ORS Quarterly Reporting Template

Project Data Entry - State Staff

Field Name	Required	Data Type	Character Limit	Format/Values	Description
Project Overview					
Project Name	✔	Character	100		Free text field
Project Description	✔	Character	1,000		Brief description of the overall purpose and activities of the project. All acronyms should be defined on first use.
Project Status	✔	Selection		In Progress Complete On Hold Discontinued	In progress indicates that project activities took place in the quarter and it is ongoing. Complete indicates that project activities are complete. On hold indicates that progress on project activities are not continuing forward during the quarter but will/may carry on in the future. Discontinued indicates that project activities are no longer being pursued.

Project Start Quarter	✔	Selection			This field determines the first quarter (e.g., 2023 Q1) of reporting for a project. It only appears when a project is first created.
Project Start Date	✔	Date		MM/DD/YYYY	Approximate start date of project activities
Project End Date	Dependent on project status	Date		MM/DD/YYYY	End date of project activities for complete projects. Only displays if the project status is complete, archived, or discontinued.
Is this a pilot project?	✔	Binary		Yes No	Users should check the box if their project was part of The ORS Pilot Project program that is funded through the National Association of County Health Officials (NACCHO).
ORS Goals & Strategies	✔ At least one strategy is required. If "other" is selected, a description must be provided.	Selection		See list in appendix	Select all goals and strategies that are applicable to the activities of the project.
Project Updates					
ORS Collaborators					
ORS Staff Name	✔	Selection		Filters by list of state/jurisdiction staff	First and last name of staff member

Primary Data Reporter	✔	Selection		Checkbox	This is assigned to the staff member who created the project. A national administrator can update the primary data reporter as needed.
ORS Staff Role	✔	Character	1,000		Description of the staff member's role on the project, including primary responsibilities/activities for the project, not their title.
Key Contacts					
Contact Name	✔	Selection		Can be selected from the drop-down once contact has been added.	Name of the external contact supporting activities of the project. Upon adding a new contact, the "Refresh contact dropdown" button must be used to update the dropdown list to include that new contact.
Contact role	✔	Character	1,000		What the contact's role was in the project, not their title.
New/Edit Contact (separate page linked through the Key Contacts section)					
First Name	✔	Character	25		First name of the external contact supporting activities of the project
Last Name	✔	Character	25		Last name of the external contact supporting activities of the project
Phone (mobile)		Number	20	+1XXXXXXXXXX	Mobile number for the external contact.
Phone (office)		Number	20	XXX XXX XXXX with optional extension xXXX	Office number for the external contact.
Email	✔	Character	50	yourname@example.com	Email address for the external contact.
Is this contact	✔	Selection		Select if yes	Contact still works for and is a part of the organization

active?					listed.
Affiliated Organization	✔	Selection			Organization which the contact works for or is affiliated with for the purposes of the project.
New/Edit Organization (linked through the contact new/edit page)					
Organization name	✔	Character	100		Organization name spelled out with acronym included in parentheses if space is available.
Partner Categories	✔ At least one category must be selected. If "other" is selected, a description must be provided.	Selection		Checkbox, see appendix for list of valid values	Select all partner categories that apply to the organization.
Project Focus					
Geographies					
State/Jurisdiction	✔	Selection		All U.S. states/ territories with ORS teams	State/jurisdiction(s) impacted by the activities of the project. Only 1 state can be selected per row, so the counties are specific to that 1 state. However, users can add multiple rows if the project covers multiple states.
Counties		Selection		All counties within applicable state/jurisdiction	Within state/jurisdiction, specific counties impacted by the activities of the project.
Cities		Selection		Major cities within applicable	Within state/jurisdiction, specific cities impacted by the activities of the project.

