

How do I enter a Program Improvement Plan (Goal Form)?

1 SELECT NEW ENTRY FROM THE MENU

2 CHOOSE PROGRAM IMPROVEMENT

3 CHOOSE A NEW GOAL FORM

4 CHOOSE A SITE

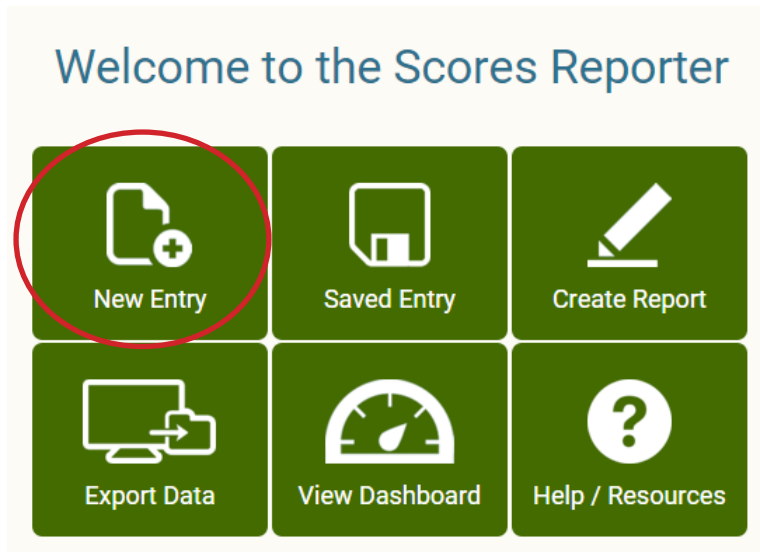
5 START GOAL FORM

6 COMPLETE GOAL FORM

7 SUBMIT GOAL FORM

Program Improvement Plans (Goal Forms) are useful for outlining and tracking the goals and intentions of your organization in order to make more intentional steps towards program imAity and goal detail. Once one goal form is entered start a new one by clicking ‘New Entry’ until all goals required to be entered by your network have been completed and submitted.

- From the Scores Reporter homepage select the ‘New Entry’ tile (circled in red below) in the top left corner of the tile cluster.

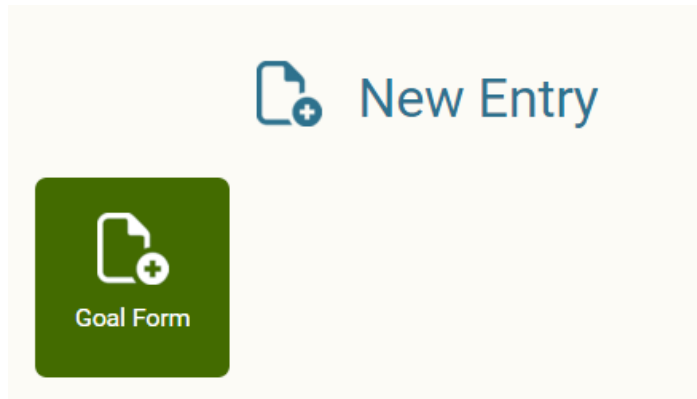


- This will take you to the new entry screen (depicted below) where you will select which form you would like to enter. Each form will be represented by a different tile (e.g. PQA, Program Improvement, etc.). Select the “Program Improvement” tile (circled in red below).

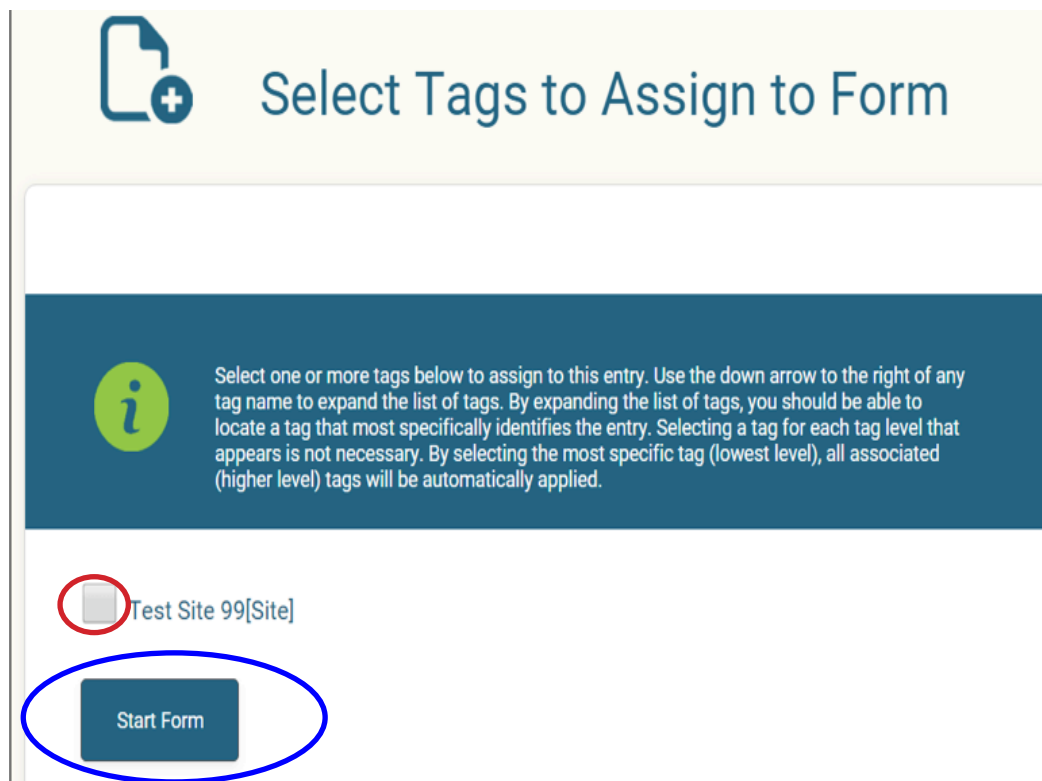
**NOTE:** User accounts are only able to see and select forms for which they have been approved to enter (e.g. if you are only responsible for entering in PQA’s then the PQA form will be the only option you have in the new entry screen). If it seems that you do not have access to a form that you are required to enter please direct any questions or concerns to your network lead or the Weikart Center helpdesk at [scoresreporter@cypq.org](mailto:scoresreporter@cypq.org)



