
SmartSheet training Program Element 51 work plan progress reporting

A one-stop shop for data collection and
reporting

January 2020



PUBLIC HEALTH DIVISION
Office of the State Public Health Director

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

Yes!

Financial reporting

PE51 fiscal reporting is done through the quarterly Revenue and Expenditure reporting.

No!

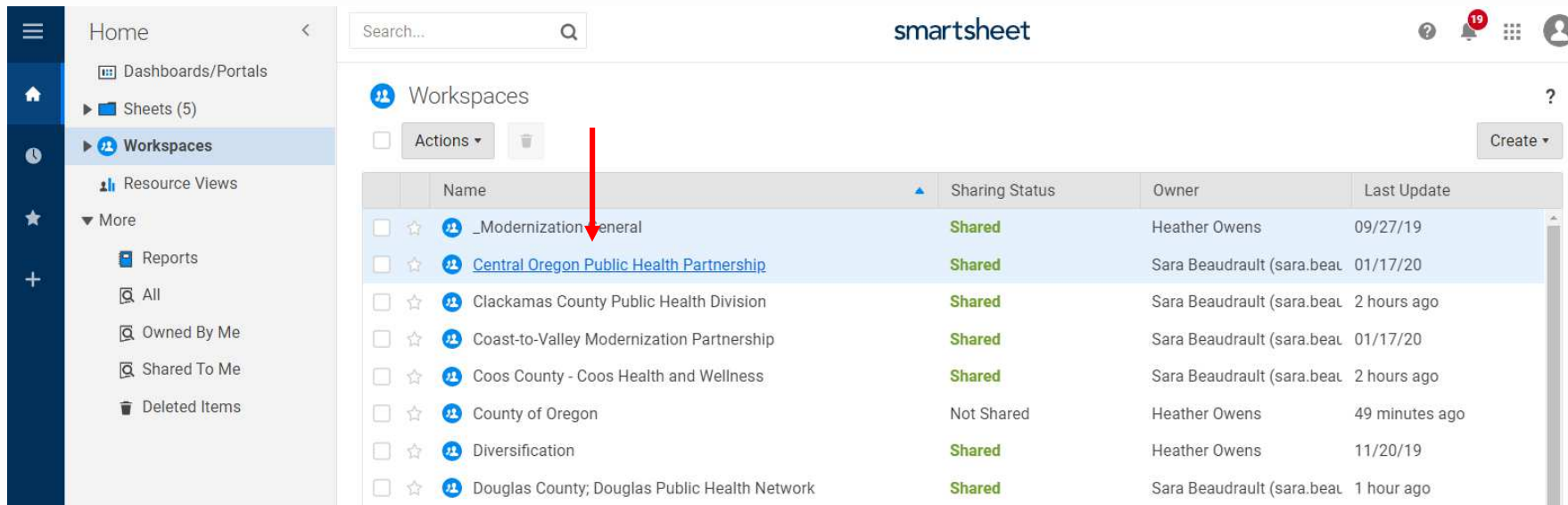
Progress reporting timeline

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

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.



The screenshot shows the Smartsheet interface. On the left is a navigation sidebar with options like Home, Dashboards/Portals, Sheets (5), Workspaces, Resource Views, and More. The main area displays a table of Workspaces. A red arrow points to the 'Central Oregon Public Health Partnership' workspace in the table.

	Name	Sharing Status	Owner	Last Update
<input type="checkbox"/>	_Modernization General	Shared	Heather Owens	09/27/19
<input type="checkbox"/>	Central Oregon Public Health Partnership	Shared	Sara Beaudrault (sara.bea)	01/17/20
<input type="checkbox"/>	Clackamas County Public Health Division	Shared	Sara Beaudrault (sara.bea)	2 hours ago
<input type="checkbox"/>	Coast-to-Valley Modernization Partnership	Shared	Sara Beaudrault (sara.bea)	01/17/20
<input type="checkbox"/>	Coos County - Coos Health and Wellness	Shared	Sara Beaudrault (sara.bea)	2 hours ago
<input type="checkbox"/>	County of Oregon	Not Shared	Heather Owens	49 minutes ago
<input type="checkbox"/>	Diversification	Shared	Heather Owens	11/20/19
<input type="checkbox"/>	Douglas County; Douglas Public Health Network	Shared	Sara Beaudrault (sara.bea)	1 hour ago

