Technical Assistance and Performance Management User Guide

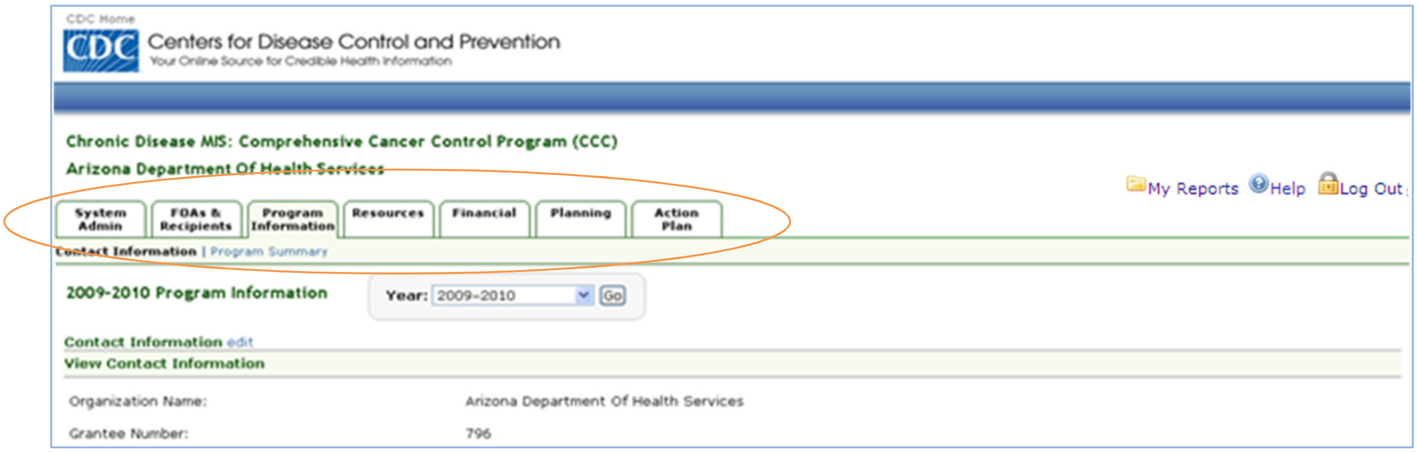
Contents

NCCDPHP Chronic MIS Navigation and Page Layout

This section provides information about navigating within the NCCDPHP Chronic MIS sections and describes the format and uses of the various page types within the system.

NCCDPHP MIS Navigation

The system has tabs at the top of each page that are used to navigate the various sections of the MIS. Each tab covers a different topic and contains one or more sections that are used to view, enter or update information.



Page Types

There are six types of pages used in NCCDPHP MIS.

1. Summary page: Lists one or more similar items, such as staff member names. Summary pages are used to access all information for each section.
2. Add page: Allows input of new information.
3. Edit page: Allows modification of existing information.
4. View page: Displays existing information. Information cannot be updated on view pages.
5. Delete page: Allows for confirmation of a delete.
6. Attachments page: Allows the uploading of file attachments.

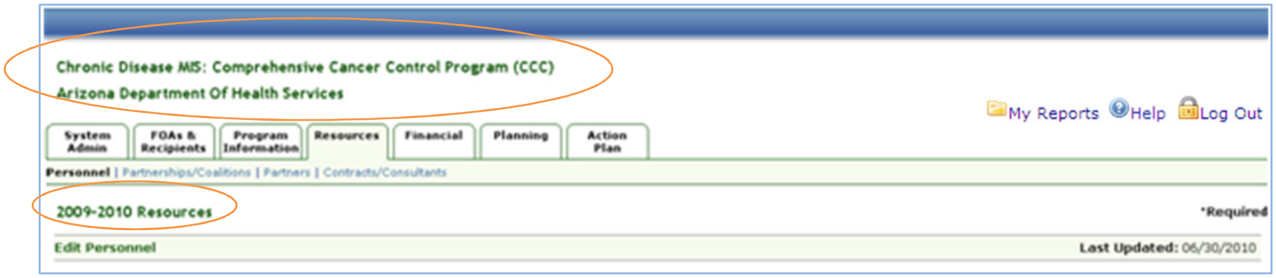
Note

- Only Users with Full Access will be able to access all types of screens. Users with 'Read Only' access will only be able to access the Summary and View screens.
- The tabs and sections visible to each user is based their access level. Most users will only have access to the tabs listed on the right of the FOA & Recipients tab (Program Information, Resources, Financial, Planning, Action Plan, etc.)

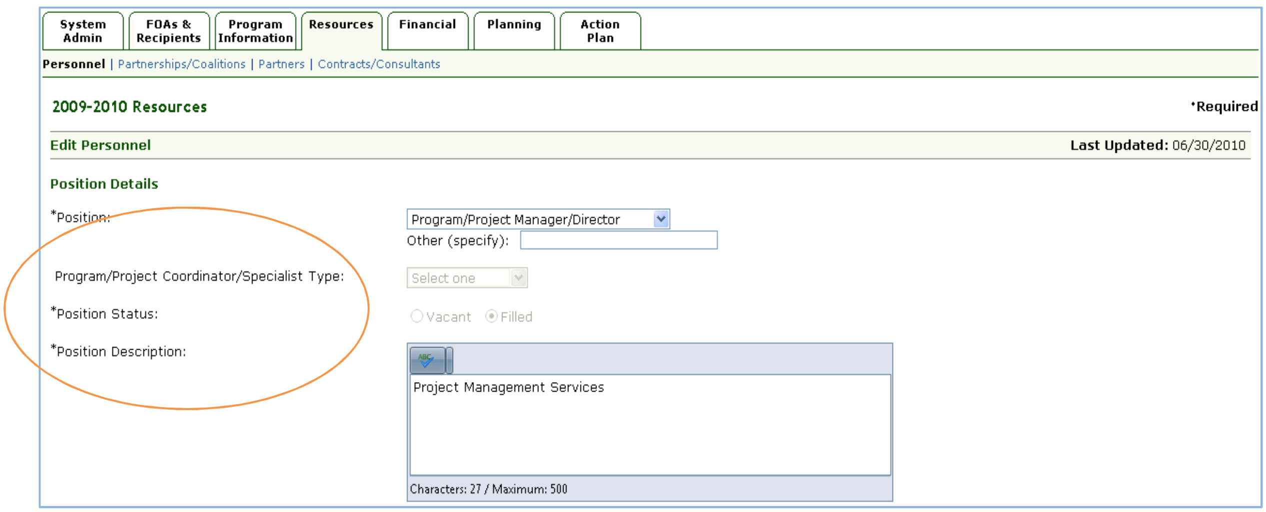
Page Layout

The pages have several features in common:

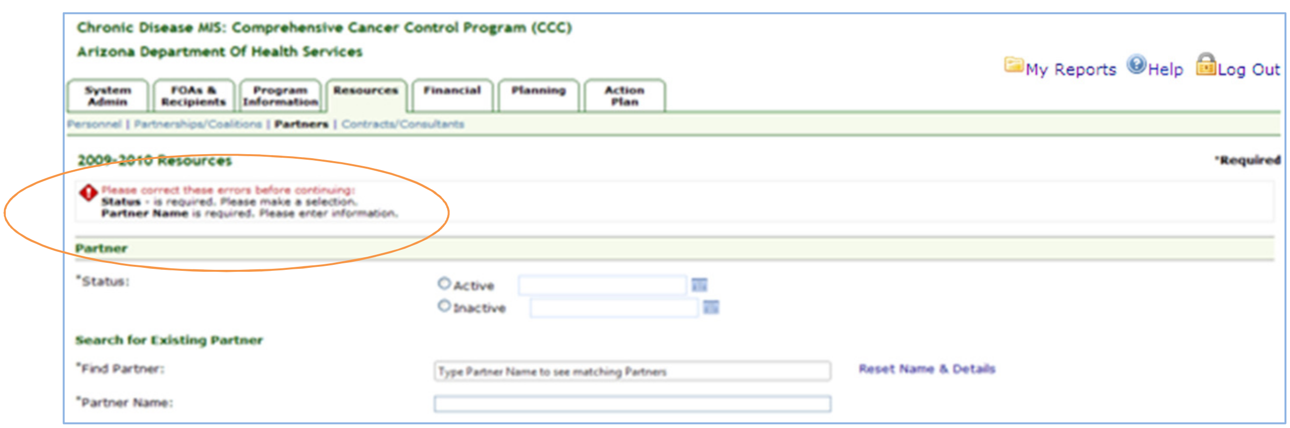
- The **Program and Grantee Names** are displayed at the top left side of each page.
- The **Budget Period** is displayed at the top right of all summary pages. The budget year always defaults to the current year.