- Once a form has been selected (e.g. Program Improvement) you will be brought to the next page (depicted below) where you will need to select which version of that form you would like to enter (e.g. Goal Form etc.).




- Once the form version has been selected, you will need to identify the site for which you wish to enter the form. You indicate this by checking the box (circled in red below) next to the name of the site you would like to enter a Goal Form for. When this has been selected, click the 'Start Form' located below the site names (circled in blue below)



- This will take you to an index page that will correspond to all of the sections of the Goal Form (depicted below). From this page you are able to jump to any of the sections of the Goal Form. However, it is recommended that you hit the blue 'Start Form' button (circled in red below) above the index. This will begin the form from the beginning and save the form as a new entry.

**NOTE:** You may return to the index page at any point during the entry process by clicking the blue 'Index' button located second from the left at the top of the page. The index will show the status of each scale by way of its status indicators located to the right of each scale name (circled in blue below). A green "√" will be present when a scale is complete, a yellow "!" when a form has been started but is not yet complete (i.e. all of the necessary fields have been entered), and a gray "x" will appear when a scale has not yet been started.



**NOTE:** This entry has been started! Even if you provide no responses/scores at this time, this entry is saved and can be located in the Saved Entry area.

The index below outlines the progress of this entry. Scale/Section names can be selected as a shortcut to that portion of the form. The color and icon of each scale/section will adjust to correspond to the completion status of that scale/section. The sequence of items in this electronic form will match the sequence found in the paper form. In order for the form to be submitted, a response/score must be provided for all items not indicated as optional.

Network: Test Network  
 Region: Test Region 9  
 Organization: Test Org Z  
 Site: Test Site 99

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**Start Form**

- I. GOAL FORM
  - Program Goal x
- II. REVIEW
  - Goal Review (Optional)
- III. PROGRESS
  - Progress Check (Optional)

- 6. When the 'start form' button is clicked, the pages that follow (depicted below) correspond to the paper goal form. All of the non-optional fields must be filled out on the first page.

NOTE: The first page is the only page of the form that must be completed before the form can be submitted. All fields on the first page not labeled 'optional' must be filled out before the form can be submitted. The form can be viewed or edited at any time (even after submission) by going through the 'saved entry' tile.

## Goal Form

This form is separated into multiple sections/pages. In order for the form to be submitted, all items not indicated as optional will require a response/score. The pages and items in this form can be completed in any order. The form will automatically save your responses every 45 seconds. Each page of this form will have a series of action buttons present at the top, as well as an indicator that shows the form's saved status. A save button, that will allow you to manually save this form, can be accessed by selecting the next button on the final page of this form. Not all form types can be submitted. If the form is eligible to be submitted, a submit form button will appear at the top of each page.

Next

Index

Submit Form

Form is Saved

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### I. GOAL FORM

Program Goal

1.Program Goal: What does success look like?

When all the information has been entered into the page click the blue 'Next' button at the top left of the page (circled in red below). This will both save the form and bring you to the next page.

NOTE: Forms save automatically every 30-45 seconds. The status of a form being saved can be found in the upper right corner (circled in blue below). When a form is saved the button will be green and read "form is saved", when a form is not saved the button will be red and read "form is not saved." Forms can also be saved manually by clicking either the 'Next' button at the top left of the page (circled in red below) or the 'Index' button immediately next to it.

**Goal Form**

**i** This form is separated into multiple sections/pages. In order for the form to be submitted, all items not indicated as optional will require a response/score. The pages and items in this form can be completed in any order. The form will automatically save your responses every 45 seconds. Each page of this form will have a series of action buttons present at the top, as well as an indicator that shows the form's saved status. A save button, that will allow you to manually save this form, can be accessed by selecting the next button on the final page of this form. Not all form types can be submitted. If the form is eligible to be submitted, a submit form button will appear at the top of each page.

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Index
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### I. GOAL FORM

Program Goal

1.Program Goal: What does success look like?

