



Technical Assistance and Performance Management User Guide

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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.

The screenshot displays the NCCDPHP Chronic MIS interface. At the top, the CDC logo and text "Centers for Disease Control and Prevention" are visible. Below this, the page title "Chronic Disease MIS: Comprehensive Cancer Control Program (CCC)" and "Arizona Department Of Health Services" are shown. A navigation bar contains several tabs: "System Admin", "FOAs & Recipients", "Program Information", "Resources", "Financial", "Planning", and "Action Plan". The "Program Information" tab is highlighted with an orange oval. To the right of the tabs are links for "My Reports", "Help", and "Log Out". Below the navigation bar, the "Contact Information" section is visible, showing "2009-2010 Program Information" with a dropdown menu for "Year: 2009-2010" and a "Go" button. The "View Contact Information" section displays the following details:

Organization Name:	Arizona Department Of Health Services
Grantee Number:	796

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.

Chronic Disease MIS: Comprehensive Cancer Control Program (CCC)
Arizona Department Of Health Services

My Reports Help Log Out

System Admin FOAs & Recipients Program Information Resources Financial Planning Action Plan

Personnel | Partnerships/Coalitions | Partners | Contracts/Consultants

2009-2010 Resources *Required

Edit Personnel Last Updated: 06/30/2010

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

System Admin FOAs & Recipients Program Information Resources Financial Planning Action Plan

Personnel | Partnerships/Coalitions | Partners | Contracts/Consultants

2009-2010 Resources *Required

Edit Personnel Last Updated: 06/30/2010

Position Details

*Position: Program/Project Manager/Director
Other (specify):

Program/Project Coordinator/Specialist Type: Select one

*Position Status: Vacant Filled

*Position Description: Project Management Services
Characters: 27 / Maximum: 500

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

Chronic Disease MIS: Comprehensive Cancer Control Program (CCC)
Arizona Department Of Health Services

My Reports Help Log Out

System Admin FOAs & Recipients Program Information Resources Financial Planning Action Plan

Personnel | Partnerships/Coalitions | Partners | Contracts/Consultants

2009-2010 Resources *Required

Please correct these errors before continuing:
Status is required. Please make a selection.
Partner Name is required. Please enter information.

Partner

*Status: Active Inactive

Search for Existing Partner

*Find Partner: Type Partner Name to see matching Partners Reset Name & Details

*Partner Name:

- 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.

Chronic Disease MIS: Comprehensive Cancer Control Program (CCC)
Arizona Department Of Health Services

System Admin | FOAs & Recipients | Program Information | Resources | Financial | Planning | Action Plan

Personnel | Partnerships/Coalitions | Partners | Contracts/Consultants

2009-2010 Resources Year: 2009-2010

Personnel add

Name	Position	Telephone	Personnel Status	Position Status	
	Policy Analyst			Vacant	view edit delete
	Other - Worksite Wellness - RN			Vacant	view edit delete
Cruz, Leira	Other - Chronic Disease Branch Chief	(846) 555-2341	Active	Filled	view edit delete
Day, Linda	Business/Financial Official	(846) 222-1234	Active	Filled	view edit delete

- **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.

Association to Action Plan	Type	Status	Time Frame
No activities assigned.			



- 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.



- 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

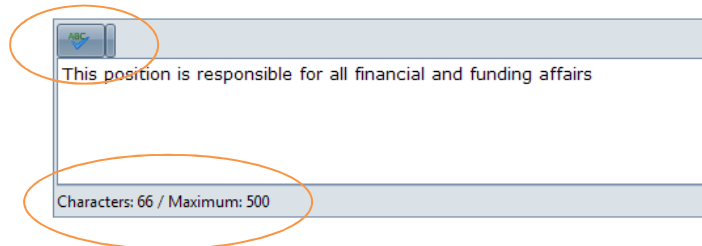
Text boxes are used for questions that are open ended. Text boxes allow you to enter free form text. You can use the keyboard to enter information or copy and paste information from another document into text boxes.

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.

