



PROGRAM PERFORMANCE TRACKING SYSTEM
Your Programs. Your Reports. Your Results.™

**U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES
PROGRAM PERFORMANCE TRACKING SYSTEM (PPTS)
USER GUIDE**

September 2017



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GENERAL INFORMATION

The HHS Program Performance Tracking System (PPTS) is used by all OpDivs and StaffDivs within HHS to collect and report the annual targets and results that are submitted to OMB and to Congress in the annual GPRA reports. The PPTS is highly structured and process-driven to support a three-phase annual GPRA reporting process:

- During the May submission, new annual Objectives/Measures/Targets are created and approved with preliminary budgets.
- During the August submissions, Objectives/Measures/Targets are adjusted and approved with revised budgets
- During the final submission in the December/January timeframe, performance results are reported, and the final budget request for Agencies and Programs is approved.

In addition to performance information, PPTS manages information for programmatic and enterprise-level risks; for grantees and contract holders under the Prevention and Public Health Fund (PPHF); for budgetary information required by the Moyer Report; for taskings relating to budget data requests; and for deviation requests that are managed by the Office of Grants Policy, Oversight and Evaluation (OGPOE).

The information that is collected by the PPTS provides an important benefit by serving as a central repository of performance information across the department to support analytic and ad hoc reporting needs.

HOW TO LOG IN

You can connect to the PPTS with your browser by going to <https://hhs-ppts.od.nih.gov>. The PPTS supports all major browsers, including the latest versions of Internet Explorer, Edge, Firefox, Chrome, and Safari.

You will be presented with a login screen as illustrated in Figure 1.

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Figure 1 – PPTS Login Screen



You can log into the system using your regular HHS network credentials, either by typing in your username and password, or by using your PIV card. This is done by entering the appropriate information into the iTrust section and then pressing the Log in button.

Alternatively, you can log into the system using your PPTS username and password. This information is entered into the blue PPTS Credentials box. If you have not already been assigned a username and password, you can contact HHS/ASFR for assistance.

After successfully logging into the system, you will be presented with a warning about the terms of use and the confidentiality of the information contained in the system. You must accept the terms of use before proceeding.

How to Change Your PPTS Password

If you would like to change your PPTS password (this is not for changing your regular HHS network password), click on the "Change your password" link provided on the login screen under PPTS Credentials. This will present the Change Password dialog as illustrated in Figure 2. You are required to enter your username, your old password, and then enter your new password twice.

The image shows a screenshot of a web browser window titled "Network Credentials". A modal dialog box titled "Change Password" is open. The dialog contains four text input fields: "Username:", "Old Password:", "New Password:", and "New Password (Again:". Below the fields is a "Change Password" button. The dialog is overlaid on a window titled "Network Credentials".

Figure 2 – Change Password Dialog

Password Policy

Your password must have a minimum of 8 characters and a maximum of 50 characters.

Your password must contain at least one character from at least three different character sets. The character sets are:

- lower case alphabetic (e.g., (a, b, c, d)
- upper case alphabetic (e.g., A, B, C, D)
- numeric (e.g., 1, 2, 3, 4)
- special characters (e.g., !, @, \$, *)

When you change your password, you must choose a new password that you have not already used as one of your 5 most recent passwords.

Password Expiration

Your password will expire every 60 days. After 60 days since your last password change, you will be required to change your password following the steps described above.

What To Do If You Forgot Your PPTS Password

If you forgot your PPTS password, click on the "Forgot your password?" link provided on the login screen under PPTS Credentials. This will prompt you to enter your PPTS username and click on the Send Email



button. After a few minutes, you will receive an email that provides you with a link to gain access to the system. You will be required to change your password at this time.

PPTS MODULES AND MENUS

After you log into the PPTS, you will be taken to your home page. At the top of the screen, you will see a set of module icons and a menu bar, as illustrated in Figure 3. The module icons that you see will always appear at the top of each screen. The menu bar, however, is context-sensitive and will change depending upon the module that you are in.

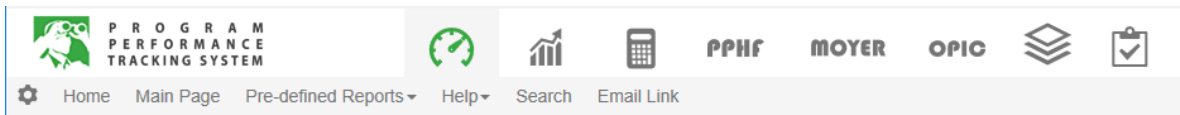


Figure 3 – Module Icons and Menu Bar

The modules that you have access to will vary depending upon your access needs. There are three modules in the PPTS for performance management, as well as modules for other functions, including Risk Management, the Prevention and Public Health Fund (PPHF), the Moyer Report, the Budget Data Request (BDR), and the Office of Grants Policy, Oversight, and Evaluation (OGPOE). The module icons and the purpose of each module is described below.



The **Navigation Module** enables a user to drill down to more detailed levels of information, or drill up to aggregate levels of information. It also displays a performance gauge and other attributes of the elements on the page to provide an at-a-glance summary of performance.



The **Targets and Results Module** is used to define the annual Targets and Results for a measure, and to provide narrative information to describe the performance. This module provides the primary source of information used in the reports.



The **Data Analytic** module provides a dashboard of information, and also provides ad hoc reporting tools to enable a user to further explore the data in the system.



The **OPIC** module is used to identify, assess, mitigate, and track programmatic risks. This data is available to OPIC users in the Business Intelligence module for ad hoc reporting purposes. The use of this module is not described in this user guide.



The **PPHF** module is used to track and report on funding opportunities that are open and awarded for the Prevention and Public Health Fund (PPHF). After awards are made, the module then tracks semi-annual progress reports from each of the awardees.



The **Moyer Report** is a module that collect cross-cutting budgetary information so that Congress can track how funding is being allocated across OpDivs and StaffDivs for a particular health care topic (e.g., Diabetes)



The **Budget Data Requests** module is used to track taskings in support of the budget data requests that are managed within the MAX system.



The **OGPOE** module supports the tracking of deviation requests, GONE Act, FAMR, Training, and Grants.

HOW INFORMATION IS ORGANIZED

The performance information in the PPTS is organized in a hierarchical structure, as illustrated in Figure 4, with predefined relationships. There is a certain degree of flexibility in the structure to allow for differences between OpDivs and StaffDivs. For example, some agencies have Agency Programs directly belonging to the agency, while other agencies have their Agency Programs organized into Agency Macro Programs. In other cases, some agencies have their Agency Measures organized into Agency Long-Term Objectives whereas other agencies have Agency Measures directly under their Agency Programs.

Measure Types

In addition to the hierarchical structure of the elements in the system, measures have additional attributes that can be defined to further classify them for reporting and analysis.

Quantitative and Qualitative Measures

There are two fundamental classes of measures: Quantitative and Qualitative. Quantitative measures are those that can be measured numerically with numeric targets and numeric results (e.g., the number of children in the nation covered by health insurance). Qualitative measures are those that have annual Targets created as individual hierarchical elements that are defined as an annual activity that needs to be met. An annual activity, for example, could be to establish 20 new diabetes education centers in underserved areas throughout the United States. Although there is still a quantitative element to the measure (i.e., "20"), this type of a measure is more appropriately created as a qualitative measure because there could be other activities that are less quantitative (e.g., in the first year, the target may be to create educational materials and pamphlets for the diabetes education centers).

Measure Types

Measures are further classified by one or more measure types. These types are Outcome measures, Intermediate Outcome measures, Output measures, Efficiency measures, Developmental measures, and Contextual measures. However, in certain cases, a measure can be classified into more than one type. For example, a measure could be an Outcome measure and an Efficiency measure, an Output measure and an Efficiency measure, or an Intermediate Outcome measure and an Efficiency measure. In all, there are seven different combinations of measure type that are possible.

Valid combinations for the measure type are:

- Outcome Measure
- Intermediate Outcome Measure
- Output Measure
- Efficiency Measure
- Developmental Measure
- Contextual Measure
- Outcome Measure and Efficiency Measure
- Intermediate Outcome Measure and Efficiency Measure
- Output Measure and Efficiency Measure
- Developmental Measure and Outcome Measure
- Developmental Measure and Intermediate Outcome Measure



- Developmental Measure and Output Measure
- Developmental Measure and Efficiency Measure
- Contextual Measure
- Contextual Measure and Outcome Measure
- Contextual Measure and Intermediate Outcome Measure
- Contextual Measure and Output Measure
- Contextual Measure and Efficiency Measure