				state/jurisdiction	
Races					
Was this project designed to impact a specific race?		Selection		Select if yes	Selection is completed only if project activities impacted a specific race. Otherwise, users do not need to take any action.
Race	✔ when the field appears because the previous question was selected. If "Race not listed here" is selected, a description is required.	Selection		American Indian or Alaska Native Asian Black or African American Native Hawaiian or Other Pacific Islander White Race not listed here	Select one or more races if specifically impacted by project activities. All options cannot be selected; if the project had population-wide impact then the previous question should not be selected.
Ethnicity					
Was this project designed to impact a specific ethnicity?		Selection		Select if yes	Selection is completed only if project activities impacted a specific ethnicity. Otherwise, users do not need to take any action.
Ethnicity	✔ if the field appears because	Selection		Hispanic or Latino Not Hispanic or Latino	Select one or more ethnicities if specifically impacted by project activities. All options cannot be selected; if the project had population-wide impact then the previous question should not be selected.

	the previous question was selected..				
Ages					
Was this project designed to impact a specific age group?		Selection		Select if yes	Selection is completed only if project activities impacted a specific age group. Otherwise, users do not need to take any action.
Age Group	✔ if the field appears because the previous question was selected.	Selection		<18 18-24 25-64 65+	Select one or more age groups if specifically impacted by project activities. All options cannot be selected; if the project had population-wide impact then the previous question should not be selected.
Genders					
Was this project designed to impact a specific gender?		Selection		Select if yes	Selection is completed only if project activities impacted a specific gender. Otherwise, users do not need to take any action.
Gender	✔ if the field appears because the previous question	Selection		Men Women Transgender men/transmen/ female-to-male (FTM) Transgender	Select one or more genders if specifically impacted by project activities. All options cannot be selected; if the project had population-wide impact then the previous question should not be selected.

	was selected.. If "Other gender category" is selected, a description is required.			women/ transwomen/ male to female (MTF) Genderqueer/ gender nonconforming/n either exclusively male nor female Other gender category	
Sexual Orientations					
Was this project designed to impact a specific sexual orientation?		Selection		Select if yes	Selection is completed only if project activities impacted a specific sexual orientation. Otherwise, users do not need to take any action.
Sexual Orientation	✔ if the field appears because the previous question was selected.. If "Somethin g else" is selected, a description is required.	Selection		Bisexual Lesbian or gay Queer, pansexual, and/or questioning Straight or homosexual Something else	Select one or more sexual orientations if specifically impacted by project activities. All options cannot be selected; if the project had population-wide impact then the previous question should not be selected.
Substances					

Did the project target a specific substance?		Selection		Select if yes	Selection is completed only if project activities were focused on addressing specific substances. Otherwise, users do not need to take any action.
Substance	✔ if the field appears because the previous question was selected.	Selection		Opioids Stimulants Hallucinogens Depressants Cannabis Polysubstances	Select one or more substance categories if specifically impacted by project activities. All options cannot be selected. All options cannot be selected; if the project addressed all substances rather than one or more specific categories then the previous question should not be selected.
Administration Priorities					
Did the project address a specific priority?		Selection		Select if yes	Selection is completed only if project activities addressed specific administration priorities. Otherwise, users do not need to take any action.
Administration Priority	✔ if the field appears	Selection		See appendix for list of valid values for administration priorities	Select one or more administration priorities if addressed by project activities. All options cannot be selected.
Documents					
Document title	✔	Character	100		Title of the document.
Document description	✔	Character	1,000		One to three sentences of description about the document.
Is this a recurring document?	✔	Selection		Select if yes	Select if a document is completed more than once.
Publish date	✔ if the	Date		MM/DD/YYYY	Date of a one-time document

	field appears				
Frequency	✔ if the field appears	Selection		Weekly Every Other Week Monthly Quarterly	Field will only show if "recurring document" is selected. Frequency of a recurring document.
Start date	✔ if the field appears	Date		MM/DD/YYYY	Field will only show if "recurring document" is selected. Date first document was disseminated.
End date		Date		MM/DD/YYYY	Field will only show if "recurring document" is selected. Date final document was disseminated.
Audience	✔ if "other" is selected, a description is required.	Selection		Checkbox, see appendix for list of valid values	The intended recipients of the document. At least one option must be selected.
Participating ORS Staff/Partners		Selection		Collaborators and key contacts selected on project	Collaborators and key contacts listed on the project will be populated here. Select one or more individuals that worked on the document.
Presentations					
Presentation title	✔	Character	100		Title of the presentation.
Presentation description	✔	Character	1,000		1-3 sentence description of the topic of the presentation.
Presentation date	✔	Date		MM/DD/YYYY	Date of the presentation.