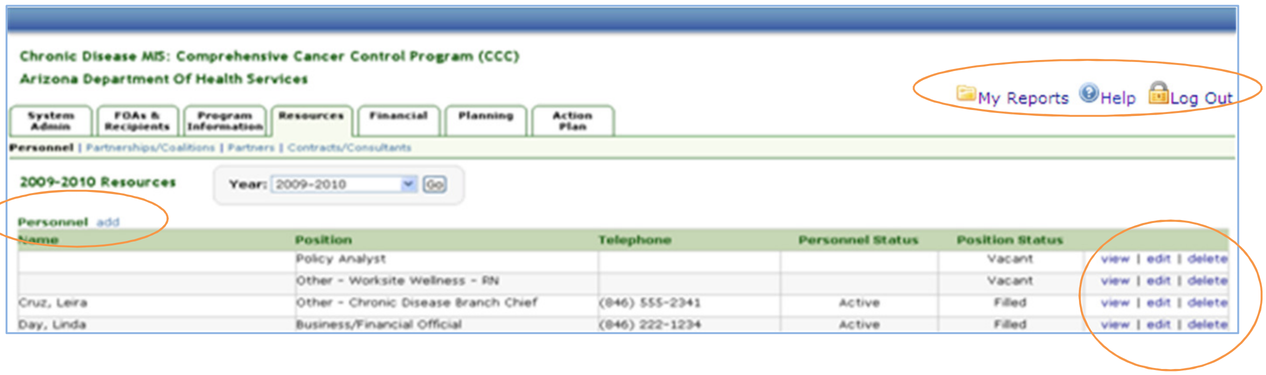
- **Required information** is displayed with an asterisk (*) to the left of the field name.



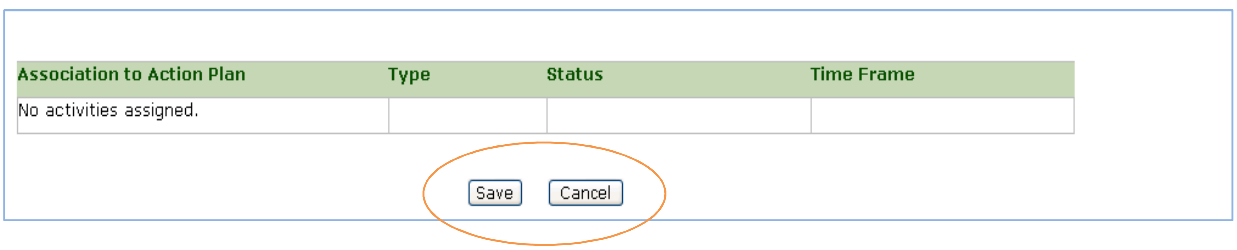
- **Error messages** are displayed at the top of the page. All errors must be corrected before the information can be saved.



- Links to add, edit, view or delete information, upload attachments, or return to a previous page are displayed in blue and underlined (similar to any type of Internet hyperlink). The edit, view, and delete links are usually displayed to the right of the entry.
- Links to add information are usually located at the top left, next to the section name in the header bar
- Every page has a link to the online Help and to the My Reports option (see [ ] for more information on My Reports).
- Every page is printable.



- ***Save*** and ***Cancel*** buttons are usually located at the bottom of each enter and edit page. Click on 'Cancel' to discard any changes. Click on 'Save' to save information.



Note

- If any fields on the page are incomplete or invalid when the 'Save' button is clicked, the system will display an error message. The invalid fields must be corrected before the information can be saved.

Important

- If you navigate away from a page without clicking the 'Save' button, all changes will be lost.

Entering Information

The Chronic MIS uses five methods for entering information:

- Check boxes
- Text boxes
- Radio buttons
- Drop down lists
- File uploads

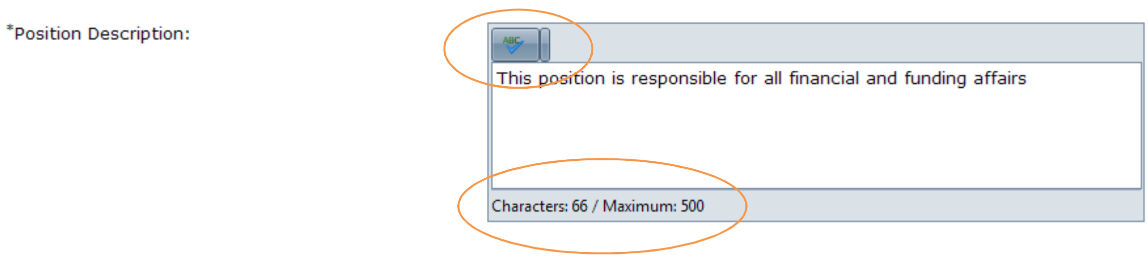
Text Boxes

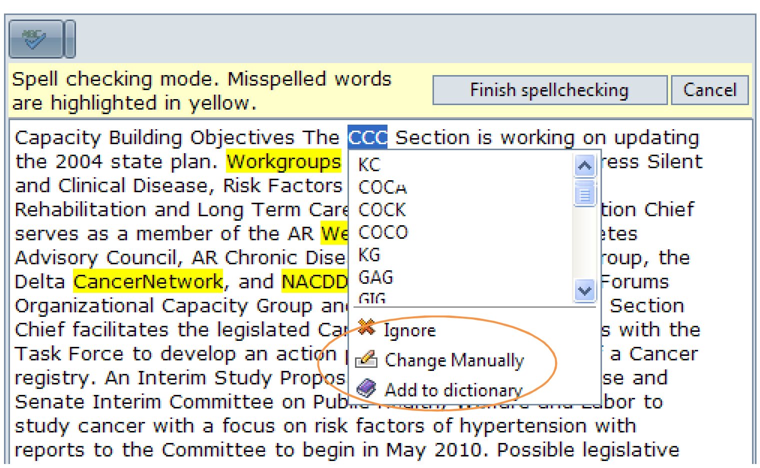
Text boxes are used for questions that are open ended. Text boxes allow you to enter free form text. You can use the keyboard to enter information or copy and paste information from another document into text boxes.

Each text box accommodates a limited number of characters/words which varies depending on the amount of information requested. The maximum number of characters is displayed at the bottom of each text box. A count of the characters used is also displayed and incremented as text is entered.

Spell-check feature is included in each text box. Click on the spell check icon  in the upper left corner of the text box to start the spell-checker. This functions much like the spell checker in Word. Misspelled words are highlighted in yellow and a list of replacement words is displayed with the option to change or ignore the misspelled word.

Text Box Examples:





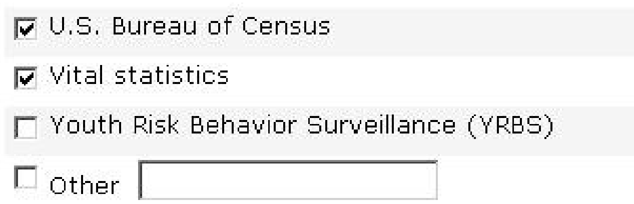
Check Boxes

Check boxes are used for questions that allow more than one response option. Check boxes allow you to select multiple responses from a list of several response options. Whenever check box options are displayed, you may select all the options that apply. In cases where you can check only a certain number of boxes, additional instructions will be included below the field name.

To check an option, click inside the check box and a check mark will appear in the box. To uncheck a selected option, click inside the check box again and the check mark will be removed.

For most check box lists, the last option is an ‘Other’ check box that allows you to add one or more items that are not in the check box list. When you select an ‘Other’ check box, you must specify the other items in the text box provided.

Check Box Example:



Radio Buttons

Radio buttons are used for questions that require only one response option to be selected. Radio buttons allow you to select one response option from a list of two or more response options. A common example is when there is a question requiring a Yes or No answer.

To select a radio button, click inside the circle. A dot will appear in the circle. To change the selection, click inside the other circle. The dot will be removed from the one circle and appear in the other.