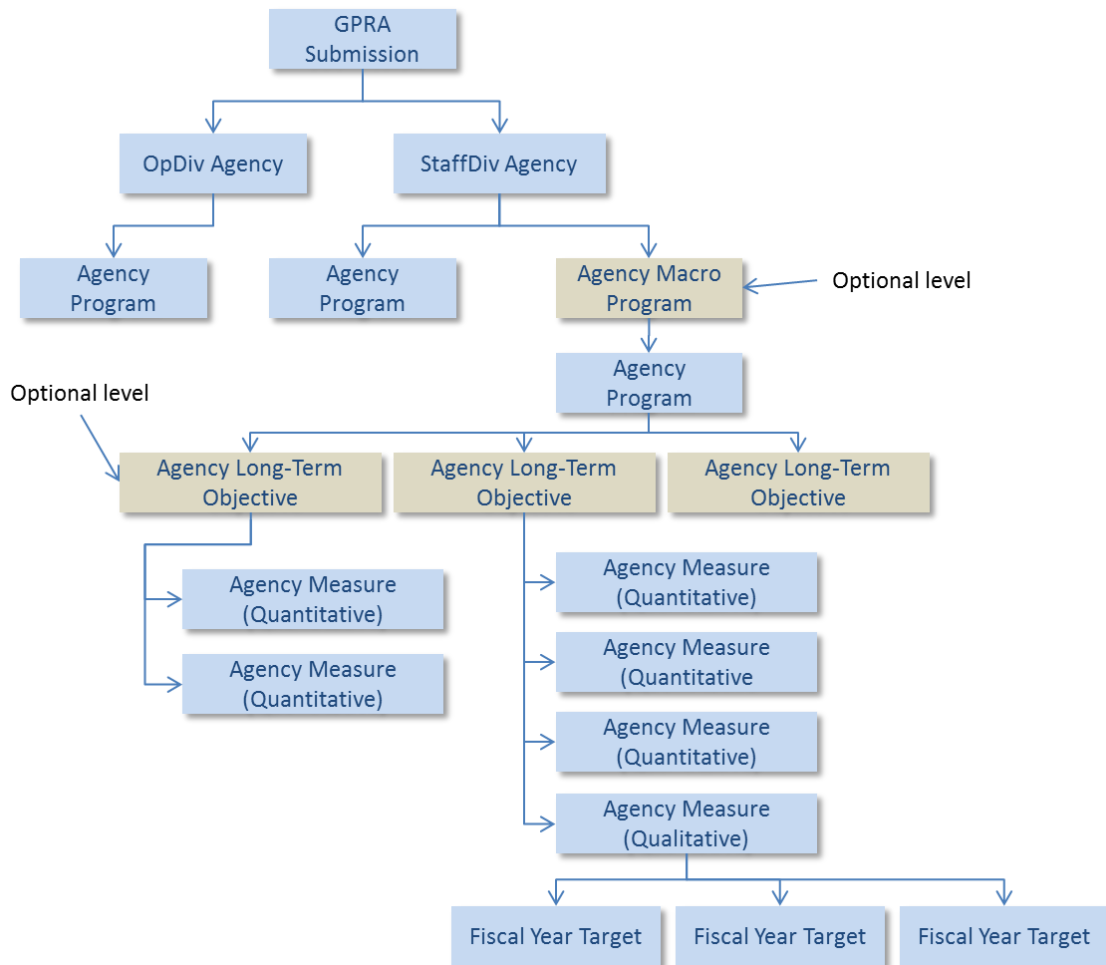


Figure 4 – Hierarchical Structure of Information

Measure Uses

Measures can also be categorized to have one or more of the following categories:

- Budget Measure
- HHS Performance Plan Measure
- Agency Priority Goal Measure 2016 – 2017
- Agency Priority Goal Measure 2018 - 2019
- HHS Strategic Plan Measure 2014 – 2018
- HHS Strategic Plan Measure 2018 - 2022



- Internal HHS Measure

Based on how you have configured a measure to have more than one type (e.g., Output and Efficiency measure) or more than one measure use (e.g., HHS Performance Plan Measure and HHS Strategic Plan Measure) it is still a single measure, and it will be counted only once in the system. When you generate a report (e.g., the Full APP/R Report), you will have the option of filtering out measures based on the measure type and measure use, if desired. Internal measures are for internal use only, and are not included in any of the pre-defined reports.

GENERAL NAVIGATION

Using the Navigation Screen

The Navigation Screen has the various elements of the hierarchical structure displayed in sections. A new section is created each time the underlying type of data is different. For example, on the page that displays OpDivs and StaffDivs, there are two separate sections because OpDivs are considered to be different from StaffDivs.

Selecting a Submission

By default, the navigation screen has the current GPRA submission selected. You can change this by selecting a different GPRA submission from the Submission dropdown near the top of the navigation screen. For example, if you are currently looking at the FY2018 PB submission but you would like to refer back to something that was in the FY2014 DHHS submission, you can select the FY2014 DHHS submission from the dropdown to view that information.

Drilling Down to Lower Levels

You can drill down to a lower level in the navigation screen simply by clicking on the name of any element that has a “>” symbol next to it. This will open up a new section within the page directly beneath the element that you just clicked on. For example, if you are currently displaying the pages that lists all of the OpDivs and StaffDivs, clicking on the name of an OpDiv (e.g., Food and Drug Administration) will display all of the next level items that belong to that element (e.g., all of the FDA Agency Programs). You can collapse a section by clicking on the name of the element to which that section belongs. For example, if you click on Food and Drug Administration again, it will collapse the OpDiv and hide all of the underlying Agency Programs.

Sorting by a Column

You can sort the information for a section in the Navigation Screen by clicking on any column heading. There are three possible states that the section can have when you click on the column heading:

- Click once on the column heading to sort alphabetically in ascending order
- Click a second time on the column heading to sort alphabetically in descending order
- Click a third time to remove the sorting, and return it to the default sort order.

If there are multiple sections in the Navigation Screen, clicking on a column heading will sort only the section whose column heading you clicked, even if the other sections have a column heading with the same name.

Defining Your Home Page

You will typically want your home page to be the Navigation Screen with some of the sections already opened, but that is not necessarily the case. You can choose any page within the PPTS to be the page that you go to each time you log into the system. Additionally, you can configure the screen within the Navigation Screen to serve as your home page. For example, if you are responsible for the measures of one program, you may drill down so that the program is displayed, and then make that your home page.



To define your home page, navigate to the screen that you would like to be your home page, and then click on the "Make this my Home page" link at the bottom of the screen.

Global Navigation

The global navigation is used to show all possible actions or to navigate to other modules within the PPTS for a particular element. The global navigation pop-up is activated by clicking on the global navigation icon (☰) located to the left of an element's name, as illustrated in Figure 5. When you click on the global navigation icon, it will display all of the different navigation options you have for that particular element. For example, if you click on the global navigation icon for an OpDiv, you will be able to navigate to the mini-wizard, view or upload documents for the OpDiv, or create a new element within the OpDiv (e.g., a new Agency Program). If you click on the global navigation icon for a Measure, you will be able to navigate to the mini-wizard, enter targets or results for the measure, view or create comments for a measure, or create a new element (e.g., create a new quantitative measure).




Figure 5 – Global Navigation Pop-up

Under the Create section of the global navigation, the element types that you can create may be indented to the right. If so, this means that the new element that you are creating will be added as a new element within the element that you clicked on. For example, if you clicked on the global navigation icon for an Agency Program, then the Agency Measure type will be indented to indicate that the measure you are about to create will be created as a “child” within that Agency Program. You could also create a new Agency Program, but this one is not indented because it is going to create a new Agency Program that is a “sibling” of the program that you clicked on.

When you select any of the items from the global navigation pop-up, it will either open up a new browser tab where you can do this work, or it will open a pop-up window in your current window. In both cases, you will not lose the place where you started from. If a new tab is opened, you can simply click on the previous tab to go back to where you started from; if a pop-up window is opened, you can close the window to return to where you started from.

Viewing Changes Made to a Field

The PPTS keeps a 6-month record of changes made to any data entry field so that you can know when the change was made, who made the change, and what the change was. If a field has been changed and there the change was made within the past 6 months, the field will have a  icon displayed above the field name when you mouse over the field. You can click on the icon to review the changes that have been made. Figure 6 illustrates the change log pop-up screen to show changes that have been made within the past 6 months.



Changes for the field Target Results Summary

- Show only current value
- Show edits between (mm/dd/yyyy) (mm/dd/yyyy)
- Show all edits

Changed on:	Changed by:	New content:
08/19/2012	McCrary, Michael	The FY08 target was MET. Delivery of the 2-year interventions being tested in the POUNDS Lost trial has been completed. All data collection for the trial was completed in January 2008. Results of the study are expected to be reported in FY 2009. The purpose of this study is to test the effectiveness for weight loss and weight maintenance of four diets differing in macronutrient composition: moderate in fat (40 percent energy) with two different protein levels (15 percent and 25 percent), and low in fat (20 percent energy), also with 15 percent and 25 percent protein levels
08/19/2012	McCrary, Michael	The FY08 target was MET. Delivery of the 2-year interventions being tested in the POUNDS Lost trial has been completed. All data collection for the trial was completed in early January 2008. Results of the study are expected to be reported in FY 2009. The purpose of this study is to test the effectiveness for weight loss and weight maintenance of four diets differing in macronutrient composition: moderate in fat (40 percent energy) with two different protein levels (15 percent and 25 percent), and low in fat (20 percent energy), also with 15 percent and 25 percent protein levels

Deleted Text Inserted Text

Figure 6 – Example Change Log Screen

If you mouse over the content that represents a change, the system will highlight the text that was changed to help you identify the differences between this version, and the previous version of the text, as illustrated in Figure 7. If you would like to revert to a previous version, you can click on the "Revert to this version"

Target Results Summary

(mm/dd/yyyy) (mm/dd/yyyy)

Changed on:	Changed by:	New content:
08/19/2012	McCrary, Michael	The FY08 target was MET. Delivery of the 2-year interventions being tested in the POUNDS Lost trial has been completed. All data collection for the trial was completed in January 2008. Results of the study are expected to be reported in FY 2009. The purpose of this study is to test the effectiveness for weight loss and weight maintenance of four diets differing in macronutrient composition: moderate in fat (40 percent energy) with two different protein levels (15 percent and 25 percent), and low in fat (20 percent energy), also with 15 percent and 25 percent protein levels
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Deleted Text Inserted Text

Figure 7 – Example Change Log Screen with Changes Highlighted

Online Field Level Help

Help is available for most data entry fields in the system. If help is available for a field, a help (?) icon appear above the field name when you mouse over the field. The help is displayed when you mouse over the help icon, but the help will disappear if you move your mouse away from the help icon. If you would like the help to be displayed while you enter data, you can click on the help icon to lock it in place. This will create a pop-up window with the help, and you are able to move the help around on the screen so that



it does not interfere with your data entry. If you lock the help in place, you are able to open help for other fields on the same screen and also lock them in place.