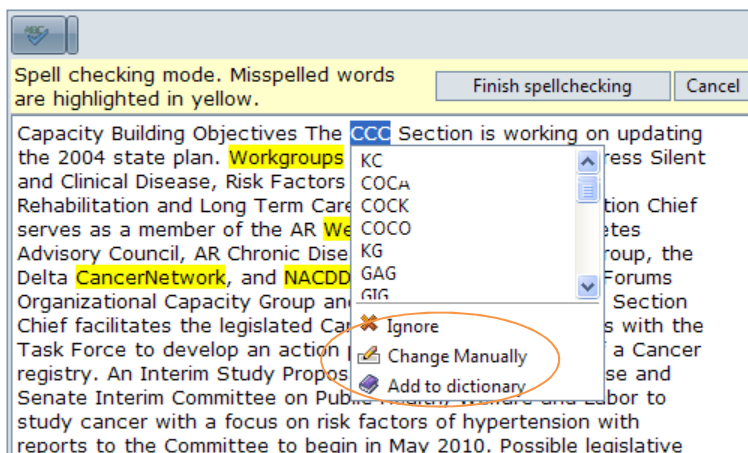
Spell-check feature is included in each text box. Click on the spell check icon  in the upper left corner of the text box to start the spell-checker. This functions much like the spell checker in Word. Misspelled words are highlighted in yellow and a list of replacement words is displayed with the option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

Text Box Examples:

*Position Description:



A screenshot of a text box. In the top-left corner, there is a small icon with the letters 'ABC' and a blue arrow pointing to the right. The text inside the box reads: "This position is responsible for all financial and funding affairs". At the bottom of the text box, it says "Characters: 66 / Maximum: 500". Two orange circles are drawn around the 'ABC' icon and the character count text.



A screenshot of a spell checker window. The title bar says "Spell checking mode. Misspelled words are highlighted in yellow." There are two buttons: "Finish spellchecking" and "Cancel". The main area shows a list of words with a dropdown menu open. The word "CCC" is selected, and the dropdown menu shows a list of suggestions: "KC", "COCA", "COCK", "COCO", "KG", "GAG", "GIG". Below the list, there are three options: "Ignore", "Change Manually", and "Add to dictionary". The "Ignore" option is circled in orange.

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:

U.S. Bureau of Census
 Vital statistics
 Youth Risk Behavior Surveillance (YRBS)
 Other

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:

* Can this product be shared? Yes No

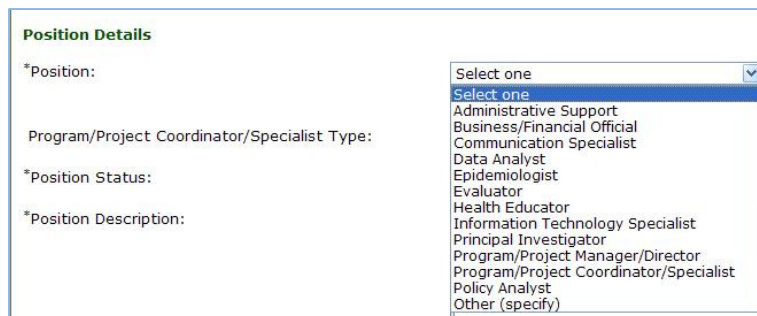
Drop-down Lists

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:



The screenshot shows a web form titled "Position Details". It contains several input fields: "*Position:", "Program/Project Coordinator/Specialist Type:", "*Position Status:", and "*Position Description:". A dropdown menu is open next to the "*Position:" field, displaying a list of job titles. The list starts with "Select one" at the top, followed by "Administrative Support", "Business/Financial Official", "Communication Specialist", "Data Analyst", "Epidemiologist", "Evaluator", "Health Educator", "Information Technology Specialist", "Principal Investigator", "Program/Project Manager/Director", "Program/Project Coordinator/Specialist", "Policy Analyst", and "Other (specify)".

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.)

