PFS II MRT

Grant Management Reporting Tool

PreventionManagement
Reporting & Training System

USER MANUAL

VERSION 1.1
JULY 2013

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INTRODUCTION

What is the purpose of the PFS II MRT system?

The PFS II MRT system is a web-based system designed to help you or your organization use SAMHSA's Partnership for Success (PFS). Each PFS step (Assessment, Capacity, Planning, Implementation, and Evaluation) is displayed as a link (or button) at the top of the page. Required Progress Reports will be submitted through PFS II MRT. You will work through each of these PFS steps to populate your quarterly Progress Report. In addition to submitting reports, you will be able to use PFS II MRT as a way to manage your grant.

TIPS FOR USING THE SYSTEM EFFECTIVELY

Recommended Computer Settings

Screen Resolution

You will get the best screen layout if you set your PC monitor settings to 1024 X 768 pixels or larger. If your screen resolution is smaller (800 X 600 pixels) everything on the screen will appear larger. If you use 800 X 600 pixels, you will have to scroll more both up and down and left and right to access all the data fields.

To change your PC monitor settings, right click on the Desktop background and select Properties. Next, click on the Settings tab and move the Screen Resolution scroll bar to the right (towards 'more') to select 1024 X 768 resolution. Click the OK button at the bottom of the window to make the change effective.

Web Browser

The web browser supported by PFS II MRT is Microsoft Internet Explorer (IE). Mozilla Firefox, Netscape, Safari and other browsers may not be supported by PFS II MRT. They may function but not to design specifications. We recommended users have the latest version of IE installed on their computer along with the updates provided by Microsoft (which are released periodically).

Pop-Up Blocker

Modern computer security technology and usability features development have lead to pop-up blocking. Although this new feature of internet browsers, toolbars, and other 3rd party software blocks hazardous and annoying pop-ups, sites like PFS II MRT require pop-ups to be able to function. If your pop-up blocker is enabled, there is a possibility that PFS II MRT may not function or appear properly. You should either disable the pop-up blocker while using PFS II MRT (while remembering to enable it, if desired, when not in PFS II MRT) or create exceptions for the pop-up blocker. This is cumbersome but may be easier than making exceptions to the pop-up blocker.

To create exceptions for the pop-up blocker, open your Internet Explorer browser window. Once the browser is open click the toolbar options "Tools" and then go to "Internet Options". After the "Internet Options" window is available you will want to click on the "Privacy" tab at the top of the window. You will notice while on the "Privacy" tab, at the bottom will be a section on Pop-Up Blockers. If your "Block Pop-Ups" checkbox is checked, click on the "Settings" button. You can now add the PFS II MRT link to the "Allowed Sites" list which the pop-up blocker will ignore when trying to block pop-ups from PFS II MRT.

*Notes: These are instructions for Internet Explorer 7.0 and may be different for other Internet Explorer versions.

Application Navigating

PFS II MRT is set up in such a fashion that moving from top to bottom of each page and section to section on the Menu is the best approach to using the system. You must start at Assessment, filling in all of the information for that module (all pages and submenus), before moving on to Capacity and the other Menu items. Continuing in this manner will ensure that all of the forms in the systems have enough information to function correctly. If certain forms have not been completed you may have difficulty completing other forms. You also must save each form before moving onto the next form by clicking the [Save] (**Save**) button located at the bottom of the form.

Computer Keys

While entering information into a form, several keys are helpful for moving the cursor from one information box (called a data field) to another. The table below summarizes those keys:

Key	Description	Function
	Mouse cursor	Points to desired location
Tab	TAB key	Moves the cursor to the next data field
Shift	SHIFT key + TAB key	Moves the cursor to the previous data field
Ctrl	Control (CTRL) key	Enables blocked material to open (due to pop-up blocker)
	MOUSE	Moves the cursor by pointing and clicking

Entering data into PFS II MRT can be made easier by using the "TAB" key on the keyboard. The "TAB" key advances the cursor to the next data field. You can go from the current field to the previous field by holding "SHIFT" and pressing "TAB" (SHIFT + TAB). You can also navigate through the fields by using the mouse.

Menu Information
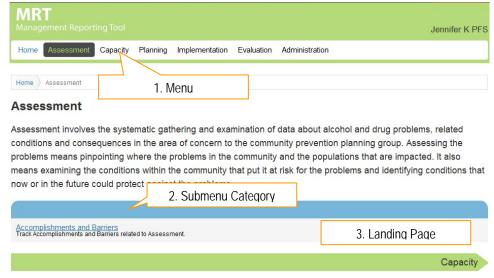
You can access the six (6) main areas by using the Menu or the links from the Home page. The Menu for PFS II MRT is located near the top of the screen. The Menu includes links to the six (6) main areas of PFS II MRT. Clicking on a link brings you to the corresponding page (called a Landing Page) which displays the submenu modules for that area as links to access the module. Once a module is selected from a Landing Page, the module's Listing Page will be available to add new data or modify existing data. (For more information on Landing Pages and Listing Pages, see the Landing Pages and Listing Pages sections of this manual.)
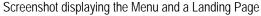
1. **Menu**   Constant (unchanging). Available at all times.
2. **Submenu Category**   Varies depending on which Menu link is selected.
3. **Landing Page**   Varies depending on which Menu link is selected. Displays the Submenu.
4. **Listing Page**   Varies depending on which Submenu category link is selected.
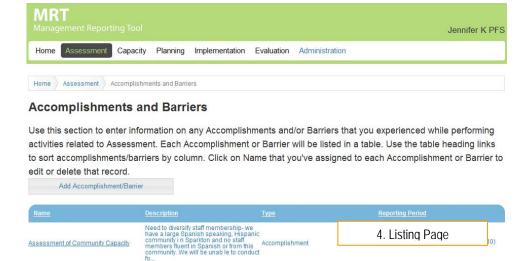
Screenshot displaying the Menu and a Landing Page

Sample screenshot displaying a Listing Page

Above the Menu provides links to **Logout** of the system. The Data Submissions tab is available to switch between different applications that the username has access to. The user's name is also displayed.

Screenshot displaying main menu
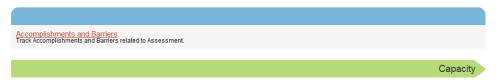
Bread Crumb Trail

A Bread Crumb Trail is provided to indicate where you currently are in the system. The links provided in the Bread Crumb Trail allow you to go to the previous page you were on.

Sample screenshot displaying a Bread Crumb Trail

Landing Pages

A Landing Page is the main page of each of the main sections, or modules (Assessment, Capacity, Planning, Implementation, Evaluation, and Administration) within PFS II MRT. The Landing Page contains the links for each module (Submenu category) within the section. No data is entered on a Landing Page.

Screenshot displaying a Landing Page

Listing Pages

A Listing Page is the main page of each module (Submenu category) within the main sections of PFS II MRT. A Listing Page contains either all data that have been entered for the module or a portion of the data that has been entered with links to view/edit the previously recorded data in its entirety. No data is entered on a Listing Page.
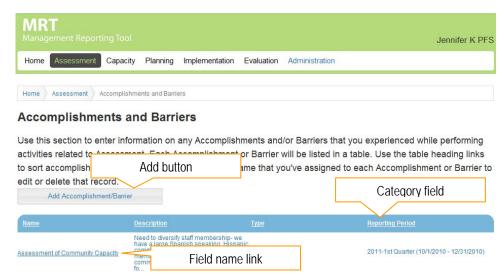
There are two types of Listing Pages in PFS II MRT:

1. **Grid View**
2. **Single Form View**

Grid View:

The Grid View displays the data in tables. Multiple data is entered and saved when a Grid View Listing Page is available. Specific pieces of data will be displayed within the grid based on the fields within the Edit Form (see the Edit Forms section of this manual for details on the Edit Form).

- An [Add] (**Add**) button will be available above the grid to create multiple data entries (records).
- Clicking on a field name link located to the left within the grid will allow you to view/edit the data.

Sample screenshot displaying a "Grid View" Listing Page

Tips

- Clicking on a field name in a Category field (e.g., Name) will allow you to sort through your data in ascending or descending order.
- If you are entering data for the first time, the grid will appear empty.

Single Form View:
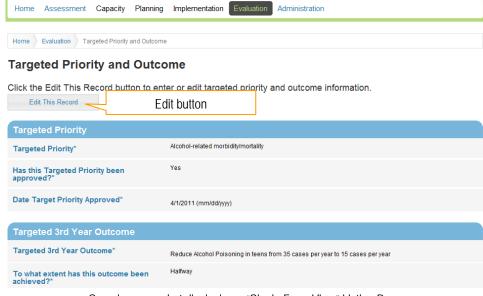
The Single Form View is used when the data entered is updated periodically. Only one (1) form is available and edited. The Single Form View displays the data fields on the Edit Form (see the Edit Forms section of this manual for details on the Edit Form).

- An [Edit This Record] (**Edit**) button will be available to modify the data.

Edit Forms

The Edit Form contains the fields for entering and editing data.

- If you clicked the [Add] (**Add**) button to enter new information into a form, the Edit Form data fields will be blank.
- When selecting a field name link to view existing data, the Edit Form data fields will display the data that was entered/selected previously. These fields may be modified, if needed.
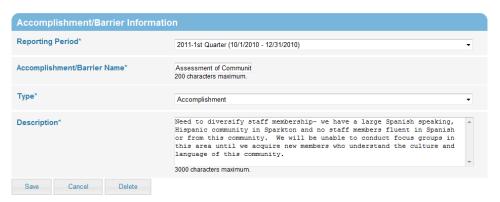
Sample screenshot displaying a "Single Form View" Listing Page

Sample screenshot displaying an Edit Form for existing data

Data Fields and Buttons

In PFS II MRT there are several fields, boxes, and buttons that are used to collect, store, and organize data.

Here are some examples:

Type	Preview/Description
Text Field (aka text box)	
Drop Down List (aka dropdown menu)	Select One
Radio Buttons	⊙ selected ○ not selected
Check Boxes	☑ checked ☐ unchecked
Required Fields	Date Established* (mm/dd/yyyy)
Calendar	(See the Calendar Feature section for instructions.)

If a required field does not have data entered into it and you try to save the form you will receive a message that informs you of the field vacant of data and you will not be able to save that form until that field has data. Some or all of the fields may be required in order to save a form. Those fields that are required are **bold** and marked with an asterisk (*).
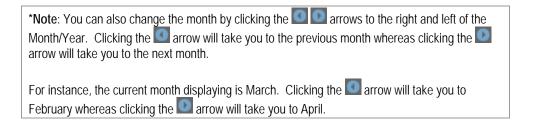
Tips

- You must click the ☐ Save (**Save**) button before moving on to the next section in the system.
- To select multiple data options at one time from a list box, hold the control (CTRL) key on your keyboard while simultaneously left clicking the mouse on any of the data options that you'd like to include in your entry.

Calendar Feature

Dates can be entered in two different ways: 1) typing the date directly into the field or 2) using the **Calendar** feature. The **Calendar** can be used as an alternative option to entering a date directly into a date field.

1. When you select a date field, a calendar displaying the current month and year will display below the date field.
2. Select the date by clicking on a number within the calendar.
3. The calendar will close and the date will appear within the date field.

*Note: You can also change the month by clicking the ◄ ► arrows to the right and left of the Month/Year. Clicking the ◄ arrow will take you to the previous month whereas clicking the ► arrow will take you to the next month.

For instance, the current month displaying is March. Clicking the ◄ arrow will take you to February whereas clicking the ► arrow will take you to April.

Date selected

Today's date

Edit Form Buttons

Information is entered and edited through the Edit Form. The table below summarizes the buttons used to enter and edit data into an Edit Form.

Button	Description
Add	Must be selected to add new information to an Edit Form
Edit This Record	Allows the Edit Form fields to be "open" for modification
Delete	Removes the information (data) from the PFS II MRT database
Save	Adds the information (data) to the PFS II MRT database
Cancel	Cancels the Add or Edit without saving the information (data) entered and goes back to the Listing Page
Capacity	Cancels the Add or Edit without saving the information (data) entered and goes to the next module.

Additional Feature Buttons

Within the MRT Application are icons offering additional help to the user. Click on one of the icons to receive the help needed.

(?)	Provides information on the desired topic

Below are some additional buttons that may appear within a form:

Submit	Forwards the approved information to the appropriate parties for further consideration.
Export	Downloads the selected file into the desired format.
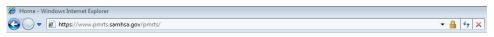
LOGIN PROCEDURE

Connect to the Internet using an internet browser (e.g., Internet Explorer).
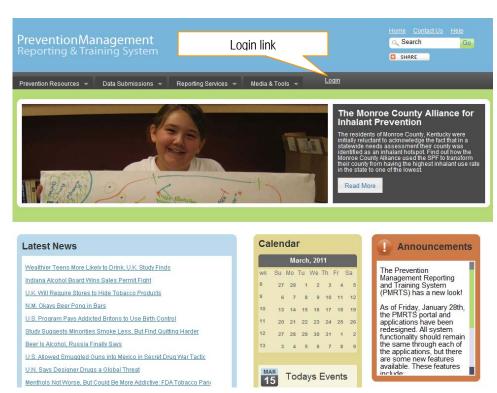
In the Address (location) box, type in the following address and press Enter:
https://www.pmrts.samhsa.gov/pmrts/

Partial screenshot displaying the URL in Internet Explorer

To access PFS II MRT, you will login through the Prevention Management Reporting and Training System website.
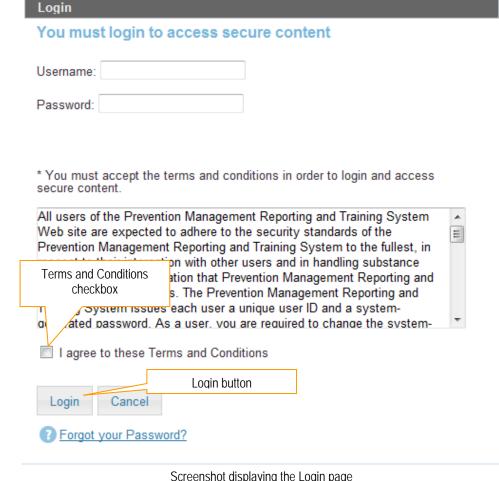
1. Click the **Login** (**Login**) link located at the top right hand corner of the screen.

Screenshot displaying the PMRTS Home Page

Login

You must login to access secure content

Username: [ ]

Password: [ ]

* You must accept the terms and conditions in order to login and access secure content.

2. Type the login name in the **Username*** text box.

3. Type the password in the **Password*** text box.

4. Click the box that states "**I agree to these Terms and Conditions**".

5. Click the `Login` (**Login**) button.
   ***Note**: To cancel the login process, click the `Cancel` (**Cancel**) button.

All users of the Prevention Management Reporting and Training System Web site are expected to adhere to the security standards of the Prevention Management Reporting and Training System to the fullest, in _____ the _____ tion with other users and in handling substance _____ ation that Prevention Management Reporting and ___ s. The Prevention Management Reporting and ___ System issues each user a unique user ID and a system-_____ ated password. As a user, you are required to change the system-

Terms and Conditions checkbox

☐ I agree to these Terms and Conditions

Login button

Login   Cancel

❓ Forgot your Password?

Screenshot displaying the Login page

Tips

- The **Username** is NOT case sensitive.
- The **Password** IS case sensitive.

6. Click Data Submissions (**Data Submissions**) from the Prevention Management Menu.

7. From the *Your available systems:* box, click the MRT - Management Reporting Tool (**MRT – Management Reporting Tool**) link.

Data Submissions link

MRT link

Screenshot displaying the Prevention Management Data Submissions Landing Page

Change Your Password

The Change Your Password feature allows a user to change the password for the account he or she is currently logging into the system with.
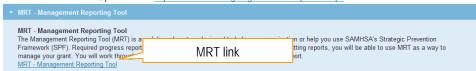
1. To change your password, begin by clicking the MY ACCOUNT (**My Account**) button from the Prevention Management Reporting and Training System main menu.

2. Click the Change Your Password (**Change Your Password**) link..

My Account link

Screenshot displaying the Home page – this is a partial screenshot

3. Select a **Security Question*** from the dropdown menu.
   ***Note**: The Security Question will be used when using the Forgot Password feature to ensure the user requesting a password is legitimate.

4. Enter your answer to the selected security question in the **Security Answer*** text box.

5. Type the password you would like to use in the **New Password*** text box.

6. Retype the password in the **Confirm New Password*** text box.

7. Verify or update the email address in the **Email Address*** text box.

8. Click the [Submit] (**Submit**) button.

Change Password

My Account > Change Your Password

Change Your Password

Please update your account by creating a new password and security question and answer. Please ensure you enter a valid email address in order to receive confirmation of your change. Your new password must be at least 8 characters long and contain at least one number, one uppercase letter, and one special character. Passwords can not contain spaces. All fields marked with an asterisk (*) are required. After entering all required information, click on the Submit button to continue.

Security Question*:   What is the name of the high school you attended?

Security Answer*:

New Password*:

Confirm New Password*:

Email Address*:

[Submit] ——— Submit button

Sample screenshot displaying the Change Your Password page

Tips

- The **User Name** is NOT case sensitive.

- The **Password** IS case sensitive. The Password must fill the following requirements:
  - Minimum length: 8 characters
  - At lease one (1) upper case letter
  - At least one (1) lower case letter
  - At least one (1) of the following special characters: !@#$%^&
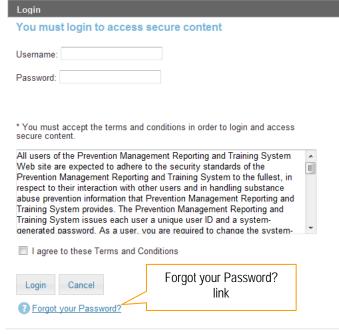
- You will be required to change your password every 90 days.

Forgot Your Password?
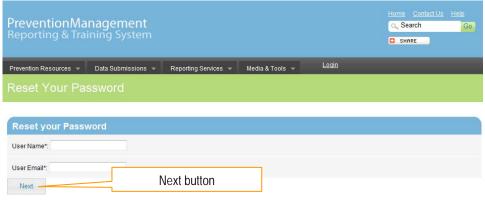
If you are unable to log into PFS II MRT due to forgetting your password, you can retrieve this information at the login page.

1. On the Login page, click the 🔵 Forgot your Password? (**Forgot your Password?**) link.

Screenshot displaying the Login page

2. Type the login name in the **User Name*** text box.

3. Type the email address of the user who is associated with the User Name in the **User Email*** text box.
   ***Note**: This must be a valid email address.