Editing Options for Text Fields

The PPTS contains a full-featured text editor that provides a set of word processing-like features to give you more control over the formatting of the text. Table 1 provides a description of each of the icons available for use in the text editor. The full-featured text fields are activated by clicking on the field.

Usage Tip

Use the **Paste from Word** icon when copying and pasting text from Microsoft Word to improve formatting quality.




Table 1 – Text Editor Functions

Text Editor Icon Name	Text Editor Icon	Description
Cut		After selecting text in the editor, this icon will become active. Click on this icon to remove the selected text.
Copy		After selecting text in the editor, this icon will become active. Click on this icon to copy the selected text.
Paste from Word		If copying text from Microsoft Word, this is an important tool that will remove the extraneous formatting that is contained in text that is copied from Word, but that is unusable by most web applications. It will also preserve the Word formatting that is important to the PPTS, but that would otherwise be lost if the text is simply pasted without using this Paste from Word feature. For example, if bulleted text is copied and pasted directly into the browser without using the Paste from Word feature, the bullet points will be pasted as simple dots, and will not be recognized by the PPTS as true bullet points. Using the Paste from Word feature will paste these items correctly as bulleted text.
Undo		If you make a change to the text, this icon will become active and you can click to undo your last change. You can continue to click to undo previous changes, as well.
Redo		If you undo a change, this icon will become active and you can click on this icon to put your change back.
Search		This will open a pop-up where you can enter text to search within the text editor. Options for the search are: <ul style="list-style-type: none"> • Match case: this will match the case of the text. For example, if checked, a search for "The" will return all occurrences of "The" but not "the". • Match whole word: do not search partial words. For example, if this is checked and you search for the word "an" it will not return "cannon" as part of the search result because it did not match the entire word. • Match cyclic: after reaching the end of the text, search again from the beginning of the text until the position of the cursor is reached. If unchecked, it will search only



Text Editor Icon Name	Text Editor Icon	Description
		from the current position of the cursor to the end of the text.
Bold		Turn Bold font on or off for the selection.
Italic		Turn Italic font on or off for the selection.
Underline		Turn Underlined font on or off for the selection.
Subscript		Turn Subscript font on or off for the selection.
Superscript		Turn Superscript font on or off for the selection.
Numbered List		Insert or remove a numbered list.
Bulleted List		Insert or remove a bulleted list.
Increase Indent		Increase the indent level of the text.
Decrease Indent		This icon is activated if at least one level of indenting has been turned on. Click to reduce the indent level of the text.
Font Size		Change the font size. Use the dropdown to select the desired font size. However, the font size is overridden by most of the reports to Times New Roman 12pt.
Background Color		Change the background color of the text to highlight it.
Text Color		Change the color of the text.
Table		Click on this icon to insert a table. You can specify the number of rows and columns, and add other configuration to change the appearance and to make the table Section 508 compliant (e.g., specifying the headers, caption, etc.). After inserting a table, you can right-click on the table to edit the table properties.
Add Footnote		Click to insert a footnote into the text. Do not number the footnote; only enter the text for the footnote. The PPTS will take care of numbering the footnotes when the reports are generated. The text in the editor will appear as <footnote>xxxxxxxx</footnote> (where xxxxxxxxx is the footnote text), and it should be left this way with the <footnote> and </footnote> tags displayed in the text.
Character Count		Click on this icon to get a count of the number of characters in the text field.
Insert Image		Click on this icon to load an image into the text field. After uploading an image, click on the image to insert it into the text field. Right-click on the image to add additional information for Section 508 compliance (e.g., Alternative Text). You can also add other image properties, such as image size, borders, alignment, hyperlinks, etc. You can also resize the image by clicking on the corner of the image and dragging it to the desired size.




Text Editor Icon Name	Text Editor Icon	Description
Email Link		Click on this icon to send an email to another user. When the user clicks on the hyperlink in the email they receive, they will be taken to the screen in the PPTS with this field highlighted. Refer to Emailing a Link to the PPTS.
Source		Click on this icon to view the HTML source for the text contained within this field. A general understanding of HTML formatting is required to make use of this feature.
Spell Checker		Click on this icon to check the spelling of the text in the field.

Uploading a Document to a Field

A document can be uploaded to a field to provide supporting information. This feature is enabled for most of the text field. For example, you may choose to upload a scientific publication to the Data Source field to provide access to the complete information supporting the data source.

Document Upload

If document upload is enabled for a field, you will see an icon () that appears above the name of the field when you mouse over the field. If you click on the paperclip icon, you will be presented with a pop-up (as illustrated in Figure 8) where you can upload a document or view documents that have already been uploaded to this field.

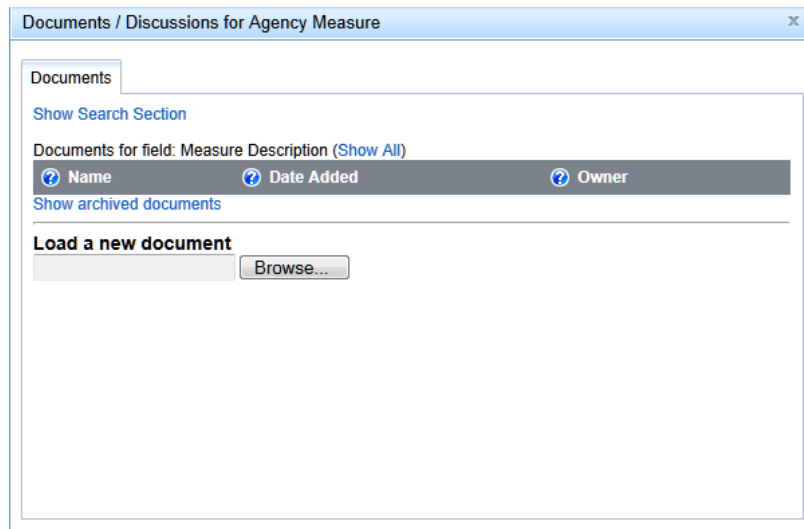


Figure 8 – Document Upload Pop-up

You can click on the **Browse...** button to browse your computer for a document to be uploaded. After you have uploaded a document, you will see the name of the document, the date it was added, and your name as the owner, as illustrated in Figure 9.

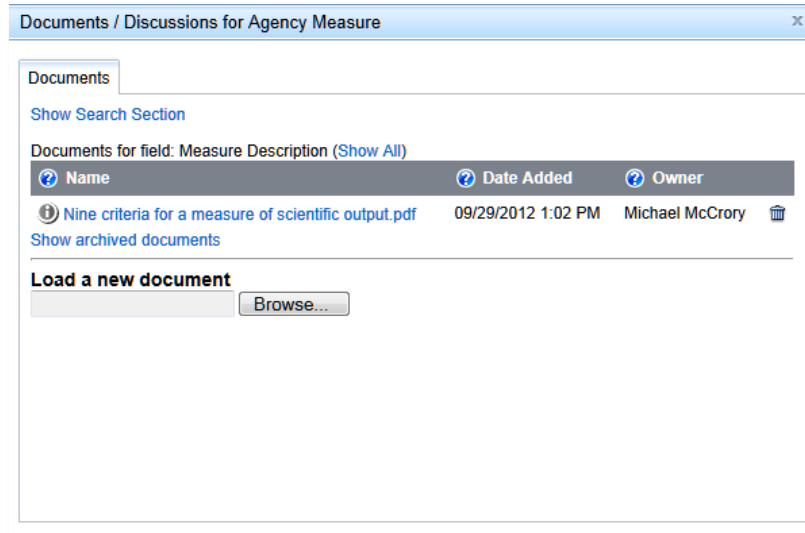



Figure 9 – Document Upload Pop-up After a Document has been Uploaded

Once a document has been uploaded, you have several options to further manage the document. These options include opening the document, naming and describing the document, categorizing the document, uploading/reviewing other versions of the document, defining who can see and/or edit the document, defining keywords for the document, and archiving the document.

Opening a Document

To open a document, simply click on the hyperlinked name of the document.

Naming and Describing a Document

To edit the naming of the document, click on the  icon and then click on the **Naming** tab. There are three fields that you can update: the file name, the document name, and the long description. The file name is used to name the file that contains the document; the document name is used for a more explicit title of the document; and the long description is used to fully describe the contents of the document. All three of these fields default to the original file name when the document is uploaded. Click on the **Update** button after making changes to the naming.

Defining the Document Category

From the **Naming** tab, you can use the **Category** dropdown to select the document category. This is an optional field, but is helpful when using the document search feature to narrow down the search results. Click on the **Update** button after choosing the category.

Uploading/Reviewing a Document Version

The PPTS uses a revision control system so that a document can be revised without losing the original version. If you would like to edit the document that has been uploaded, you must open the document to make your changes, save it to your computer, and then upload it as a new version of the document.

To see all of the versions of the document, or to upload a new version, click on the **Versions** tab. From this tab, you will be able to see the versions, the date added, and the name of the user that updated the version.

Defining Access Permissions for a Document

There are four categories of access permissions: Read access, Edit access, Add Version access, and Archive access. By default, the PPTS is configured to:

- grant read access to all users of the system
- grant edit access to only you as the owner of the document



- grant add version access to only you as the owner of the document
- grant archive access to only you as the owner of the document

These default settings can be overridden for each document by going to the **Security** tab. If you want to specify selected users to have access to the document, click on the “**Allow selected users...**” radio button and then click on the **Edit users and Roles** button to select individual users. Click on the **Update** button after making changes to the access permissions.