Radio Button Example:

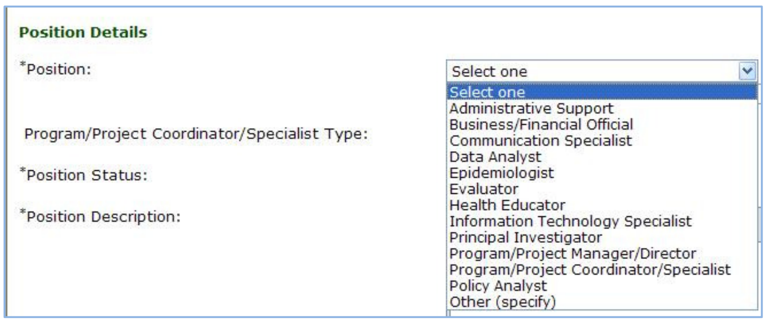
Drop-down Lists

Drop down lists are used for questions that require only one response option to be selected. Drop-down lists display several items from which you can select only one item.

To select an item from a drop-down list, you simply click the down arrow in the box and select the desired item from the displayed list. You can scroll up or down a displayed list to view all the items displayed on a list before selecting one.

Most drop-down lists in the Chronic MIS are static lists. That is, they are pre-populated with information and you cannot change the lists. However, some of the drop-down lists are dynamic lists. These are the drop-down lists that contain information like personnel members or partners. They are referred to as dynamic because they are created solely from the names you enter into the Chronic MIS and are updated every time you add a new name.

Drop-down Example:



Attachments

You can attach files into some sections of the Chronic MIS. Attaching a file is simply saving a copy of a document into the system. The maximum file size that can be uploaded is 10MB.

The procedure for uploading files is the same throughout the system. All the steps for uploading files are explained here as well as in the online Help.

The Chronic MIS can accommodate the following types of attachments:

- Microsoft Word (.doc)
- WordPerfect (.wpd)
- PowerPoint (.ppt)
- Excel (.xls)
- Adobe (.pdf)
- HTML (.htm or .html)
- rich text (.rtf)
- text (.txt)
- zipped (.zip).

Use of trade names is for identification only and does not imply endorsement by the U.S. Department of Health and Human Services.

Before uploading a document, it is recommended that you protect the document by making it a “read-only” file. This will prevent other users from unintentionally changing the document. (For further instructions on protecting files, consult your network support team or your word processing guide.)

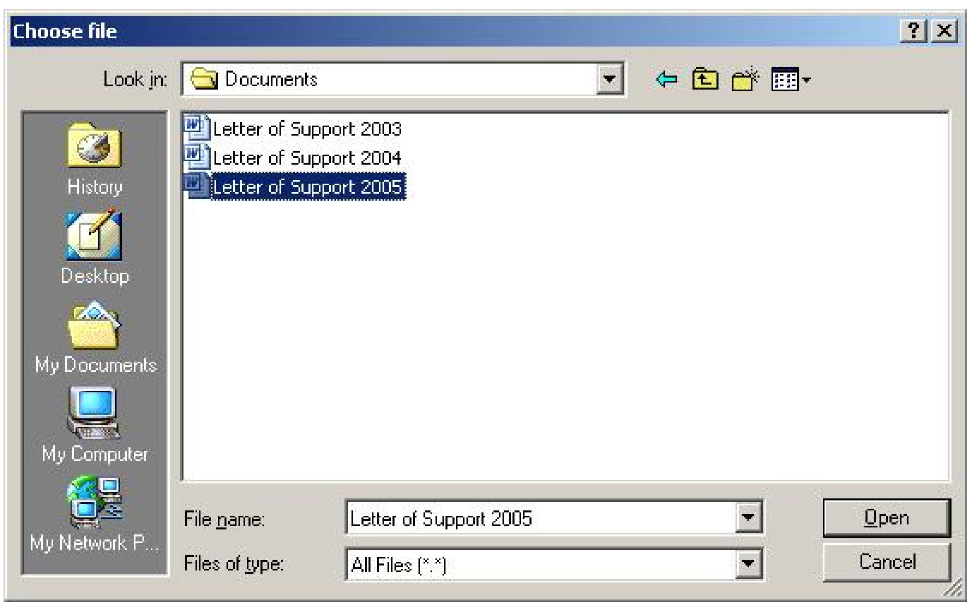
Any number of versions of a document can be uploaded. That is, when you update a document, such as a state plan, you can upload each version as it gets updated.

Attaching Documents:

Use the ‘Browse’ button to search your local or network drives for the file to be attached. Use the following steps:

1. Click Browse.
2. Scroll through the list of folders that are displayed.
3. Double-click on the appropriate folder.
4. Click again on the file name of the document you want to upload.
5. Click the ‘Open’ button (or double click on the file name).

This process is similar to the same process for attaching a file to an E-mail. An example of a dialog box for selecting a folder is displayed below.

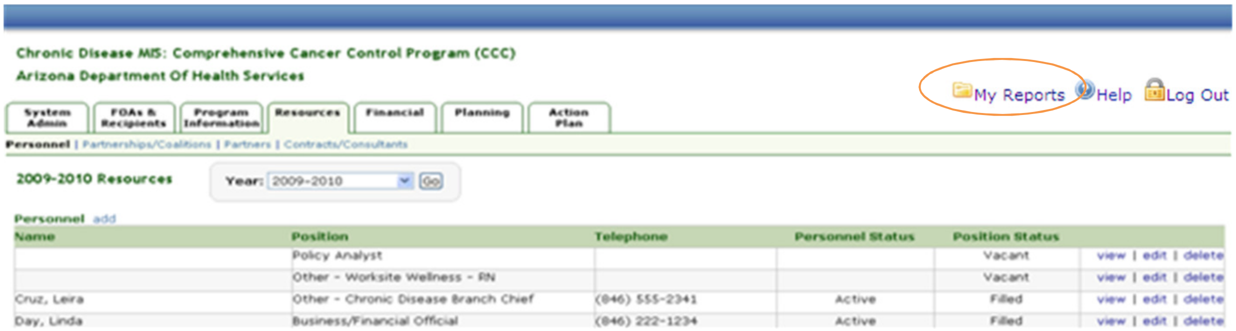


After clicking the ‘Open’ button, the document’s entire path and file name is displayed in the ‘File’ text box within the Chronic MIS.

Using the My Reports Option

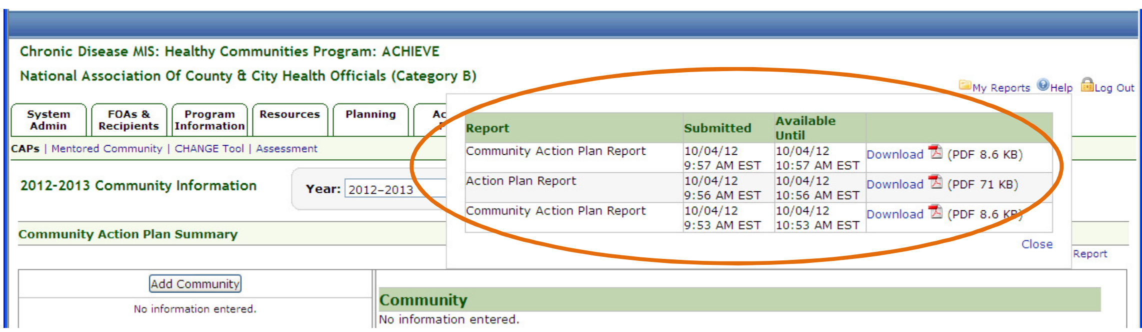
Generating Reports

When you “print” a report (e.g., action plan summary report, interim progress report), the report is sent to a processing queue. As the report is processing, you can continue with your work in the MIS. To check the status of a printed report and download it, click the My Reports option.



The My Reports Pop-up List

Clicking My Reports displays the My Reports pop-up list, which shows all generated reports that are processing or have completed processing and are available for download. Click the Download link to open a report file or save it locally.



Note the following:

- The My Reports option is available for all reporting years.
- Generated reports in the My Reports list are available until the “Available Until” time, which is 18 hours from the “Submitted” time (Eastern Standard Time), or until you click the “Download” link.
- If you generate the same report multiple times, the most recently generated document appears highest in the list.
- Final progress reports are still available under the Reports tab, but you can check the processing status in the My Reports list.

