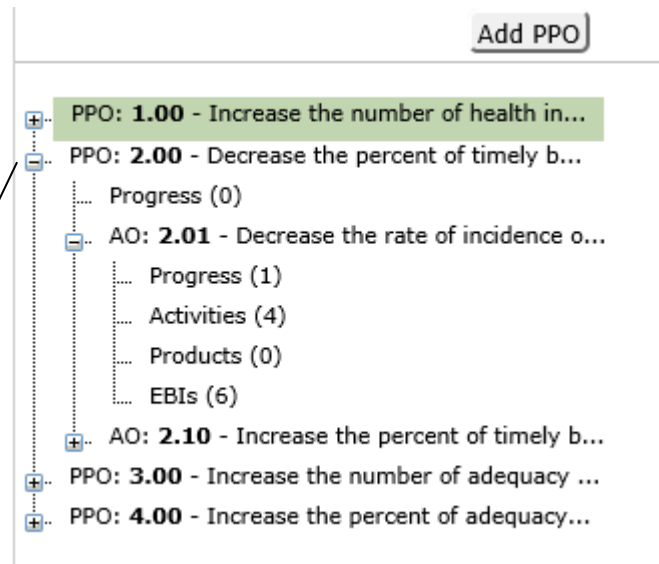
The Action Plan Summary pane is located to the right of the navigation tree, and allows you to work with your PPOs and all the components of the PPO, i.e. AOs, activities, products, EBIs.

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 above the navigation tree.
   Result: The system displays the fields for adding the PPO in the right display pane.

Add Project Period Objective

*Objective ID: [_____]

*Priority Area:
- ○ Emphasize primary prevention of cancer
- ○ Facilitate screening and early detection of cancer
- ○ Improve cancer survivors' quality of life
- ○ Promote health equity as it relates to cancer control

*Cancer Focus:
- ☐ All Cancers
- ☐ Breast
- ☐ Cervical
- ☐ Colorectal
- ☐ Immunization
- ☐ Lung
- ☐ Ovarian
- ☐ Prostate
- ☐ Skin
- ☐ Alcohol use
- ☐ Nutrition
- ☐ Obesity
- ☐ Physical activity
- ☐ Tobacco use

*Measurement:
(This section creates the SMART Objective Statement)

Direction of Change: [Select ▽]   Unit of Measurement: [Select ▽]

Long-Term Outcome Indicator [Select ▽]

Baseline: [_____]   Target: [_____]
☐ Unknown

Data Source: [Select one ▽]

*Related Program Goal:

[ABC ✓]

Characters: 0 / Maximum: 2000

Timeframe: 06/30/2017 - 06/29/2022

[Save] [Cancel]

2. In the *Objective ID* field, enter an objective ID or number that will be assigned to the PPO. Maximum text is 15 characters.

3. In the *Priority Area* field, select the appropriate priority area(s) from the list.

> The selected priority area determines the options that will be displayed in the Long-Term Outcome Indicator dropdown in the Measurement field. You cannot edit the Priority Area field if the PPO is associated to an annual objective.

4. In the *Cancer Focus* field, select the areas on which the cancer focuses.

5. 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 Long Term Outcome Indicator field, select the indicator that will be used for measuring the Project Period Objective. The long-term outcome indicators displayed here are determined by the option selected in the Priority Area field. You cannot edit the Long Term Outcome Indicator field if the PPO is associated to an annual objective.

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

6. 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.

7. In the *Related Program* field, enter the program related to the project period objective. Maximum text is 2000 characters, about 400 words.

8. In the *Timeframe* field, notice the start date and the end date for the PPO. The timeframe displayed defaults to the FOA project period.

9. 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

Editing PPO information

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

Project Period Objective Summary

1.00 - Increase the number of health insurance coverage during treatment from 10 to 20 by June 2022.   view | edit | delete

Project Period Objective Progress add

Progress Period	Description	Target Met	
No information entered.			

Click to edit PPO

Annual Objective add

Annual Objective   hide details

1.01 - Decrease the number of adult obesity prevalence from 75 to 25 by June 2018.   view | edit | delete

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.

Edit Project Period Objective   Last Updated: 02/02/2018

*Objective ID: 1.00

The disabled fields cannot be modified due to its existing association with an annual objective.