Defining Keywords for a Document

You can define one or more keywords for a document to help to improve searching for a document. Click on the **Keywords** tab to add keywords. You can add multiple keywords by entering them one at a time and clicking on **Add Keywords** after each addition, or by entering multiple keywords by separating them with commas, and then clicking on the **Add Keywords** button.

The keywords associated with the document will appear beneath the **Add Keywords** button. You then have the option to remove one or more of the keywords by clicking on the **Remove** hyperlink, or adding the keywords to the list of global keywords by clicking on the **Add to global keywords list** hyperlink.

If global keywords have been created for the system, they you will be able to click on the **Show global keyword section** to display all of the global keywords, and then click on one of the global keywords to add it to this document. Global keywords have the added benefit of improving standardization and consistency of keywords across documents.

Archiving a Document

A document cannot be deleted from the system (except by an administrator of the PPTS). However, it can be “archived” to hide it from view and make it appear as if it has been deleted. This is similar to how the Trash works in Microsoft Windows.

Searching for a Document

You can search for a document by clicking on the **Show Search Section**. This will provide options to search using keywords, a document category, and the document type (e.g., pdf, doc, xls). You can also search only within the current element (e.g., for a specific measure), for all element that belong to a particular element (e.g., find all documents that belong to this program or any of its measures), or for any element (e.g., find all documents in the entire system that meet my search criteria).

Emailing a Link to the PPTS

There could be an occasion when you would like to communicate with someone else and have them review or change the contents of a field. You can do this by sending an email link to one or more individuals that they can click on to go to a specific page in the PPTS, or to a specific field(s).

There are two primary methods for sending an email link, as described in the following sections.

Email Link for a Single Text Field

Each of the large text fields has an icon (✉) for sending an email link. By clicking on this link, you will be able to send an email to one or more people containing a hyperlink to go to this field when the hyperlink is clicked from the email. This will return the user to this page in the PPTS with this field highlighted.

After clicking on the link, you will be prompted to define who the email message should be sent to, and the message that you would like to include, as illustrated in Figure 10.

For the **Email to:** field, you will receive suggestions for email recipients as soon as you begin typing. For example, if you type the letter “J” you will receive a list of all users whose first names or last names begin with the letter J. As you continue typing, the list of suggested users will be reduced to the list of users that match what you have typed. It is not mandatory to send the email to a PPTS user. However, only



users that are authorized to log in will be able to click on the hyperlink in the email and see the field in the PPTS.

Share this location

Email to:

Send copy to my email address

Subject: Program Performance Tracking System (PPTS) Link

Message (Optional):

Preview:

To:

From: "Michael McCrory" <mmccrory@plexsci.com>

Subject: Program Performance Tracking System (PPTS) Link

Body: <https://hhs-ppts.od.nih.gov/plexus/t/zhWX>

Send Cancel

Figure 10 – Email Link Pop-up

The **Message** field is optional, but is recommended so that you can provide an explanation in your email to describe why you have sent the email. For example, you may want to request that the email recipient change some of the text in the field.

After you have completed the information in the pop-up, click on the Send button to send the email.

Email Link for a Set of Fields

If you would like to send an email link to a specific set of fields, you can do so by clicking on the **Email Link** menu located at the menu bar at the top of the screen. You will be prompted with the small pop-up that appears in Figure 11. This gives you the opportunity to click on the fields that you want to include in the email message. If you do not want to specify any fields, click on “Skip” and proceed to Email Link to a Page.

Please select fields that your email will link to and click Done. If you wish to email a link to this page and not a specific field, click Skip. To go back, press Cancel.

Skip Cancel

Figure 11 – Pop-up to Prompt Selection of Multiple Fields

If you would like to specify fields for the email, begin clicking on the fields that you would like to be highlighted when the email recipient comes to this page. As soon as you click on the first field, the “**Skip**” button will change to a “**Done**” button. After clicking on the **Done** button, you will be prompted to complete the email configuration using the same pop-up illustrated in Figure 10.

Email Link to a Page

You can send an email link to a user that has a hyperlink that takes the user to a page within the PPTS without having any fields highlighted. To do this, click on the **Email Link** menu located in the menu bar



at the top of the screen. When the pop-up (illustrated in Figure 11) appears, click on the **Skip** button to skip the step to specify individual fields. This will then open up the email pop-up illustrated in Figure 10 that can be completed to send the email.



REPORTING TARGETS AND RESULTS

Targets and results for a measure are created and updated in the Results Module. This assumes that the Measure has already been created.

REPORTING TARGETS AND RESULTS FOR QUANTITATIVE MEASURES

To access the Targets and Results module from the Navigation Screen, click on the Enter Targets and Results for this Agency Measure option under the View/Manage section of the Global Navigation pop-up.

Defining targets and results for a Measure is a two-step process. Targets for a measure are defined prior to the start of each fiscal year, and then the results are entered upon completion of the fiscal year. After entering data into this screen, you must click on the Save button for the data to be saved to the database. However, there is no risk that you will forget this step because the system will remind you if you have entered data that has not yet been saved. In this case, a pop-up window will appear asking you if you want to "Leave this page" or "Stay on this page." If you want to save the data, click on "Stay on this page" and then save your data with the Save button. If you do not wish to save the data, click on "Leave this page."

Defining a Target

A quantitative target is created by selecting a target type, and then entering a target value. Depending upon which target type is selected, a target unit may also be required. The resulting target that is created is called the Calculated Target Value.

Usage Tip

You can enter the Target Value without selecting a Target Type, and the Target Type will be automatically set to "Target ="

Target Type

The target type is selected from a dropdown that has 13 options as shown in below. If the Target Value is entered without selecting a target type, the target type will default to "Target =".

Table 2 – Possible Target Types

Target Type	Target Type Definition	Target Value Applies	Target Unit Applies
Historical Actual, No Target	No target is available for historical reasons. Only a result will be entered.	No	No
TBD	The target is not known at this time and will be set in the future.	No	No
Set Baseline	The target is not known at this time, and a baseline will be set. Once the baseline value is entered into the Result field, the value of the result will become the "target" for this fiscal year.	No	No
Maintain Baseline	Once the baseline is known, it will serve as the target value for this fiscal year.	No	No
Baseline +	The baseline value will be increased by the target value and target unit to be the target for this fiscal year.	Yes	Yes
Baseline -	The baseline value will be decreased by the target value and target unit to be the target for this fiscal year.	Yes	Yes
Maintain Target	The target will be the same as for the prior fiscal year.	No	No



Prior Target +	The prior year's target will be increased by this year's target value and target unit.	Yes	Yes
Prior Target -	The prior year's target will be decreased by this year's target value and target unit.	Yes	Yes
Target =	The target is defined by the Target value that is entered.	Yes	No
Prior Result +	This year's target will be computed as last year's result plus this year's target value and target unit.	Yes	Yes
Prior Result -	This year's target will be computed as last year's result minus this year's target value and target unit.	Yes	Yes
UNDEFINED	There is no target defined.	No	No

Target Value

The Target Value is a numeric value that is used in conjunction with the target type and target unit to compute the calculated target value.

Target Unit

If the Target Unit applies (see Table 2), it can be selected from the dropdown.

Table 3 – Target Unit Options

Target Unit	Description
NA	No unit is used. The raw Target Value is used in the calculation of the calculated target value. For example, if the target type is "Prior Target +" and the target unit is NA, the target value will be added to the prior year's calculated target value.
PP	Percentage Points. If the target type is "Prior Target +" and the target is defined as a percentage (e.g., 48%) and the target value is 3, then the target value will be added to the prior year target (i.e., 51%).
%	Percentage. If the target type is "Prior Target +" and the target is defined as a percentage (e.g., 48%) and the target value is 3, then the target value will be added as a percentage to the prior year target (i.e., 49.44%).

Calculated Target Value

The calculated target value is computed as described above, using a combination of the target type, target value, and target unit. The calculated target value is the value that is used in the reports, and for comparison with the result to compute the performance.

Entering a Result

Once a result is entered, it will be compared with the calculated target value to compute the year to year comparison and the performance against target.

Date Expected

If the result is not yet known, you should enter the date that you expect the results to be known and reported. When entering the date, you can select it from the calendar that pops up, or you can enter it directly into the date field. Entering directly in the date field may be more convenient when the date expected is several years out, and would require you to click multiple times through the calendar.



Result

The result is entered as a numeric value, and is usually not entered until after the completion of the fiscal year unless the result is obtained before the end of the fiscal year. Once the result is entered, a few things will happen:

- the Date Expected field will change from whatever date had been entered to "Collected"
- the Year to Year Comparison will be updated (but only if the prior year's result has been entered)
- the Performance Against Target will be computed

Year to Year Comparison

The year to year comparison value is computed by comparing this year's result with the prior year's result. The direction of a measure (increase is good vs. decrease is good) is taken into consideration when determining if an improvement or decline was made. This column will have one of five possible values, as defined in Table 4.

Table 4 – Year to Year Comparison Values

Value	Definition
Stable	This year's result is exactly the same as the prior year's result.
Improvement	This year's result is better than the prior year's result.
Decline less than 10%	This year's result is worse than last year's result by 10% or less.
Decline greater than 10%	This year's result is worse than last year's result by more than 10%.
Not Available	The prior year's result is unknown.

Performance Against Target


The performance against target field is calculated by comparing the result with the calculated target value. The possible values are shown in Table 5.