4. Click the [Next] (**Next**) button.

5. On the next screen, answer the Security Question.

6. Click the [Next] (**Next**) button.

Screenshot displaying the Forgot Your Password? page

7. A new temporary password will be sent to the email address that is associated with the User Name.

Reset Your Password

A link has been emailed to you which will allow you to reset your password.

Screenshot displaying the Forgot Your Password? confirmation

Tips

- If you currently do not have an account you will not be able to use the Forgot Password feature.
- If you do not receive a new temporary password, first check your junk mail and spam folders. If you still did not receive a temporary password contact Support at 1-888-348-4248. The following reasons may be the cause: your email address has changed since the account was created, you mistyped the email address, or you are unable to receive emails from Support.
- Please add the following domain to your email safe list: @kitsolutions.net to ensure you receive emails from Support.

Account Locked

If you attempt to log into the system unsuccessfully three (3) times, you will be locked out of your account. Please contact Support to have your account unlocked.

SUPPORT CONTACT INFORMATION:

- 1-888-348-4248
- DCARSupport@kitsolutions.net
- Use the Contact Form on the Support Site:
  http://kitusers.kithost.net/support/dcarsupport
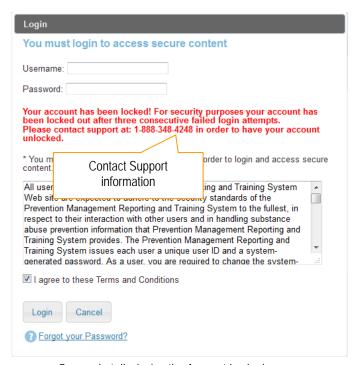
Once your account is unlocked you will receive an email:

1) The email informs you that your account has been unlocked.
   Subject line will read: **User Account has Been Unlocked**

2) The email will be from DONOTREPLY@kitsolutions.net

Screenshot displaying the Account Locked screen

When your account is unlocked you can request Support to reset your password if you do not remember your current password.

Once your password has been reset you will receive an email:

1) The email provides you a link to reset your password.
   Subject line will read: **Password Has Been Reset**

2) The email will be from DONOTREPLY@kitsolutions.net

Screenshot displaying the Password Reset email – this is a partial screenshot

Current Organization

If you work in multiple organizations, you will have to select the organization from the list of Organizations. *This screen will not appear if you work at one (1) organization.*
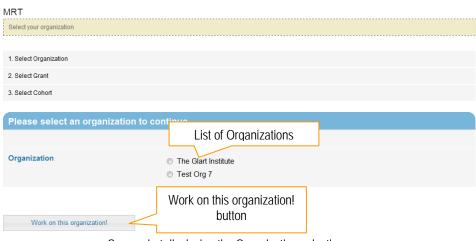
1. Select the radio button next to the appropriate organization name.
2. Click the [Work on this organization!] (**Work on this organization!**) button.

Home

MRT

Select your organization

1. Select Organization
2. Select Grant
3. Select Cohort

Please select an organization to continue

List of Organizations

Organization
- The Glart Institute
- Test Org 7

Work on this organization! button

[Work on this organization!]

Screenshot displaying the Organization selection page

Grant Selection

If your organization works with multiple Grants, you will have to select the Grant name from the list of Grants. *This screen will not appear if you work on one (1) Grant.*

1. Select the radio button next to the appropriate Grant.
2. Click the [Work on this grant!] (**Work on this grant!**) button.

Home

MRT

Finally, select a Grant to work on

1. Select Organization ☑
2. Select Grant
3. Select Cohort

Please select a grant to continue

List of Grants

Grant
- SPF-T00006
- METH-T00005
- HIV-T00004

Work on this grant! button

[Work on this grant!]

Screenshot displaying the Grant selection page

ASSESSMENT
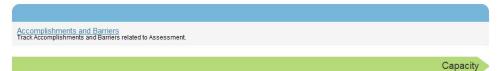
Within the Assessment module, a user is able to perform the following task:

1. Enter, edit and delete Accomplishments and Barriers related to Assessment.

Screenshot displaying the Assessment Landing Page

Accomplishments and Barriers

The Accomplishments and Barriers module allows the user to track their accomplishments and barriers related to assessment.

Adding an Accomplishment or Barrier

1. Click **Assessment** from the Menu.
2. Click **Accomplishments and Barriers** from the Assessment Landing Page.
3. Click the [Add Accomplishment/Barrier] (**Add Accomplishment/Barrier**) button.

Sample screenshot displaying the Accomplishments and Barriers Listing Page

4. Select the reporting period this accomplishment or barrier occurred in from the **Reporting Period*** dropdown menu.

5. Select the name of the accomplishment or barrier from the **Accomplishment/Barrier Name*** dropdown menu.

6. Select *Accomplishment* or *Challenge/Barrier* from the **Type*** dropdown menu.

7. Enter details about the accomplishment or barrier in the **Description*** text box.

8. Click the [Save] (**Save**) button.
   ***Note**: Click the [Cancel] (**Cancel**) button to cancel this entry.

Accomplishments and Barriers

Enter information on any Accomplishments and/or Barriers that you had while performing activities related to Assessment.

You may now Add a record

Accomplishment/Barrier Information

Reporting Period*	Select One
Accomplishment/Barrier Name*	Select One
Type*	Select One
Description*	

3000 characters remaining.

Save   Cancel

Save button

Screenshot displaying the Accomplishments and Barriers Edit Form

Editing an Accomplishment or Barrier

1. Click **Assessment** from the Menu.

2. Click **Accomplishments and Barriers** from the Assessment Landing Page.

3. From the Listing Page, select the accomplishment or barrier you wish to edit by clicking the appropriate accomplishment/barrier Name.

4. Make any changes needed to the form.

5. Click the ⬚Save (**Save**) button.
   *Note: Click the ⬚Cancel (**Cancel**) button to cancel the changes.

Sample screenshot displaying the Accomplishments and Barriers Listing Page

Deleting an Accomplishment or Barrier

1. Click **Assessment** from the Menu.

2. Click **Accomplishments and Barriers** from the Assessment Landing Page.

3. From the Listing Page, select the accomplishment or barrier you wish to delete by clicking the appropriate accomplishment/barrier Name.

4. Click the ⬚Delete (**Delete**) button.

5. Click the ⬚Yes (**Yes**) button when asked "Are you sure you want to permanently delete this record?
   *Note: If you do not want to delete the record, click the ⬚No (**No**) button.

6. Notice the record is removed from the grid.

Sample screenshot displaying the Accomplishments and Barriers Edit Form

CAPACITY

Within the Capacity module, a user is able to perform the following tasks:

1. Add, edit and delete Advisory Council and SEW Memberships.
2. Add, edit and delete Advisory Council and SEW Meetings.
3. Add, edit and delete Advisory Council and SEW Subcommittees
4. Add, edit and delete Grantee Resources.
5. Add, edit and delete Subrecipient Resources.
6. Add, edit and delete Training and Technical Assistance.
7. Add, edit and delete Accomplishments and Barriers related to Capacity.

Capacity

Capacity refers to the various types and levels of resources available to establish and maintain a community prevention system that can identify and leverage resources that will support an effective strategy aimed at the priority problems and identified risk factors in the community at the appropriate population level. Capacity to carry out strategies depends not only upon the resources of the community organizations and their function as a cohesive problem-solving group, but also upon the readiness and ability of the larger community to commit its resources to addressing the identified problems.

Membership
Add Advisory Council and SEW members relevant to your project.

Advisory Council and SEW Meetings
Add advisory council and SEW meetings that have been conducted.

Advisory Council and SEW Subcommittees
Add and organize Advisory Council and SEW Subcommittees.

Grantee Resources
Add data regarding the Grantee Resources.

Subrecipient Resources
Subrecipient Resources

Training and Technical Assistance
Add records for Training and Technical Assistance provided to the Grantee, PFS II Subrecipients, or PFS II Sub-State entities.

Accomplishments and Barriers
Track Accomplishments and Barriers related to Capacity.

Planning

Screenshot displaying the Capacity Landing Page

Membership

The Membership module allows the user to add any organizations and/or individual members to your Advisory Council and State Epidemiological Outcomes Workgroup.

Adding a Membership

1. Click **Capacity** from the Menu.
2. Click **Membership** from the Capacity Landing Page.
3. Click the [Add Membership] (**Add Membership**) button.
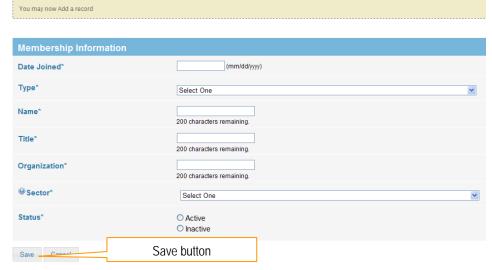
Sample screenshot displaying the Advisory Council and SEW Membership Listing Page

4. Enter the date the member joined in the **Date Joined*** text box as mm/dd/yyyy or use the Calendar feature to select the date. (See the Calendar Feature section for additional details.)

5. Select the type of membership from the **Type*** dropdown menu.

    a. If *Other* is selected, enter the type in the **Specify Other Type*** textbox.

6. Enter the name of the member in the **Name*** text box.

7. Enter the member's title in the **Title*** text box.

8. Enter the member's organization name in the **Organization*** text box.

9. Select the sector of society the member is a part of from the **Sector*** dropdown menu.

10. Select the status of the member using the **Status*** radio buttons.

    a. *Active*: currently a member

    b. *Inactive*: no longer a member

        i. If *Inactive* is selected, enter the date the member became inactive in the **Date Exited*** text box as mm/dd/yyyy or use the Calendar feature to select the date. (See the Calendar Feature section for additional details.)

11. Click the [Save] (**Save**) button.
    ***Note**: Click the [Cancel] (**Cancel**) button to cancel this entry.

Membership

Enter your Member's information.

You may now Add a record

Membership Information

Date Joined*	[ ] (mm/dd/yyyy)
Type*	Select One
Name*	[ ] 200 characters remaining.
Title*	[ ] 200 characters remaining.
Organization*	[ ] 200 characters remaining.
Sector*	Select One
Status*	○ Active ○ Inactive

Save   Cancel   Save button

Screenshot displaying the Membership Edit Form

Editing a Membership
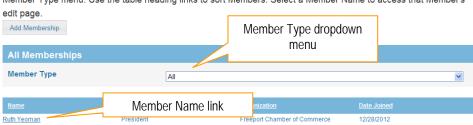
1. Click **Capacity** from the Menu.

2. Click **Membership** from the Capacity Landing Page.

3. If desired, use the **Member Type** dropdown menu to narrow the list of members to a specific membership type.

4. From the Listing Page, select the member you wish to edit by clicking the appropriate Member Name.

5. Make any changes needed to the form.

6. Click the [Save] (**Save**) button.
   *Note: Click the [Cancel] (**Cancel**) button to cancel the changes.

Deleting a Membership

1. Click **Capacity** from the Menu.

2. Click **Advisory Council and SEW Membership** from the Capacity Landing Page.

3. If desired, use the **Member Type** dropdown menu to narrow the list of members to a specific membership type.

4. From the Listing Page, select the member you wish to delete by clicking the appropriate Member Name.

5. Click the [Delete] (**Delete**) button.

6. Click the [Yes] (**Yes**) button when asked "Are you sure you want to permanently delete this record?
   *Note: If you do not want to delete the record, click the [No] (**No**) button.

7. Notice the record is removed from the grid.

Membership

Use this section to add any organization and/or individual members to your Advisory Council and State Epidemiological Outcome Workgroup. To edit previously added members, first select the member type from the Member Type menu. Use the table heading links to sort Members. Select a Member Name to access that Member's edit page.

[Add Membership]

All Memberships

Member Type	All

Member Type dropdown menu

Name		nization	Date Joined
Ruth Yeoman	President	Freeport Chamber of Commerce	12/28/2012

Member Name link

Sample screenshot displaying the Membership Listing Page

Membership

Enter your Member's information.

You may now Edit this record

Membership Information

Date Joined*	12/28/2012	(mm/dd/yyyy)
Type*	Project Advisory Council	
Name*	Ruth Yeoman	
	189 characters remaining.	
Title*	President	
	191 characters remaining.	
Organization*	Freeport Chamber of Com	
	172 characters remaining.	
Sector*	Business Community	
Status*	⊙ Active	

[Save] [Cancel] [Delete]

Delete button

Sample screenshot displaying the Advisory Council and SEW Membership Edit Form

Advisory Council and SEW Meetings

The Advisory Council and SEW Meetings module allows the user to add information related to Advisory Council and SEW Meetings.

Adding an Advisory Council or SEW Meeting

1. Click **Capacity** from the Menu.
2. Click **Advisory Council and SEW Meeting** from the Capacity Landing Page.
3. Click the [Add Meeting] (**Add Meeting**) button.

Advisory Council and SEW Meetings

Use this section to add information related to Advisory Council and SEW Meetings. Use the table heading links to sort your meetings. Sel... ...hat meeting's edit page.

[Add Meeting] — Add Meeting button

Type	Meeting Name/Topic	Meeting Date
Project Advisory Council	2013 planning	12/28/2012

Sample screenshot displaying the Advisory Council and SEW Meetings Listing Page

4. Enter the date the meeting occurred in the **Meeting Date*** text box as mm/dd/yyyy or use the Calendar feature to select the date. (See the Calendar Feature section for additional details.)
5. Select the type of meeting from the **Type*** dropdown menu.
   a. If _Other_ is selected, enter the meeting type in the **Specify Other Type*** text box.
6. Enter a meeting name or topic in the **Meeting Name/Topic*** text box.
7. To upload an agenda, perform the following steps:
   a. Click the [Browse] (**Browse**) button.
   b. Select the document you wish to upload from the **Choose File** window and click the [Open] (**Open**) button.
   c. The file path will appear in the field. Click the [Upload Agenda] (**Upload**) button.
   d. The file name will appear next to the **Upload** button.
      ***Note**: To view the uploaded document, click on the file name. If you uploaded the wrong file, repeat the steps to upload the correct file.
8. To upload the Minutes, repeat step 7 using the Upload Minutes section.
9. Click the [Save] (**Save**) button.
   ***Note**: Click the [Cancel] (**Cancel**) button to cancel this entry.

Advisory Council and SEW Meetings

Enter your Meeting information.

You may now Add a record

Meeting Information

Meeting Date*	_____ (mm/dd/yyyy)
Type*	Select One ▼
Meeting Name/Topic*	_____
	200 characters remaining.
Upload Agenda	No file selected... [Browse] — Browse button
	[Upload Agenda]
Upload Minutes	No file selected... [Browse]
	[Upload Minutes]
[Save] — Save button [Cancel]	
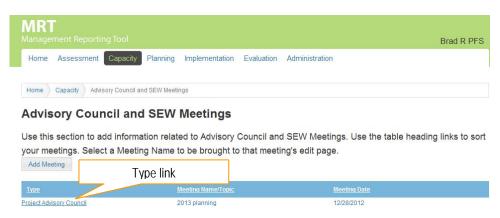
Screenshot displaying the Advisory Council and SEW Meetings Edit Form

Editing an Advisory Council or SEW Meeting

1. Click **Capacity** from the Menu.
2. Click **Advisory Council and SEW Meeting** from the Capacity Landing Page.
3. From the Listing Page, select the meeting you wish to edit by clicking the appropriate meeting Type link.
4. Make any changes needed to the form.
   *Note: To replace an uploaded file, refer to step 7 in the Adding an Advisory Council or SEW Meeting section.
5. Click the ⬚ (**Save**) button.
   *Note: Click the ⬚ (**Cancel**) button to cancel the changes.

Deleting an Advisory Council or SEW Meeting

1. Click **Capacity** from the Menu.
2. Click **Advisory Council and SEW Meeting** from the Capacity Landing Page.
3. From the Listing Page, select the meeting you wish to delete by clicking the appropriate meeting Type link.
4. Click the ⬚ (**Delete**) button.
5. Click the ⬚ (**Yes**) button when asked "Are you sure you want to permanently delete this record?
   *Note: If you do not want to delete the record, click the ⬚ (**No**) button.
6. Notice the record is removed from the grid.

Sample screenshot displaying the Advisory Council and SEW Meetings Listing Page

Sample screenshot displaying the Advisory Council and SEW Meetings Edit Form

Advisory Council and SEW Subcommittees

The Advisory Council and SEW Subcommittees module allows the user to create Advisory Council and SEW Subcommittees, as well as organize their memberships.
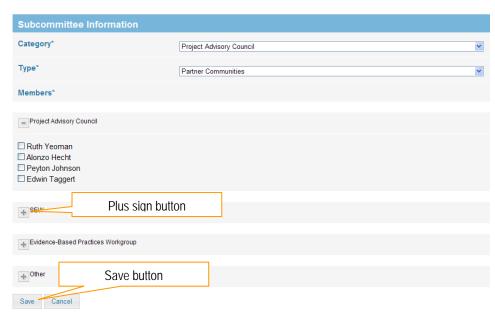
Adding an Advisory Council or SEW Subcommittee

1. Click **Capacity** from the Menu.
2. Click **Advisory Council and SEW Subcommittees** from the Capacity Landing Page.
3. Click the [Add Subcommittee] (**Add Subcommittee**) button.

Advisory Council and SEW Subcommittees

Use this section to create Advisory Council and SEW Subcommittees, as well as organize their Membership. Use the table heading links to ... Add Subcommittee button ... tee category to be brought to that committee's edit page.

[Add Subcommittee]

Category	Type
Project Advisory Council	Public Relations

Sample screenshot displaying the Advisory Council and SEW Subcommittees Listing Page

Advisory Council and SEW Subcommittees

Select your Council or SEW Subcommittee information.

You may now Add a record

Subcommittee Information

Category*	Project Advisory Council
Type*	Partner Communities
Members*	

4. Select the category type for the subcommittee from the **Category*** dropdown menu.
   *Note: You will not be able to add subcommittees for members that were entered as *Other*.
5. Select the type of subcommittee from the **Type*** dropdown menu.
   a. If *Other* is selected, enter the type in the **Specify Other Type*** text box.
6. Use the checkboxes to select the **Members*** for the subcommittee.
7. Click the [Save] (**Save**) button.
   *Note: Click the [Cancel] (**Cancel**) button to cancel this entry.

− Project Advisory Council

☐ Ruth Yeoman
☐ Alonzo Hecht
☐ Peyton Johnson
☐ Edwin Taggert

+ SEW — Plus sign button

+ Evidence-Based Practices Workgroup

+ Other — Save button

[Save] [Cancel]

Sample screenshot displaying the Advisory Council and SEW Subcommittees Edit Form

Editing an Advisory Council or SEW Subcommittee

1. Click **Capacity** from the Menu.
2. Click **Advisory Council and SEW Subcommittees** from the Capacity Landing Page.
3. From the Listing Page, select the subcommittee you wish to edit by clicking the appropriate subcommittee Category name.
4. Make any changes needed to the form.
5. Click the ☐ Save ☐ (**Save**) button.
   *Note: Click the ☐ Cancel ☐ (**Cancel**) button to cancel the changes.