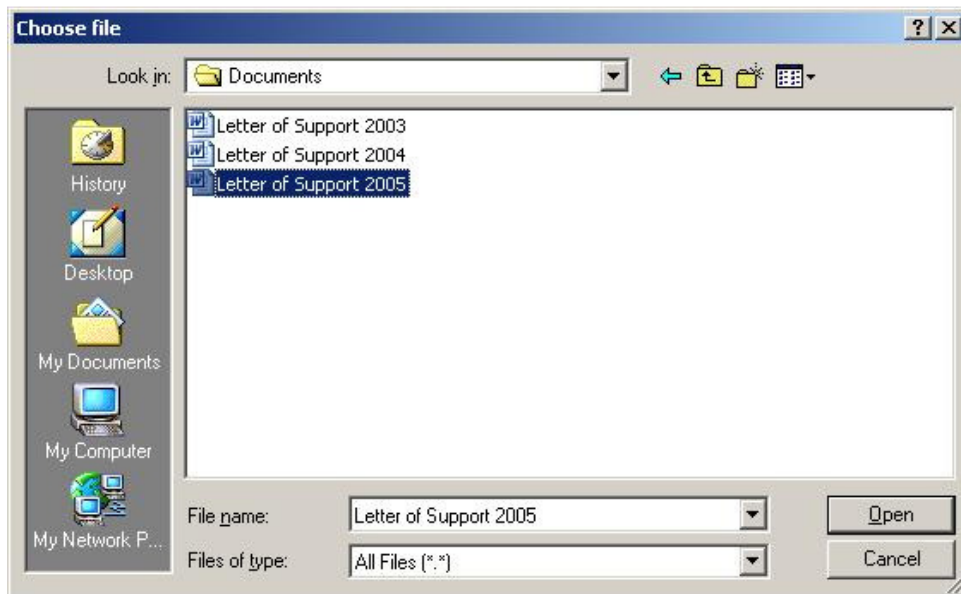
Any number of versions of a document can be uploaded. That is, when you update a document, such as a state plan, you can upload each version as it gets updated.

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.

Chronic Disease MIS: Comprehensive Cancer Control Program (CCC)
Arizona Department Of Health Services

System Admin | FOAs & Recipients | Program Information | Resources | Financial | Planning | Action Plan

Personnel | Partnerships/Coalitions | Partners | Contracts/Consultants

2009-2010 Resources Year: 2009-2010 Go

Name	Position	Telephone	Personnel Status	Position Status	
	Policy Analyst			Vacant	view edit delete
	Other - Worksite Wellness - RN			Vacant	view edit delete
Chuz, Leira	Other - Chronic Disease Branch Chief	(846) 555-2341	Active	Filed	view edit delete
Day, Linda	Business/Financial Official	(846) 222-1234	Active	Filed	view edit delete

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.

Chronic Disease MIS: Healthy Communities Program: ACHIEVE
National Association Of County & City Health Officials (Category B)

System Admin | FOAs & Recipients | Program Information | Resources | Planning | AC

CAPs | Mentored Community | CHANGE Tool | Assessment

2012-2013 Community Information Year: 2012-2013

Report	Submitted	Available Until	
Community Action Plan Report	10/04/12 9:57 AM EST	10/04/12 10:57 AM EST	Download (PDF 8.6 KB)
Action Plan Report	10/04/12 9:56 AM EST	10/04/12 10:56 AM EST	Download (PDF 71 KB)
Community Action Plan Report	10/04/12 9:53 AM EST	10/04/12 10:53 AM EST	Download (PDF 8.6 KB)

Close Report

Add Community
No information entered.

Community
No information entered.

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

Link to view the cumulative status of communities.

Link to view all the comments that have been added

A grey wedge indicates that the displayed rating includes activities that have not been rated.

The screenshot displays the 'Technical Assistance Dashboard | Performance Monitoring' interface. It includes a 'Performance Monitoring Summary' section with an overall status of 98% In Progress On Schedule and an 'Overview Comment' section. Below this is the 'Status for Objectives' section, which shows a recipient summary status of 99% In Progress On Schedule for the Central Michigan District Health Department. A table lists annual objectives with columns for 'Annual Objective', 'SMART Statement', 'Current Rating', and 'Cumulative Rating'. The table shows three objectives (5.1, 5.2, 5.3) with their respective SMART statements and ratings. A 'Status Key' at the bottom indicates 'On Schedule or Complete' (green), 'Behind Schedule' (yellow), and 'Past Due' (red).

List of annual objectives

Link to view the status ratings for an annual objective and its associated activities

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.