Online Help

When you click on the online Help link, the Help for the current section will be displayed. Each Help screen provides you with a description of the section, general explanation of the screen, specific instructions for adding or editing information within the section, some examples for responses as appropriate, and definitions of terms and fields used in the section, as needed.

Navigation

Once you are in the online Help, you can use the Hide Navigation Pane/Show Navigation links at the top right of each Help screen to toggle between displaying the navigation pane and hiding the navigation pane. The navigation pane provides an outline of the Help sections.

To show the navigation pane, click the *Show Navigation Pane* link. Click on any Help screen to access it.

Quick Tip: You can print any online Help screen by using the print function on your Web browser.

Technical Assistance

Use the Technical Assistance tab to enter and maintain Technical Assistance and Performance Monitoring information.

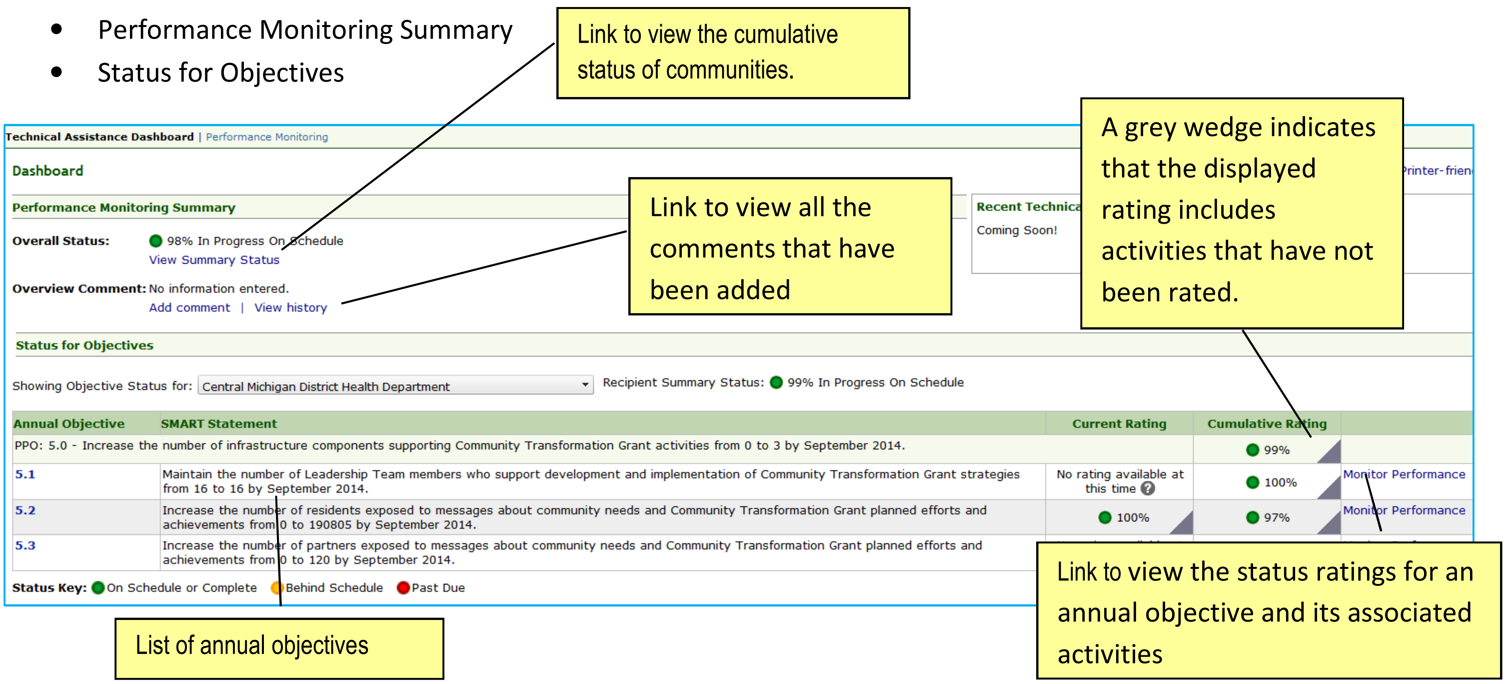
This tab is available only to CDC Project Officers, Program staff, CTG National, and REACH FOAs.

Technical Assistance Dashboard

The Technical Assistance Dashboard lets you view at a glance, the status of the Project Period Objectives, Annual Objectives, and Activities in an Action Plan.

The Technical Assistance Dashboard consists of the following sections:

- Performance Monitoring Summary
- Status for Objectives



Performance Monitoring Summary

The Performance Monitoring section displays the cumulative rating of all your annual objectives and the associated communities.

The following actions can be performed in the Performance Monitoring section:

- *View Summary Status:* Click this link to view the cumulative status for the recipients and the associated communities in a pop-up window. After viewing the status information, click *Close* to close the pop-up window and return to the Technical Assistance Dashboard.
- *View History:* Click this link to view all the overview comments that have been added. When viewing the overview comment history, you can also add, edit, or delete comments.

Field/Section/Button	Instructions
Overall Status	The overall status of all the objectives associated with the recipients and communities.
Overview Comment	Displays the most recent overview comment that has been added to the Performance Monitoring Summary section.

Status for Objectives

This Status for Objectives section lists the Annual Objectives associated with each selected recipient. The section also displays the PPO associated with each Annual Objective, the cumulative rating for the PPO, and the current and cumulative rating for each annual objective.

The following actions can be performed in the Status for Objectives section:

- *Monitor Performance:* Click this link to go to the Performance Monitoring page and view the status ratings for an annual objective and its associated activities.

The system displays a circle next to each rating. A green circle ( ) indicates that the annual objective is On Schedule or Complete, a yellow circle ( ) indicates that the annual objective is Behind Schedule, and a red circle ( ) indicates that the annual objective is Past Due. The Status Key is also shown at the bottom of the page.

Field/Section/Button	Instructions
Showing Objective Status for	Displays the recipient or community for which objective status is being displayed. To view objective status information for another recipient, click the arrow and select another recipient from the drop down list.
Recipient Summary Status	Summarizes the status of the selected recipient whose information is being viewed.
Annual Objective SMART Statement	This column displays the PPO, the objective ID for each annual objective, and the SMART Statement for each PPO and its associated annual objectives.
Current Rating	This column displays the current rating associated with each annual objective. The current rating is based on the statuses of the AO's associated activities. The AO Ratings are displayed only after the AO's activity statuses have been entered in Performance Monitoring. *Note:* A grey wedge ( ) next to a rating indicates that the displayed rating includes activities that have not been rated, e.g. a Projected activity.
Cumulative Rating	This column displays the cumulative rating associated with each PPO and annual

objective. The cumulative rating for the PPO is based on the cumulative rating of all its associated annual objectives. PPO Ratings are displayed only after the Action Plan is completed and status has been entered for all the activities in the current quarter. The cumulative rating is calculated as follows:

> **Sum of the Cumulative Rating for all associated Annual Objectives/number of objectives rated**

For example,

A PPO has 5 annual objectives with the following ratings:

82, 75, 58, 94, 66

The total of the numbers = **375**

375 divided by 5 = **75**

The cumulative rating is 75% and the status is green, In Progress On Schedule

The cumulative rating for each annual objective is calculated as follows:

> 70 or greater = In Progress On Schedule (Green)
> 50-69 = In Progress Behind Schedule (Yellow)
> Less than 50 = Past Due (Red)

The system displays a circle next to each rating. A green circle indicates that the annual objective is On Schedule or Complete, a yellow circle indicates that the annual objective is Behind Schedule, and a red circle indicates that the annual objective is Past Due. The Status Key is also shown at the bottom of the page.

