SmartSheet training Program Element
51 work plan progress reporting

A one-stop shop for data collection and reporting

January 2020
But first... introductions

- **Sara Beaudrault**, Public Health Modernization Lead
- **Heather Owens**, Policy and Partnerships Coordinator
What we’ll cover today

• Review requirements for PE51 progress reports and deliverables.
• Demonstrate how to complete quarterly progress reports.
• Review tips for making Smartsheet work for you.
• Time for questions
SmartSheet reporting

Work plan progress reports
Quarterly work plan updates and submitting deliverables

Financial reporting
PE51 fiscal reporting is done through the quarterly Revenue and Expenditure reporting.
## Progress reporting timeline

<table>
<thead>
<tr>
<th>Progress report/deliverable</th>
<th>Due date</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY20 Q2 (10/1/19-12/31/19)</td>
<td>January 31, 2020</td>
</tr>
<tr>
<td>FY20 Q3 (1/1/20-3/31/20)</td>
<td>April 10, 2020</td>
</tr>
<tr>
<td>PE51-02 deliverable: one new policy</td>
<td>June 30, 2020</td>
</tr>
<tr>
<td>FY20 Q4 (4/1/20-6/30/20)</td>
<td>July 10, 2020</td>
</tr>
<tr>
<td>FY21 Q1 (7/1/20-9/30/20)</td>
<td>October 10, 2020</td>
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<tr>
<td>PE51 deliverable: health equity assessments and plans</td>
<td>December 31, 2020</td>
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<tr>
<td>FY 21 Q2 (10/1/20-12/31/20)</td>
<td>January 10, 2021</td>
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<tr>
<td>FY 21 Q3 (1/1/21-3/31/21)</td>
<td>April 10, 2021</td>
</tr>
<tr>
<td>PE51-02 deliverable: two additional work products</td>
<td>June 30, 2021</td>
</tr>
<tr>
<td>FY 21 Q4 (4/1/21-6/30/21)</td>
<td>July 10, 2021</td>
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</tbody>
</table>
Navigating in Smartsheet

Accessing your workplan
- Each user received a link to their Smartsheet through email. Users will only have access to the Smartsheet for their LPHA or regional partnership.
- Click on your LPHA or regional partnership’s name to open the smartsheet.
Your Workplan

Work plans are organized by objectives and include the activities, measures and deliverables/milestones from your approved PE51 work plans.

<table>
<thead>
<tr>
<th>Mark when complete</th>
<th>Activity Start Date</th>
<th>Activity End Date</th>
<th>Activities</th>
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<table>
<thead>
<tr>
<th>Mark when complete</th>
<th>Measure Collection start (if applicable)</th>
<th>Measure Collection end (if applicable)</th>
<th>Measures</th>
<th>Data Source</th>
<th>Baseline</th>
<th>Target</th>
<th>Updated Data</th>
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<tr>
<th>Mark when complete</th>
<th>Start date (if applicable)</th>
<th>Completion Date</th>
<th>Deliverables/ Milestones</th>
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<tbody>
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Objective 1.1.1: Participate in shared learning opportunities or communities of practice focused on governance and public health system-wide planning (required)

Enter updates on progress made or barriers encountered for activities listed below in this cell. You do not need to add updates for each activity individually. When an activity has been completed, check the box in the “mark when complete” column.

Activity #1

Measure #1

Deliverable

Deliverable

Objective 1.1.2: Plan for full implementation of public health modernization across foundational capabilities and programs. Access and develop models for effective and efficient delivery of public health services.

Enter updates on progress made or barriers encountered for activities listed below in this cell. You do not need to add updates for each activity individually. When an activity has been completed, check the box in the “mark when complete” column.
Smartsheet Functions

Collapsing/Expanding Sections: Click on this icon to expand the section and view activities measures and deliverables/milestones.

Using/Creating Filters: Your Smartsheet has filters that allow you to only view activities, measures or deliverables, without viewing the entire sheet. Users could use this function to track when deliverables are coming due, or to monitor which activities have not been completed. Users are able to create their own filters, as well as use the ones already available.
Quarterly work plan progress reporting

What to include for activities:

- In the “Progress Report” column, add highlights of progress, challenges/barriers and changes since the last reporting period.
- You can provide a summary of activities for each objective by entering your notes in the indicated cells. **You do not need to provide updates on each activity individually.**
- When an activity is completed, check the box in the column labeled “Mark when complete”.

<table>
<thead>
<tr>
<th>Complete</th>
<th>Start Date</th>
<th>End/Comp. Date</th>
<th>Description</th>
<th>Data Source</th>
<th>Baseline</th>
<th>Target</th>
<th>Updated Data</th>
<th>Progress Report FY20 Q2 (10/1/19-12/31/2019)</th>
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<tbody>
<tr>
<td></td>
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<td>Award amount: $111,111</td>
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<td>Leadership and Governance</td>
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<tr>
<td>[ ]</td>
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<td>Activity 1: XXXX</td>
<td>n/a</td>
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<td>[ ]</td>
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<td>Activity 2: XXXX</td>
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<td>n/a</td>
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Quarterly work plan progress reporting

What to include for measures:

- Add updated data when it is available.
- When a measure is complete (i.e. you will not provide any additional data before June 30, 2021), check the box for “Mark when complete”.
- You do not need to add a narrative update for measures.

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Leadership and Governance

- Objective 1.1.1: Participate in shared learning opportunities or communities of practice focused on governance and public health system-wide planning (required)

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Measure 1: XXXXX
Quarterly work plan progress reporting

What to include for deliverables/milestones:

- When a deliverable or milestone is complete, check the box for “Mark when complete”.
- Attach all deliverables using the paperclip icon in one of the left-hand columns. All deliverables must be attached in Smartsheet.
- You do not need to add a narrative update for deliverables/milestones.
Additional Smartsheet Functions

- Use 📝 to enter comments.
  - Leave notes for others working within your plan.
  - Comments can be attached and viewed by individual row or to whole sheet.

- Attach a document/ email or spreadsheet.
  - **To submit a deliverable**, select 📁, or drag an item and dropping it onto the icon.

- Sending an update request (sending row)
  - Select 📧 to send a request for an update.
  - See your requests by viewing alerts 📣 in upper right of screen.
Assigning users and permission levels –
OHA gave all LPHA users “Editor – can share” access

• Editor:
  – Edit unlocked rows and columns
  – Insert rows
  – Delete unlocked rows
  – Add new attachments and comments
  – Sort unlocked rows and freeze columns
  – Filter data in sheets, name filters to save them
  – Send Update Requests for specific rows
  – Share with others if allowed***
  – Move rows within the sheet, or to another sheet
Assigning users and permission levels -

Editors can use the “Share” functions to add additional users.
Assigning users and permission levels -

• **Viewer:**
  – View all the sheet data, including comments
  – Export the sheet
  – Send the sheet, or rows through email to themselves or others
  – Download attachments
  – Set own reminders and notifications
  – Sort rows and freeze columns for their own purposes, but can’t save these changes
  – Filter data in sheets with the "Unnamed Filter" or apply filters that an Admin (on a Team plan or higher) has created
  – No editing or sharing power
Questions?
For questions or assistance, you can reach us through any of the following:

PublicHealth.Policy@state.or.us

Sara Beaudrault
sara.beaudrault@state.or.us | (971) 645-5766
  • Changes to workplan
  • Funding usage

Heather Owens
Heather.r.owens@state.or.us | (971) 291-2568
  • Technical Assistance