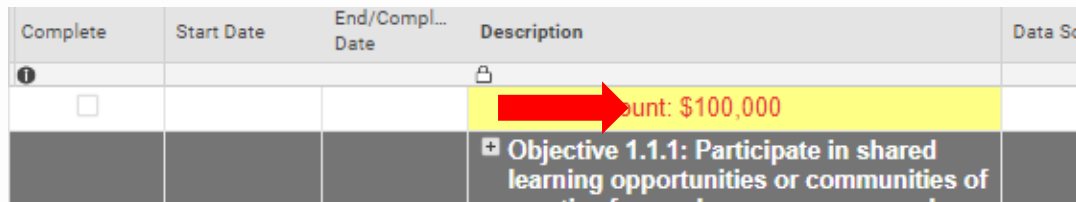
Your Workplan


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

Award amount: \$100,000								
<input type="checkbox"/>			Objective 1.1.1: Participate in shared learning opportunities or communities of practice focused on governance and public health system-wide planning (required)					
Mark when complete	Activity Start Date	Activity End Date	Activities				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.	
<input type="checkbox"/>			Activity #1	n/a	n/a	n/a	n/a	
Mark when complete	Measure Collection start (if applicable)	Measure Collection end (if applicable)	Measures	Data Source	Baseline	Target	Updated Data	Enter updated data as it is available.
<input type="checkbox"/>			Measure #1					
<input type="checkbox"/>								
Mark when complete	Start date (if applicable)	Completion Date	Deliverables/ Milestones					When a deliverable has been completed, check the box in the "mark when complete" column and attach the deliverable in the "attachments" column.
<input type="checkbox"/>			Deliverable	n/a	n/a	n/a	n/a	
<input type="checkbox"/>			Deliverable	n/a	n/a	n/a	n/a	
<input type="checkbox"/>								
			Objective 1.1.2: Plan for full implementation of public health modernization across foundational capabilities and programs. Assess and develop models for effective and efficient delivery of public health services.					
Mark when complete	Activity Start Date	Activity End Date	Activities					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.

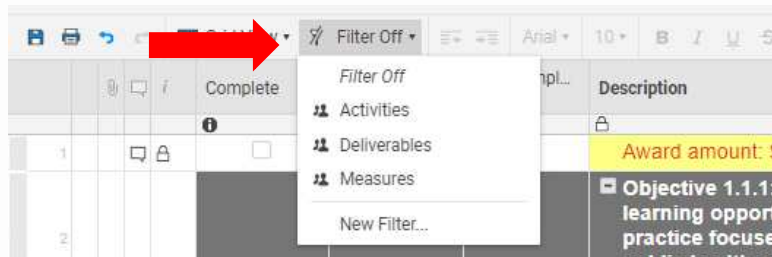
Smartsheet Functions

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



Complete	Start Date	End/Compl... Date	Description	Data So
<input type="checkbox"/>			 Award amount: \$100,000	
			+ Objective 1.1.1: Participate in shared learning opportunities or communities of practice focused on... and	

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”.

Complete	Start Date	End/Compl... Date	Description	Data Source	Baseline	Target	Updated Data	Progress Report FY20 Q2 (10/1/19-12/31/2019)
<input type="checkbox"/>			Award amount: \$111,111				<input type="checkbox"/>	<input type="checkbox"/>
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)					
<input type="checkbox"/>	Activity Start Date	Activity End Date	Activities					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.
<input type="checkbox"/>			Activity 1: XXXX	n/a	n/a	n/a	n/a	
<input type="checkbox"/>			Activity 2: XXXX	n/a	n/a	n/a	n/a	

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.

Complete	Start Date	End/Compl... Date	Description	Data Source	Baseline	Target	Updated Data	Progress Report FY20 Q2 (10/1/19-12/31/2019)
<input type="checkbox"/>			Award amount: \$111,111				<input type="checkbox"/>	<input type="checkbox"/>
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)								
<input type="checkbox"/>	Activity Start Date	Activity End Date	Activities				<input type="checkbox"/>	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.
<input type="checkbox"/>	Measure Collection start (if applicable)	Measure Collection end (if applicable)	Measures	Data Source	Baseline	Target	Updated Data	Enter updated data as it is available.
<input type="checkbox"/>			Measure 1: XXXXX					
<input type="checkbox"/>								

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.



Complete	Start Date	End/Compl... Date	Description	Data Source	Baseline	Target	Updated Data	Progress Report FY20 Q2 (10/1/19-12/31/2019)
<input type="checkbox"/>			Award amount: \$111,111				<input type="checkbox"/>	<input type="checkbox"/>
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)								
<input type="checkbox"/>	Mark when complete	Activity Start Date	Activity End Date	Activities				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.
<input type="checkbox"/>	Mark when complete	Measure Collection start (if applicable)	Measure Collection end (if applicable)	Data Source	Baseline	Target	Updated Data	Enter updated data as it is available.
<input type="checkbox"/>	Mark when complete	Start date (if applicable)	Completion Date	Deliverables/ Milestones				When a deliverable has been completed, check the box in the "mark when complete" column and attach the deliverable in the "attachments" column.
<input type="checkbox"/>			Deliverable 1: XXXX	n/a	n/a	n/a	n/a	
<input type="checkbox"/>				n/a	n/a	n/a	n/a	

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.

The screenshot shows a spreadsheet application interface for 'County of Oregon'. The top right corner features a blue 'Share' button with a user icon. A red arrow points from the 'Share' button towards the 'Updated Data' column of the table below. The table has the following structure:

	Data Source	Baseline	Target	Updated Data	Progress Report FY20 Q2 (10/1/19-12/31/2019)	Progress Q3 (1/1/20)
amount: \$100,000						
ive 1.1.1: Participate in shared g opportunities or communities of e focused on governance and health system-wide planning ed)						
rities					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.	

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