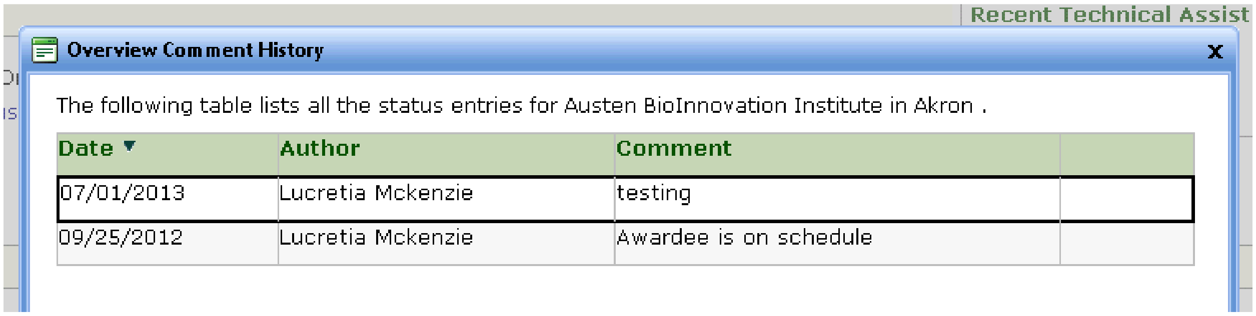
Note: A grey wedge ( ) next to a rating indicates that the displayed cumulative rating for the PPO and AO includes activities that have not been rated during the current or previous quarters, e.g. a Projected activity.

Status Key

A green circle ( ) indicates that the annual objective is On Schedule or Complete, a yellow circle ( ) indicates that the annual objective is Behind Schedule, and a red circle ( ) indicates that the annual objective is Past Due.

View History

When you click the “View History” link under the Overview Comment field, the system displays the Overview Comment History pop-up window, which lists all the existing comments in a table. The table displays the date the comment was entered, the author of the comment, and the author's comments. You can click the Date column heading to sort the list by date.



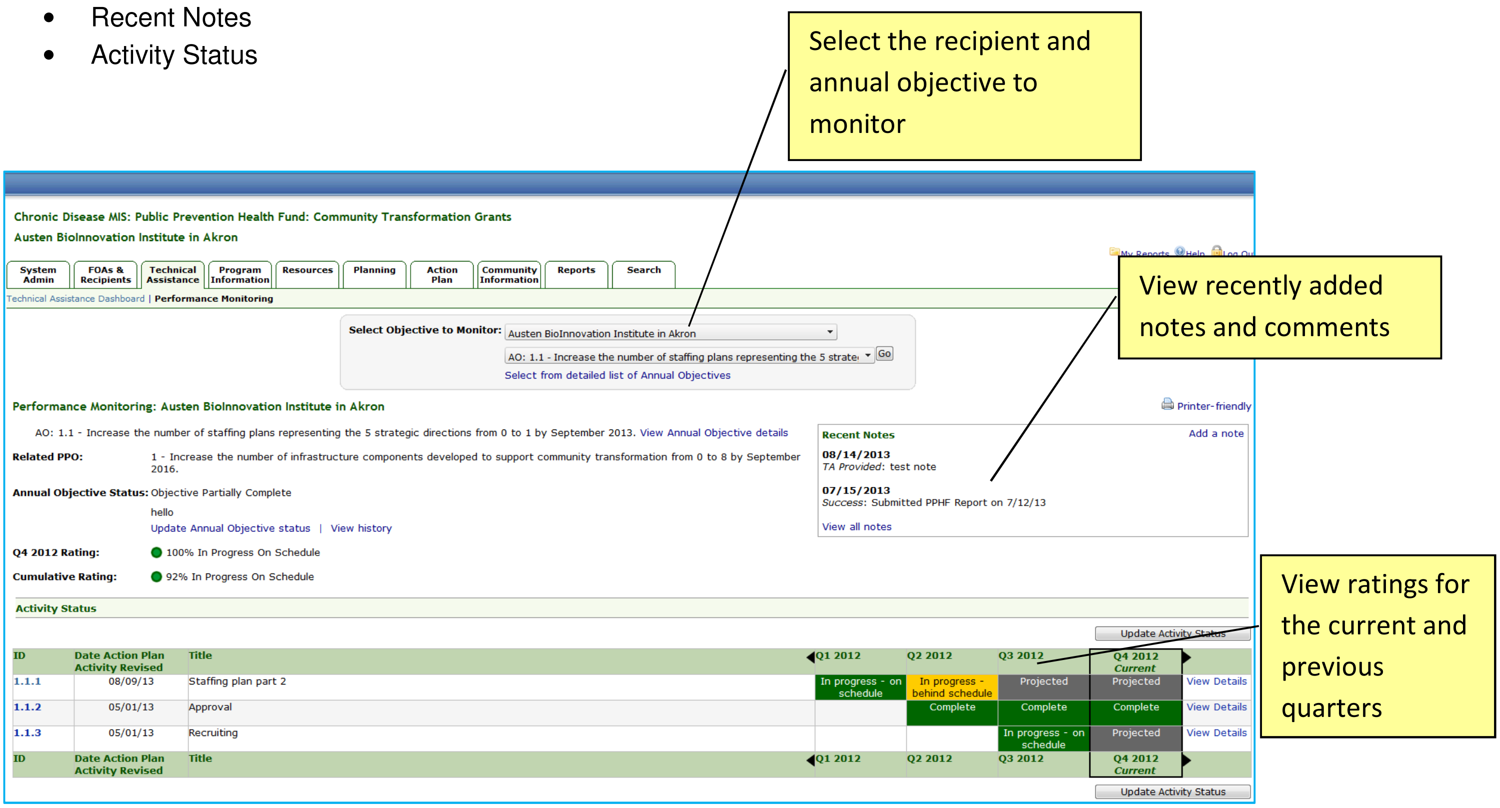
After viewing the history, you can click the “Close” button at the bottom of the pop-up window to close it and return to the Technical Assistance Dashboard.

Performance Monitoring

Use the Performance Monitoring section to view the status rating for each activity associated with an annual objective, view previous ratings, and view ratings for the current and previous quarters.

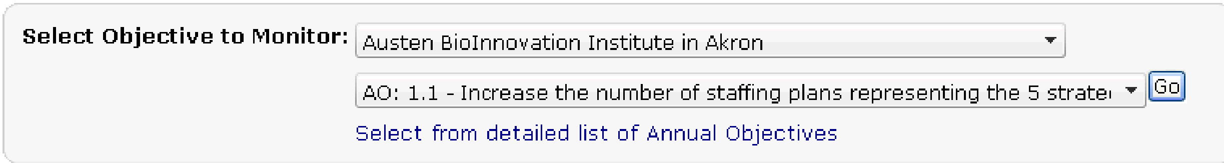
The Performance Monitoring section consists of the following subsections:

- Select Objective to Monitor
- Recent Notes
- Activity Status



Select Objective to Monitor -

Use the Select Objective subsection to select the recipient and annual objective to monitor.



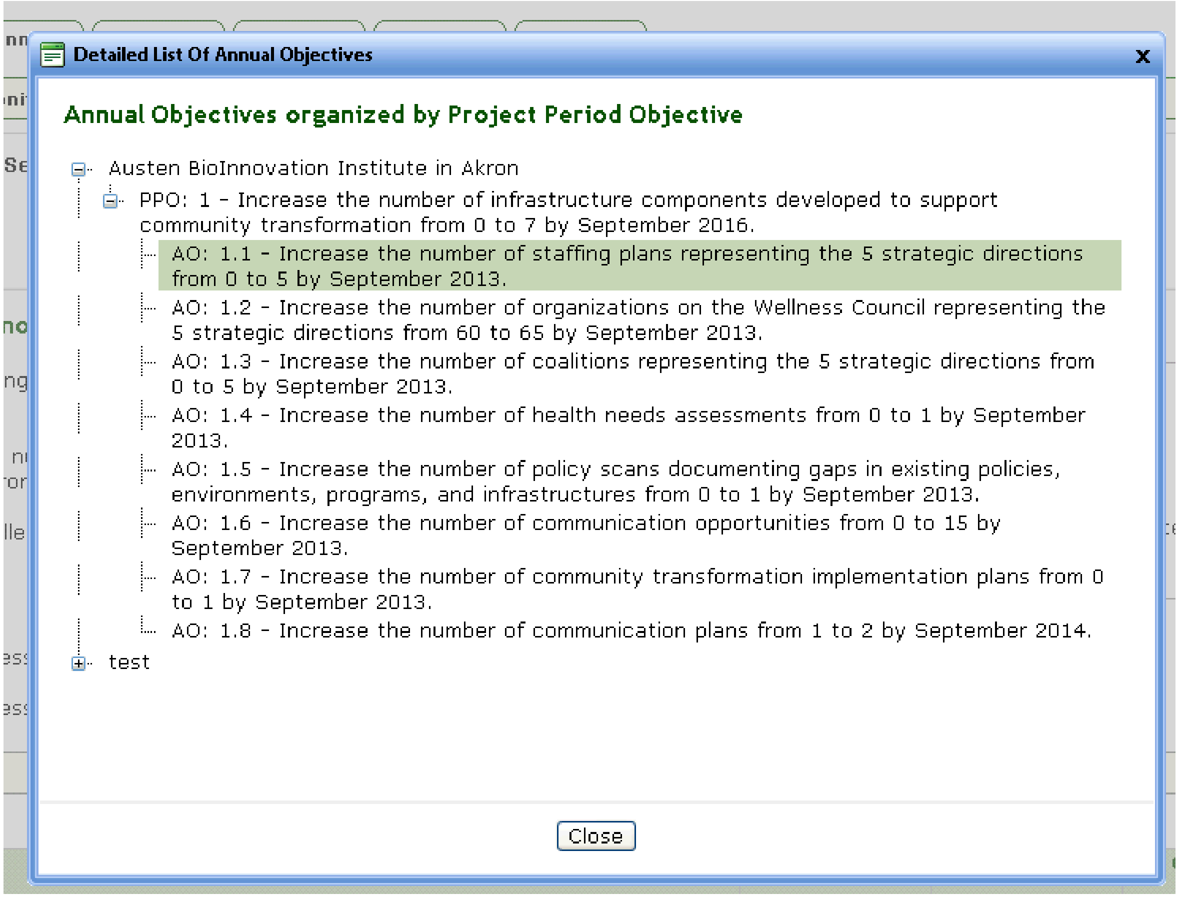
To select an annual objective to monitor:

1. Select a recipient from the first drop down list. Once the recipient is selected, the system populates the annual objectives drop down list with the objectives associated with the selected recipient.
2. Select the desired annual objective from the second drop down list.
3. Click “Go”. The system populates the page with the information associated with the selected recipient and annual objective.

Note: You can also click the *Select from detailed list of Annual Objectives* link to select an annual objective from a comprehensive list of annual objectives for the recipient and all associated communities, if applicable (see instructions below).

The following action can be performed in the Select Objective to Monitor section:

- *Select from detailed list of Annual Objectives:* Click this link to view a comprehensive list of all the Project Period Objectives (PPOs) and annual objectives (AOs) associated with recipients. The system displays the annual objectives in a pop-up window. You can use the plus (+) and minus (-) next to each recipient name and PPO to expand or collapse the list. When you select an annual objective from the list, the system closes the pop-up window and displays performance monitoring information for the selected annual objective. If you choose not to select an annual objective from the pop-up window, click *Close* to close the pop-up window and return to the Performance Monitoring subsection. After viewing the annual objectives, click the “Close” button at the bottom of the page to close the pop-up window and return to the Performance Monitoring page.

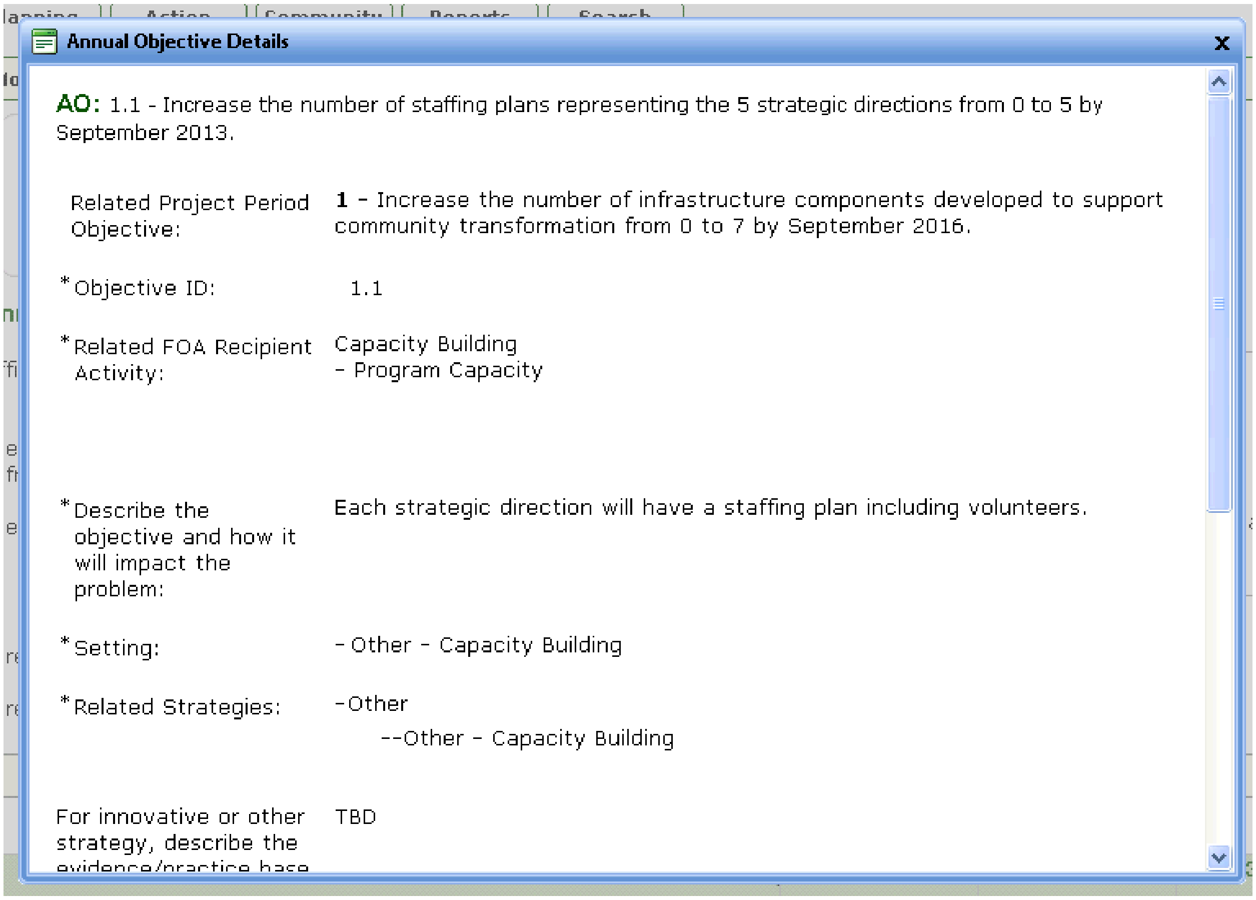


The Performance Monitoring Subsection

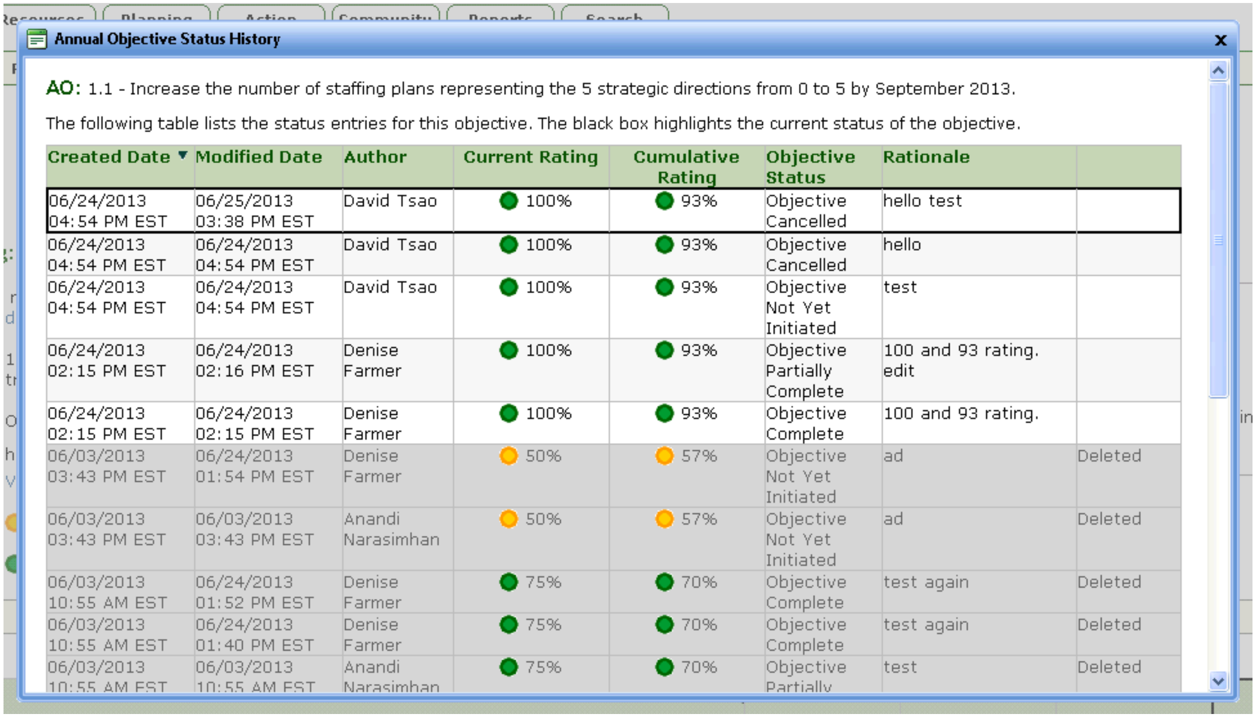
The Performance Monitoring subsection displays the selected annual objective, related PPO, annual objective status, and the quarter and cumulative ratings for the annual objective.