Table 5 – Performance Against Target Values

Value	Description
Not Collected	Both the Result and Date Expected fields are empty.
Pending	The Result field is empty, but the Date Expected field has a date in it.
Target Not In Place	The Target is undefined or not fully defined, but a Result has been entered.
Historical Actual	The target type is "Historical Actual, No Target" and a Result has been entered.
Target Not Met	The result reported was worse than the calculate target value set.
Target Not Met But Improved	The result was better than the prior year's result, but the calculated target value was not met.
Baseline	The target type was set to "Set Baseline" and the result has been entered.
Target Met	The result is exactly the same as the calculated target value.
Target Exceeded	The result reported is better than the calculated target value.



Adding a Footnote to a Value

A footnote can be added to a calculated target value or to a result for a particular fiscal year. This is done by clicking on the  field displayed next to these two fields. This will cause a pop-up box to appear where you can enter the footnote text. The numbering of the footnotes will take place automatically by the software when reports are generated, so you should not enter any footnote number into this text box.

If a footnote has already been created for a value, it will be denoted with a  icon. You can click on the icon to edit the footnote that already exists.

Formatting a Quantitative Measure's Target and Results

There are two components to formatting the measure's targets and results. The format string is used to format the number itself, to define number of decimal points, whether thousands should be comma-separated, and whether a dollar sign or percent sign should be used. The format string must follow precise syntax for it to work properly (e.g., \$#,###.00), and it becomes a part of the number being reported. The unit of measure, on the other hand, is a text field that you can use to supplement the formatting of the number. The value of the target or result always appears after the value (e.g., parts per million).

Format String

The possible symbols that can be included in the format string are shown in Table 6. Any symbols besides those that are shown below will be removed when entered, with a warning message displayed.

Table 6 – Format String Symbols

Symbol	Location	Meaning
0	Part of the number	Used to force a digit to appear, even if it has a value of zero.
#	Part of the number	Used to display a digit, but zero values following a decimal point will not be displayed.
.	Part of the number	Decimal separator.
,	Part of the number	Comma separator to separate thousands.
%	Suffix	To show as a percentage value.
\$	Prefix or Suffix	To show as a dollar value.

Unit of Measure

The unit of measure can be entered as anything to help understand what the number represents.

The example below in Figure 12 – Example Formatting of Targets and Results shows how the targets and results have been formatted using a combination of the Format String and the Unit of Measure.

Usage Tip

To format a number with no decimal places, use #

To format a number in millions with the thousands separated by commas, use #,###

To format a number as a percentage with no decimal places, use #%

To format a number a number as a percentage and always include a decimal place, even when it is zero, use #.0%



Format: \$#.###.##
 Unit of Measure: per thousand inhabitants
 Discontinued beginning in FY: Nothing selected

Display 8 fiscal years before the current year of 2011

Period	Target					Date Expected	Actual Result
	Type	Value	Unit	Calculated Value	Target Not Comparable		
2003	Historical Actual, No Target	0	NA	per thousand inhabitants		Collected	\$6,375 per thousand inhabitants
2004	Target =	6029	NA	\$6,029 per thousand inhabitants		Collected	\$6,567 per thousand inhabitants
2005	Target =	6143	NA	\$6,143 per thousand inhabitants		Collected	\$7,492 per thousand inhabitants

Figure 12 – Example Formatting of Targets and Results

Viewing Fewer or More Fiscal Years

If you would like to view additional fiscal years, you can define the number of earlier fiscal years and the number of later fiscal years to display, relative to the "current year." You can display earlier fiscal years by changing the value located just above the table where it says "Display (xx) fiscal years before the current year of yyyy." Similarly, you can display later fiscal years by changing the value located just below the table where it says "Display (xx) fiscal years after the current year of yyyy." After you save the measure, the values that you have entered into these two fields will become the defaults for the number of fiscal years to display for this measure.

Adding Narrative Explanations for a Measure

Towards the bottom of the screen, there are three expandable sections, as illustrated in Figure 13. The first expandable section is used to add/update the Measure Narrative. The second section is expanded by default and is used to group measure narratives together. The third expandable section is used to add/update the Explanation of Performance, Data Source, and Data Validation. Click on the small triangle ▶ to expand the section.

Display 5 fiscal years after the current year of 2012

▶ View/Edit The Measure Narrative

▼ Grouping of Measures

Group Explanation of Performance with Previous Measure

▶ View/Edit Explanation of Performance, Data Source, and Data Validation

Save

Figure 13 – Expandable Sections to Add Narrative Explanations

After the section has been expanded, as illustrated in Figure 14, the individual fields are displayed. There are three fields in the Measure Narrative Section. Refer to *Error! No bookmark name given.* for instructions on how to use the text editor.

- **Measure Description:** This brief narrative should give an overview of the measure and its relevance to the success of the program. Unlike the more technical Measure Description that is entered into the Wizard when defining a measure, the text in this field should be two to three sentences in length and should be easily understood by a member of the public.
- **Data and Trend Analysis:** This brief narrative should provide details on the latest performance results and explain the context for the data. The narrative should also discuss the data trends, if applicable. The text in this field should be three to five sentences in length and should be easily understood by a member of the public.



- **Measure Also Supports:** This field allows the user to indicate how the measure aligns with other Strategic Plan objectives, Healthy People 2020, or other plans. This is an open text field.
 - Please use the following conventions for other Strategic Plan objectives: [Goal].[Objective], for example, 3.C.
 - Please use the following conventions for Healthy People Objectives: [Topic Area abbreviation] HP2020-[Objective]; for example, BDBS HP2020-3.

▼ View/Edit The Measure Narrative

Measure Description:

Salmonella is the leading known cause of bacterial foodborne illness and death in the United States. Each year in the United States, food contaminated with Salmonella causes an estimated 1.3 million illnesses, including fever and diarrhea, and between 400 and 500 deaths. *Salmonella Enteritidis* (SE), a subtype of Salmonella, is the second most common type of Salmonella in the United States and accounts for approximately 17% of all Salmonella cases in humans. The most significant sources of foodborne SE infections are shell eggs (FDA-regulated) and broiler chickens (USDA-regulated). Preventing Salmonella infections depends on actions taken to reduce contamination of food by regulatory agencies, the food industry, and consumers, as well as actions taken for detecting and responding to outbreaks when they occur. FDA published a final egg rule, "Prevention of Salmonella Enteritidis in Shell Eggs During Production, Storage and Transportation", on July 9, 2009. This rule requires shell egg producers to implement controls to prevent SE from contaminating eggs on the farm and from further growth during storage and transportation. The regulation also requires egg producers to maintain records concerning their compliance with the egg rule and to register with FDA. The final rule is expected to reduce SE-associated illnesses and deaths by reducing the likelihood that shell eggs are contaminated with SE.

Data and Trend Analysis:

FDA seeks to decrease the rate of SE illness in the population by 10%. The baseline, provided by CDC, is the average annual rate of SE illness in the population from 2007 through 2009. The target is a 10% reduction in that rate, which would result in a rate of 2.3 cases per 100,000 by the end of calendar year 2011. CDC will provide the data to report progress on this goal. The CY 2011 actual data will be available in June 2012.

Figure 14 – Measure Narrative Fields

In the Explanation of Performance, Data Source, and Data Validation section, there are three additional fields.

- **Explanation of Performance:** Enter any information that you believe is relevant to explain the performance of this measure. This information will appear in the Full APP/R report. If this measure is grouped with a previous measure (refer to Combining Explanation of Performance Across Measures.), you can leave this field blank because only the previous measure's Explanation of Performance information will be used in the Full APP/R report.
- **Data Source:** Enter the source of data for the measure's results.
- **Data Validation:** Enter the methodology and/or sources used to validate the data that was reported.

Combining Explanation of Performance Across Measures

There are occasions when multiple measures are related and share the same Explanation of Performance. Rather than entering the information multiple times, and having it reported multiple times in the various reports, you have the option of combining the Explanation of Performance across measures. This feature is available only when the measures are located one after another within a program; if they are separated by other measures, then this feature will not work as expected.

To combine the Explanation of Performance information, you need to enter the Explanation of Performance only for the first measure in the series. For all other measures, you can leave the Explanation of Performance field blank, and click on the **Group Explanation of Performance with Previous Measure** checkbox. When the reports are generated, the system will know that it should group these measures together and output the Explanation of Performance information only once for the series of measures that are grouped together.

Discontinuing a Measure

You can set a measure to be discontinued by selecting the year when the measure will become discontinued. The PPTS will continue to consider the measure to be active until the results for all of the annual targets prior to the year discontinued have been reported. The year discontinued can be set from the Results module just above the upper right corner of the targets and results table, or in the Wizard on step 1 using the dropdown titled **Discontinued beginning in FY**.



REPORTING TARGETS AND RESULTS FOR QUALITATIVE MEASURES

To access the Targets and Results module from the Navigation Screen, click on the Enter Targets and Results for this Agency Measure option under the View/Manage section of the Global Navigation pop-up.

The targets and results for qualitative measures are reported using the results module, but the screen layout is quite different for qualitative measures versus quantitative measures. For qualitative measures, the annual targets are displayed as columns under each fiscal year.

Reporting Results for a Target

If a target's results have not yet been reported and there are no fields for you to enter information, you will need to click on the **New...** button, as illustrated in Figure 15, to create a new status report for a period ending that you specify. You can create multiple status reports for an individual target. This provides the ability to report on a target's performance throughout the fiscal year. When reports are generated, the latest available status report is used. For the final status report for the fiscal year, you should select the last day of the fiscal year (e.g., 09/30/2012).

If multiple status reports have been created for a single target, you can select the status report that you wish to view by selecting it from the dropdown that says "as of dd/mm/yy."

The image shows a software interface for creating a new status report. At the top right, there is a 'New...' button with a dropdown arrow. Below it is a dialog box titled 'Period Ending Date:'. Inside the dialog box, there is a text input field containing '9/30/2012' and a small dropdown arrow to its right. Below the input field is a blue button labeled 'Create New Report'.

