

How do I conduct a goal review and/or a goal form progress check?

1 CLICK ON SAVED ENTRY  
FROM THE HOMEPAGE

2 CHOOSE A FORM AND  
SELECT VIEW/EDIT

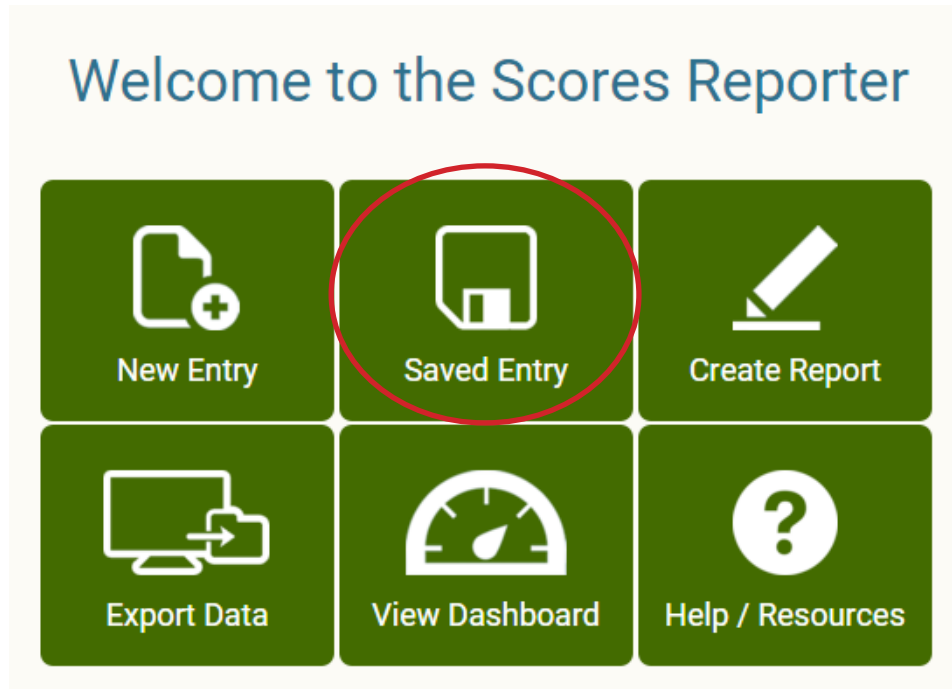
3 CLICK ON THE REVIEW SECTION  
FROM THE FORM INDEX

4 ENTER THE DATE OF REVIEW,  
REVIEW GOAL, AND ADD REVIEW

5 FROM THE FORM INDEX YOU CAN  
ALSO CHECK PROGRESS

6 SUBMIT FORMS

- From the Scores Reporter homepage select the 'Saved Entry' tile (circled in red below) in the center middle of the tile cluster.



- This will take you to the saved entry screen (depicted below). On this screen you will select the form that you would like to review/check in on. Once you have found the form click 'view/edit' (circled in red below).

**NOTE:** If you possess a higher level access and need to limit the scope of forms that you see you can use the filter function (in the blue box below) on the left side of the page. Using this you can limit by date, form status (recommend using 'submitted', form type (click program improvement), form name (goal form), or tagging (to limit to a specific organization or site). Not all filters need to be applied; only the ones necessary for you to limit the field enough to find the form you are looking for.

## Saved Entry

Filter

Start Date

Clear

End Date

Clear

Form Status ▼

Form Type ▼

This area lists each of the active entries that are accessible to your account. Entries that are indicated as IN PROGRESS can be edited. Entries that are indicated as SUBMITTED can be viewed only and are available for reporting. Submitted entries from prior years that have been archived will not be listed, but those entries are still available for reporting. The Filter menu on the left side of the page can be used to set the parameters for what will appear in the list of entries.

ID	Form	Date	Last Saved	Created
44097	Goal Form	12/18/2015	12/18/2015	12/18/2015



Tags: Test Site 99

Status: IN PROGRESS Edit / View

- Once you have selected your form you will be brought to the form index (depicted below) where you will need to choose which area of the form you would like to contribute to. If you would like to submit a goal review click the 'goal review' section (example circled in red below), if you would like to conduct a goal check-up click the 'progress check' section.

Network: Test Network  
 Region: Test Region 9  
 Organization: Test Org Z  
 Site: Test Site 99  
 Form ID: 35789

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

Once the section of the form has been selected, you will be directed to either the goal review or progress check page.

- For the goal review page you will need to put the date that you are conducting the review on. From there enter your review of the goal and any items that still need work or have been successfully accomplished. More reviews for that goal (if you are making reviews at multiple time points or for different parts of the same goal) can be entered by clicking the 'add goal review' button (circled in red below).

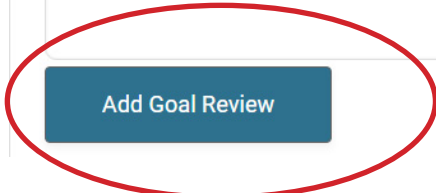
**NOTE:** If at any point you need to reference the original goal you can review it by clicking 'index' and then clicking on 'program goal' to see what has been entered. You can then navigate back to 'goal review' by clicking next or by using the index.

II. REVIEW

Goal Review (Optional)

Goal Review date:

Goal Review:



Add Goal Review

- For the progress check page, as with the goal review page, you will need to put the date that you are conducting the review on. From there enter your check in of the goal and how successfully those goals have been maintained once accomplished. More progress checks for that goal (if you are conducting check ins at multiple time points or for different parts of the same goal) can be entered by clicking the ‘add progress check’ button (circled in red below).

**NOTE:** If at any point you need to reference the original goal you can review it by clicking ‘index’ and then clicking on ‘program goal’ to see what has been entered. You can then navigate back to ‘progress check’ by clicking next twice or by using the index.

- Once all of the necessary information has been entered click the ‘Submit Form’ button (circled in red below). The form should now be submitted (or resubmitted)!

If you would like to conduct a goal review or goal check in for a different goal form you can access them by going back to the homepage and clicking saved entry again or by directly clicking saved entry (circled in red below).

The screenshot displays the Scores Reporter 3.0 interface. On the left, a vertical menu is visible with the following items: Home Page, New Entry, Saved Entry (highlighted with a red circle), Create Report, Export Data, View Dashboard, Contact Us, and Log Out. The main content area is titled "Goal Form" and contains an information icon (a lowercase 'i' in a circle) followed by a paragraph of text: "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." Below this text are four buttons: "Next", "Index", "Submit Form", and "Form is Saved" (which is highlighted in green). At the bottom of the form area, the following metadata is displayed: Network: Test Network, Region: Test Region 9, Organization: Test Org Z, Site: Test Site 99, and Form ID: 44159.