2.Measurement: How will you measure progress? Select Form

3.Action Steps

ACTION STEPS: What needs to happen?	OUTCOME: When this step is completed, what will be done?	LEADER: Who will be Responsible?	RESOURCES: What is needed for success?	TIMELINE / STATUS: When will this step be completed?
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
				Status <input type="button" value="v"/>

- Once all of the fields on the first page that you have information for have been filled for the Goal Form (this will only be the first page if you have just created this goal form) click the 'Submit Form' button (circled in red below). The form should now be submitted!

NOTE: If the form does not submit, it is likely that there are non-optional items are not completely filled out. Be sure to check the first page to see that all of those fields are filled.

**Goal Form**

**i** This form is separated into multiple sections/pages. In order for the form to be submitted, all items not indicated as optional will require a response/score. The pages and items in this form can be completed in any order. The form will automatically save your responses every 45 seconds. Each page of this form will have a series of action buttons present at the top, as well as an indicator that shows the form's saved status. A save button, that will allow you to manually save this form, can be accessed by selecting the next button on the final page of this form. Not all form types can be submitted. If the form is eligible to be submitted, a submit form button will appear at the top of each page.

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**I. GOAL FORM**

Program Goal

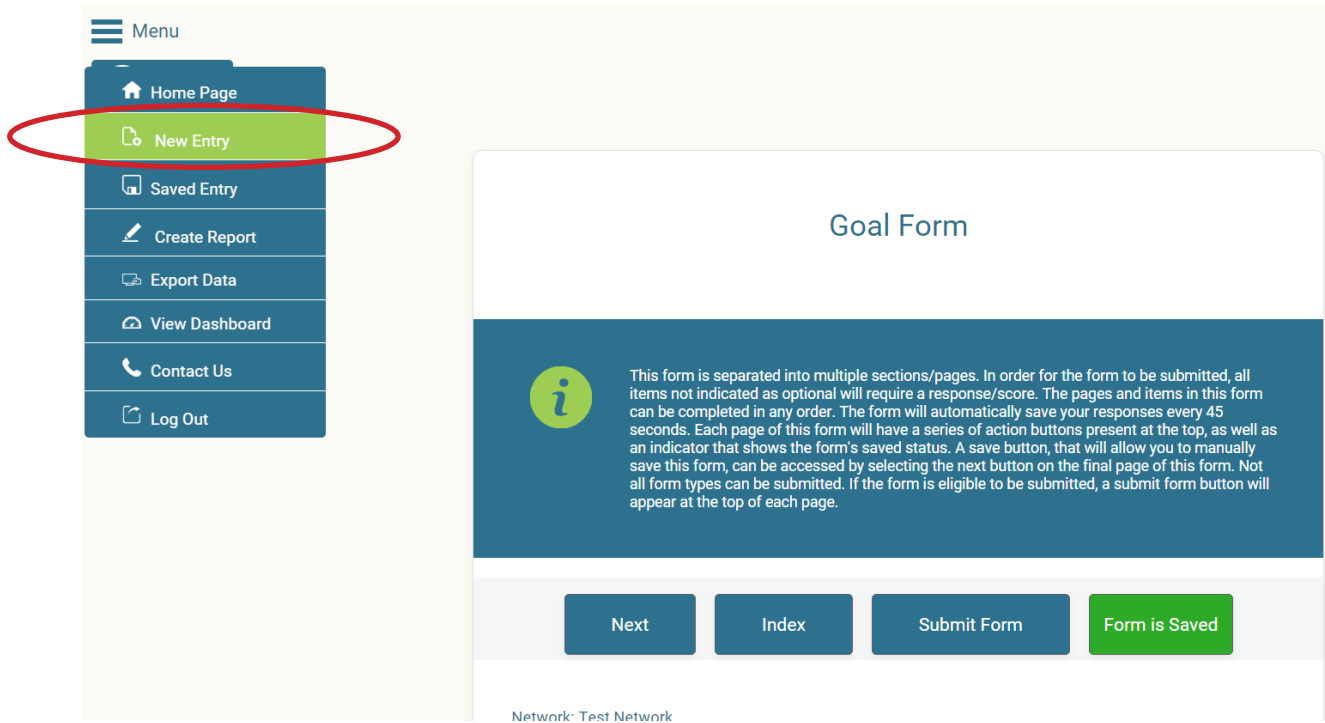
1. Program Goal: What does success look like?

2. Measurement: How will you measure progress?

3. Action Steps

ACTION STEPS: What needs to happen?	OUTCOME: When this step is completed, what will be done?	LEADER: Who will be Responsible?	RESOURCES: What is needed for success?	TIMELINE / STATUS: When will this step be completed?
				<input type="text"/> Status <span style="float: right;">▼</span>

If you would like to enter a different goal or begin a different form you can begin a new form by going back to the homepage and beginning the process again or by directly clicking new entry (circled in red below). Old and submitted forms can also be accessed through the 'saved entry' tile located on the homepage.



NOTE: If you are a network coach or leader and need to conduct goal reviews or progress checks please see the user guide for conducting goal reviews and progress checks.