*Priority Area: ⦿ Emphasize primary prevention of cancer
                    ◯ Facilitate screening and early detection of cancer
                    ◯ Improve cancer survivors' quality of life
                    ◯ Promote health equity as it relates to cancer control

*Cancer Focus: ☐ All Cancers
                    ☐ Breast
                    ☑ Cervical
                    ☐ Colorectal
                    ☐ Immunization
                    ☐ Lung
                    ☐ Ovarian
                    ☐ Prostate
                    ☐ Skin
                    ☐ Alcohol use
                    ☐ Nutrition
                    ☑ Obesity
                    ☐ Physical activity
                    ☐ Tobacco use

*Measurement: Direction of Change: Unit of Measurement:
(This section creates   Increase   Number of
the SMART Objective
Statement)   Long-Term Outcome Indicator
                    Health insurance coverage during treatment

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.
> - When editing a PPO, if the PPO is associated to an annual objective, the Priority Area, Cancer Focus, and Long-Term Outcome Indicator fields are disabled.

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.

Project Period Objective Summary

1 - Increase the percent of Alaska's agencies and systems that are impacting the root   view | edit | delete
causes of IPV to 90% by March 2018.

Project Period Objective Progress add

Progress Period	Description	Target Met	
First 6 Months	We have completed some evaluations of individual webinars, but we do not yet have a sense of how partners are incorporating this into their work or...	Ongoing	view	edit	delete

Click to add a PPO progress entry

Annual Objective add

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.

Add Project Period Objective Progress

Related Project Period Objective:	**1.00** - Increase the number of health insurance coverage during treatment from 10 to 20 by June 2022.
Progress Period:	June 30, 2017 - December 29, 2017
*Objective's Target Met:	◯Yes ◯No ◯Ongoing
*Current Measurement:	[ ] ☐Unknown at this time
*Describe Progress:	

Characters: 0 / Maximum: 5000

*Facilitating Factors of Success:

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. Inspect the period displayed in the *Progress Period* field to ensure that it is the right period for the progress entry.

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.

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.

• 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 products, and allows you add, edit, and delete the information.

Annual Objective

1.01 - Decrease the number of adult obesity prevalence from 75 to 25 by June 2018.   view | edit | delete

Progress add

Progress Period	Description	Target Met	
No information entered.			

Evidence-Based Intervention   show details

1.1.1 - Health Systems Changes: Screening for and management of obesity in adults

Activities

Title	Lead Personnel	Timeframe	
Activity 1: Program Collaboration			view	edit
Activity 2: External Partnerships			view	edit
Activity 3: Cancer Data and Surveillance			view	edit
Activity 4: Implementing the EBI			view	edit
Activity 5: Program Monitoring and Evaluation			view	edit

Products add

Title	Type	File Name	

Adding an Annual Objective (AO)

1. On the navigation tree, click the PPO for which you want to add the AO.
   Result: The system displays the *Project Period Objective Summary* in the right display pane. The related PPO is displayed at the top of the page.

Project Period Objective Summary

1.00 - Increase the number of health insurance coverage during treatment from 10 to 20 by June 2022.   view | edit | delete

Project Period Objective Progress add

Progress Period	Description	Target Met	
June 30, 2017 - December 29, 2017	Great progress is being made in this area.	Ongoing	view	edit	delete

Annual Objective add

Click to add a new AO.

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

Add Annual Objective

Related Project Period **1.00** - Increase the number of health insurance coverage during treatment from 10 to 20
Objective: by June 2022.

*Objective ID: [   ]

*Population Focus: ○ General Population
                           ○ Specific Population

*Scope: ○ City, County, Local
                 ○ Multi-State Region
                 ○ National
                 ○ Region Within State, Territory, Pacific Island Jurisdiction
                 ○ State, Territory, Pacific Island Jurisdiction
                 ○ Tribe/Tribal Organization

*Level of Change: ☐ Community/Population
                           ☐ Individual
                           ☐ Organizational/System
                           ☐ Policy
                           ☐ Provider/Community Health Worker/Patient Navigator
                           ☐ Other (specify)
                             [   ]

*Type of Change: ☐ Awareness, Knowledge, Attitude
                          ☐ Behavior/practice
                          ☐ Policy