MRT
Management Reporting Tool   Brad R PFS

Home   Assessment   **Capacity**   Planning   Implementation   Evaluation   Administration

Home   Capacity   Advisory Council and SEW Subcommittees

Advisory Council and SEW Subcommittees

Use this section to create Advisory Council and SEW Subcommittees, as well as organize their Membership. Use the table heading links to ⬚⬚⬚⬚⬚⬚ttee category to be brought to that committee's edit page.

Add Subcommittee

> Subcommittee Category
> Name link

Category	Type
Project Advisory Council	Public Relations

Sample screenshot displaying the Advisory Council and SEW Subcommittees Edit Form

Deleting an Advisory Council or SEW Subcommittee

1. Click **Capacity** from the Menu.
2. Click **Advisory Council and SEW Subcommittees** from the Capacity Landing Page.
3. From the Listing Page, select the subcommittee you wish to delete by clicking the appropriate Subcommittee name.
4. Click the [Delete] (**Delete**) button.
5. Click the [Yes] (**Yes**) button when asked "Are you sure you want to permanently delete this record?

    *Note: If you do not want to delete the record, click the [No] (**No**) button.
6. Notice the record is removed from the grid.

Advisory Council and SEW Subcommittees

Select your Council or SEW Subcommittee information.

You may now Edit this record

Subcommittee Information

| Category* | Project Advisory Council |
| Type* | Public Relations |

Members*

+ Project Advisory Council

+ SEW

+ Evidence-Based Practices Workgroup

+ Other   Delete button

Save   Cancel   Delete

Sample screenshot displaying the Advisory Council and SEW Subcommittees Edit Form
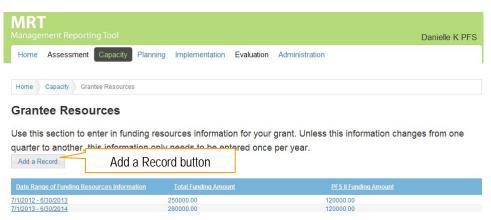
Grantee Resources

The Grantee Resources module allows the user to enter information about your funding resources.

Adding Grantee Resources

1. Click **Capacity** from the Menu.
2. Click **Grantee Resources** from the Capacity Landing Page.
3. Click the [Add a Record] (**Add a Record**) button.

Sample screenshot displaying the Grantee Resources Listing Page

4. Enter the total annual funding in the **What is your (Grantee-level) current total funding amount (annual operating budget)?** field.
5. Enter the period the budget covers in the **From*** and **To*** text box as mm/dd/yyyy or use the Calendar feature to select the dates. (See the Calendar Feature section for additional details.)

Partial screenshot displaying the Grantee Resources Edit Form

6. Enter the dollar amount that comes from each funding source.
Note: The **Dollar Amount** column must equal 100% of the current annual total funding amount. The **Percentage** field automatically shows the percentage this dollar amount is of the total funding.

   a. If an amount is entered in the **Other (Please Specify) Dollar Amount** field, specify the other type of source of funding in the **Specify Other** text box.

7. For each source of funding use the **Funding Stream used for PFS II Priorities in PFS II Communities?** dropdown menu to select if PFS II activities are funded by that source.

8. If "Yes" is selected, specify the amount of the funding stream used for PFS II priorities in the **Amount of the Funding Stream used for PFS II Priorities in PFS II Communities** field.
Note: This **Percentage** field automatically shows the percentage this dollar amount is of the total PFS II funding. Total amounts and percentages are displayed at the bottom of the columns.

What dollar amount of your funding comes from each funding source?

Source of Funding/Resources	Percentage	Dollar Amount	Funding Stream used for PFS II Priorities in PFS II Communities?	Amount of the Funding Stream used for PFS II Priorities in PFS II Communities	Percentage
PFS II		$	N/A	$	
Drug Free Communities Grant		$	N/A	$	
STOP Act Funding		$	N/A	$	
Minority HIV/AIDS Initiative		$	N/A	$	
Substance Abuse Prevention and Treatment Block Grant		$	N/A	$	
Medicaid (Federal, State, and Local)		$	N/A	$	
Other Federal Funds		$	N/A	$	
State Funds (excluding State Medicaid)		$	N/A	$	
Local Funds (excluding State Medicaid)		$	N/A	$	
Foundations/Non-Profit Organizations		$	N/A	$	
Private/Corporate Entities		$	N/A	$	
Individual Donations/Funding from Fundraising Events		$	N/A	$	
In-Kind Contributions		$	N/A	$	
Other (Please Specify)		$	N/A	$	

Partial screenshot displaying the Grantee Resources Edit Form

9. If desired, enter any comments about the funding sources in the **Comments** text box.

10. Click the [Save] (**Save**) button.
Note: Click the [Cancel] (**Cancel**) button to cancel this entry.

Comments:

Save button

Save   Cancel

Partial screenshot displaying the Grantee Resources Edit Form

Editing Grantee Resources

1. Click **Capacity** from the Menu.
2. Click **Grantee Resources** from the Capacity Landing Page.
3. From the Listing Page, select the date range you wish to edit by clicking the appropriate **Date Range of Funding Resources Information** link.
4. Make any changes needed to the form.
5. Click the [Save] (**Save**) button.
   *Note: Click the [Cancel] (**Cancel**) button to cancel the changes.

Sample screenshot displaying the Grantee Resources Edit Form

Deleting Grantee Resources

1. Click **Capacity** from the Menu.
2. Click **Grantee Resources** from the Capacity Landing Page.
3. From the Listing Page, select the date range you wish to edit by clicking the appropriate **Date Range of Funding Resources Information** link.
4. Click the [Delete] (**Delete**) button.
5. Click the [Yes] (**Yes**) button when asked "Are you sure you want to permanently delete this record?
   *Note: If you do not want to delete the record, click the [No] (**No**) button.
6. Notice the record is removed from the grid.

Partial screenshot displaying the Grantee Resources Edit Form
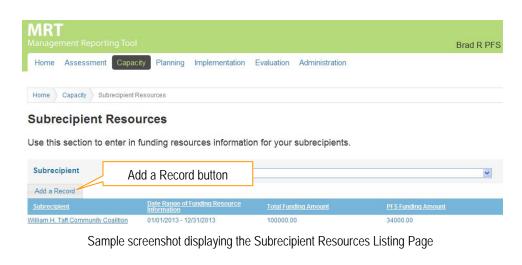
Subrecipient Resources

The Subrecipient Resources module allows the user to enter information about your subrecipient's funding resources.

Adding Subrecipient Resources

1. Click **Capacity** from the Menu.
2. Click **Subrecipient Resources** from the Capacity Landing Page.
3. Click the [Add a Record] (**Add a Record**) button.

Sample screenshot displaying the Subrecipient Resources Listing Page

4. Enter the total funding in the **What is your (Grantee-level) current total funding amount (annual operating budget)?*** field.
5. Enter the period the budget covers in the **From*** and **To*** text box as mm/dd/yyyy or use the Calendar feature to select the dates. (See the Calendar Feature section for additional details.)

Partial screenshot displaying the Subrecipient Resources Edit Form

6. Enter the dollar amount that comes from each funding source.
   *Note: The **Dollar Amount** column must equal 100% of the current total funding amount. The **Percentage** field automatically shows the percentage this dollar amount is of the total funding.
   a. If an amount is entered in the **Other (Please Specify) Dollar Amount** field, specify the other type of source of funding in the **Specify Other** text box.

7. For each source of funding use the **Funding Stream used for PFS II Priorities in PFS II Communities?** dropdown menu to select if PFS II activities are funded by that source.

8. If "Yes" is selected, specify the amount of the funding stream used for PFS II priorities in the **Amount of the Funding Stream used for PFS II Priorities in PFS II Communities** field.
   *Note: This **Percentage** field automatically shows the percentage this dollar amount is of the total PFS II funding. Total amounts and percentages are displayed at the bottom of the columns.

What dollar amount of this Subrecipient's funding comes from each funding source?

Source of Funding/Resources	Percentage	Dollar Amount	Funding Stream used for PFS II Priorities in PFS II Communities?	Amount of the Funding Stream used for PFS II Priorities in PFS II Communities	Percentage
PFS II		$	N/A	$	
Drug Free Communities Grant		$	N/A	$	
STOP Act Funding		$	N/A	$	
Minority HIV/AIDS Initiative		$	N/A	$	
Substance Abuse Prevention and Treatment Block Grant		$	N/A	$	
Medicaid (Federal, State, and Local)		$	N/A	$	
Other Federal Funds		$	N/A	$	
State Funds (excluding State Medicaid)		$	N/A	$	
Local Funds (excluding State Medicaid)		$	N/A	$	
Foundations/Non-Profit Organizations		$	N/A	$	
Private/Corporate Entities		$	N/A	$	
Individual Donations/Funding from Fundraising Events		$	N/A	$	
In-Kind Contributions		$	N/A	$	
Other (Please Specify)		$	N/A	$	

Partial screenshot displaying the Subrecipient Resources Edit Form

9. If desired, enter any comments about the funding sources in the **Comments** text box.

10. Click the [Save] (**Save**) button.
   *Note: Click the [Cancel] (**Cancel**) button to cancel this entry.

Comments:

Save button

Save   Cancel

Partial screenshot displaying the Subrecipient Resources Edit Form

Editing Subrecipient Resources

1. Click **Capacity** from the Menu.

2. Click **Subrecipient Resources** from the Capacity Landing Page.

3. If desired, use the **Subrecipient** dropdown menu to narrow the list of records to a specific subrecipient.

4. From the Listing Page, select the subrecipient you wish to edit by clicking the appropriate Subrecipient link.

5. Make any changes needed to the form.

6. Click the [Save] (**Save**) button.
   *Note: Click the [Cancel] (**Cancel**) button to cancel the changes.

Deleting Subrecipient Resources

1. Click **Capacity** from the Menu.

2. Click **Subrecipient Resources** from the Capacity Landing Page.

3. If desired, use the **Subrecipient** dropdown menu to narrow the list of records to a specific subrecipient.

4. From the Listing Page, select the subrecipient you wish to edit by clicking the appropriate Subrecipient link.

5. Click the [Delete] (**Delete**) button.

6. Click the [Yes] (**Yes**) button when asked "Are you sure you want to permanently delete this record?
   *Note: If you do not want to delete the record, click the [No] (**No**) button.

7. Notice the record is removed from the grid.

Sample screenshot displaying the Subrecipient Resources Edit Form

Partial screenshot displaying the Subrecipient Resources Edit Form

Training and Technical Assistance

The Training and Technical Assistance module allows the user to record any training and/or technical assistance that has been received by members of either your organization or your community.

Adding a Training or Technical Assistance

1. Click **Capacity** from the Menu.
2. Click **Training and Technical Assistance** from the Capacity Landing Page.
3. Click the [Add Training/Technical Assistance] (**Add Training/Technical Assistance**) button.

Sample screenshot displaying the Training and Technical Assistance Listing Page

4. Enter the date the training or technical assistance is being requested for in the **Date Requested*** text box as mm/dd/yyyy or use the Calendar feature to select the date. (See the Calendar Feature section for additional details.)

5. Select the status of the training or technical assistance from the **Status*** dropdown menu.

   a. *Needed* indicates the training has not yet occurred and you still need it.

   b. *Received* indicates that the training has been received. If *Received* is selected, new fields will appear at the bottom of the form.

      i. Select the delivery mechanism from the **Delivery Mechanism*** dropdown menu.

         a) If *Other* is selected, specify the other delivery mechanism in the **Specify Other Delivery Mechanism*** text box.

      ii. Select the source of assistance from the **Source of Assistance*** dropdown menu.

         a) If *Other* is selected, specify the other source in the **Specify Other Source of Assistance*** text box.

      iii. Select *Yes* or *No* for **Timely?**

      iv. Select *Yes* or *No* for **Effective?**

         a) If *No* is selected for either of these fields, enter details in the **Explanation*** text box.

      v. Enter a description of the training received in the description text box.

   c. *Closed* indicates the training is no longer needed and has not been received. If *Closed* is selected, new fields will appear at the bottom of the form.

      i. Enter the date in the **Date Closed*** text box as mm/dd/yyyy or use the Calendar Feature to select the date.

      ii. Select the reason the status was closed from the **Reason Closed*** checkboxes.

6. Enter a name for the training or technical assistance in the **Training/TA Name*** text box.

Technical and Training Assistance

Add records for Training and Technical Assistance provided to Coalition Members.

You may now Add a record

Training/Technical Assistance Information
Date Requested*
Status*
Training/TA Name*

Screenshot displaying the Training and Technical Assistance Edit Form

7. Check the box next to each **Training/TA Topic*** that was provided.

8. Enter details about the training or technical assistance in the **Brief Description of the Need for the TA*** text box.

9. Click the [Save] (**Save**) button.
   *Note: Click the [Cancel] (**Cancel**) button to cancel this entry.

Screenshot displaying the Training and Technical Assistance Edit Form

Editing a Training or Technical Assistance

1. Click **Capacity** from the Menu.

2. Click **Training and Technical Assistance** from the Capacity Landing Page.

3. From the Listing Page, select the training or technical assistance you wish to edit by clicking the appropriate Training/TA Name.

4. Make any changes needed to the form.

5. Click the [Save] (**Save**) button.
   *Note: Click the [Cancel] (**Cancel**) button to cancel the changes.

Deleting a Training or Technical Assistance

1. Click **Capacity** from the Menu.

2. Click **Training and Technical Assistance** from the Capacity Landing Page.

3. From the Listing Page, select the training or technical assistance you wish to edit by clicking the appropriate Training/TA Name.

4. Click the [Delete] (**Delete**) button.

5. Click the [Yes] (**Yes**) button when asked "Are you sure you want to permanently delete this record?
   *Note: If you do not want to delete the record, click the [No] (**No**) button.
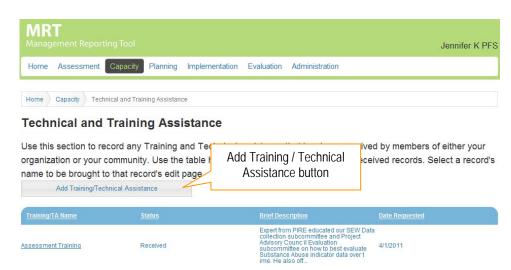
6. Notice the record is removed from the grid.

Sample screenshot displaying the Training and Technical Assistance Listing Page

Sample screenshot displaying the Training and Technical Assistance Edit Form – this is a partial screenshot

Accomplishments and Barriers

The Accomplishments and Barriers module allows the user to track their accomplishments and barriers related to capacity.

Adding an Accomplishment or Barrier

1. Click **Capacity** from the Menu.
2. Click **Accomplishments and Barriers** from the Capacity Landing Page.
3. Click the [Add Accomplishment/Barrier] (**Add Accomplishment/Barrier**) button.

Sample screenshot displaying the Accomplishments and Barriers Listing Page

4. Select the reporting period this accomplishment or barrier occurred in from the **Reporting Period*** dropdown menu.
5. Select the name of the accomplishment or barrier from the **Accomplishment/Barrier Name*** dropdown menu.
6. Select *Accomplishment* or *Challenge/Barrier* from the **Type*** dropdown menu.
7. Enter details about the accomplishment or barrier in the **Description*** text box.
8. Click the [Save] (**Save**) button.
   ***Note**: Click the [Cancel] (**Cancel**) button to cancel this entry.

Screenshot displaying the Accomplishments and Barriers Edit Form

Editing an Accomplishment or Barrier

1. Click **Capacity** from the Menu.

2. Click **Accomplishments and Barriers** from the Capacity Landing Page.

3. From the Listing Page, select the accomplishment or barrier you wish to edit by clicking the appropriate accomplishment/barrier Name.

4. Make any changes needed to the form.

5. Click the [Save] (**Save**) button.
   *Note: Click the [Cancel] (**Cancel**) button to cancel the changes.

Deleting an Accomplishment or Barrier

1. Click **Capacity** from the Menu.

2. Click **Accomplishments and Barriers** from the Capacity Landing Page.

3. From the Listing Page, select the accomplishment or barrier you wish to delete by clicking the appropriate accomplishment/barrier Name.

4. Click the [Delete] (**Delete**) button.

5. Click the [Yes] (**Yes**) button when asked "Are you sure you want to permanently delete this record?
   *Note: If you do not want to delete the record, click the [No] (**No**) button.

6. Notice the record is removed from the grid.

Sample screenshot displaying the Accomplishments and Barriers Listing Page

Sample screenshot displaying the Accomplishments and Barriers Edit Form

PLANNING

Within the Planning module, a user is able to perform the following tasks:

1. Add, edit and delete Strategic Plans for a reporting period.
2. Add, edit and delete Accomplishments and Barriers related to Planning.

Screenshot displaying the Planning Landing Page
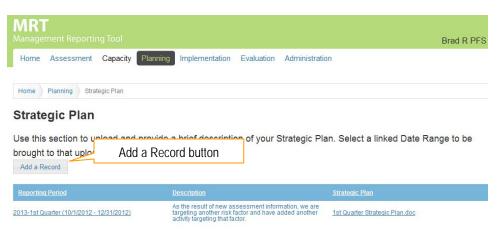
Strategic Plan

The Strategic Plan module allows the user to upload and briefly describe your Strategic Plan for a reporting period. If your Strategic Plan has not changed since it was uploaded last, you do not need to upload it again.

Adding a Strategic Plan

1. Click **Planning** from the Menu.
2. Click **Strategic Plan** from the Planning Landing Page.
3. Click the [Add Meeting] (**Add a Record**) button.

Sample screenshot displaying the Strategic Plan Listing Page
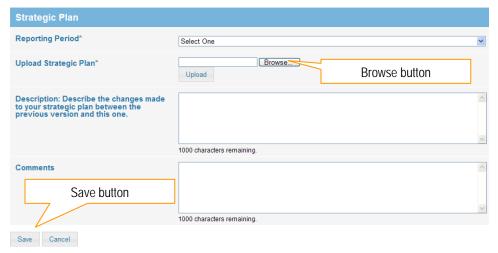
4. Select the reporting period from the **Reporting Period** dropdown list.
5. To upload the Strategic Plan, do the following steps:
   a. Click the [Browse] (**Browse**) button.
   b. Select the document you wish to upload from the **Choose File** window and click the [Open] (**Open**) button.
   c. The file path will appear in the field. Click the [Upload] (**Upload**) button.
   d. The file name will appear below the **Upload** button.
      *Note: To view the uploaded document, click on the file name. If you uploaded the wrong file, repeat the steps to upload the correct file
6. Use the **Description** text box to describe the changes made to your Strategic Plan since it was last uploaded.
7. Enter any comments in the **Comments** text box.
8. Click the [Save] (**Save**) button.
   *Note: Click the [Cancel] (**Cancel**) button to cancel this entry.