Audience	✔ if "other" is selected, a description is required.	Selection		Checkbox, see appendix for list of valid values	The primary audience members intended to receive the information from the presentation.
Participating ORS Staff/Partners		Selection		Collaborators and key contacts selected on project	Collaborators and key contacts listed on the project will be populated here. Select one or more individuals that worked on the presentation.
Activities Completed					
Activities With Targets	✔	Character	1,000		Description of activities that had targets set from previous quarters. Only displays for projects with in progress status that were continued from a previous quarter.
Activities Without Targets		Character	1,000		Activities that took place and were not anticipated/planned from previous quarters. Separate activities can be listed using the "add an activity" button. If there are no additional activities to be listed, users click "Review complete" without any data entry.
Targets for Next Quarter					
Target	✔ if the project status is "In Progress", otherwise N	Character	1,000		Goals for progress on project activities in the next quarter, in SMART (Specific, Measurable, Achievable, Relevant, and Time-Bound) format if possible. Separate targets can be listed using the "add a target" button. If there are no targets to be listed, users click "Review complete" without any data entry.

Success Stories					
Title	✔	Character	100		A short title (10 words or less) that summarizes the success story.
Challenge	✔	Character	1,000		Description of the problem/challenges addressed in the success story.
Approach/ Activities	✔	Character	1,000		Description of the activities implemented and parties involved.
Results/ Outcomes	✔	Character	1,000		Description of how the activity addressed the problem.
ORS Staff Involved		Selection		Collaborators selected on project	Collaborators listed on the project will be populated here. Select one or more individuals that were involved in the success story.
Attachment (Type of attachment, Other attachment type, Attachment)		Type of attachment: selection Other attachment type: character, Attachment: file upload	Up to 5GB	Videos and files of any type	Attachments can be used to share visuals/documents associated with the success story, including a direct quote or testimonial from a partner or participant, pictures, promotional materials, press release, an example of the work products (e.g., reports/bulletins), etc. Only non-sensitive attachments should be uploaded.

National Admin Only

Field Name	Required	Data Type	Character Limit	Format/Values	Description
Staff Directory - Add/Edit Staff Member					
First Name	✔	Character	25		
Last Name	✔	Character	25		
Phone (mobile)	✔	Number	20	+1XXXXXXXXXX	Must be able to accept text messages for two-factor authentication.
Phone (office)		Number	20	XXX XXX XXXX with optional extension xXXX	Optional field
Email	✔	Character	50	yourname@example.com	This is the email that the system invitation will be sent to.
Is this staff member active?	✔	Selection			This field only appears when editing an existing staff member. It controls whether the user has access to the ORSTRS system.
State or National Role	✔	Selection		State National	
National - Role	Either a selection must be made for this field or National Admin must be checked	Selection		National Read-Only National Reviewer	Options only display if "National" is selected for State or National Role.

National Admin	Either a selection must be made for role or National Admin must be checked	Selection			Box indicates that individual has a role as an administrator of the system.
State - Role	✔	Selection		DIO PHA	Options display if "State" is selected for State or National Role.
National Reviewer	✔	Selection		List includes all staff assigned national reviewer roles	Options display if "State" is selected for State or National Role. Select the national reviewer responsible for reviewing project updates by the primary reporter.
HIDTA	✔	Selection		List of all HIDTA programs	Options display if "State" is selected for State or National Role. Select the HIDTA the staff member covers.
State/Jurisdiction	✔	Selection		List of all states and territories in ORS program	Options display if "State" is selected for State or National Role. Select the state/jurisdiction the staff member covers.
Review Process					
Add a comment /edit a comment /submit /request changes /approve modal	✔ for add a comment, edit a comment, and request changes, otherwise not required	Character	1,000		Comment can address questions or other information for primary data reporter, collaborator, or reviewer.
Notify primary		Selection			This field only appears when the action is "Request

data reporter of requested changes by email					changes"
Success Stories					
Final Version		Character	1,000		Only editable by national admin or national reviewer. Final description of the success story when the project is complete.
Featured Products (Product type, Other product description, Month, Year)		Product type: selection Other product description: character Month: selection Year: selection			Only editable by national admin or national reviewer. List of product(s) in which this success story is featured.