Date ▼	Author	Comment
07/01/2013	Lucretia Mckenzie	testing
09/25/2012	Lucretia Mckenzie	Awardee is on schedule

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

Chronic Disease MIS: Public Prevention Health Fund: Community Transformation Grants
Austen BioInnovation Institute in Akron

System Admin | FOAs & Recipients | Technical Assistance | Program Information | Resources | Planning | Action Plan | Community Information | Reports | Search

Technical Assistance Dashboard | Performance Monitoring

Select Objective to Monitor: Austen BioInnovation Institute in Akron
 AO: 1.1 - Increase the number of staffing plans representing the 5 strate...
[Select from detailed list of Annual Objectives](#)

Performance Monitoring: Austen BioInnovation Institute in Akron

AO: 1.1 - Increase the number of staffing plans representing the 5 strategic directions from 0 to 1 by September 2013. [View Annual Objective details](#)

Related PPO: 1 - Increase the number of infrastructure components developed to support community transformation from 0 to 8 by September 2016.

Annual Objective Status: Objective Partially Complete
 hello
[Update Annual Objective status](#) | [View history](#)

Q4 2012 Rating: ● 100% In Progress On Schedule
 Cumulative Rating: ● 92% In Progress On Schedule

Recent Notes

08/14/2013
 TA Provided: test note

07/15/2013
 Success: Submitted PPHF Report on 7/12/13
[View all notes](#)

Activity Status

ID	Date Action Plan Activity Revised	Title	Q1 2012	Q2 2012	Q3 2012	Q4 2012 Current
1.1.1.1	08/09/13	Staffing plan part 2	In progress - on schedule	In progress - behind schedule	Projected	Projected
1.1.1.2	05/01/13	Approval		Complete	Complete	Complete
1.1.1.3	05/01/13	Recruiting			In progress - on schedule	Projected

Select Objective to Monitor -

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

Select Objective to Monitor: Austen BioInnovation Institute in Akron ▼
AO: 1.1 - Increase the number of staffing plans representing the 5 stratei ▼ **Go**
[Select from detailed list of Annual Objectives](#)

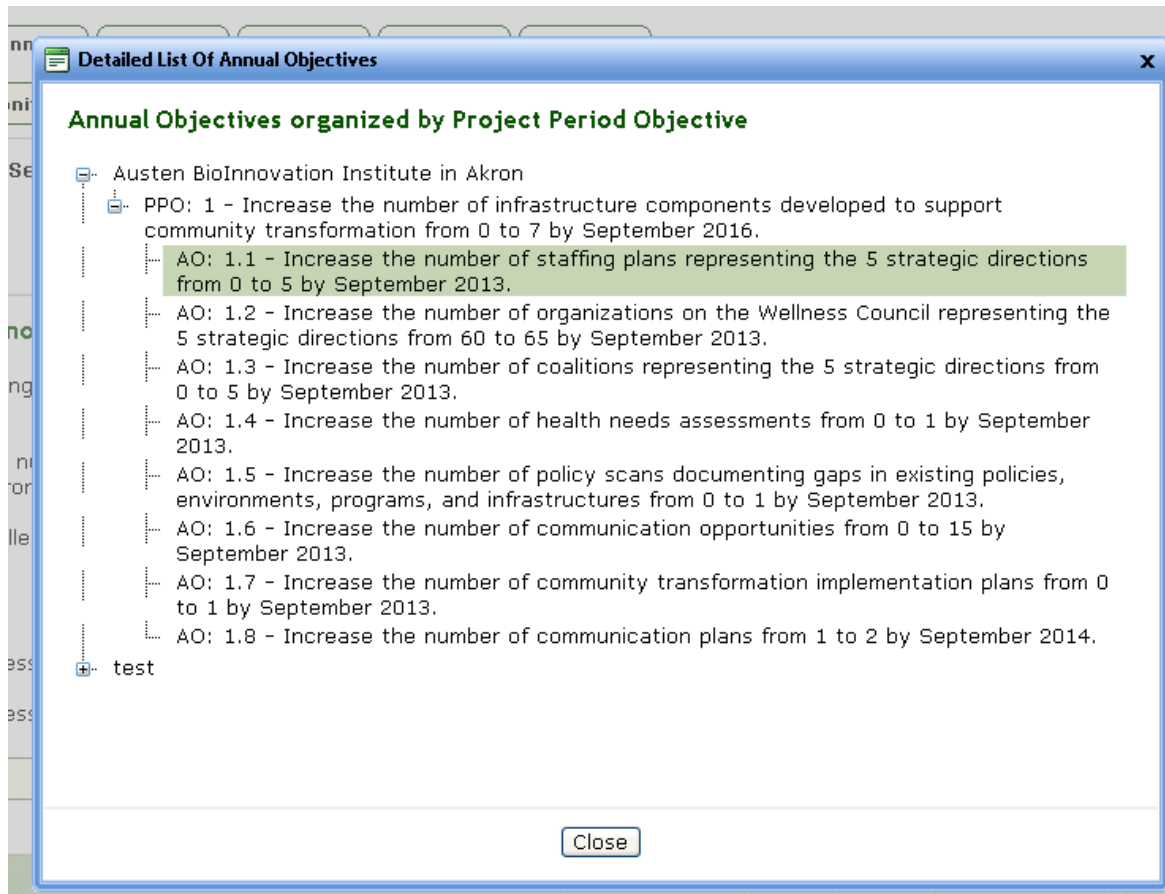
To select an annual objective to monitor:

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.



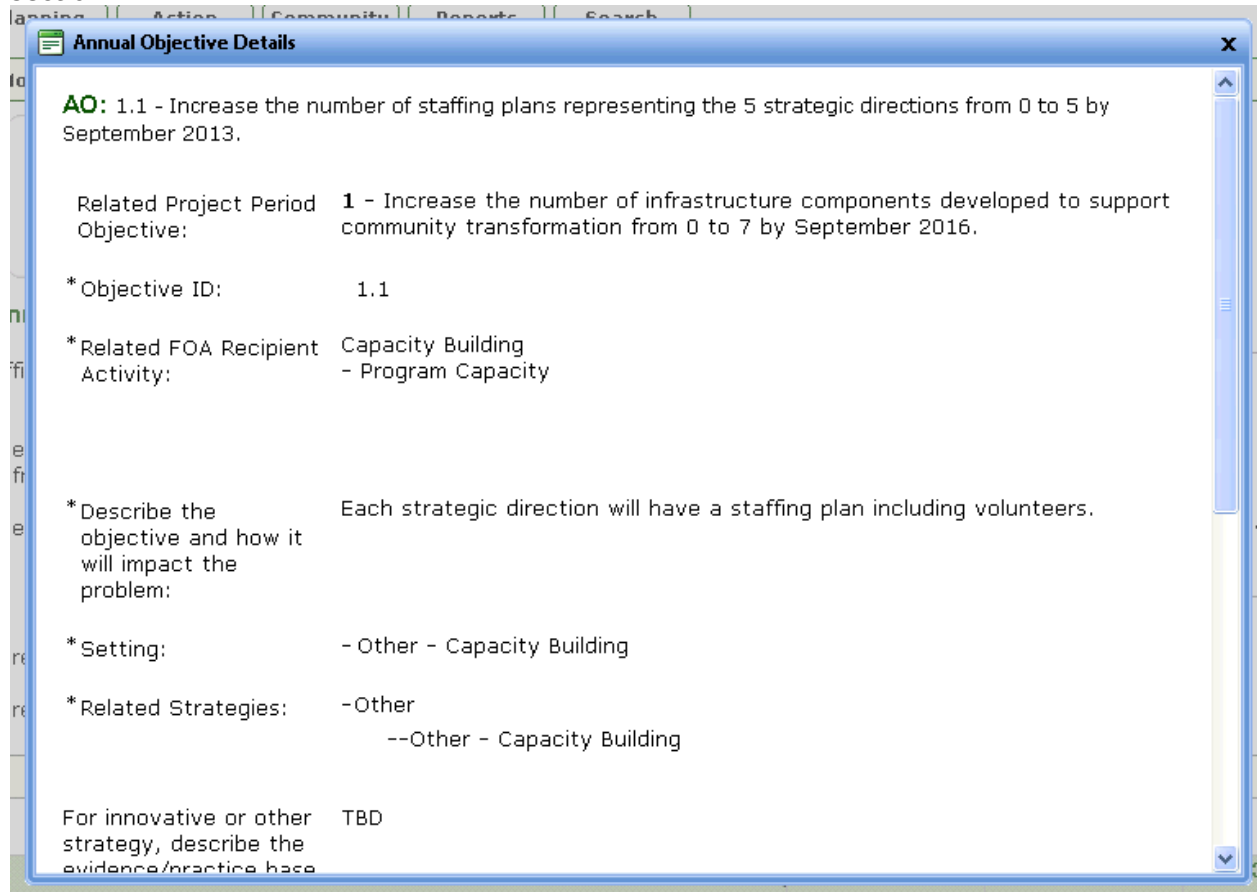
The Performance Monitoring Subsection

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.

Recent Notes

01/16/2013
Barrier: New comment

01/16/2013
Barrier: . added note as system admin

[View all notes](#)

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.

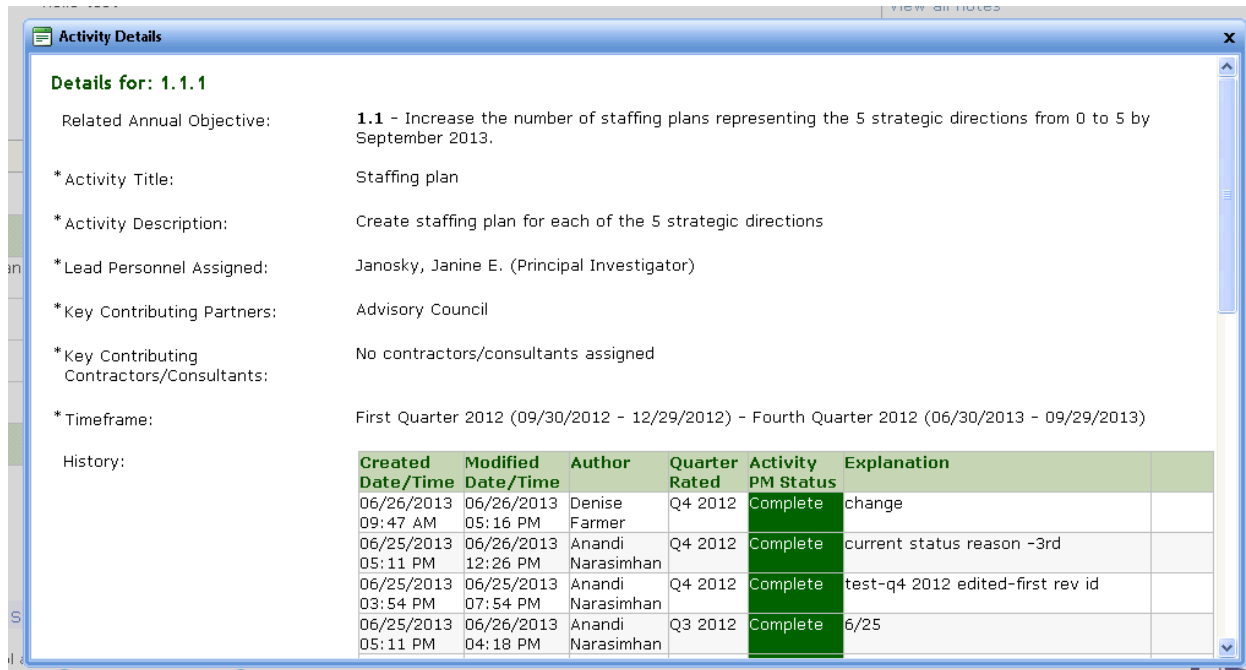
Activity Status

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".

ID	Date Action Plan Activity Revised	Title	Q1 2012	Q2 2012	Q3 2012	Q4 2012 Current	
1.1.1	08/09/13	Staffing plan part 2	In progress - on schedule	In progress - behind schedule	Projected	Projected	View Details
1.1.2	05/01/13	Approval	Complete	Complete	Complete	Complete	View Details
1.1.3	05/01/13	Recruiting			In progress - on schedule	Projected	View Details

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.