Screenshot displaying the Strategic Plan Edit Form

Editing a Strategic Plan

1. Click **Planning** from the Menu.

2. Click **Strategic Plan** from the Planning Landing Page.

3. From the Listing Page, select the reporting period you wish to edit by clicking the Reporting Period link.

4. Make any changes needed to the form.
   *Note: To replace an uploaded file, refer to step 5 in the Adding a Strategic Plan section.

5. Click the [Save] (**Save**) button.
   *Note: Click the [Cancel] (**Cancel**) button to cancel the changes.

Deleting a Strategic Plan

1. Click **Planning** from the Menu.

2. Click **Strategic Plan** from the Planning Landing Page.

3. From the Listing Page, select the reporting period you wish to edit by clicking the Reporting Period link.

4. Click the [Delete] (**Delete**) button.

5. Click the [Yes] (**Yes**) button when asked "Are you sure you want to permanently delete this record?
   *Note: If you do not want to delete the record, click the [No] (**No**) button.

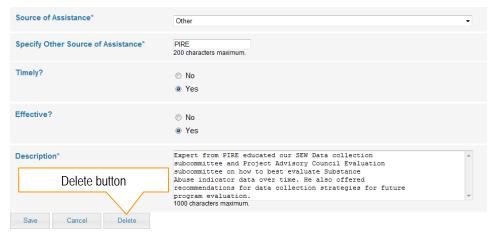6. Notice the record is removed from the grid.

Sample screenshot displaying the Strategic Plan Listing Page

Sample screenshot displaying the Strategic Plan Edit Form

Accomplishments and Barriers

The Accomplishments and Barriers module allows the user to track their accomplishments and barriers related to planning.

Adding an Accomplishment or Barrier

1. Click **Planning** from the Menu.
2. Click **Accomplishments and Barriers** from the Planning Landing Page.
3. Click the [Add Accomplishment/Barrier] (**Add Accomplishment/Barrier**) button.

Accomplishments and Barriers

Use this section to enter information on any Accomplishments and/or Barriers that you experienced while performing activities related to Assessment. Each Accomplishment or Barrier will be listed in a table. Use the table heading links to sort accomplishments/barriers by colu[...]ed to each Accomplishment or Barrier to edit or delete that record.

Add Accomplishment / Barrier button

[Add Accomplishment/Barrier]

Name	Description	Type	Reporting Period
Establishment of key policies	Although 5 of the 6 distinct communities were represented at the Planning meeting, our mos t at risk community (the Native American Community) was not in attendance.	Challenge/Barrier	2011-1st Quarter (10/1/2010 - 12/31/2010)

Sample screenshot displaying the Accomplishments and Barriers Listing Page

4. Select the reporting period this accomplishment or barrier occurred in from the **Reporting Period*** dropdown menu.
5. Select the name of the accomplishment or barrier from the **Accomplishment/Barrier Name*** dropdown menu.
6. Select *Accomplishment* or *Challenge/Barrier* from the **Type*** dropdown menu.
7. Enter details about the accomplishment or barrier in the **Description*** text box.
8. Click the [Save] (**Save**) button.
   ***Note**: Click the [Cancel] (**Cancel**) button to cancel this entry.

Accomplishments and Barriers

Enter information on any Accomplishments and/or Barriers that you had while performing activities related to Assessment.

You may now Add a record

Accomplishment/Barrier Information

Reporting Period*   Select One

Accomplishment/Barrier Name*
                           200 characters maximum.

Type*   Select One

Description*

Save button

3000 characters maximum.

[Save] [Cancel]

Screenshot displaying the Accomplishments and Barriers Edit Form

Editing an Accomplishment or Barrier

1. Click **Planning** from the Menu.
2. Click **Accomplishments and Barriers** from the Planning Landing Page.
3. From the Listing Page, select the accomplishment or barrier you wish to edit by clicking the appropriate accomplishment/barrier Name.
4. Make any changes needed to the form.
5. Click the [Save] (**Save**) button.
   *Note: Click the [Cancel] (**Cancel**) button to cancel the changes.

Deleting an Accomplishment or Barrier

1. Click **Planning** from the Menu.
2. Click **Accomplishments and Barriers** from the Planning Landing Page.
3. From the Listing Page, select the accomplishment or barrier you wish to delete by clicking the appropriate accomplishment/barrier Name.
4. Click the [Delete] (**Delete**) button.
5. Click the [Yes] (**Yes**) button when asked "Are you sure you want to permanently delete this record?
   *Note: If you do not want to delete the record, click the [No] (**No**) button.
6. Notice the record is removed from the grid.

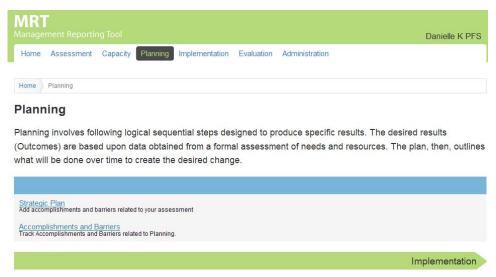Sample screenshot displaying the Accomplishments and Barriers Listing Page

Sample screenshot displaying the Accomplishments and Barriers Edit Form

IMPLEMENTATION

Within the Implementation module, a user is able to perform the following tasks:

1. Add, edit and delete Sub-State Information.
2. Add, edit and delete Sub-Recipient.
3. Add, edit and delete Interventions Implemented.
4. Updating Grantee Process Measures.
5. Updating Subrecipient Process Measures (Demographics per targeted priority).
6. Updating Subrecipient Process Measures (Other).
7. Updating Subrecipient Process Measures (Membership).
8. Add, edit and delete Accomplishments and Barriers related to Implementation.

Screenshot displaying the Implementation Landing Page

Sub-State Information

The Sub-State Information module allows the user to add Sub-State information for Sub-Recipients that are funded by a 'Sub-State'. A Sub-State can be a regional, county or other organization designated by the state to provide PFS II funds to subrecipients. The funds go from the Grantee to the Sub-State and from the Sub-State to the Sub-Recipient. If you do not have any Sub-States, this module can be skipped.

Adding a Sub-State

1. Click **Implementation** from the Menu.
2. Click **Sub-State Information** from the Implementation Landing Page.
3. Click the [Add Sub-State] (**Add Sub-State**) button.

Sample screenshot displaying the Sub-State Information Listing Page

4. Enter the name of the Sub-State in the **Sub-State Name*** text box.
5. Select the type of Sub-State from the **Sub-State Type*** dropdown menu.
   a. If *Other* is selected, enter the name of the sub-state type in the **Specify Other Sub-State*** text box.
6. Enter the total amount of funding the Sub-State receives in the **Total Funding for Sub-State*** text box.
   *Note: Do not enter the dollar ($) symbol.
7. For each targeted zip code:
   a. Enter the zip code into the **Targeted Zip Code** text box.
      *Note: To look up zip codes for your sub-state area, use the USPS Zip Code Look-Up link to go to USPS.com.
   b. Click the [Add] (**Add**) button.
      *Note: If you added the wrong zip code, click the **Delete** button to the right to delete it.

Screenshot displaying the Sub-State Information Edit Form

8. For each targeted congressional district:

    a. Enter the Congressional District into the **Targeted Congressional District** text box.
       *Note:** To look up Congressional Districts for your sub-state area, use the Congressional District Look-Up link.

    b. Click the Add (**Add**) button.
       *Note:** If you added the wrong congressional district, click the **Delete** button to the right to delete it.

9. Enter details about the Sub-State funding in the **Briefly describe how Sub-Recipients are being funded*** text box.

10. Click the Save (**Save**) button.
    *Note**: Click the Cancel (**Cancel**) button to cancel this entry.

Screenshot displaying the Sub-State Information Edit Form

Editing a Sub-State

1. Click **Implementation** from the Menu.

2. Click **Sub-State Information** from the Implementation Landing Page.

3. From the Listing Page, select the sub-state you wish to edit by clicking the appropriate Sub-state Name.

4. Make any changes needed to the form.

   *__Note__: To delete a Zip Code or a Congressional District, click the **Delete** (**Delete**) button to the right of the item to be deleted.

5. Click the **Save** (**Save**) button.

   *__Note__: Click the **Cancel** (**Cancel**) button to cancel the changes.

Sub-State Information

Use this section to enter information on Sub-State entities, if any, that are participating in your PFS II program. The term 'Sub-State' refers to a regional, county, or other sub-State organization designated by the State to provide PFS II funds to subrecipients. There are two levels of subrecipients: (1) entities directly funded by the Grantee ('Grantee-Funded Subrecipients') and (2) entities funded, not by the Grantee, but by a Sub-State ('Sub-State-Funded Subrecipients'). The term 'Subrecipient' includes both of these levels - Grantee-Funded Subrecipients and Sub-State-Funded Subrecipients.

Add Sub-State

Sub-State Name link

Sub-state Name	Total Funding for Sub-State	Targeted Zip Codes	Targeted Congressional Districts	How is the Subrecipient being funded?
Cumberland Co.	150000.00	04032 , 04033 , 04034	CD 1	PFS, Drug Free Communities, STOP Act funding

Sample screenshot displaying the Sub-State Information Listing Page

Deleting a Sub-State

1. Click **Implementation** from the Menu.

2. Click **Sub-State Information** from the Implementation Landing Page.

3. From the Listing Page, select the sub-state you wish to delete by clicking the appropriate Sub-state Name.

4. Click the **Delete** (**Delete**) button.

5. Click the **Yes** (**Yes**) button when asked "Are you sure you want to permanently delete this record?

   *__Note:__ If you do not want to delete the record, click the **No** (**No**) button.

6. Notice the record is removed from the grid.

   *__Note__: You will not be able to delete a Sub-State if a Sub-Recipient is associated with it.

Sub-State Information

Sub-State Name*	Cumberland Co.
	186 characters remaining.
Sub-State Type*	County
Total Funding for Sub-State*	$ 150000.00
Target Zip Codes	[ ] Add USPS Zip Code Look-Up
	5 characters remaining.
	04032 Delete
	04033 Delete
	04034 Delete
Targeted Congressional District(s)	[ ] Add Congressional District Look-Up
	30 characters remaining.
	CD 1 Delete
Briefly describe how Subrecipients are being funded*	PFS, Drug Free Communities, STOP Act funding

Delete button

956 characters remaining.

Save   Cancel   Delete

Sample screenshot displaying the Sub-State Information Edit Form

Subrecipient

The Subrecipient module allows the user to add Subrecipients that are funded. These include both those funded by the grantee and those funded by the sub-state.

Adding a Subrecipient

1. Click **Implementation** from the Menu.
2. Click **Subrecipient** from the Implementation Landing Page.
3. Click the [Add Sub-recipient] (**Add Subrecipient**) button.

Subrecipient

Use this section to add any Subrecipients who have been funded. There are two levels of subrecipients: (1) entities directly funded by the Grantee ('Grantee-Funded Subrecipients') and (2) entities funded, not by the Grantee, but by a Sub-State ('Sub-State-Funded Subrecipients'). The term 'Subrecipient' includes both of these levels - Grantee-Funded Subrecipients and S[...]

[Add Subrecipient] ← Add Sub-recipient button

Subrecipient Name	Communities Targeted for PFS II by Subrecipient	Targeted Zip Codes	Amount Awarded per Year	Date Funded
Freeport Community Coalition	Freeport	04032	15000.00	12/1/2012

Sample screenshot displaying the Subrecipient Listing Page

4. Select the type of Subrecipient from the **Subrecipient Type*** dropdown menu.
   a. If _Sub-State_ is selected, select the sub-state name from the **Sub-State Name*** dropdown menu.
      ***Note**: The Sub-State Name dropdown menu is populated with the information added in the Sub-State Information module.
5. Enter a name for the Subrecipient in the **Subrecipient Name*** text box.
6. Enter the street address for the Subrecipient in the **Subrecipient Street Address*** text box.
7. Enter the city the Subrecipient resides in the **Subrecipient City*** text box.
8. Select the state the Subrecipient resides in from the **Subrecipient State*** dropdown menu.
9. Enter the 5-digit zip code the Subrecipient resides in the **Subrecipient Zip Code*** text box.
10. For each targeted zip code:
    a. Enter the zip code into the **Subrecipient's Targeted Zip Code** text box
       ***Note:** To look up zip codes for your targeted areas, use the USPS Zip Code Look-Up link to go to USPS.com.
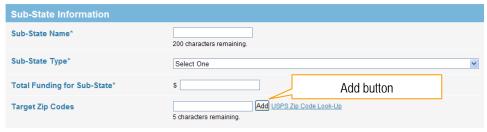   b. Click the [Add] (**Add**) button.
       ***Note:** If you added the wrong zip code, click the **Delete** button to the right to delete it.

Subrecipient

Enter subrecipient information for the subrecipient (Grantee-Funded Subrecipient or Subrecipient-Funded Entity) who has been funded. The term "Grantee-Funded Subrecipient" refers to an entity that receives PFS II funds directly from the Grantee. The term "Subrecipient-Funded Entity" refers to an entity that receives PFS II funds from a Grantee-Funded Subrecipient rather than directly from the Grantee.

You may now Add a record

Subrecipient Information

⊙ Subrecipient Type*	Funded by Sub-State
Sub-State Name*	Select One
Subrecipient Name*	_____
	200 characters remaining.
Subrecipient Street Address*	_____
	200 characters remaining.
Subrecipient City*	_____
	50 characters remaining.
Subrecipient State*	Select One
Subrecipient Zip Code*	_____
	5 characters remaining.
Target Zip Codes	_____ [Add] USPS Zip Code Look-Up
	5 characters remaining.

Add button →

Partial screenshot displaying the Subrecipient Edit Form
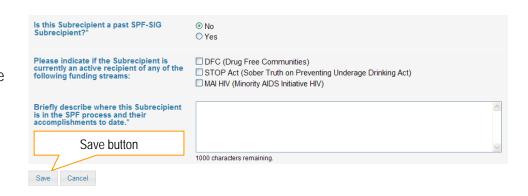
11. If desired, enter the name of the Subrecipient's organization in the **Organization Name** text box.

12. Enter the names of the communities in the **Communities Targeted for PFS II by Subrecipient*** text box.

13. Enter the **Duns Number** of the Subrecipient.

14. Select *Yes* or *No* for **Is this Subrecipient a Tribe or Tribal Organization?**.

15. Select the status of the Subrecipient in the **Subrecipient Status*** dropdown menu.

16. Use the **Has this Subrecipient been funded?*** radio buttons to select if the Subrecipient has received funding.

    a. If *Yes* was selected:

        i. Enter the date the Subrecipient was funded in the **Date Funded*** text box as mm/dd/yyyy or use the Calendar feature to select the date. (See the Calendar Feature section for additional details.)

        ii. Enter the amount of money the Subrecipient was awarded in the **Amount Awarded per year*** text box.

Partial screenshot displaying the Subrecipient Edit Form

17. Select *Yes* or *No* for **Is this Subrecipient a past SPF-SIG Subrecipient?***.

18. If applicable, **Please indicate if the Subrecipient is currently an active recipient of any of the following funding streams:** by checking the appropriate boxes.

19. **Briefly describe where the Subrecipient is in the SPF process and their accomplishments to date*** in the text box.

20. Click the [Save] (**Save**) button.
    ***Note**: Click the [Cancel] (**Cancel**) button to cancel this entry.

Save button

Editing a Subrecipient

1. Click **Implementation** from the Menu.

2. Click **Subrecipient** from the Implementation Landing Page.

3. From the Listing Page, select the Subrecipient you wish to edit by clicking the appropriate Subrecipient Name.

4. Make any changes needed to the form.

5. Click the [Save] (**Save**) button.
   *Note: Click the [Cancel] (**Cancel**) button to cancel the changes.

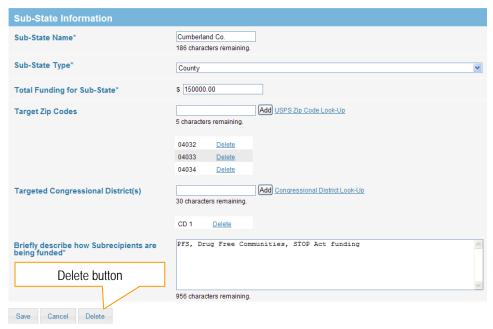Sample screenshot displaying the Subrecipient Listing Page

Deleting a Subrecipient

1. Click **Implementation** from the Menu.

2. Click **Subrecipient** from the Implementation Landing Page.

3. From the Listing Page, select the Subrecipient you wish to edit by clicking the appropriate Subrecipient Name.

4. Click the [Delete] (**Delete**) button.

5. Click the [Yes] (**Yes**) button when asked "Are you sure you want to permanently delete this record?
   *Note: If you do not want to delete the record, click the [No] (**No**) button.

6. Notice the record is removed from the grid.

Sample screenshot displaying the Subrecipient Edit Form – this is a partial screenshot

Interventions Implemented

The Interventions Implemented module allows the user to add the interventions implemented within your subrecipients.

Interventions Implemented

Use this section to add/edit your Interventions Implemented. Use the table heading links to sort activities by column. Click on the Interventio[...]   record.

Add New Intervention

Add New Intervention button

Adding an Implemented Intervention

1. Click **Implementation** from the Menu.
2. Click **Interventions Implemented** from the Implementation Landing Page.
3. Click the [Add New Intervention] (**Add New Intervention**) button.

Subrecipient	Intervention/Practice Name	Service Type	CSAP Strategy Type	Evidence-based?	Targeting Underage Drinking?	Targeting Prescription Drug use?	Targeted Priority	IOM Category	Status
Freeport Community Coalition	Behavioral Couples Therapy for Alcoholism and Drug Abuse	Original Resource Directories Developed	Alternative Activities	Yes	Yes	True	Marijuana use among persons ages 12-25	Universal Direct, Universal Indirect	True

Showing 1 to 1 of 1 entries

◄ Previous   Next ►

Sample screenshot displaying the Interventions Implemented Listing Page

4. Select the Subrecipient community name from the **Subrecipient*** dropdown menu.
5. Select the standard intervention or practice name from the **Standard intervention/Practice Name*** dropdown menu.
   a. If _Other_ is selected, enter the name of the intervention in the **Specify Other Intervention/Practice Name*** text box.
6. Enter a brief description of the intervention to identify it by in the **Intervention/Practice Description*** text box.
7. Select the type of service from the **Service Type*** dropdown menu.
   ***Note**: For a description of the service types, click the For a Service Type guidance document, click here link.