Figure 15 – Creating a New Status Report for a Target

Results for an annual target are reported in the fields in the column for the target. Refer to Editing Options for Text Fields for information on features available within the large text fields.

- **Target Status:** Target Status is used to determine the overall performance of the target. Based on the target results in comparison to the description of the target, select the option from the Target Status dropdown that most closely reflects the performance (i.e., Target Met, Target Not Met, Target Exceeded, etc.).
- **Year to Year Comparison:** Select from the dropdown to define the performance of this year's target relative to the performance of the prior fiscal year's target. Options are Stable, Improvement, Decline less than 10%, and Decline greater than 10%.
- **Timeliness of Reporting:** Select from the dropdown to define when the target's results were available relative to the end of the fiscal year.
- **Date Expected:** If results are not yet available, enter the date when you expect results to be available and entered into the system.
- **Target Results:** Use this field to document the results of the Target for this performance period. This should be a complete description of all results achieved.
- **Target Results Summary:** Use this field to enter a brief summary of the results achieved for this target. This information is used in reports where the full description of Target Results is not needed.
- **Target Advances or Highlights:** Enter the summary of the scientific advances made, or the highlights of the achievements, for the annual target.
- **Explanation of Performance:** Provide any information that you believe is relevant to explain the performance of this measure. This information will appear in the Full APP/R report. If this measure



is grouped with a previous measure, you can leave this field blank because only the previous measure's Explanation of Performance information will be used in the Full APP/R report.

- **Data Source:** Enter the source of data for the measure's results.
- **Data Validation:** Enter the methodology and/or sources used to validate the data that was reported.

When you have finished updating these fields, you can click on the Save icon (📁) to save your results.

Measure Narrative

The Measure Narrative can be displayed by clicking on the *View/Edit The Measure Narrative* hyperlink located near the bottom of the screen. This will cause a pop-up window to be displayed, as illustrated in Figure 14. There are three fields in the Measure Narrative pop-up. Refer to Editing Options for Text Fields.

- **Measure Description:** This brief narrative should give an overview of the measure and its relevance to the success of the program. Unlike the more technical Measure Description that is entered into the Wizard when defining a measure, the text in this field should be two to three sentences in length and should be easily understood by a member of the public.
- **Data and Trend Analysis:** This brief narrative should provide details on the latest performance results and explain the context for the data. The narrative should also discuss the data trends, if applicable. The text in this field should be three to five sentences in length and should be easily understood by a member of the public.
- **Measure Also Supports:** This field allows the user to indicate how the measure aligns with other Strategic Plan objectives, Healthy People 2020, or other plans. This is an open text field.
 - Please use the following conventions for other Strategic Plan objectives: [Goal].[Objective], for example, 3.C.

Please use the following conventions for Healthy People Objectives: [Topic Area abbreviation] HP2020-[Objective]; for example, BDBS HP2020-3.

The screenshot shows a pop-up window titled "View/Edit The Measure Narrative". It has three main sections, each with a text input field and a small "Measure Description" button to its right:

- Measure Description:** The text field contains: "Asthma exacerbations (often called asthma attacks) are a significant cause of morbidity in patients with asthma and represent a significant public health burden. However, not all asthma patients are equally susceptible to them. In order to ensure more effective treatment of those patients who are prone to exacerbations, markers are needed that are associated with their phenotypes and/or sub-phenotypes. Having such markers will aid investigators in their efforts to develop mechanism-based treatments that can be successfully targeted to responsive patient sub-groups."
- Data and Trend Analysis:** The text field contains: "The FY 2011 target was to characterize cellular and molecular inflammation in the distal lung that may contribute to severe asthma and frequent asthma 'attacks'. Scientists met the target and characterized the molecular pathways in fibroblasts (the principal active cells of connective tissue) from two regions of the lung. Their analysis showed differences in gene expression between human distal lung/parenchymal fibroblasts (DLF) and airway fibroblasts that may help explain differences between the two regional fibroblast populations in responses to injury, regeneration, and remodeling in the lung. Their findings suggest that DLF may be the more important fibroblast cell type in processes that may contribute to disease progression and severity in asthma."
- Measure Also Supports:** The text field is currently empty.

At the bottom right of the window, there are "Save" and "Cancel" buttons.

Figure 16 – Qualitative Measure Narrative Pop-up



Measure Performance Narrative

The Measure's Performance Narrative can be displayed by clicking on the **View/Edit The Measure's Performance Narrative** hyperlink located near the bottom of the screen. This will cause a pop-up window to be displayed, as illustrated in Figure 17. There is only a single field in the Measure's Performance Narrative pop-up to describe the performance of the measure. Enter any information that you believe is relevant to explain the performance of this measure. This information will appear in the Full APP/R report. Refer to **Editing Options for Text Fields** for instructions on how to use the text editor.

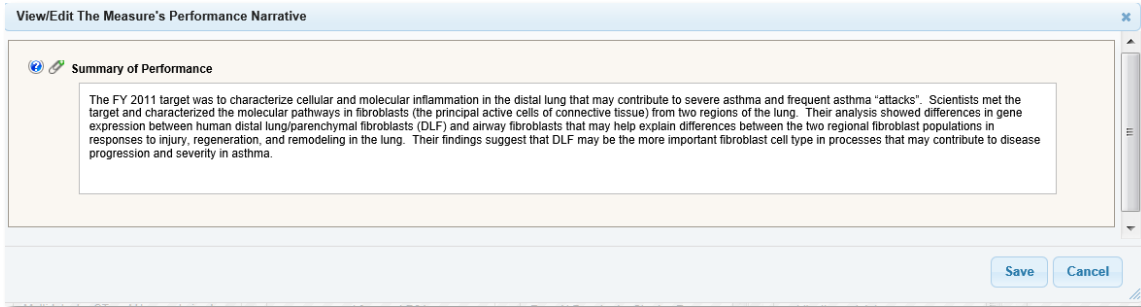


Figure 17 – Qualitative Measure's Performance Narrative Pop-up

SELECTING A DIFFERENT MEASURE

You can use the measure selector near the top of the screen, as illustrated in Figure 18, to select a different measure.

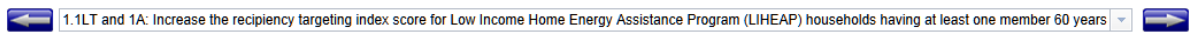


Figure 18 – Measure Selector

There are three different ways to select a different measure using the measure selector.

Clicking to the Next/Previous Measure

You can click on the left/right arrows to navigate to the previous/next measure in the list. This is a good option if you want to update measures sequentially.

Selecting a Measure from the Dropdown

You can open the dropdown and then go directly to any measure in the dropdown list by clicking on it, as illustrated in Figure 19.

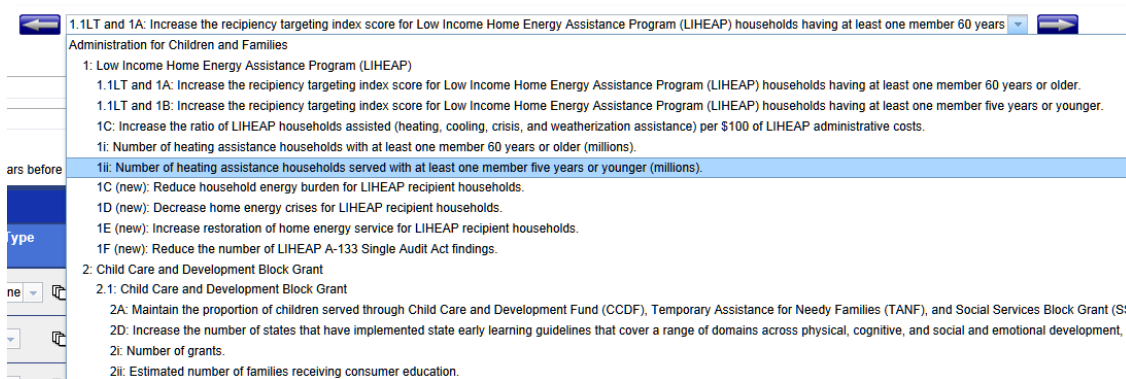


Figure 19 – Selecting a Measure from the Measure Selector Dropdown



Searching for a Measure within the Dropdown

A useful feature, especially if there are many measures listed in the dropdown, is to search for a measure based on its measure number or measure name. Searching is done by typing your search string into the measure dropdown. To do this, you must first clear the contents of the information that is displayed in the dropdown. You can do this in one of two ways:

- Without expanding the dropdown, click on the text in the dropdown and select all of the text in the dropdown, click on the Delete key to erase the contents, and then begin typing your search string.
- Without expanding the dropdown, rapidly click three times on the dropdown to select all of the text and then begin typing your search string.

As you type your search criteria, the dropdown will open up and display all of the measures that match the search string that you are typing. The list of measures will continually update as you type additional text, as illustrated in Figure 20 and Figure 21.