*Setting: ☐ Agriculture
                   ☐ Community
                   ☐ Faith-based
                   ☐ Health Care
                   ☐ School
                   ☐ Transportation
                   ☐ Work Site
                   ☐ Other (specify) [   ]

*Measurement: Direction of Change: Unit of Measurement:
(This section creates   [Select   ▽]   [Select   ▽]
the SMART Objective
Statement)   Short-Term Outcome Indicator
                    [Select   ▽]

                    Baseline: Target:
                    [   ]   [   ]
                    ☐ Unknown

                    Data Source:
                    [Select one   ▽]

*Strategy   [Select   ▽]

*Evidence-Based Intervention   [Select   ▽]

*EBI ID   [   ]

                             [Add]

Timeframe: 06/30/2017 - 06/29/2018

                    [Save]   [Cancel]

3. In the *Objective ID* field, enter an objective ID or number that will be assigned to the AO. Maximum text is 15 characters.

4. In the *Population Focus* field, select the type of population on which the AO focuses. You can select *General Population* as a whole or select *Specific Population* and then specify the population by selecting all that apply.

5. In the *Scope* field, select the scope for the annual objective.

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

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.

9. 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 *Short Term Indicator* field, select the short-term indicator that will be measured in the annual objective.

    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.

10. 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 Strategy field, select the strategy or strategies related to the annual objective.

12. In the Evidence-Based Intervention field, select the Evidence-Based Intervention (EBI) option that is associated with the selected strategy.

⚠ Important	You must enter at least three (3) Evidence-Based Interventions (EBIs) and each **EBI** must have **activities** that align with the five (5) funding opportunity announcement (FOA) strategies (Program Collaboration, External Partnerships, Cancer Data and Surveillance, Implementation of EBIs, and Program Monitoring and Evaluation).

13. In the EBI ID field, assign an EBI ID or number to the Evidence-Based Intervention. Maximum text is 15 characters.

14. Click the **Add** button to add the EBI information to the AO.

- You must click the **Add** button after entering EBI information. If you do not click the **Add** button, the system will not save the EBI information.
- After adding an EBI, you can delete the EBI only if you have not saved the AO. Once you save the AO, you can no longer edit or delete the EBI, you can only edit the EBI's activities that align with the FOA strategies. However, you can delete the AO and start over.

15. 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.

Edit EBI Activities

You must enter at least three (3) Evidence-Based Interventions (EBIs) and each **EBI** must have **activities** that align with the five (5) funding opportunity announcement (FOA) strategies (Program Collaboration, External Partnerships, Cancer Data and Surveillance, Implementation of EBIs, and Program Monitoring and Evaluation).

When editing EBI activities, the system displays the Related Annual Objective, Evidence-Based Intervention, Activity ID, and Activity Title for the EBI.

To edit EBI activity:
1. Under the Evidence-Based Intervention section, click the **edit** link for the EBI activity that you want to edit. The system displays details of the activity.

Edit Annual Objective Activity   Last Updated:

*Related Annual Objective: **1.0.2** - Increase the percent of women aged 18 to 26 years who have completed the 3-dose hpv vaccination series from 25% to 50% by June 2018.

*Evidence-Based Intervention: **1.0.2.1** - Health Systems Changes: Provider reminders to increase appropriate vaccination

*Activity ID: 1.0.2.1.1

*Activity Title: Activity 1: Program Collaboration

*Briefly describe how your program will collaborate across NBCCEDP, National Program of Cancer Registries(NPCR), and other chronic disease prevention and health promotion programs to implement the selected EBI.

Characters: 0 / Maximum: 2000

*Lead Personnel Assigned: Select ▼

*Key Contributing Partners: ☐ No partners assigned

Partners
Select ▼

*Implementation Workgroups   Select the implementation workgroup(s) the partner is assigned to from the list below:

☐ Breast
☐ Cervical
☐ Not Applicable

Add

Partner Name	Implementation Workgroups
No Implementation Workgroups Selected	

*Key Contributing Contracts/Consultants: ☐ No Contracts/Consultants assigned

Available   Selected
TEE Programs   [>]
                                [>>]
                                [<]
                                [<<]

*Timeframe: Start Date: Select ▼
                     End Date: Select ▼

Save   Cancel

2. In the *Briefly describe how your program will collaborate across NBCCEDP, National Program of Cancer Registries(NPCR), and other chronic disease prevention and health promotion programs to implement the selected EBI* field under the *Key Contributing Partners* field, enter a description of how your program will collaborate across NPCR and other programs to effectively implement the EBI. Maximum is 2000 characters, about 400 words.