Interventions Implemented

Enter information for your intervention. To add quarterly data click on the "Add Quarterly Data" button. You will only be able to add quarterly data if the intervention is currently active.

You may now Add a record

Interventions Implemented

ⓘ Subrecipient*   Select One
ⓘ Standard Intervention/Practice Name*   Select One
ⓘ Intervention/Practice Description*
                         1000 characters maximum.
Service Type*   Select One

For a Service Type guidance document, click here

Partial screenshot displaying the Interventions Implemented Edit Form

8. Select the CSAP strategy associated with the intervention from the **CSAP Strategy Type** dropdown menu.

9. Answer _Yes_ or _No_ to **Is this an evidence-based program or practice?***.

10. Answer _Yes_ or _No_ to **Is this intervention/practice targeting underage drinking?***.

11. Answer _Yes_ or _No_ to **Is this intervention/practice targeting prescription drugs?***.

12. Select the related targeted priority from the **Targeted Priority related to this Intervention/Practice** dropdown menu

Partial screenshot displaying the Interventions Implemented Edit Form

13. Select the targeted IOM category from the **IOM Category the Intervention/Practice Targets*** checkboxes.

14. Enter the date the intervention first received funding in the **Intervention/Practice Funding Start Date*** text box as mm/dd/yyyy or use the Calendar feature to select the date. (See the Calendar Feature section for additional details.).

15. Answer _Yes_ or _No_ to **Is this intervention/practice currently active***.

    a. If _No_ is selected, enter the date the intervention ended in the **Intervention/Practice End Date*** text box as mm/dd/yyyy or use the Calendar feature to select the date.

Save button

16. Click the [Save] (**Save**) button.
    ***Note**: Click the [Cancel] (**Cancel**) button to cancel this entry.
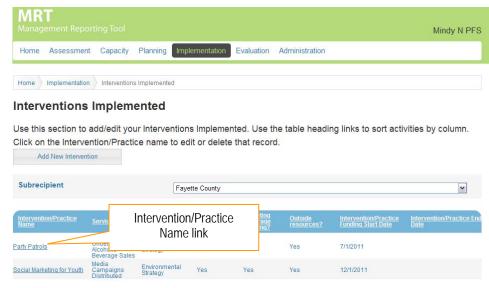
Partial screenshot displaying the Interventions Implemented Edit Form

Adding Quarterly Data
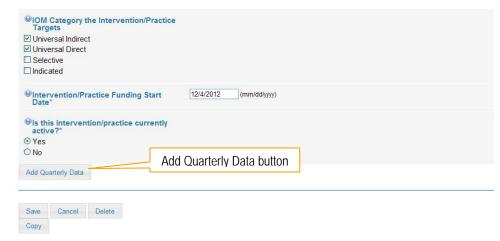
Once the Intervention is saved, you can begin entering quarterly data to it.

1. Click **Implementation** from the Menu.
2. Click **Interventions Implemented** from the Implementation Landing Page.
3. If desired, use the **Subrecipient** dropdown menu to narrow the list of Intervention/Practice Names to a specific subrecipient community.
4. From the Listing Page, select the implemented intervention you wish to add quarterly data to by clicking the appropriate Intervention/Practice Name.

Sample screenshot displaying the Interventions Implemented Listing Page

5. Click the [Add Quarterly Data] (**Add Quarterly Data**) button.

Partial screenshot displaying the Interventions Implemented Edit Form

a. Select the appropriate reporting period for the quarter from the **Reporting Period** dropdown menu.

b. Enter the number of people reached during the quarter in the **Number of people served by this intervention/practice during this quarter** text box.

c. Enter the number of people served during the quarter in the **Number of people reached by this intervention/practice during this quarter** text box.

d. Click the [Save] (**Save**) button.
   *Note: Click the [Cancel] (**Cancel**) button to cancel this entry.

6. Click the [Save] (**Save**) button.
   *Note: Click the [Cancel] (**Cancel**) button to cancel this entry.

Sample screenshot displaying the Quarterly Data Edit Form
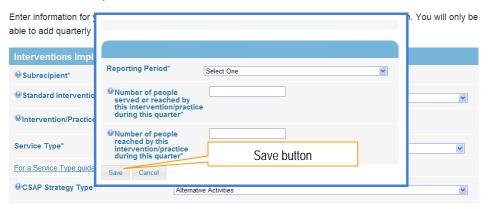
Editing an Implemented Intervention

1. Click **Implementation** from the Menu.

2. Click **Interventions Implemented** from the Implementation Landing Page.

3. If desired, use the **Subrecipient** dropdown menu to narrow the list of Intervention/Practice Names to a specific subrecipient community.

4. From the Listing Page, select the implemented intervention you wish to edit by clicking the appropriate Intervention/Practice Name.

5. Make any changes needed to the form.

   a. To edit quarterly data, click the link of the reporting period you wish to edit.

   b. Make any changes needed to the form.

   c. Click the [Save] (**Save**) button.
      *Note: Click the [Cancel] (**Cancel**) button to cancel the changes.
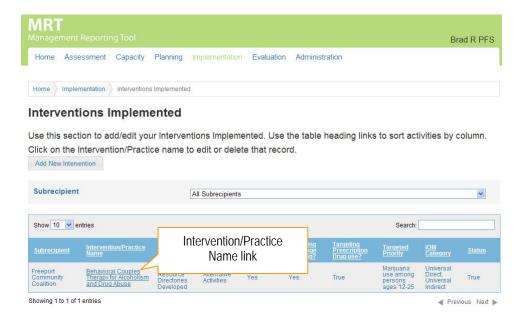
   d. To delete the quarterly update, click the [Delete] (**Delete**) button.

6. Click the [Save] (**Save**) button.
   *Note: Click the [Cancel] (**Cancel**) button to cancel the changes.

Sample screenshot displaying the Interventions Implemented Listing Page

Deleting an Implemented Intervention

1. Click **Implementation** from the Menu.

2. Click **Interventions Implemented** from the Implementation Landing Page.

3. If desired, use the **Subrecipient** dropdown menu to narrow the list of Intervention/Practice Names to a specific subrecipient community.

4. From the Listing Page, select the implemented intervention you wish to delete by clicking the appropriate Intervention/Practice Name.

5. Click the [Delete] (**Delete**) button.

6. Click the [Yes] (**Yes**) button when asked "Are you sure you want to permanently delete this record?

   *Note: If you do not want to delete the record, click the [No] (**No**) button.

7. Notice the record is removed from the grid.

Partial screenshot displaying the Interventions Implemented Edit Form

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Tips

- Once an intervention has associated quarterly data, it cannot be deleted. Delete all quarterly data records associated with it, then delete that intervention.
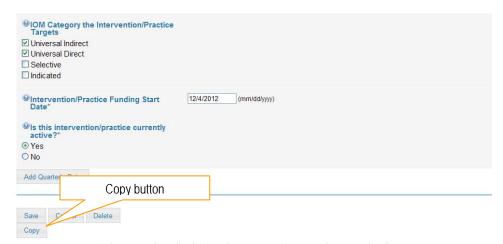
Copying an Implemented Intervention

1. Click **Implementation** from the Menu.

2. Click **Interventions Implemented** from the Implementation Landing Page.

3. If desired, use the **Subrecipient** dropdown menu to narrow the list of Intervention/Practice Names to a specific subrecipient community.

4. From the Listing Page, select the implemented intervention you wish to copy by clicking the appropriate Intervention/Practice Name.

5. Click the [Copy] (**Copy**) button.

Partial screenshot displaying the Interventions Implemented Edit Form

6. A list appears informing you of the data that will be copied to a new record.

7. Select the Subrecipient community name you would like the interventions information to belong to from the **Subrecipient** dropdown menu.
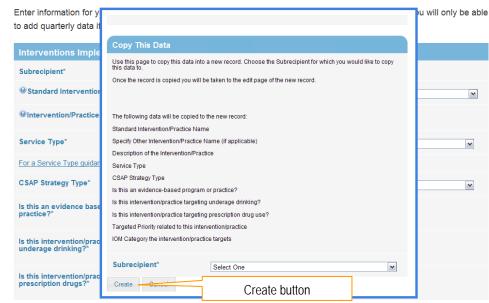
8. Click the [Copy] (**Create**) button.
   *Note: Click the [Cancel] (**Cancel**) button to cancel this copy.

9. The Interventions Implemented Edit Form will display. Make any changes needed to the details.

10. Click the [Save] (**Save**) button.
    *__Note__: Click the [Cancel] (**Cancel**) button to cancel this entry.

Screenshot displaying the Copy This Data Edit Form

Grantee Process Measures

The Grantee Process Measures module allows the user to enter and update information regarding the process measure for your grant. This module can be updated as data becomes available.

Updating a Grantee Process Measure

1. Click **Implementation** from the Menu.

2. Click **Grantee Process Measures** from the Implementation Landing Page.

3. Select the reporting period from the **Reporting Period** dropdown list.

4. Click the Edit this Record (**Edit this Record**) button

Sample screenshot displaying the Grantee Process Measures Listing Page

5. For each subrecipient you wish to update:

   a. Enter the number of trainings and technical assistance activities this subrecipient provided to their community in the **Number of Training/TA Activities Provided to the Community** textbox.

   b. Enter the number served by these activities in the **Numbers Served by the Grantee through the Training/TA Activities Provided** text box.

   c. Using the dropdown menu, select _N/A_, _Yes_ or _No_ to answer the question, **Did this subrecipient increase the Number or Percent of Evidence-based Programs, Policies or Practices between the last Reporting Period and this one?**

   d. Enter the **Number of Evidence-based Programs, Policies or Practices implemented** in the text box.

   e. Using the dropdown menu, select _N/A_, _Yes_ or _No_ to answer the question, **Did this subrecipient increase the Number of Prevention Activities supported by Leveraged Resources between the last Reporting Period and this one?**

   f. Enter the **Number of Prevention Activities supported by Leveraged Resources** in the text box.

   g. Using the dropdown menu, select _N/A_, _Yes_ or _No_ to answer the question, **Does this Subrecipient submit data to the Grantee's Data system?**

6. Click the [Save] (**Save**) button.
   *Note: Click the [Cancel] (**Cancel**) button to cancel this entry

Grantee Process Measures

Sample screenshot displaying the Grantee Process Measures Edit Form

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Tips

- For help finding each subrecipient, click on a header to arrange that column in ascending or descending order.

- Grantee Process Measures cannot be deleted. Instead reset the values to their defaults of 0 (zero) and N/A.

Subrecipient Process Measures (Demographics)

The Subrecipient Process Measures (Demographics) module allows the user to enter and update the demographic data of those reached by the subrecipient during the reporting period for each priority.
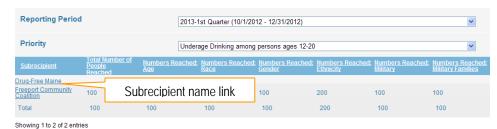
Updating a Subrecipient Process Measure (Demographics)

1. Click **Implementation** from the Menu.
2. Click **Subrecipient Process Measures (Demographics)** from the Implementation Landing Page.
3. Select the reporting period from the **Reporting Period** dropdown list.
4. Select the priority from the **Priority** dropdown list. A list of subrecipients is displayed.
5. Click on the Subrecipient name link to enter demographic data for that subrecipient

Sample screenshot displaying the Subrecipient Process Measures (Demographics) Listing Page

6. Enter the total number of people reached in the **Total Number of People Reached** text box.
7. Enter the number of people reached by **Age** in the appropriate text boxes.
8. Enter the number of people reached by **Gender** in the appropriate text boxes.
9. Enter the number of people reached by **Race** in the appropriate text boxes.
10. Enter the number of people reached by **Ethnicity** in the appropriate text boxes.

Partial screenshot displaying the Subrecipient Process Measure (Demographics)s Edit Form

11. Enter the number of people reached, if any, by **Military** status in the appropriate text boxes.

12. Enter the number of people reached, if any, who are family members of a military service member. (other than a military service member) in the **Military Families** section.

13. Click the [Save] (**Save**) button.
    *Note: Click the [Cancel] (**Cancel**) button to cancel this entry

Partial screenshot displaying the Subrecipient Process Measure (Demographics)s Edit Form

E. Military

Armed Forces (Current Service Members, including active duty, reserve, or National Guard)

Veterans

F. Military Families

Military Family members (other than the service member(s))

Showing 1 to 32 of 32 entries

Save button

Save   Cancel

Tips

- The total for each subcategory (Ethnicity, Race, Gender, and Age Group) must equal the Total Number of People Reached.
- Subrecipient Process Measures (Demographics) cannot be deleted.

Subrecipient Process Measures (Other)
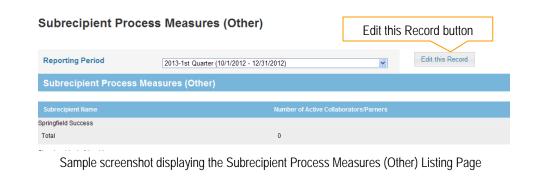
The Subrecipient Process Measures (Other) module allows the user to enter and update information regarding the other process measures for your subrecipients for the reporting period.

Updating a Subrecipient Process Measure (Other)

1. Click **Implementation** from the Menu.
2. Click **Subrecipient Process Measures (Other)** from the Implementation Landing Page.
3. Select the reporting period from the **Reporting Period** dropdown list.
4. Click the [Edit this Record] (**Edit this Record**) button.

Subrecipient Process Measures (Other)

| | Edit this Record button |

| **Reporting Period** | 2013-1st Quarter (10/1/2012 - 12/31/2012) | Edit this Record |

Subrecipient Process Measures (Other)

Subrecipient Name	Number of Active Collaborators/Parners
Springfield Success	
Total	0

Sample screenshot displaying the Subrecipient Process Measures (Other) Listing Page

5. For each subrecipient you wish to update, enter the number of active collaborators or partners involved with this subrecipient in the **Number of Active Collaborators/Partners** textbox.
6. Click the [Save] (**Save**) button.
   *Note: Click the [Cancel] (**Cancel**) button to cancel this entry

Subrecipient Process Measures (Other)

| **Reporting Period** | 2013-1st Quarter (10/1/2012 - 12/31/2012) |

Subrecipient Process Measures (Other)

Subrecipient Name	Number of Active Collaborators/Parners
Springfield Success	

Save button

Showing 1 to 1 of 1 entries

[Save] [Cancel]

Sample screenshot displaying the Subrecipient Process Measures (Other) Edit Form

Tips
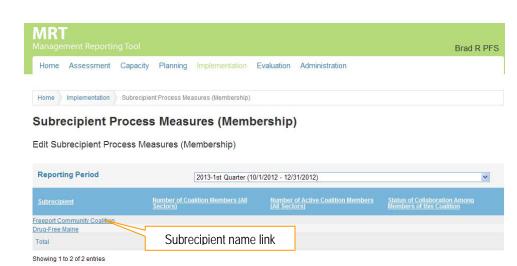
- For help finding each subrecipient, click on the Subrecipient Name header to arrange that column in ascending or descending order.
- Subrecipient Process Measures (Other) cannot be deleted.

Subrecipient Process Measures (Membership)

The Subrecipient Process Measures (Membership) module allows the user to track the coalition membership's collaboration and level of involvement by subrecipient for a reporting period.

Updating a Subrecipient Process Measure (Membership)

1. Click **Implementation** from the Menu.
2. Click **Subrecipient Process Measures (Membership)** from the Implementation Landing Page.
3. Select the reporting period from the **Reporting Period** dropdown list.
4. Click on the Subrecipient name link to enter membership information for that subrecipient.

Sample screenshot displaying the Subrecipient Process Measures (Membership) Listing Page

5. Use the radio buttons to complete the statement, **Collaboration Among Members of this Coalition is**:*

6. For each Sector:

    a. Enter **How many coalition members represent this sector?**

    b. Enter **How many of these coalition members are active?**

    c. Rate the sector's average level of involvement using the **What is the average level of involvement for each of the sectors?** radio buttons.

Partial screenshot displaying the Subrecipient Process Measure (Membership) Edit Form

7. If a member's sector is other than those listed, complete step 6 for that sector.

    a. An **Other (Please Specify)** field will appear. Enter the name of the "Other" sector.

8. Click the [Save] (**Save**) button.
    *__Note__: Click the [Cancel] (**Cancel**) button to cancel this entry

Partial screenshot displaying the Subrecipient Process Measure (Membership)s Edit Form

Tips

- All fields, except "Other" are required. Enter 0 (zero) and "Low" for those sectors that have no members.
- Subrecipient Process Measures (Membership) cannot be deleted.

Accomplishments and Barriers

The Accomplishments and Barriers module allows the user to track their accomplishments and barriers related to implementation.

Adding an Accomplishment or Barrier

1. Click **Implementation** from the Menu.
2. Click **Accomplishments and Barriers** from the Implementation Landing Page.
3. Click the [Add Accomplishment/Barrier] (**Add Accomplishment/Barrier**) button.

Sample screenshot displaying the Accomplishments and Barriers Listing Page

4. Select the reporting period this accomplishment or barrier occurred in from the **Reporting Period*** dropdown menu.
5. Select the name of the accomplishment or barrier from the **Accomplishment/Barrier Name*** dropdown menu.
6. Select *Accomplishment* or *Challenge/Barrier* from the **Type*** dropdown menu.
7. Enter details about the accomplishment or barrier in the **Description*** text box.
8. Click the [Save] (**Save**) button.
   ***Note**: Click the [Cancel] (**Cancel**) button to cancel this entry.

Screenshot displaying the Accomplishments and Barriers Edit Form

Editing an Accomplishment or Barrier

1. Click **Implementation** from the Menu.

2. Click **Accomplishments and Barriers** from the Implementation Landing Page.

3. From the Listing Page, select the accomplishment or barrier you wish to edit by clicking the appropriate accomplishment/barrier Name.

4. Make any changes needed to the form.

5. Click the [Save] (**Save**) button.
   *Note: Click the [Cancel] (**Cancel**) button to cancel the changes.

Sample screenshot displaying the Accomplishments and Barriers Listing Page

Deleting an Accomplishment or Barrier

1. Click **Implementation** from the Menu.

2. Click **Accomplishments and Barriers** from the Implementation Landing Page.

3. From the Listing Page, select the accomplishment or barrier you wish to delete by clicking the appropriate accomplishment/barrier Name.

4. Click the [Delete] (**Delete**) button.

5. Click the [Yes] (**Yes**) button when asked "Are you sure you want to permanently delete this record?
   *Note: If you do not want to delete the record, click the [No] (**No**) button.