Appendix A. Valid Values

Field: ORS Goals and Strategies

GOAL 1: Share data systems to inform rapid and effective community overdose prevention efforts.

1.1 Formalizing/arranging data sharing partnerships

1.2 Data transfer between organizations or agencies

1.3 Opioid-related database management and maintenance

1.4 Drug-related data collection, analysis, or dissemination (e.g., presentations, reports, publications)

1.5 ODMAP usage for strategic planning at the local level

1.6 Overdose Fatality Reviews (OFRs)

1.7 Public Health and Public Safety Teams (PHAST)

1.8 Environmental scans or assessment

1.9 Other

GOAL 2: Support immediate, evidence-based response efforts that can directly reduce overdose deaths.

2.1 Targeted naloxone distribution

2.2 Increased access to medication-assisted treatment (MAT)

2.3 911 Good Samaritan Law

2.4 Naloxone distribution in treatment centers and the criminal justice system

2.5 MAT in the criminal justice system and upon release

2.6 Initiation of buprenorphine-based MAT in Emergency Departments

2.7 Syringe services programs

2.8 Other

GOAL 3: Design and use promising strategies at the intersection of public health and public safety.

3.1 Pre-arrest diversion programs

3.2 Safe station programs

3.3 Drug courts

3.4 Post-overdose outreach programs

3.5 Stigma reduction and/or compassion fatigue programs for first responders

3.6 Rapid response strategies (e.g., response protocols for OD cluster or pain clinic closure)

3.7 Other

GOAL 4: Disseminate information to support the implementation of evidence-informed prevention strategies that can reduce substance use and overdose.

4.1 Support the development and dissemination of overdose prevention communications campaigns

4.2 Host or contribute to community events that support overdose prevention awareness

4.3 Develop and disseminate overdose prevention informational materials

4.4 Build capacity among partners to identify, select, and/or implement appropriate evidence-informed prevention strategies

Fields: Partner Categories, Audience

Community Based Organization
- ☐ Advocacy Organization/Coalition
- ☐ Faith-based organization
- ☐ Harm Reduction Organization
- ☐ People in Recovery/People with Lived Experience
- ☐ Drug Free Community
- ☐ Other

Criminal/Juvenile Justice
- ☐ Courts
- ☐ Defense Attorney/Public Defender
- ☐ Jail
- ☐ Law Enforcement
- ☐ Parole
- ☐ Prison
- ☐ Probation
- ☐ Prosecutors/DA
- ☐ School Resource Officers
- ☐ Other

Healthcare/Medical
- ☐ EMS/Fire Department
- ☐ ER/Hospital
- ☐ Local/State Health Department
- ☐ Medical Examiner/Coroner
- ☐ Pharmacies
- ☐ Other

Social and Supportive Services
- ☐ Child and Family Services
- ☐ Foster Care
- ☐ Housing/Homeless Services
- ☐ Other

Other
- ☐ Business Community
- ☐ Higher Education
- ☐ Media
- ☐ Research Firm/Evaluator
- ☐ Schools
- ☐ Transportation Services
- ☐ Veteran-serving Organization
- ☐ Other

Field: Administration Priorities

1. Expanding access to evidence-based treatment
2. Advancing racial equity issues in our approach to drug policy
3. Enhancing evidence-based harm reduction efforts
4. Supporting evidence-based prevention efforts to reduce youth substance use
5. Reducing the supply of illicit substances
6. Advancing recovery-ready workplaces and expanding the addiction workforce
7. Expanding access to recovery support services

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