Note

This field displays differently depending on the activity being edited. The pages for entering EBI activities that align with the five FOA strategies are identical. The difference is that the description field is specific to each activity. The different fields displayed are listed below.

- **Activity 1: Program Collaboration:** Briefly describe how your program will collaborate across NBCCEDP, National Program of Cancer Registries (NPCR), and other chronic disease prevention and health promotion programs to implement the selected EBI.
- **Activity 2: External Partnerships:** Briefly describe how your program will convene, support, and sustain partnerships necessary to implement the selected EBI.
- **Activity 3: Cancer Data and Surveillance:** Briefly describe how your program will use cancer risk factor and surveillance data to identify priorities and set baselines and targets specific to the selected EBI.
- **Activity 4: Implementation of EBIs:** Briefly describe key steps necessary to implement the selected EBI.
- **Activity 5: Program Monitoring and Evaluation:** Briefly describe how your program will monitor the implementation of the selected EBI, including any quality improvement or evaluation efforts.

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3. In the *Lead Personnel Assigned* field under the *Key Contributing Contracts/Consultants 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.
4. In the *Key Contributing Partners* field, select the partners assigned to this activity from the Partners list. The partners listed are pulled 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. Select at least one Implementation Workgroup for each partner selected for an activity. If this information is not applicable, select the *Not Applicable* check box
5. Click the **Add** button to add the Partner and Implementation Workgroups information.

Note

You must click the **Add** button after entering Partner information. If you do not click the **Add** button, the system will not save the Partner information.

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6. In the *Key Contributing Contracts/Consultants* 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. The contracts/consultants listed in this section are pulled 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.

7. In the *Timeframe* field, select the time frame of initiation for the activity from the drop-down lists. In the *Start Date* drop-down field, select the quarter and year that starts the time frame of initiation for the activity from the drop-down list. In the *End Date* drop-down field, select the quarter and year that ends the time frame of the activity from the drop-down list.

8. Click **Save** to save the information you entered. The system saves the EBI activity and returns you to the Annual Objective Summary page.

Annual Objective add

Annual Objective   hide details

1.0.2 - Increase the percent of women aged 18 to 26 years who have completed the 3-dose   view | edit | delete
hpv vaccination series from 25% to 50% by June 2018.

Progress add

Progress Period	Description	Target Met	
No information entered.			

Evidence-Based Intervention   hide details

1.0.2.1 - Health Systems Changes: Provider reminders to increase appropriate vaccination

Activities

Title	Lead Personnel	Timeframe	
Activity 1: Program Collaboration	Polor, Rene (Health Educator)	Fourth Quarter 2017 – Fourth Quarter 2017	view | edit
Activity 2: External Partnerships			view | edit
Activity 3: Cancer Data and Surveillance			view | edit
Activity 4: Implementing the EBI			view | edit
Activity 5: Program Monitoring and Evaluation			view | edit

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.

Annual Objective

1.01 - Decrease the number of adult obesity prevalence from 75 to 25 by June 2018.   view | edit | delete

Progress add

Progress Period	Description	Target Met	
No information entered.			

Evidence-Based Intervention   Click to edit an AO   show details

1.1.1 - Health Systems Changes: Screen   obesity in adults

Activities

Title	Lead Personnel	Timeframe	
Activity 1: Program Collaboration			view	edit
Activity 2: External Partnerships			view	edit
Activity 3: Cancer Data and Surveillance			view	edit
Activity 4: Implementing the EBI			view	edit
Activity 5: Program Monitoring and Evaluation			view	edit

> **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.

Edit Annual Objective

⚠ **Do *NOT* change the intent** of an existing Annual Objective.**

If the intent of this Annual Objective will change, then select CANCEL and add a new Annual Objective.

**Changes to the intent of an objective may include, but are not limited to:
- Settings
- Target Population
- Intervention
- Geographic Area
- Organization Type
- Unit of Measurement
- Direction of Change
- What will be measured?