6. Notice the record is removed from the grid.

Sample screenshot displaying the Accomplishments and Barriers Edit Form

EVALUATION

Within the Evaluation module, a user is able to perform the following tasks:

1. Upload an Evaluation Plan.
2. View the Grantee Targeted Priorities and Targeted Communities.
3. View the Subrecipient Targeted Priorities and Targeted Communities.
4. Add, edit and delete Approved Statewide Targets.
5. Add, edit and delete Community-Level NOMs and Targeted Outcome Data.
6. Upload an Evaluation Report.
7. Update Milestones and Timeline Progress.
8. Upload a Site Visit Report.
9. Add, edit and delete Accomplishments and Barriers related to Evaluation.

Evaluation

The Evaluation Step is comprised of conducting, analyzing, reporting on and using the results of Outcome Evaluation. The Outcome Evaluation involves collecting and analyzing information about whether the intended Goals and Objectives were achieved. Evaluation results identify areas where modifications to prevention strategies may be needed, and can be used to help plan for sustaining the prevention effort as well as future endeavors.

Evaluation Plan
Upload your evaluation plan. (This is optional.)

Grantee Targeted Priority and Targeted Communities
Use this section to view your targeted priority and targeted communities

Subrecipient Targeted Priority and Targeted Communities
Use this section to view your subrecipient's targeted priority and targeted communities

Approved Statewide Target
Use this section to enter your approved statewide target.

Community-Level NOMs and Targeted Outcome Data
Use this section to enter your community-level NOMs and targeted outcome data for your subrecipients.

Evaluation Report
Upload your evaluation report. (This is optional.)

Milestone/Timeline Progress
Track your progress on meeting your specified milestones and timeline

Site Visit Report
Upload reports on Grantee site visits to Grantee-Funded Subrecipients and Sub-State-Funded Subrecipients.

Accomplishments and Barriers
Track Accomplishments and Barriers related to Evaluation.

Screenshot displaying the Evaluation Landing Page

Evaluation Plan

The Evaluation Plan module allows the user to upload and provide a brief description of their evaluation plan. This is optional.

Uploading the Evaluation Plan

1. Click **Evaluation** from the Menu.
2. Click **Evaluation Plan** from the Evaluation Landing Page.
3. Click the [Edit Evaluation Plan] (**Edit Evaluation Plan**) button.

Evaluation Plan

This is optional. Use this section to upload and provide a brief description of your Evaluation Plan. Select 'Edit Evaluation Plan' to be broug[...] plan is active or requires revision will you be able to edit the plan. Once the plan [...] be able to edit the plan.

Edit Evaluation Plan button

[Edit Evaluation Plan]

Evaluation Plan	
Upload Evaluation Plan*	Evaluation Plan 2012.doc
Description	Use this description field to provide a short identifying descriptor for your evaluation plan upload.

Sample screenshot displaying the Evaluation Plan Listing Page

4. To upload an evaluation plan, perform the following steps:
   a. Click the [Browse] (**Browse**) button.
   b. Select the document you wish to upload from the **Choose File** window and click the [Open] (**Open**) button.
   c. The file path will appear in the field. Click the [Upload Evaluation Plan] (**Upload Evaluation Plan**) button.
   d. The file name will appear next to the **Upload** button.
      *Note: To view the uploaded document, click on the file name. If you uploaded the wrong file, repeat the steps to upload the correct file.
5. If desired, enter a description of the evaluation plan in the **Description** text box.
6. Click the [Save] (**Save**) button.
   *Note: Click the [Cancel] (**Cancel**) button to cancel this entry.

Evaluation Plan

This is optional. Upload and provide a brief description of your evaluation plan. You may only upload one evaluation plan to this system. Use the Browse button to select a file from your local computer and then click the Upload Evaluation Plan button. To replace a plan that has already been uploaded, you will need to select a new file and upload it. Once the plan has been submitted or accepted, you will no longer be able replace the plan.

You may now Edit this record

Evaluation Plan	
Upload Evaluation Plan*	[ ] [Browse...] [Upload Evaluation Plan]
Description	[ ] 1000 characters remaining.

Save button

[Save] [Cancel]

Sample screenshot displaying the Evaluation Plan Edit Form

Grantee Targeted Priority and Targeted Communities

The Grantee Targeted Priority and Targeted Communities module allows the user to view details regarding the grantee's targeted priorities and targeted communities.

Viewing the Grantee Targeted Priority and Targeted Communities

1. Click **Evaluation** from the Menu.
2. Click **Grantee Targeted Priority and Targeted Communities** from the Evaluation Landing Page.

Sample screenshot displaying the Grantee Targeted Priority and Targeted Communities Listing Page

Subrecipient Targeted Priority and Targeted Communities

The Subrecipient Targeted Priority and Targeted Communities module allows the user to view details regarding the subrecipient's targeted priorities and targeted communities.

Viewing the Subrecipient Targeted Priority and Targeted Communities

1. Click **Evaluation** from the Menu.
2. Click **Subrecipient Targeted Priority and Targeted Communities** from the Evaluation Landing Page.
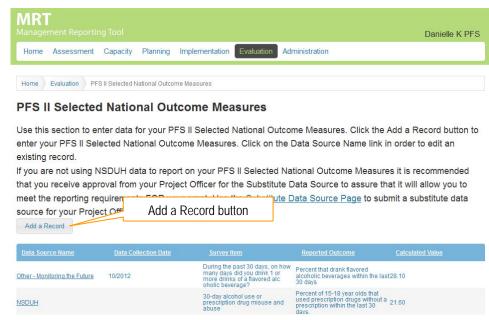
Sample screenshot displaying the Subrecipient Targeted Priority and Targeted Communities Listing Page

PFS II Selected National Outcomes Measures

The PFS II Selected National Outcome Measures module allows the user to enter information regarding their PFS II Selected National Outcome Measures.

Adding a PFS II Selected National Outcome Measure

1. Click **Evaluation** from the Menu.

2. Click **PFS II Selected National Outcome Measures** from the Evaluation Landing Page.
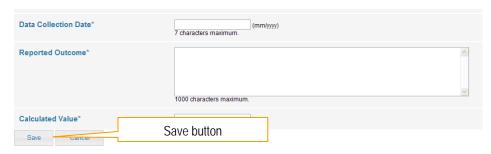
3. Click the [Add a Record] (**Add a Record**) button.

Sample screenshot displaying the PFS II Selected National Outcome Measures Listing Page

4. Use the dropdown menu to select the **Data Source Name**.

    a. If *Other* is selected, enter the specific name of the data source in the **Specify Data Source Name** text box.

5. Use the dropdown menu to select the **Survey Item**.

    a. If *Other* is selected, enter the specific item in the **Specify Survey Item** text box.

6. Enter the response options for the survey item in the **Response Option(s)** text box.

7. Select whether the survey population was defined by age or grade from the **Population Parameters** dropdown menu.

    a. If *Enter Age Range* is selected, enter the lower and upper bound for the age range for the population represented in two (2) fields: **Age Range Minimum** and **Age Range Maximum**.

    b. If *Enter Grade(s)* is selected, select the grade(s) of the population represented using the **Grade Range** checkboxes.

8. Enter a description of the sampling strategy in the **Description of Sampling Design** text box.

Screenshot displaying the PFS II Selected National Outcome Measures Edit Form

9. Indicate the month and year in which the survey was conducted in the **Data Collection Date** text box as mm/yyyy.

10. Enter the outcome of the survey data in the **Reported Outcome** text box.

11. Enter the calculated value of the measure in the **Calculated Value*** text box.

12. Click the [Save] (**Save**) button.
    *Note: Click the [Cancel] (**Cancel**) button to cancel this entry.

Save button

Screenshot displaying the PFS II Selected National Outcome Measures Edit Form

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Tips

- If NSDUH is the data source, only the following fields will display: **Survey Item, Response Option(s), Age Range Minimum** and **Maximum, Reported Outcome** and **Calculated Value**.

Editing a PFS II Selected National Outcome Measure

1. Click **Evaluation** from the Menu.
2. Click **PFS II Selected National Outcome Measure** from the Evaluation Landing Page.
3. From the Listing Page, select the data source you wish to edit by clicking the appropriate Data Source Name.
4. Make any changes needed to the form.
5. Click the [Save] (**Save**) button.
   *Note: Click the [Cancel] (**Cancel**) button to cancel the changes.

Deleting a PFS II Selected National Outcome Measure

1. Click **Evaluation** from the Menu.
2. Click **PFS II Selected National Outcome Measure** from the Evaluation Landing Page.
3. From the Listing Page, select the data source you wish to delete by clicking the appropriate Data Source Name.
4. Click the [Delete] (**Delete**) button.
5. Click the [Yes] (**Yes**) button when asked "Are you sure you want to permanently delete this record?
   *Note: If you do not want to delete the record, click the [No] (**No**) button.
6. Notice the record is removed from the grid.

PFS II Selected National Outcome Measures

Use this section to enter data for your PFS II Selected National Outcome Measures. Click the Add a Record button to enter your PFS II Selected National Outcome Measures. Click on the Data Source Name link in order to edit an existing record.

If you are not using NSDUH data to report on your PFS II Selected National Outcome Measures it is recommended that you receive approval from your Project Officer for the Substitute Data Source to assure that it will allow you to meet the reporting requirements FOR your grant. Use the Substitute Data Source Page to submit a substitute data source for your Project Officer's review and approval.

[Add a Record]

Data Source Name	Data Collection Date	Survey Item	Reported Outcome	Calculated Value
Other - Monitoring the Future		During the past 30 days, on how ...k 1 or ...ed alc	Percent that drank flavored alcoholic beverages within the last 30 days	28.10
NSDUH		30-day alcohol use or prescription drug misuse and abuse	Percent of 15-18 year olds that used prescription drugs without a prescription within the last 30 days.	21.60

Data Source Name link

Sample screenshot displaying the PFS II Selected National Outcome Measures Listing Page

Reported Outcome*

Age at first use

984 characters remaining.

Calculated Value*

Delete button

[Save] [Cancel] [Delete]

Sample screenshot displaying the PFS II Selected National Outcome Measures Edit Form

Submitting a Substitute Data Source

1. Click **Evaluation** from the Menu.
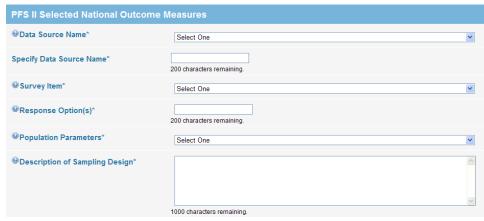2. Click **PFS II Selected National Outcome Measure** from the Evaluation Landing Page.
3. From the Listing Page, click on the **Substitute Data Source Page** link.

PFS II Selected National Outcome Measures

Use this section to enter data for your PFS II Selected National Outcome Measures. Click the Add a Record button to enter your PFS II Selected National Outcome Measures. Click on the Data Source Name link in order to edit an existing record.

If you are not using NSDUH data to report on your PFS II Selected National Outcome Measures it is recommended that you receive approval from your Project Officer for the Substitute Data Source to assure that it will allow you to meet the reporting requirements FOR your grant. Use the Substitute Data Source Page to submit a substitute data source for your Project Officer's review and approval.

Add a Record

> Substitute Data Source Page link

Data Source Name	Data Collection Date	Survey Item		...lated Value
Other - Monitoring the Future	10/2012	During the past 30 days, many days did you drink 1 or more drinks of a flavored alcoholic beverage?	alcoholic beverages within the last 30 days	28.10
NSDUH		30-day alcohol use or prescription drug misuse and abuse	Percent of 15-18 year olds that used prescription drugs without a prescription within the last 30 days.	21.60

Sample screenshot displaying the Approved Statewide Target Listing Page

4. Click the **Submit a Substitute Data Source** button.

Substitute DataSource Request

Enter information for your Substitute Data S...   ...rd button to enter your Substitute Data Source Request. Click on the Data S...   ...sting record.

Submit a Substitute Data Source Request

> Submit a Substitute Data Source Request button
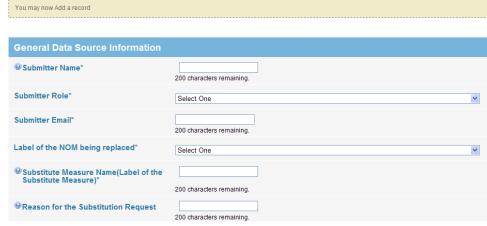
Screenshot displaying the Substitute Data Source Request Listing Page

Substitute DataSource Request

Enter information for your Substitute Data Source Request.

You may now Add a record

5. Enter the submitter's name in the **Submitter Name*** text box.

6. Select the submitter's role using the **Submitter Role*** dropdown menu.

7. Enter the submitter's email address in the **Submitter Email** text box.

8. Select the label of the NOM item being replaced from the **Label of the NOM being replaced*** dropdown menu.

9. Enter the substitute measure's name in the **Substitute Measure Name (Label of the Substitute Measure)*** text box.

10. Enter a brief reason for the substitution in the **Reason for Substitution Request** text box.

General Data Source Information

Submitter Name*	
	200 characters remaining.
Submitter Role*	Select One
Submitter Email*	
	200 characters remaining.
Label of the NOM being replaced*	Select One
Substitute Measure Name(Label of the Substitute Measure)*	
	200 characters remaining.
Reason for the Substitution Request	
	200 characters remaining.

Screenshot of the Substitute Data Source Request Edit Form

11. Enter the **Agency/Organization responsible for Data collection** in the text box.

12. Enter the **Most recent year for which data are available?** As mm/yyyy.

13. Select *Yes* or *No* from the dropdown menu to answer the question **Is the data collection repeated every year?***

    a. If *No* is selected, enter how often data is collected in the **Frequency of Data collection** field.

14. Select *Yes* or *No* from the dropdown menu to answer the question **Is trend data available?***

    a. If *Yes* is selected enter the year as yyyy in the **Start year of trend data** text box.

15. Use the dropdown menu to select the **Mode of Data Collection***.

Agency/Organization responsible for Data Collection	
	200 characters remaining.
Most recent year for which data are available?*	(mm/yyyy)
	7 characters remaining.
Is the data collection repeated every year?*	Select One
Is trend data available?*	Select One
Mode of Data Collection*	Select One
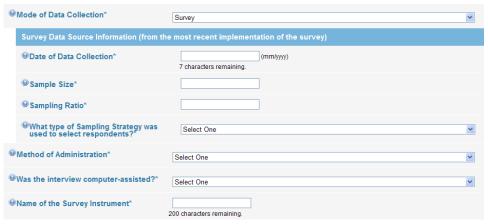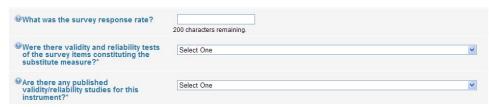
Screenshot of the Substitute Data Source Request Edit Form

a. If *Survey* is selected, enter the Survey Data source information from the most recent implementation of the survey:

   i. Enter the date of the most recent implementation of the survey in the **Date of Data Collection** text box as mm/yyyy.

   ii. Enter the **Sample Size***.

   iii. Enter the **Sampling Ratio***.

   iv. Use the dropdown menu to select **What type of Sampling Strategy was used to select respondents?***.

      a) If *Probability sample* is selected, provide information about the sampling strategy (Stratified, Cluster, Multistage, etc.) in the appropriate text boxes.

   v. Use the dropdown menu to select the **Method of Administration***.

      a) If *Other* is selected, enter the specific administration method in the **Other Method (Specify)** text box.

   vi. Select *Yes* or *No* from the dropdown menu to answer the question **Was the interview computer-assisted?***.

   vii. Enter the name of the survey in the **Name of the Survey Instrument*** text box.

Screenshot of the Substitute Data Source Request Edit Form

   viii. Enter **What was the survey response rate?**

   ix. Select *Yes* or *No* from the dropdown menu to answer the question **Were there validity and reliability tests of the survey items constituting the substitute measure?***.

      a) If *Yes* is selected, enter a description of these tests in the **Description of the reliability/validity study(ies)*** text box.

   x. Select *Yes* or *No* from the dropdown menu to answer the question **Are there any published validity/reliability studies for this instrument?***.

      a) If *Yes* is selected, enter **Bibliographic information*** in the text box.

Screenshot of the Substitute Data Source Request Edit Form

b. If *Other* is selected:

  i. Specify what the mode is using the **Other Mode (Specify)** text box.

  ii. Use the dropdown menu to select **What type of Sampling Strategy was used to select respondents?***.

    a) If *Probability sample* is selected, provide information about the sampling strategy (Stratified, Cluster, Multistage, etc.) in the appropriate text boxes.

  iii. Select *Yes* or *No* from the dropdown menu to answer the question **Was the interview computer-assisted?***

Screenshot of the Substitute Data Source Request Edit Form

16. To upload data set information, perform the following steps:

  a. Click the [Browse] (**Browse**) button.

  b. Select the document you wish to upload from the **Choose File** window and click the [Open] (**Open**) button.

  c. The file path will appear in the field. Click the [Upload File] (**Upload File**) button.

  d. The file name will appear to the left.
  *Note: To view the uploaded document, click on the file name. If you uploaded the wrong file, click the Delete (**Delete**) button to the right of the file to delete it and repeat the steps to upload the correct file.

Screenshot of the Substitute Data Source Request Edit Form

17. Enter a description for each file in the **For each data file, describe the contents of the data record(s)*** text box.

18. Click the [Submit] (**Submit**) button to send this page to the Project Officer for review.

19. Click the [Yes] (**Yes**) button when asked "Are you sure you wish to submit this request?
  *Note: If you wish to cancel the submission, click the [No] (**No**) button.

Screenshot of the Substitute Data Source Request Edit Form

Tips
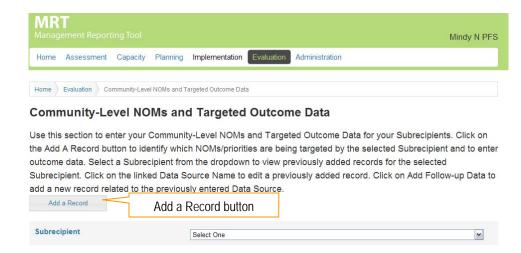
- Once the survey is under review by the Project Officer, the status of the submitted Substitute Data Source will change and the Project Officer's Feedback will be displayed.

Community-Level NOMs and Targeted Outcome Data

The Community-Level NOMs and Targeted Outcome Data module allows the user to enter their community-level NOMs and targeted outcome data for your subrecipients. Only enter this data if the Data Source has been approved by the Grantee.

Adding a Community-Level NOMs

1. Click **Evaluation** from the Menu.

2. Click **Community-Level NOMs and Targeted Outcome Data** from the Evaluation Landing Page.

3. Click the [Add a Record] (**Add a Record**) button.

Screenshot displaying the Community-Level NOMs Listing Page

4. Select the Subrecipient community name from the **Subrecipient** dropdown menu.

5. Select the NOMs you are reporting from the **Targeted NOMs** dropdown menu.

    a. If *Other* is selected (because this is not a NOM), describe the targeted priority from the **Other Targeted Priority** dropdown menu.