The following actions can be performed in the Performance Monitoring subsection:

- *View Annual Objective details:* Click this link to view the annual objective details in a pop-up window. Details displayed in the pop-up window include all the information that was entered by the recipient in the Action Plan, i.e., related PPO, objective ID, setting, measurement, time frame, etc. After viewing the information in the pop-up window, click the *Close* button to close the window and return to the Performance Monitoring section.



- *View history*: Click this link to display a pop-up window containing all the status update information. After viewing the information in the pop-up window, click the *Close* button to close the window and return to the Performance Monitoring section.


Annual Objective Status History

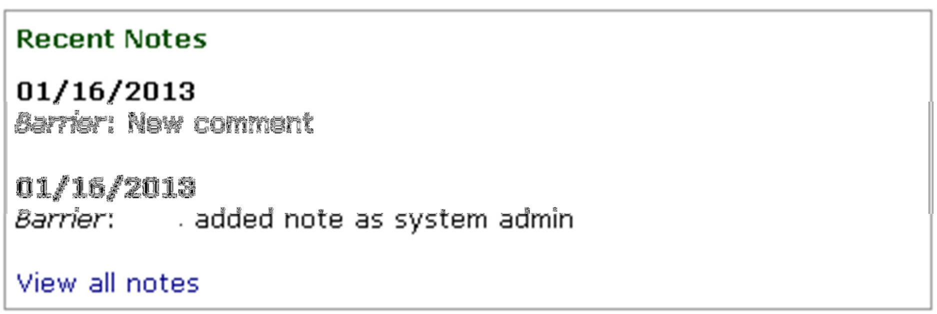
AO: 1.1 - Increase the number of staffing plans representing the 5 strategic directions from 0 to 5 by September 2013.

The following table lists the status entries for this objective. The black box highlights the current status of the objective.

Created Date	Modified Date	Author	Current Rating	Cumulative Rating	Objective Status	Rationale	
06/24/2013 04:54 PM EST	06/25/2013 03:38 PM EST	David Tsao	100%	93%	Objective Cancelled	hello test	
06/24/2013 04:54 PM EST	06/24/2013 04:54 PM EST	David Tsao	100%	93%	Objective Cancelled	hello	
06/24/2013 04:54 PM EST	06/24/2013 04:54 PM EST	David Tsao	100%	93%	Objective Not Yet Initiated	test	
06/24/2013 02:15 PM EST	06/24/2013 02:16 PM EST	Denise Farmer	100%	93%	Objective Partially Complete	100 and 93 rating. edit	
06/24/2013 02:15 PM EST	06/24/2013 02:15 PM EST	Denise Farmer	100%	93%	Objective Complete	100 and 93 rating.	
06/03/2013 03:43 PM EST	06/24/2013 01:54 PM EST	Denise Farmer	50%	57%	Objective Not Yet Initiated	ad	Deleted
06/03/2013 03:43 PM EST	06/03/2013 03:43 PM EST	Anandi Narasimhan	50%	57%	Objective Not Yet Initiated	ad	Deleted
06/03/2013 10:55 AM EST	06/24/2013 01:52 PM EST	Denise Farmer	75%	70%	Objective Complete	test again	Deleted
06/03/2013 10:55 AM EST	06/24/2013 01:40 PM EST	Denise Farmer	75%	70%	Objective Complete	test again	Deleted
06/03/2013 10:55 AM EST	06/03/2013 10:55 AM EST	Anandi Narasimhan	75%	70%	Objective Partially	test	Deleted

Recent Notes

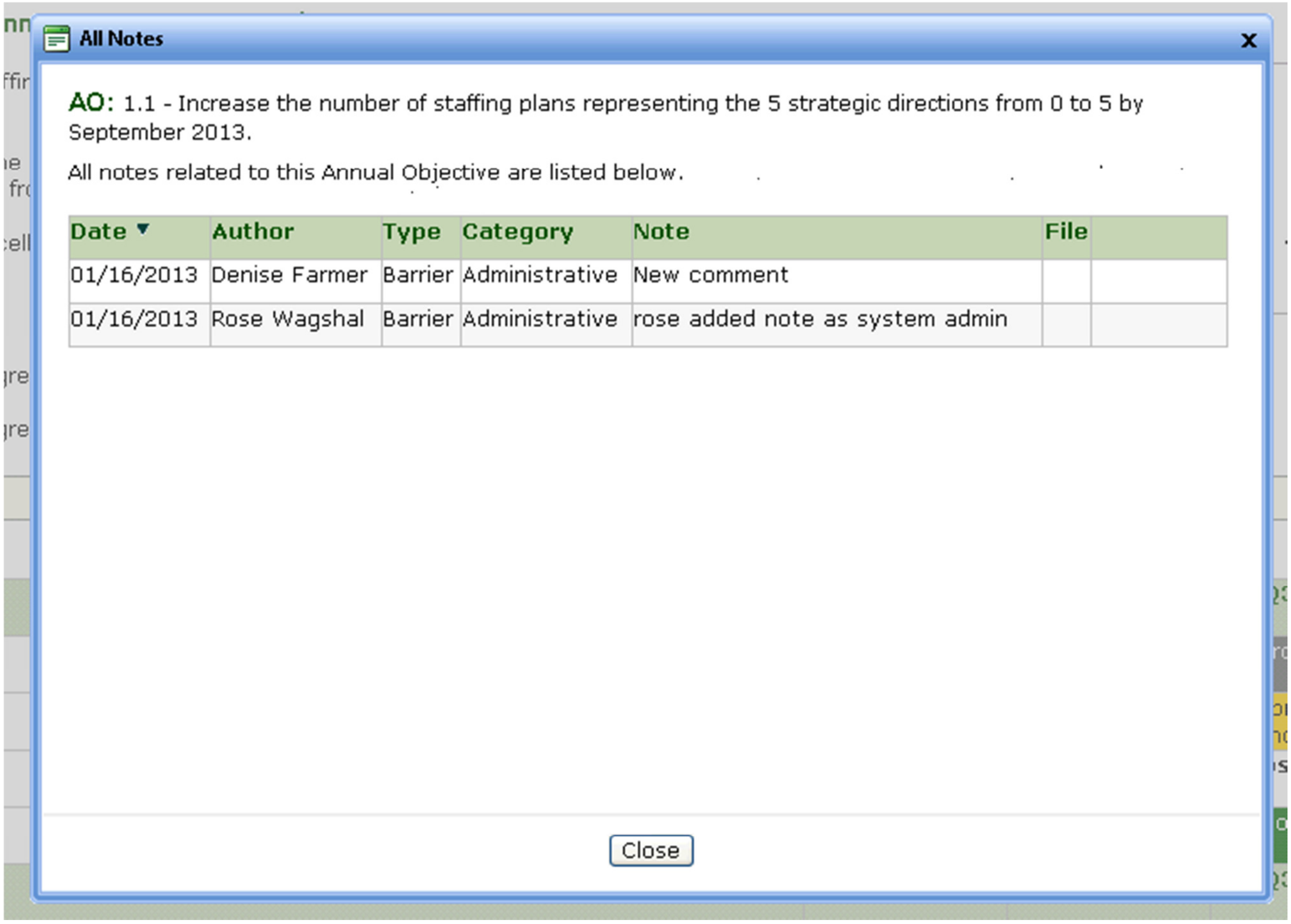
The Recent Notes subsection displays the notes and comments that were recently added to the section. For each note, the system displays the date that the note was added.