Continue   Cancel

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.

Annual Objective

1.01 - Decrease the number of adult obesity prevalence from 75 to 25 by June 2018.   view | edit | delete

Progress add

Progress Period	Description	Target Met	
No information entered.			

> Click to delete an AO

Evidence-Based Intervention   show details

1.1.1 - Health Systems Changes: Screening for and management of obesity in adults

Activities

Title	Lead Personnel	Timeframe	
Activity 1: Program Collaboration			view	edit
Activity 2: External Partnerships			view	edit
Activity 3: Cancer Data and Surveillance			view	edit
Activity 4: Implementing the EBI			view	edit
Activity 5: Program Monitoring and Evaluation			view	edit

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.
- Once an AO is deleted, it is no longer available in the system.
- If you delete an AO, all existing associations to EBIs and activities will also be deleted.

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.

Annual Objective				
1.01 - Decrease the number of adult obesity prevalence from 75 to 25 by June 2018.			view | edit | delete	

Progress add

Progress Period	Description	Target Met	
No information entered.			

Click to view AO information

Evidence-Based Intervention   show details

1.1.1 - Health Systems Changes: Screening for and management of obesity in adults

Activities			
Title	Lead Personnel	Timeframe	
Activity 1: Program Collaboration			view | edit
Activity 2: External Partnerships			view | edit
Activity 3: Cancer Data and Surveillance			view | edit
Activity 4: Implementing the EBI			view | edit
Activity 5: Program Monitoring and Evaluation			view | edit

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

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

View Annual Objective	Last Updated: 02/02/2018

View History

Related Project Period Objective:	1.00 - Increase the number of health insurance coverage during treatment from 10 to 20 by June 2022.
*Objective ID:	1.01

Click to view AO history

*Population Focus:	General
*Scope:	City, County, Local
*Level Of Change:	- Community/Population - Policy
*Type Of Change:	- Policy
	Policy: - Breast - CRC screening
*Setting:	- Community - Faith-based - School - Work Site

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

View Objective History

Date of Change	Updated by	Explanation
2/2/2018	Ebhomielen, Ruby	Added one more level of change (Individual).
2/2/2018	Siebold, Wendi	Added an EBI.

Close

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.

Add Annual Objective Progress

Related Annual Objective:	**1.01** - Decrease the number of adult obesity prevalence from 75 to 25 by June 2018.
Progress Period:	June 30, 2017 - December 29, 2017
Objective's Target Met:	◯Yes ◯No ◯Ongoing
Current Measurement:	[　　　　　] ☐Unknown at this time

Describe Progress:

Characters: 0 / Maximum: 5000

Facilitating Factors of Success:

3. 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.
4. 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.
5. In the *Describe Progress* field, enter a description for the annual objective progress. Maximum text is 5000 characters, about 1000 words.
6. 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.
7. 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.
8. 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.

9. 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.

10. 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.

11. 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.

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.

Delete Annual Objective Progress

Are you sure you want to delete **We have made considerable progress with this AO. The number is being reduced.** as a Progress?

Yes   No

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.

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.

Add Annual Objective Product

Related Annual Objective:	**1.01** - Decrease the number of adult obesity prevalence from 75 to 25 by June 2018.
*Product Title:	

*Product Description:

Characters: 0 / Maximum: 1500

*Product Type:	Select one ▾
Attachment:	Browse...
	File size cannot exceed 10MB

Save   Cancel

3. In the *Product Title* field, enter a descriptive title for the product. Maximum is 200 characters, about 40 words.

4. In the *Product Description* field, enter a description for the product. Maximum is 1500 characters, about 300 words.

5. 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.

6. 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.

7. 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.

| | • | 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.

   Edit Annual Objective Product   **Last Updated:** 02/02/2018

   Related Annual Objective: **1.01** - Decrease the number of adult obesity prevalence from 75 to 25 by June 2018.

   Product Title: AO Obesity Product

   Product Description:

   Pertinent documents associated with adult obesity prevalence.

   Characters: 60 / Maximum: 1500

   Product Type: Policy document

   Attachment: Browse...
                          File size cannot exceed 10MB

                          Save   Cancel

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.

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

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