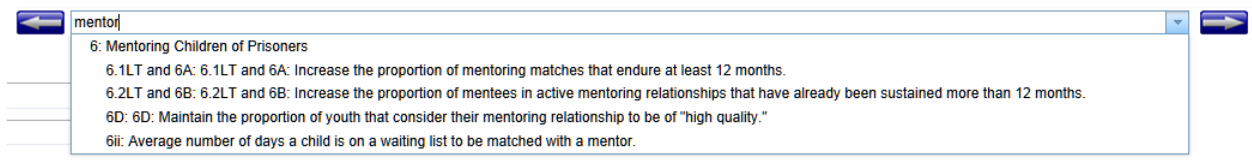


Figure 20 – Initial Search Criteria within the Measure Selector Dropdown

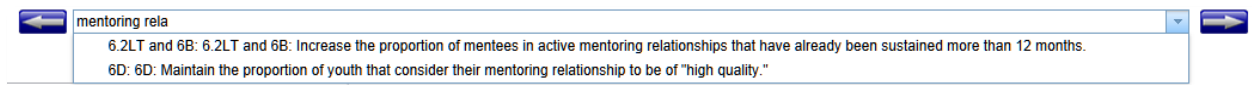


Figure 21 – Expanded Search Criteria within the Measure Selector Dropdown

After completing the entry of your search criteria, you can click on one of the measures in the dropdown that match your search criteria.

NAVIGATING TO OTHER MODULES

You can navigate to other modules within the PPTS by clicking on the global navigation icon displayed beside the measure's name near the top of the screen, as illustrated in Figure 22.

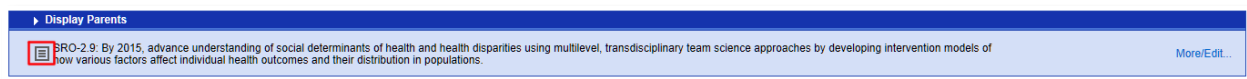


Figure 22 – Navigating to Other Modules for the Current Measure

Alternatively, you can navigate to other modules for any of the "parent" levels of the measure by clicking on "Display Parents" located near the top of the screen. As illustrated in Figure 23, you can click on the global navigation icon located beside any of the higher-level elements to navigate to another part of the PPTS for that element.

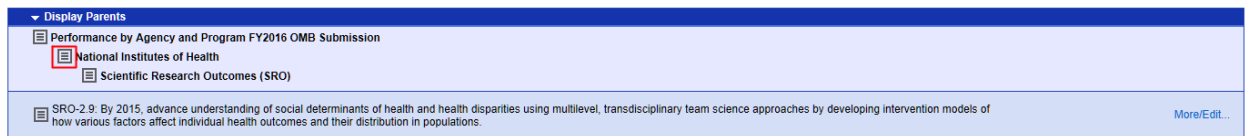


Figure 23 – Navigating to Other Modules for Parents of the Measure



ADDING A NEW ELEMENT

There are two ways to add a new element to the system.

- Any type of element can be added from the Navigation Screen by using the Global Navigation pop-up and selecting the type of element that you want to create under the Create section of the pop-up.
- If you are adding a new Measure or a Target for a Qualitative Measure, you can do this either from the Navigation Screen, or from within the Results Module and clicking on the Add Measure.

Table 7 – Which Module to Use

If you want to	Module to Use
Add a new macro program	Navigation Screen
Add a new program	Navigation Screen
Add a new long-term objective	Navigation Screen
Add a new measure	Navigation Screen or Targets and Results Module
Add a new qualitative target	Targets and Results Module
Change the order in which an element appears in the navigation screen and reports.	Navigation Screen
Change the "parent" of an element	Navigation Screen
Add multiple "parents" to an element	Navigation Screen

Parent and Child Relationships

Each element that is added to the system is assigned a "parent." Since all elements in the PPTS are organized into a hierarchical structure, the parent is the element that this element belongs to, and is the next highest level in the hierarchical structure. For example, every measure will have a parent that is either a program or a long-term objective. An element that has a parent is referred to as a "child" of the parent element.

It is possible for an element to have one or more parents. For example, if you are defining a cross-cutting measure that aligns with more than one program, you probably want to make each of the programs a parent of the measure.

When you add a new element, the parent is already known and will be automatically defined. There are cases when you may want to change the parent of an element, or add other parents. The procedure to do this is described in **Error! Reference source not found.**

ADDING A NEW ELEMENT FROM THE NAVIGATION SCREEN

Click on the global navigation icon next to an item to open up the list of possible actions for that item.

After selecting one of these element types, the user is displayed a pop-up window to complete all of the fields. Figure 24 provides an example pop-up window used to create or edit the definition of a measure.



Mini Wizard

Agency Measure Title *** required field: Increase the cumulative number of tools, evidence-based information, and products available in AHRQ's inventory of tools to improve patient safety and reduce the risk

Agency Measure Description (long form) *** required field: Increase the cumulative number of tools, evidence-based information, and products available in AHRQ's inventory of tools to improve patient safety and reduce the risk of patient harm.

Discontinued beginning in FY: Nothing selected

Unique Identifier *** required field: 1.3.41

Measure Uses

- Budget Measure
- HHS Performance Plan Measure
- Internal HHS Measure
- HHS Strategic Plan Measure 2014 - 2018
- HHS Strategic Plan Measure 2018 - 2022
- Agency Priority Goal Measure 2016 - 2017
- Agency Priority Goal Measure 2018 - 2019

Measure Type

- Outcome Measure
- Intermediate Outcome Measure
- Output Measure
- Efficiency Measure
- Developmental Measure
- Contextual Measure

Email Link Print Save Cancel

Figure 24 – Mini Wizard Pop-up for a Measure



The fields that are displayed depend on the type of element that you are adding. Each of the fields is defined in Table 8.

There are various fields in the PPTS that apply to the different element types.

Table 8 – Wizard Field Definitions

Field Name	Required	Description
Agency Fields		
Agency Title	Yes	Enter the name of the agency
Agency Description (long form)	Yes	Enter a more complete description of the agency. At a minimum, enter the name of the agency.
HHS Agency	Yes	Use the dropdown to select the agency. This information will be propagated to all programs and measures that belong to the agency.
Agency Macro Program		
Unique Identifier	No	Enter the unique identifier of the agency macro program.
Agency Macro Program Title	Yes	Enter the agency macro program name.
Agency Macro Program Description (long form)	Yes	Enter a more complete description of the agency macro program. At a minimum, include the name of the agency macro program.
Agency Program		
Unique Identifier	No	Enter the unique identifier of the agency program.
Agency Program Title	Yes	Enter the agency program name.



Agency Program Description (long form)	Yes	Enter a more complete description of the agency program. At a minimum, include the name of the agency program.
Discontinued beginning in FY	No	Select the fiscal year in which the program will be discontinued.
Agency Long-Term Objective Fields		
Unique Identifier	No	Enter the unique identifier of the agency long-term objective.
Agency Long-Term Objective Title	Yes	Enter the agency long-term objective name.
Agency Long-Term Objective Description (long form)	Yes	Enter a more complete description of the agency long-term objective. At a minimum, include the name of the agency long-term objective.
Discontinued beginning in FY	No	Select the fiscal year in which the agency long-term objective will be discontinued.
Measure Fields		
Unique Identifier	Yes	Enter the measure's unique identifier. The unique identifier must be unique for all measures within your agency.
Agency Measure Title	Yes	Enter the name/title of the measure.
Agency Measure Description (long form)	Yes	Enter a complete description of the measure.
Discontinued Beginning in FY	No	Select the fiscal year in which the measure will be discontinued.
Measure Uses	Yes	You must select at least one of the following checkboxes.
Budget Measure		Check this checkbox if this measure is to be reported in the HHS Performance Plan as a Budget Measure.
HHS Performance Plan Measure		Check this checkbox if this measure is to be reported in the HHS Performance Plan as a Performance Plan Measure.
Agency Priority Goal Measure 2016 - 2017		Check this checkbox if this measure supports an Agency Priority Goal Measure for 2016 – 2017.
Agency Priority Performance Goal Measure 2018 - 2019		Check this checkbox if this measure supports an Agency Priority Goal Measure for 2018 – 2019.
HHS Strategic Plan Measure 2014 – 2018		Check this checkbox if this measure in an HHS Strategic Plan measure for the 2014 – 2018 strategic plan.
HHS Strategic Plan Measure 2018 – 2022		Check this checkbox if this measure in an HHS Strategic Plan measure for the 2018 – 2018 strategic plan.
Internal Measure		Check this checkbox if this measure is for internal purposes only. If this checkbox is checked, the measure will not appear in any of the pre-defined reports.
Measure Details		
Primary HHS Strategic Objective	Yes	Click the button to select the primary HHS strategic objective that this measure aligns with.
Additional HHS Strategic Objective(s)	No	You can add as many rows to this table, as needed, to select objectives that align with this measure. Click on the Select button to select a measure. Click on the green  icon to add an objective and click on the red  icon to remove an objective.
Strategic Plan Measure Unique Identifier	No	If this is an HHS Strategic Plan Measure (with the checkbox checked above under Measure Uses), then enter the Strategic Plan Measure Unique Identifier. The unique identifier begins



		with the unique identifier of the HHS Strategic Plan Objective (e.g., 3.B) and is then given an additional sequential number to make the identifier unique.
Title of the Chart in the HHS Strategic Plan Measure Detail Report	No	Applies only to Quantitative measures. This is an optional field to provide a title for the chart that appears in the HHS Strategic Plan Measure Detail report and the HHS Measure Detail report.
Y-axis Label for the Chart in the HHS Strategic Plan Measure Detail Report	No	Applies only to Quantitative measures. This is an optional field to provide a Y-axis label for the chart that appears in the HHS Strategic Plan Measure Detail report and the HHS Measure Detail report. This will be used in conjunction with the Unit of Measure field in the Results module.
Performance Gauge Direction	Yes	Select one of the two values from the dropdown. The default value is "A higher value represents better performance."
Measure Type	Yes	Select the measure type(s). Valid combinations are: Output; Outcome; Intermediate Outcome; Efficiency; Output and Efficiency; Outcome and Efficiency; Intermediate Outcome and Efficiency. Developmental Measure can be selected alone, or in addition to any of these valid combinations
Outcome Measure		Check this checkbox if this is an Outcome measure.
Intermediate Outcome Measure		Check this checkbox if this is an Intermediate Outcome measure.
Output Measure		Check this checkbox if this is an Output measure.
Efficiency Measure		Check this checkbox if this is an Efficiency measure.
Developmental Measure		Check this checkbox if this is a Developmental measure.
Contextual Measure		Check this checkbox if this is a Contextual measure
Agency Measure Target Fields		
Fiscal Year	Yes	Use the dropdown to select the target's fiscal year.
Planned Completion Date	No	Enter (or select from the calendar) the planned completion date for the target. Typically, it is the last day of the selected fiscal year.
Agency Measure Target Title	Yes	Enter the name/title of the target.
Agency Measure Target Description (long form)	Yes	Enter a more complete description of the target.
Alternate Target Title	No	Enter the name/title of the measure's alternate target.
Alternate Target Description (long form)	No	Enter a more complete description of the alternate target.
Baseline	No	Enter the target's baseline.
Target Discussion	No	This is an optional field that can be used to collect additional information. It is not used in any of the reports.