To view all the notes that have been entered, click the "View all notes" link. All the notes associated with an annual objective are displayed in a table which consists of the following columns:

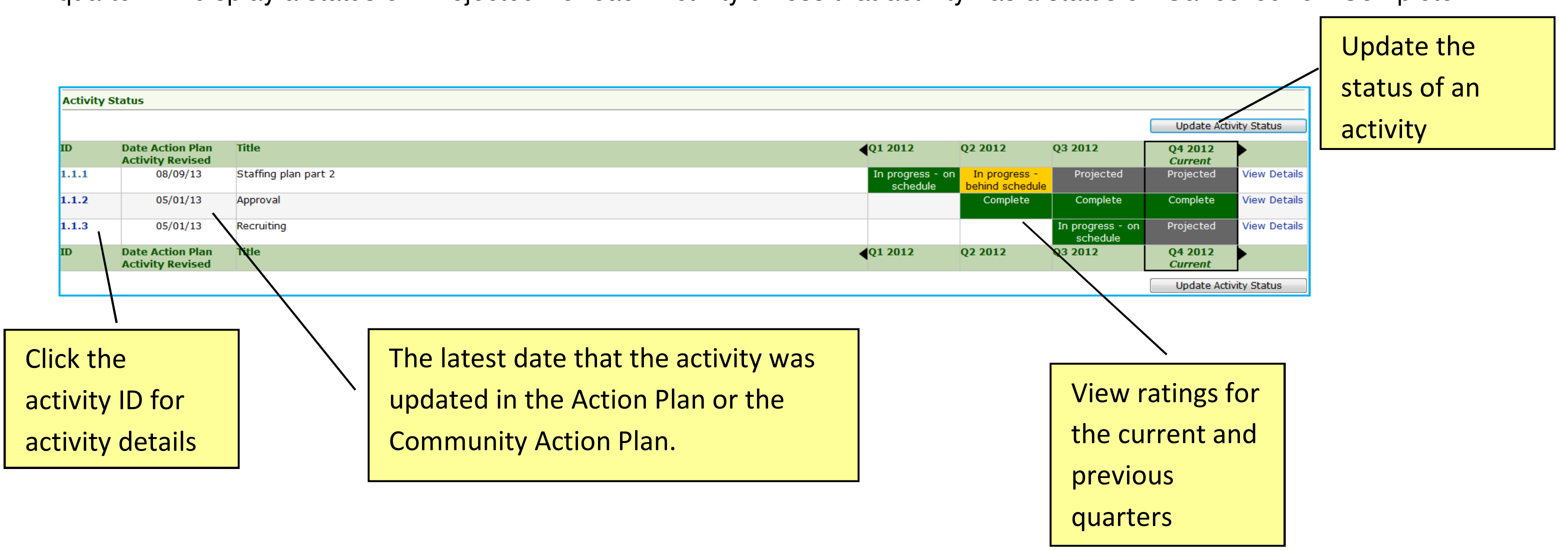
- Date: The date the note was added. You can click the date heading to sort the list by date.
- Author: The name of the individual who added the note.
- Type: The type of note, and if selected, the type of TA provided.
- Category: The category of the note.
- Note: The note content.
- File: The attached file, if available. If a file has been attached to the note, the system displays a paper clip icon in the column, click the icon to open the attached file.

After viewing the information in the pop-up window, click the *Close* button to close the window and return to the Performance Monitoring section.



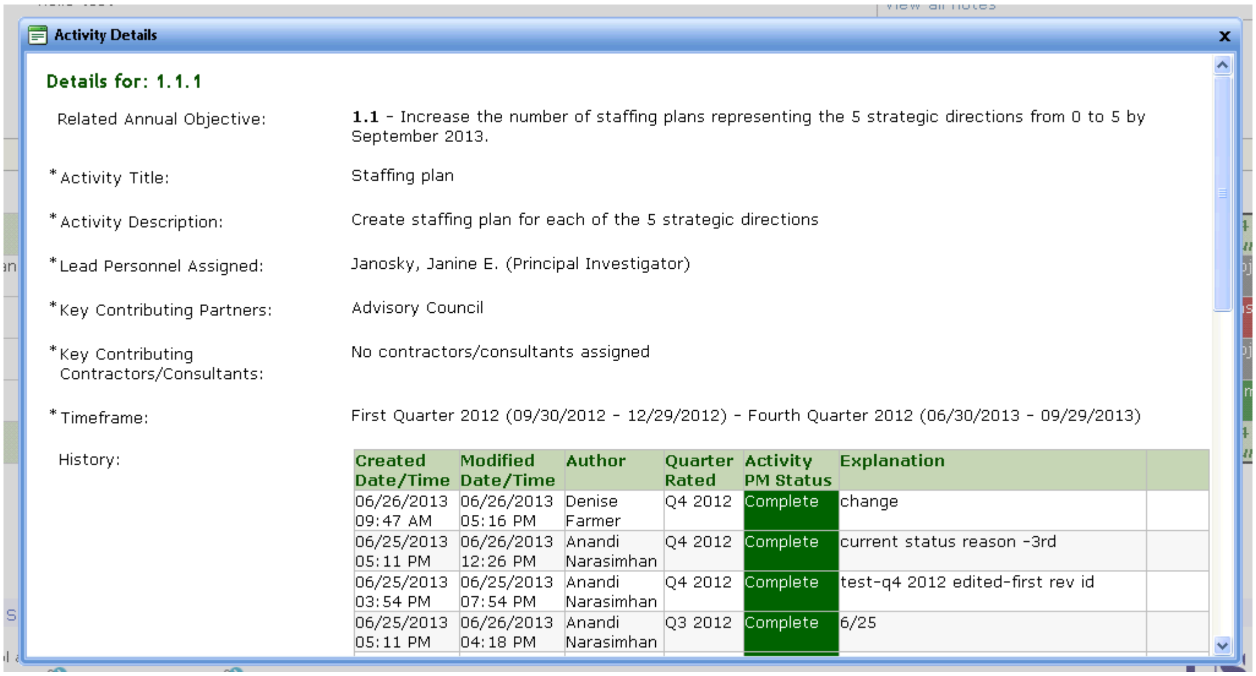
Activity Status

The Activity Status subsection allows you to view the activities in the selected annual objective by quarter and the status of each activity. For each activity in the annual objective, the Activity Status table displays the activity ID, title, and the activity status for each quarter. Quarters are based on the time frame of the annual objective, which are determined by the FOA's budget year. Place your mouse cursor over each quarter to view the date range for each quarter. A future quarter will display a status of "Projected" for each Activity unless that activity has a status of "Cancelled" or "Complete".



The following action can be performed in the Activity Status subsection:

View Details: Click either the *View Details* link or the activity's ID for activity details to be displayed in a pop-up window. Information displayed for the activity include activity ID and title, description, lead personnel assigned, key contributing partners, and or contractors/consultants, time frame, and status history. After viewing the activity details, click the *Close* button to close the Activity Details pop-up window and return to the Performance Monitoring section.



Activity Status Description

IPOS (In progress on schedule) – Indicates that the activity is in progress and on schedule. This activity rating is included in the current and cumulative rating calculations. An activity with this rating is assigned a rating of 70% or greater and the system displays the activity in a green background.

IPBS (In progress behind schedule) – Indicates that the activity is in progress but behind schedule. This activity rating is included in the current and cumulative rating calculation. An activity with this rating is assigned a rating of 50 – 69%. The system displays the activity in a yellow background.

Complete – Indicates that the activity has been completed. This activity rating is included in the current and cumulative rating calculations. An activity with this rating is assigned a rating of 100% and the system displays the activity in a green background.

Past due – Indicates that the activity is past due. This activity rating is included in the current and cumulative rating calculations. An activity with this rating is assigned a rating of less than 50%. The system displays activity in a red background.

Cancelled – This activity has been cancelled. This activity rating is not included in the current or cumulative rating calculations.

Projected – This activity is still being projected. This activity rating is not included in current or cumulative rating calculations.

Postponed – This activity is postponed. This activity rating is not included in current or cumulative rating calculations.