6. Select whether the NOM measure was exact, proxy or neither from the **Is this an exact NOM, NOM proxy, or neither?** dropdown menu.
    *Note: For a description of approved NOMs, click the For a list of approved NOMs items, click here link.

7. Enter the name of the data source in the **Data Source Name** text box.

8. Enter the survey item you are reporting data for in the **Survey Item** text box.

9. Enter the response options for the survey item used for this measure in the **Response Option(s)** text box.

Community-Level NOMs and Targeted Outcome Data

Enter information for the targeted NOM/priority and outcome. By entering this data it means that this Data Source has been approved by the Grantee.

You may now Add a record

Community-Level NOMs and Targeted Outcome Data

Subrecipient*   Select One

Targeted NOM*   Select One

Is this an exact NOM, NOM proxy, or neither?*   Select One
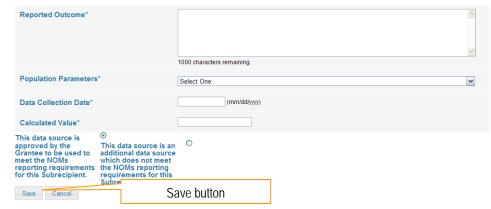
For a list of approved NOMs items, click here

Data Source Name*
                                                          200 characters remaining.

Survey Item*
                                                          200 characters remaining.

Response Option(s)*
                                                          200 characters remaining.

Screenshot displaying the Community-Level NOMs Edit Form

10. Enter the actual result and related statistics you are reporting for this measure in the **Reported Outcome** text box.

11. Select whether the survey population was defined by age or grade from the **Population Parameters** dropdown menu.

    a. If *Enter Age Range* is selected, enter the lower and upper bound for the age range for the population represented in two (2) fields: **Age Range Minimum** and **Age Range Maximum**.

    b. If *Enter Grade(s)* is selected, select the grade(s) of the population represented using the **Grade Range** checkboxes.

12. Indicate the date in which the survey was conducted in the **Data Collection Date*** text box as mm/yyyy or use the Calendar feature to select the date. (See the Calendar Feature section for additional details.).

13. Enter the calculated value of the measure in the **Calculated Value*** text box.

14. Use the radio buttons to select if the Item is approved and meets the NOMs reporting requirements for this subrecipient.

15. Click the ⬚ (**Save**) button.

Reported Outcome*
                                                          1000 characters remaining.

Population Parameters*   Select One

Data Collection Date*   (mm/dd/yyyy)

Calculated Value*

This data source is approved by the Grantee to be used to meet the NOMs reporting requirements for this Subrecipient.   This data source is an additional data source which does not meet the NOMs reporting requirements for this Subre

Save   Cancel   Save button

Screenshot displaying the Community-Level NOMs Edit Form

***Note**: Click the [Cancel] (**Cancel**) button to cancel this entry.

Tips

- A NOM must be reported for each subrecipient, regardless of whether data for additional targets are also reported.

Editing a Community-Level NOMs

1. Click **Evaluation** from the Menu.
2. Click **Community-Level NOMs and Targeted Outcome Data** from the Evaluation Landing Page.
3. Select the Subrecipient community name from the **Subrecipient** dropdown menu.
4. From the Listing Page, select the data source you wish to edit by clicking the appropriate data source name.
5. Make any changes needed to the form.
6. Click the [Save] (**Save**) button.
   ***Note**: Click the [Cancel] (**Cancel**) button to cancel the changes.

Community-Level NOMs and Targeted Outcome Data

Use this section to enter your Community-Level NOMs and Targeted Outcome Data for your Subrecipients. Click on the Add A Record button to identify which NOMs/priorities are being targeted by the selected Subrecipient and to enter outcome data. Select a Subrecipient from the dropdown to view previously added records for the selected Subrecipient. Click on the linked Data Source Name to edit a previously added record. Click on Add Follow-up Data to add a new record related to the previously entered Data Source.

[Add a Record]

Subrecipient   Fayette County

                                     Data Source Name link

Community-Level NOMs and Targeted Outcome Data Record Listing

1. Youth Survey (YS) - Percent of high school students(10th and 12th grade)who had an alcoholic beverage during the past 30 days. - 11/1/2011 **(Add Follow-up Data)**

Screenshot displaying the Community-Level NOMs Listing Page

Deleting a Community-Level NOMs

1. Click **Evaluation** from the Menu.

2. Click **Community-Level NOMs and Targeted Outcome Data** from the Evaluation Landing Page.

3. Select the Subrecipient community name from the **Subrecipient** dropdown menu.

4. From the Listing Page, select the data source you wish to delete by clicking the appropriate data source name.

5. Click the [Delete] (**Delete**) button.

6. Click the [Yes] (**Yes**) button when asked "Are you sure you want to permanently delete this record?

   *Note:** If you do not want to delete the record, click the [No] (**No**) button.

7. Notice the record is removed from the grid.

Copying a Community-Level NOMs

1. Click **Evaluation** from the Menu.

2. Click **Community-Level NOMs and Targeted Outcome Data** from the Evaluation Landing Page.

3. Select the Subrecipient community name from the **Subrecipient** dropdown menu.

4. From the Listing Page, select the data source you wish to copy by clicking the appropriate data source name.

5. Click the [Copy] (**Copy**) button.

Partial screenshot displaying the Community-Level NOMs Edit Form
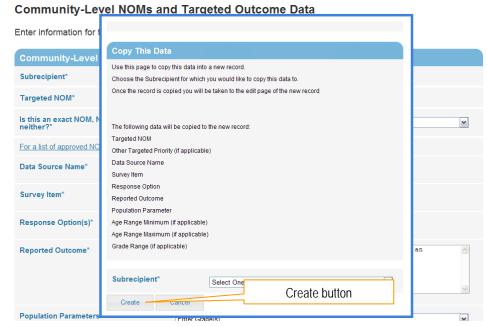
Screenshot displaying the Community-Level NOMs Edit Form

6. A list appears informing you of the data that will be copied to a new record.

7. Select the Subrecipient community name you would like the data source to belong to from the **Subrecipient** dropdown menu.

8. Click the [Copy] (**Create**) button.
   *Note: Click the [Cancel] (**Cancel**) button to cancel this copy.

9. Make any changes needed to the details.

10. Click the [Save] (**Save**) button.
    *Note: Click the [Cancel] (**Cancel**) button to cancel this entry.

Community-Level NOMs and Targeted Outcome Data

Enter information for t

Community-Level

Subrecipient*

Targeted NOM*

Is this an exact NOM, N
neither?*

For a list of approved NO

Data Source Name*

Survey Item*

Response Option(s)*

Reported Outcome*

Population Parameters

Copy This Data

Use this page to copy this data into a new record.

Choose the Subrecipient for which you would like to copy this data to.

Once the record is copied you will be taken to the edit page of the new record

The following data will be copied to the new record:

Targeted NOM

Other Targeted Priority (if applicable)

Data Source Name

Survey Item

Response Option

Reported Outcome

Population Parameter

Age Range Minimum (if applicable)

Age Range Maximum (if applicable)

Grade Range (if applicable)

Subrecipient*   Select One

Create   Cancel   Create button

Screenshot displaying the Copy This Data Edit Form

Tips

- You will only be able to copy a baseline Community-Level NOM. Follow-Up cannot be copied.

Adding a Follow-Up Community-Level NOMs

1. Click **Evaluation** from the Menu.
2. Click **Community-Level NOMs and Targeted Outcome Data** from the Evaluation Landing Page.
3. Select the Subrecipient community name from the **Subrecipient** dropdown menu.
4. Click the (Add Follow-up Data) (**Add Follow-up Data**) link located to the right of the appropriate data source.

5. Most fields will be pre-populated for you based on the Community-Level NOMs details.
6. Indicate the date in which the survey was conducted in the **Data Collection Date*** text box as mm/yyyy or use the Calendar feature to select the date. (See the Calendar Feature section for additional details.).
7. Enter the calculated value of the measure in the **Calculated Value*** text box.
8. Make any changes needed to the other fields.
9. Click the [Save] (**Save**) button.
   ***Note:** Click the [Cancel] (**Cancel**) button to cancel this entry.

Community-Level NOMs and Targeted Outcome Data

Use this section to enter your Community-Level NOMs and Targeted Outcome Data for your Subrecipients. Click on the Add A Record button to identify which NOMs/priorities are being targeted by the selected Subrecipient and to enter outcome data. Select a Subrecipient from the dropdown to view previously added records for the selected Subrecipient. Click on the linked Data Source Name to edit a previously added record. Click on Add Follow-up Data to add a new record related to the previously entered Data Source.

Add a Record

Subrecipient   Fayette County

Add Follow-Up Data link

Community-Level NOMs and Targeted Outcome Data Record Listing

1. Youth Survey (YS) - Percent of high school students(10th and 12th grade)who had an alcoholic beverage during the past 30 days. - 11/1/2011 (Add Follow-up Data)

Screenshot displaying the Community-Level NOMs Listing Page

Data Collection Date*   01/04/2013   (mm/dd/yyyy)
Calculated Value*   40

This data source is approved by the Grantee to be used to meet the NOMs reporting requirements for this Subrecipient.

This data source is an

Save button

Save   Cancel

Partial screenshot displaying the Copy This Data Edit Form

Editing a Follow-Up Community-Level NOMs

1. Click **Evaluation** from the Menu.
2. Click **Community-Level NOMs and Targeted Outcome Data** from the Evaluation Landing Page.
3. Select the Subrecipient community name from the **Subrecipient** dropdown menu.
4. From the Listing Page, select the follow-up data source you wish to edit by clicking the appropriate data source name.
5. Make any changes needed to the form.
6. Click the [Save] (**Save**) button.
   *Note: Click the [Cancel] (**Cancel**) button to cancel the changes.

Deleting a Follow-Up Community-Level NOMs

1. Click **Evaluation** from the Menu.
2. Click **Community-Level NOMs and Targeted Outcome Data** from the Evaluation Landing Page.
3. Select the Subrecipient community name from the **Subrecipient** dropdown menu.
4. From the Listing Page, select the follow-up data source you wish to delete by clicking the appropriate data source name.
5. Click the [Delete] (**Delete**) button.
6. Click the [Yes] (**Yes**) button when asked "Are you sure you want to permanently delete this record?
   *Note: If you do not want to delete the record, click the [No] (**No**) button.
7. Notice the record is removed from the grid.

Community-Level NOMs and Targeted Outcome Data

Use this section to enter your Community-Level NOMs and Targeted Outcome Data for your Subrecipients. Click on the Add A Record button to identify which NOMs/priorities are being targeted by the selected Subrecipient and to enter outcome data. Select a Subrecipient from the dropdown to view previously added records for the selected Subrecipient. Click on the linked Data Source Name to edit a previously added record. Click on Add Follow-up Data to add a new record related to the previously entered Data Source.

[Add a Record]

Subrecipient

Follow-Up Data Source Name link

Community-Level NOMs and Targeted Outcome Data

1. Youth Survey (YS) - Percent of high school students(10th and 12th grade) who had an alcoholic beverage during the past 30 days. - 11/1/2011 **(Add Follow-up Data)**
   1.1 Youth Survey (YS) - Percent of high school students(10th and 12th grade)who had an alcoholic beverage during the past 30 days. - 2/2/2012

Screenshot displaying the Community-Level NOMs Listing Page

Data Collection Date* | 11/2/2012 | (mm/dd/yyyy)

Calculated Value* | 38.00

This data source is approved by the Grantee to be used to meet the NOMs reporting requirements for this Subrecipient.

Delete button

[Save] [Cancel] [Delete]
[Copy]

Screenshot displaying the Community-Level NOMs Edit Form

Evaluation Report

The Evaluation Report module allows the user to upload and provide a brief description of their evaluation report.

Adding an Evaluation Report

1. Click **Evaluation** from the Menu.
2. Click **Evaluation Report** from the Evaluation Landing Page.
3. Click the [Add a Record] (**Add a Record**) button

Screenshot displaying the Evaluation Report Listing Page

4. Select the fiscal year of your evaluation report from the **Fiscal Year** dropdown menu.
5. To upload an evaluation report, perform the following steps:
   a. Click the [Browse] (**Browse**) button.
   b. Select the document you wish to upload from the **Choose File** window and click the [Open] (**Open**) button.
   c. The file path will appear in the field. Click the [Upload] (**Upload**) button.
   d. The file name will appear.
   *Note: To view the uploaded document, click on the file name. If you uploaded the wrong file, repeat the steps to upload the correct file.
6. If desired, enter a description of the evaluation report in the **Description** text box.
7. Click the [Save] (**Save**) button.
   *Note: Click the [Cancel] (**Cancel**) button to cancel this entry.

Sample screenshot displaying the Evaluation Report Edit Form

Editing an Evaluation Report

1. Click **Evaluation** from the Menu.
2. Click **Evaluation Report** from the Evaluation Landing Page.
3. From the Listing Page, select the evaluation report you wish to edit by clicking the appropriate Fiscal Year.
4. Make any changes needed to the form.
5. Click the [Save] (**Save**) button.
   *Note: Click the [Cancel] (**Cancel**) button to cancel the changes.

Evaluation Report

This section is optional. Use this section to upload and provide a brief description of your Evaluation Report. Select the linked Fiscal Year to be brought to your report's edit page.

Add a Record

Fiscal Year link

Fiscal Year	Description
Year 1	

Sample screenshot displaying the Evaluation Report Listing Page

Deleting an Evaluation Report

1. Click **Evaluation** from the Menu.
2. Click **Evaluation Report** from the Evaluation Landing Page.
3. From the Listing Page, select the evaluation report you wish to edit by clicking the appropriate Fiscal Year.
4. Click the [Delete] (**Delete**) button.
5. Click the [Yes] (**Yes**) button when asked "Are you sure you want to permanently delete this record?
   *Note: If you do not want to delete the record, click the [No] (**No**) button.
6. Notice the record is removed from the grid.

Evaluation Report

Fiscal Year*	Year 1
Upload Evaluation Report*	Browse...
	CoordinationReport.doc Upload
Description	

Delete button

1000 characters remaining.

Save   Cancel   Delete

Sample screenshot displaying the Evaluation Report Edit Page

Timeline Progress
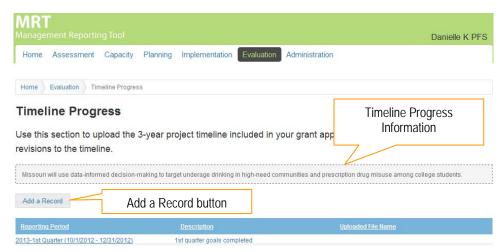
The Timeline Progress module allows the user to upload the 3 year project timeline and record any revisions to the timeline.

Adding a Timeline Progress

1. Click **Evaluation** from the Menu.
2. Click **Timeline Progress** from the Evaluation Landing Page.
3. Notice the Milestone/Timeline Progress information is displayed
4. Click the [Add a Record] (**Add a Record**) button.

Sample screenshot displaying the Timeline Progress Listing Page

5. Select the reporting period from the **Reporting Period*** dropdown menu.
6. To upload a timeline document, perform the following steps:
   a. Click the [Browse...] (**Browse**) button.
   b. Select the document you wish to upload from the **Choose File** window and click the [Open] (**Open**) button.
   c. The file path will appear in the field. Click the [Upload] (**Upload**) button.
   d. The file name will appear to the right.
      *Note: To view the uploaded document, click on the file name. If you uploaded the wrong file, repeat the steps to upload the correct file.
7. In the **Description*** text box, enter a description of the progress made on the timeline goals displayed on the page.
8. Click the [Save] (**Save**) button.
   *Note: Click the [Cancel] (**Cancel**) button to cancel this entry.

Sample screenshot displaying the Timeline Progress Edit Form

Editing a Timeline Progress

1. Click **Evaluation** from the Menu.

2. Click **Timeline Progress** from the Evaluation Landing Page.

3. From the Listing Page, select the timeline progress you wish to edit by clicking the appropriate Reporting Period link.

4. Make any changes needed to the form.

5. Click the [Save] (**Save**) button.
   *Note: Click the [Cancel] (**Cancel**) button to cancel the changes.

Sample screenshot displaying the Timeline Progress Listing Page

Deleting a Timeline Progress

1. Click **Evaluation** from the Menu.

2. Click **Timeline Progress** from the Evaluation Landing Page.

3. From the Listing Page, select the timeline progress you wish to delete by clicking the appropriate Reporting Period link.

4. Click the [Delete] (**Delete**) button.

5. Click the [Yes] (**Yes**) button when asked "Are you sure you want to permanently delete this record?
   *Note: If you do not want to delete the record, click the [No] (**No**) button.

6. Notice the record is removed from the grid.

Sample screenshot displaying the Timeline Progress Edit Form

Site Visit Report

The Site Visit Report module allows the user to upload files and describe the visit of a Subrecipient.

Adding a Site Visit Report

1. Click **Evaluation** from the Menu.
2. Click **Site Visit Report** from the Evaluation Landing Page.
3. Click the [Add Record] (**Add Record**) button.

Site Visit Report

Use this section to upload and provide a brief description of the Grantee site visits to Grantee-Funded Subrecipients and Sub-State Funded Subrecipients. Select the linked Subrecipient Name to be brought to the report's edit page.

[Add Record]   Add Record button

Subrecipient	Date of Site Visit	Site Visit Report Status	Date Report Uploaded	Description	Project Officer Feedback (Notes)
Freeport Community Coalition	01/04/2013	Completed	01/04/2013	Subrecipient is making good progress, has met all milestones and goals on time, keeps care ful records	
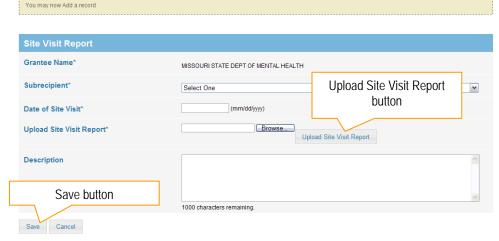
Sample screenshot displaying the Site Visit Report Listing Page

4. Select the Subrecipient that was visited from the **Subrecipient*** dropdown menu.
5. Enter the date the visit occurred in the **Date of Site Visit*** text box as mm/dd/yyyy or use the Calendar feature to select the date. (See the Calendar Feature section for additional details.)
6. To upload a site visit report, perform the following steps:
   a. Click the [Browse] (**Browse**) button.
   b. Select the document you wish to upload from the **Choose File** window and click the [Open] (**Open**) button.
   c. The file path will appear in the field. Click the [Upload Site Visit Report] (**Upload Site Visit Report**) button.
   d. The file name will appear to the right.
      ***Note**: To view the uploaded document, click on the file name. If you uploaded the wrong file, repeat the steps to upload the correct file.
7. If desired, enter a description of the site visit in the **Description** text box.
8. Click the [Save] (**Save**) button.
   ***Note**: Click the [Cancel] (**Cancel**) button to cancel this entry.

Site Visit Report

Upload and provide a brief description of the site visit report. Use the Browse button to select a file from your local computer and then click the Upload Site Visit Report button. To replace a report that has already been uploaded, you will need to select a new file and upload it.

> You may now Add a record

Site Visit Report

Grantee Name*	MISSOURI STATE DEPT OF MENTAL HEALTH
Subrecipient*	Select One
Date of Site Visit*	(mm/dd/yyyy)
Upload Site Visit Report*	[Browse...] [Upload Site Visit Report]
Description	(1000 characters remaining.)

Upload Site Visit Report button

Save button

[Save] [Cancel]

Sample screenshot displaying the Site Visit Report Edit Form

Editing a Site Visit Report

1. Click **Evaluation** from the Menu.

2. Click **Site Visit Report** from the Evaluation Landing Page.

3. From the Listing Page, select the report you wish to edit by clicking the appropriate Subrecipient name.

4. Make any changes needed to the form.

5. Click the [Save] (**Save**) button.
   *Note: Click the [Cancel] (**Cancel**) button to cancel the changes.

Sample screenshot displaying the Site Visit Report Listing Page

Deleting a Site Visit Report

1. Click **Evaluation** from the Menu.

2. Click **Site Visit Report** from the Evaluation Landing Page.

3. From the Listing Page, select the report you wish to delete by clicking the appropriate Subrecipient name.

4. Click the [Delete] (**Delete**) button.

5. Click the [Yes] (**Yes**) button when asked "Are you sure you want to permanently delete this record?
   *Note: If you do not want to delete the record, click the [No] (**No**) button.

6. Notice the record is removed from the grid.

Sample screenshot displaying the Site Visit Report Edit Form

Tips

- Once the Project Officer provides feedback on the site visit, the feedback notes will appear at the bottom of the Site Visit Report and the report can no longer be deleted.

Accomplishments and Barriers

The Accomplishments and Barriers module allows the user to track their accomplishments and barriers related to evaluation.

Adding an Accomplishment or Barrier

1. Click **Evaluation** from the Menu.
2. Click **Accomplishments and Barriers** from the Evaluation Landing Page.
3. Click the [Add Accomplishment/Barrier] (**Add Accomplishment/Barrier**) button.

Accomplishments and Barriers

Use this section to enter information on any Accomplishments and/or Barriers that you experienced while performing activities related to Assessment. Each Accomplishment or Barrier will be listed in a table. Use the table heading links to sort accomplishments/barriers by c[...]gned to each Accomplishment or Barrier to edit or delete that record.

> Add Accomplishment / Barrier button

[Add Accomplishment/Barrier]

Name	Description	Type	Reporting Period
Discussion around the selection of evidence- based policies, programs, and practices	All 6 culturally distinct neighborhoods in Sparkton were represented at this workshop. The Native American stakeholders could not attend the previous planning meeting because they did not have via...	Accomplishment	2011-1st Quarter (10/1/2010 - 12/31/2010)

Sample screenshot displaying the Accomplishments and Barriers Listing Page

4. Select the reporting period this accomplishment or barrier occurred in from the **Reporting Period*** dropdown menu.
5. Select the name of the accomplishment or barrier from the **Accomplishment/Barrier Name*** dropdown menu.
6. Select *Accomplishment* or *Challenge/Barrier* from the **Type*** dropdown menu.
7. Enter details about the accomplishment or barrier in the **Description*** text box.
8. Click the [Save] (**Save**) button.
   ***Note**: Click the [Cancel] (**Cancel**) button to cancel this entry.

Accomplishments and Barriers

Enter information on any Accomplishments and/or Barriers that you had while performing activities related to Assessment.

You may now Add a record

Accomplishment/Barrier Information

Reporting Period*	Select One
Accomplishment/Barrier Name*	(200 characters maximum.)
Type*	Select One
Description*	(3000 characters maximum.)

> Save button

[Save] [Cancel]

Screenshot displaying the Accomplishments and Barriers Edit Form

Editing an Accomplishment or Barrier

1. Click **Evaluation** from the Menu.
2. Click **Accomplishments and Barriers** from the Evaluation Landing Page.
3. From the Listing Page, select the accomplishment or barrier you wish to edit by clicking the appropriate accomplishment/barrier Name.
4. Make any changes needed to the form.
5. Click the [Save] (**Save**) button.
   *Note: Click the [Cancel] (**Cancel**) button to cancel the changes.

Deleting an Accomplishment or Barrier

1. Click **Evaluation** from the Menu.
2. Click **Accomplishments and Barriers** from the Evaluation Landing Page.
3. From the Listing Page, select the accomplishment or barrier you wish to delete by clicking the appropriate accomplishment/barrier Name.
4. Click the [Delete] (**Delete**) button.
5. Click the [Yes] (**Yes**) button when asked "Are you sure you want to permanently delete this record?
   *Note: If you do not want to delete the record, click the [No] (**No**) button.
6. Notice the record is removed from the grid.
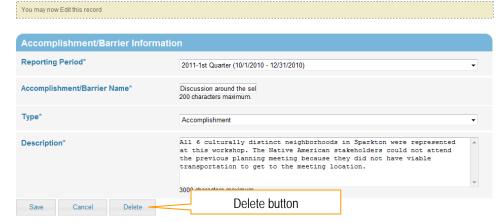

Accomplishments and Barriers

Use this section to enter information on any Accomplishments and/or Barriers that you experienced while performing activities related to Assessment. Each Accomplishment or Barrier will be listed in a table. Use the table heading links to sort accomplishments/barriers by column. Click on Name that you've assigned to each Accomplishment or Barrier to edit or delete that record.

Accomplishment / Barrier Name link

Sample screenshot displaying the Accomplishments and Barriers Listing Page

Accomplishments and Barriers

Enter information on any Accomplishments and/or Barriers that you had while performing activities related to Assessment.

You may now Edit this record

Accomplishment/Barrier Information

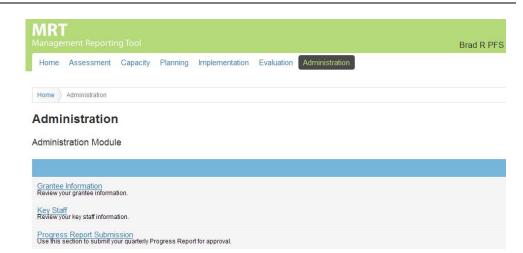| Reporting Period* | 2011-1st Quarter (10/1/2010 - 12/31/2010) |
Accomplishment/Barrier Name*	Discussion around the sel 200 characters maximum.
Type*	Accomplishment
Description*	All 6 culturally distinct neighborhoods in Sparkton were represented at this workshop. The Native American stakeholders could not attend the previous planning meeting because they did not have viable transportation to get to the meeting location. 3000 characters maximum.

Delete button

Sample screenshot displaying the Accomplishments and Barriers Edit Form

ADMINISTRATION

Within the Administration module, a user is able to perform the following tasks:

1. Review Grantee Information.
2. Review Key Staff.
3. Review and submit the Progress Report.

Screenshot displaying the Administration Landing Page

Grantee Information

The Grantee Information module allows the user view details about the grantee.

Viewing Grantee Information

1. Click **Administration** from the Menu.
2. Click **Grantee Information** from the Administration Landing Page.
3. The details of the grantee will display.

Grantee Information

Use this section to review your Grantee Information.
If any of the information below is not correct please notify your project officer: Andrea.Harris@samhsa.hhs.gov

Grantee Information	
Grantee Name*	MAINE STATE DEPT/HEALTH/HUMAN SERVS
Grant Award Number*	SP19422
Contact Information	
Address*	Office of Substance Abuse 41 Anthony Avenue
City*	Augusta
State*	ME
Zip Code*	43330
E-mail Address*	Information not found
Project Officer	
Project Officer Name*	Andrea Harris
Phone Number*	Information not found
E-mail Address*	Andrea.Harris@samhsa.hhs.gov

Sample screenshot displaying the Grantee Information Listing Page

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Tips

- This page is not editable. If you find any errors on this page, please notify your Project Officer by clicking on his/her email address at the top of the page.

Key Staff

The Key Staff module allows the user to view information about the key staff.

Key Staff

Use this section to review your Key Staff information.
If any of the information below is not correct please notify your project officer: Tonia.Gray@samhsa.hhs.gov

Project Director	
Project Director Name*	Danielle Knox
Phone Number*	5735559042
E-mail Address	dknox@genericemail.com

Epidemiology Lead	
Epidemiology Lead Name	Jackson Brown
Phone Number*	5737555039
E-mail Address	jbrown@genericemail.com

Project Evaluator	
Project Evaluator Name*	Marie Esteban
Phone Number*	5735557556
E-mail Address	mesteban@genericemail.com

Partial screenshot displaying the Key Staff Listing Page

Viewing Key Staff

1. Click **Administration** from the Menu.
2. Click **Key Staff** from the Administration Landing Page.
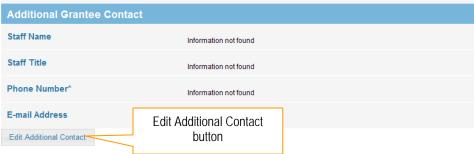3. The key staff for the grantee will display.

Tips

- Except for the Additional Grantee Contact, this page is not editable. If you find any errors on this page, please notify your Project Officer by clicking on his/her email address at the top of the listing page.

Adding/Updating an Additional Contact

1. Click **Administration** from the Menu.

2. Click **Key Staff** from the Administration Landing Page.

3. Click the [Edit Additional Contact] (**Edit Additional Contact**) button

Additional Grantee Contact

Staff Name	Information not found
Staff Title	Information not found
Phone Number*	Information not found
E-mail Address	
[Edit Additional Contact]	

Edit Additional Contact button

Partial screenshot displaying the Key Staff Listing Page

4. Enter the name of the grantee contact in the **Staff Name** text box.

5. Enter the title of the grantee contact in the **Staff Title** text box.

6. Enter the phone number of the grantee contact without hyphens in the **Phone Number** text box.

7. Enter the email address of the grantee contact in the **E-mail Address** text box.

8. Click the [Save] (**Save**) button.
   *__Note__: Click the [Cancel] (**Cancel**) button to cancel this entry
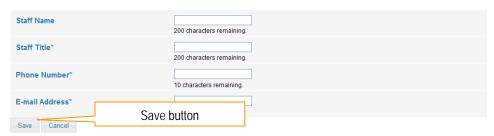
Key Staff

Edit Additional Grantee Contact Information.
Use this section to add/edit the additional grantee contact. This may be someone who is designated by the Project Director to perform the regular data entry. This section is intended to allow this grantee contact to receive the same emails as the Project Director receives through the system.

Staff Name	200 characters remaining.
Staff Title*	200 characters remaining.
Phone Number*	10 characters remaining.
E-mail Address*	
[Save] [Cancel]	

Save button

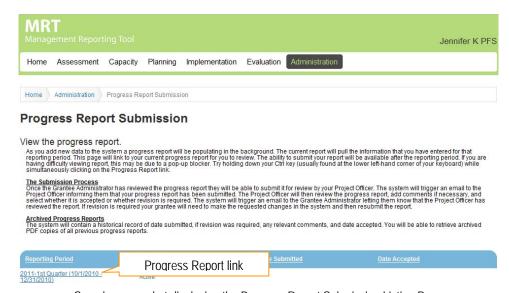Partial screenshot displaying the Key Staff Edit Page

Progress Report Submission

The Progress Report Submission module allows the user to view and submit the quarterly progress report. As you add new data to the system, a progress report will be populating in the background. The current report will pull the information that you have entered for that reporting period.
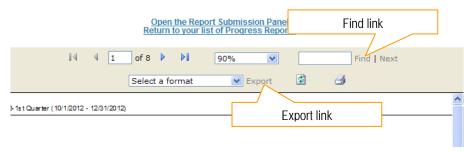
Viewing the Progress Report

1. Click **Administration** from the Menu.
2. Click **Progress Report** from the Administration Landing Page.
3. From the Listing Page, select the report you wish to view by clicking the **Reporting Period** name.

Sample screenshot displaying the Progress Report Submission Listing Page

4. Click the [◄◄ ◄ 1 of 7 ► ►►] (arrows) to maneuver to other pages in the report.
   a. To move to a specific page within the report, type a page number into the text box and click the **Enter** button on your keyboard.
5. The dropdown menu can be used to change the level of magnification of the report.
6. To find a specific word or phrase, enter it into the **Find** text box and click the Find (**Find**) link.
   a. Click the Next (**Next**) link to be taken to the next instance of the word or phrase.
7. To print or save the report you will have to download the report.
   a. To download the report, select the type of file you want from the **Select a format** dropdown menu and click the Export (**Export**) link.

Partial screenshot displaying the Progress Report view screen

Progress Report Submission

View the progress report.

As you add new data to the system a progress report will be populating in the background. The current report will pull the information that you have entered for that reporting period. This page will link to your current progress report for you to review. The ability to submit your report will be available after the reporting period. If you are having difficulty viewing report, this may be due to a pop-up blocker. Try holding down your Ctrl key (usually found at the lower left-hand corner of your keyboard) while simultaneously clicking on the Progress Report link.
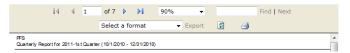
> Return to your list of Progress Reports link

...the progress report they will be able to submit it for review by your Project Officer. The system will trigger an email to the ...ess report has been submitted. The Project Officer will then review the progress report, add comments if necessary, and ...ion is required. The system will trigger an email to the Grantee Administrator letting them know that the Project Officer has ...r grantee will need to make the requested changes in the system and then resubmit the report.

Archived Progress Rep...
The system will contain a ...ecord of date submitted, if revision was required, any relevant comments, and date accepted. You will be able to retrieve archived PDF copies of all previous pr...eports.

Open the Report Submission Panel
Return to your list of Progress Reports

8. To go back to the Progress Reports submission Listing page, click the Return to your List of Progress Reports link.

| |◄ ◄ 1 of 7 ► ►| | 90% ▼ | | Find | Next |

Select a format ▼ Export 🔄 🖨

PFS
Quarterly Report for 2011-1st Quarter (10/1/2010 - 12/31/2010)

Partial screenshot displaying the Progress Report view page

Submitting the Progress Report

1. Click **Administration** from the Menu.

2. Click **Progress Report Submission** from the Administration Landing Page.

3. From the Listing Page, select the report you wish to submit by clicking the Reporting Period name.

4. Click the Open the Report Submission Panel (**Open the Report Submission Panel**) link.

Progress Report Submission

View the progress report.

As you add new data to the system a progress report will be populating in the background. The current report will pull the information that you have entered for that reporting period. This page will link to your current progress report for you to review. The ability to submit your report will be available after the reporting period. If you are having difficulty viewing report, this may be due to a pop-up blocker. Try holding down your Ctrl key (usually found at the lower left-hand corner of your keyboard) while simultaneously clicking on the Progress Report link.

The Submission Process
Once the Grantee Administrator has reviewed the progress report they will be able to submit it for review by your Project Officer. The system will trigger an email to the Project Officer informing them that your progress report has been submitted. The Project Officer will then review the progress report, add comments if necessary, and select whether it is accepted or whether revision is required. The system will trigger an email to the Grantee Administrator letting them know that the Project Officer has reviewed the report. If revision is required your gra...ee will need to make the requested changes in the...ystem and then resubmit the report.

Archived Progress Reports
The system will contain a historical record of date...
PDF copies of all previous progress reports.

> Submission Panel link

...ents, and date accepted. You will be able to retrieve archived

Open the Report Submission Panel
Return to your list of Progress Reports

| |◄ ◄ 1 of 7 ► ►| | 90% ▼ | | Find | Next |

Select a format ▼ Export 🔄 🖨

PFS
Quarterly Report for 2011-1st Quarter (10/1/2010 - 12/31/2010)

Partial screenshot displaying the Progress Report view page

Progress Report Submission

View the progress report.

As you add new data to the system a progress report will be populating in the background. The current report will pull the information that you have entered for that reporting period. This page will link to your current progress report for you to review. The ability to submit your report will be available after the reporting period. If you are having difficulty viewing report, this may be due to a pop-up blocker. Try holding down your Ctrl key (usually found at the lower left-hand corner of your keyboard) while simultaneously clicking on the Progress Report link.

The Submission Process

Once the Grantee Administrator has reviewed the progress report they will be able to submit it for review by your Project Officer. The system will trigger an email to the Project Officer informing them that your progress report has been submitted. The Project Officer will then review the progress report, add comments if necessary, and select whether it is accepted or whether revision is required. The system will trigger an email to the Grantee Administrator letting them know that the Project Officer has reviewed the report. If revision is required your grantee will need to make the requested changes in the system and then resubmit the report.

Archived Progress Reports

The system will contain a historical record of date submitted, if revision was required, any relevant comments, and date accepted. You will be able to retrieve archived PDF copies of all previous progress reports.

5. Enter the contact information of the person submitting the report in the following fields: **Name**, **Phone**, **Email**, and **Title**.

6. Use the **I have read…** checkbox to indicate you understand the submission process.

7. Click the [Submit >>] (**Submit**) button to submit the report.
   *__Note__: Click the [Close Panel >>] (**Close Panel**) button to cancel the submission.

*__Note__: Once the Submit button is selected, an email will be sent to the Contact Person specified as well as the Project Officer of the Grant.

Screenshot displaying the Progress Report Submission Panel

8. The progress report **Status** will change to _Submitted_. The **Date Submitted** column will populate with the date the report was sent to the Project Officer and a new link to the next progress report will appear.
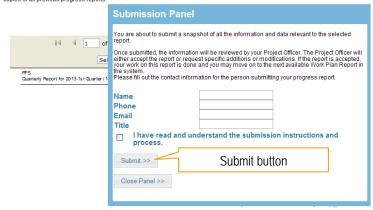

Sample screenshot displaying a submitted report on the Progress Report Listing Page

Tips

- The report is submitted, its status changes to _Submitted_ and the submission date is displayed on the Listing Page in the _Date Submitted_ column. Once the Project Officer accepts the report, the status changes to _Accepted_ and that date is displayed in the _Date Accepted_ column. If the Project Officer decides the report requires revision, the report's status changes to Requires Revision and the Grantee will need to revise and resubmit the report.

- Once the Progress Report for the reporting period is submitted, the next reporting period displays in the Reporting Period column.

- You cannot submit a progress report until the previous progress report has been accepted.