Saving Your Changes

Your changes are not saved until you do click on the Save button. If you have made any changes and attempt to close the window without having clicked on the Save button, the system will ask you if you want to save or discard your changes. This is a built-in safeguard to prevent unintended loss of changes.

Any field marked as a required field (***) must be completed before the information can be saved.



Changing the Parent(s) of an Element

From the Navigation Screen, click on the global navigation icon beside an element name, and then click on the “Move” at the bottom of the pop-up. This will open a pop-up window shown in Figure 25.

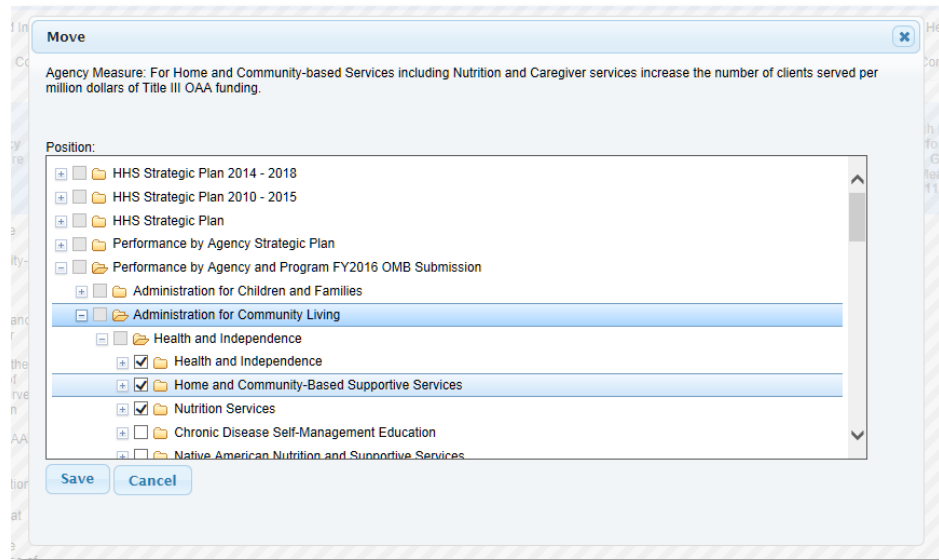


Figure 25 – Move pop-up available from the Navigation Screen

The hierarchical structure is depicted in a familiar file/folder structure similar to Microsoft Windows. Any item that current has children is shown as a folder (📁); and any items that do not currently have children are shown as a file (📄).

If you want the element to have only a single parent and change the element to have a new parent, follow these steps:

1. Uncheck the currently selected parent.
2. Check the checkbox for the new parent. (you may have to open up other folders in the hierarchy to find the parent that you need).
3. Click on Save.

If you want the element to have multiple parents, follow these steps:

1. Click on the (+) sign beside the folders that you want to open to display the desired parents.
2. Check the checkbox for the new parents.
3. Click on Save.

The PPTS has been configured with rules for assigning parents, so you will only be able to assign a child to a valid parent type. For example, a measure can have only a program or long-term objective as a parent, so only the checkboxes for programs and long-term objectives will be clickable when you are configuring a measure.

Deleting an Element

If you have permission to delete an element, you will be able to delete the measure from the Navigation Screen. To do this, on the global navigation icon beside the element name and click on the “Delete” button



located at the bottom of the global navigation pop-up. You will be prompted to confirm the deletion before the system proceeds.

Changing the Order of an Element

There may be cases where you need to change the ordering of the elements so that they will be output in the navigation screen and in reports in the correct order. This is not the same as re-ordering by clicking on a column heading in the Navigation Screen, because that just temporarily re-orders the display.

To permanently re-order the items, you can do that from the Navigation Screen by clicking on the Global Navigation icon next to an item. In this case, you will be reordering the “children” of an element, so you need to click on the Global Navigation icon next to a parent whose “child” elements you want to re-order. For example, if you want to reorder the measures within a program, then you would click on the Global Navigation icon next to the program.

At the bottom of the Global Navigation pop-up, click on the Rearrange Children button. This will open up the Rearrange Children pop-up, as illustrated in .

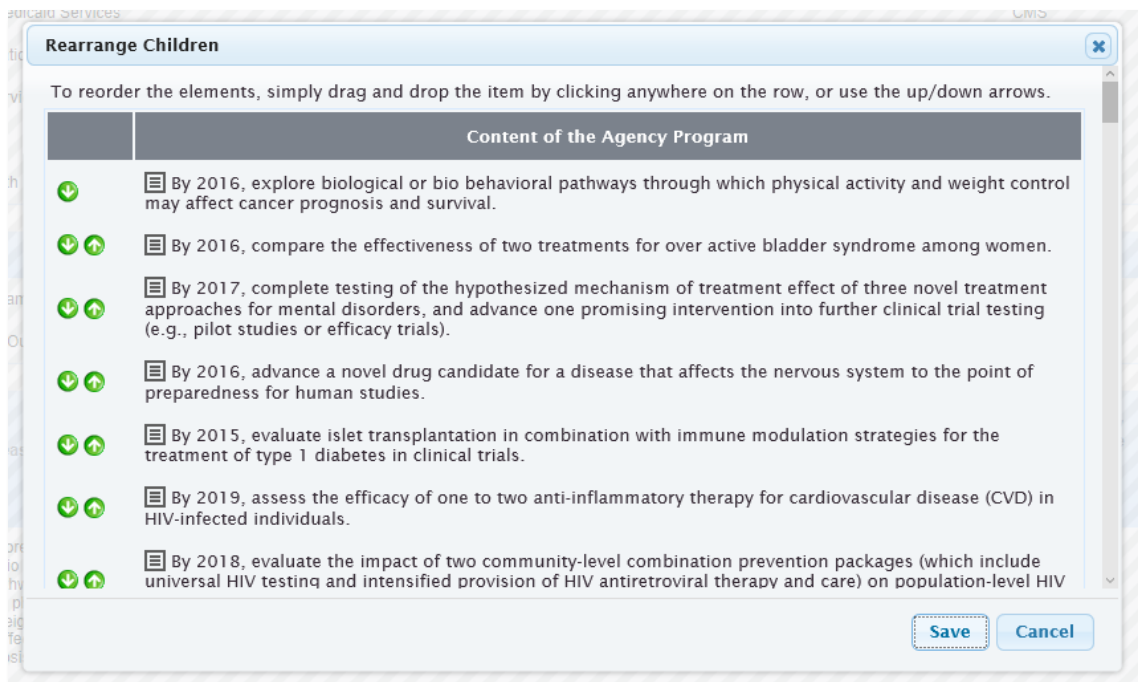


Figure 26 – Rearrange Children Pop-up

You can re-order the items by doing one of the following:

1. You can click on the up (↑) or down (↓) arrow beside an element name to move it up or down.
2. Click on the element name and drag it to the new position (this works only with newer browsers).

Click on the Save button when you are done. After clicking on the Save button, the Navigation Screen will refresh to display the elements in the new order.

ADDING A MEASURE OR TARGET FROM THE TARGETS AND RESULTS MODULE

Adding a Measure

When you are in the Targets and Results module, you can add a measure by clicking on the Add Measure button located directly beneath the measure dropdown. This will cause a new measure to be created under



the same parent where you are currently are. In other words, it will create a sibling to the measure you are currently displaying.

After clicking on the button, a pop-up window will be displayed asking you which type of measure you want to create, as illustrated in Figure 27.

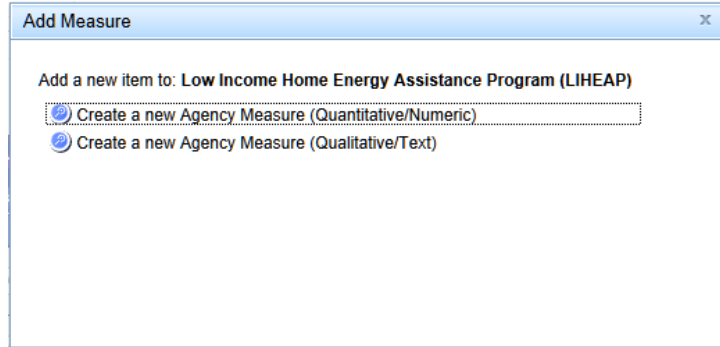


Figure 27 – Pop-up to Choose the Measure Type

After you have made your selection, the Mini Wizard (similar to that illustrated in Figure 24) will open where you can proceed to complete all of the fields. Any field marked as a required field (***) must be completed before the information can be saved.

Once the measure has been created, you can edit the measure from within the Results module by clicking on the More/Edit... link located to the right of the measure name, as illustrated in Figure 28.

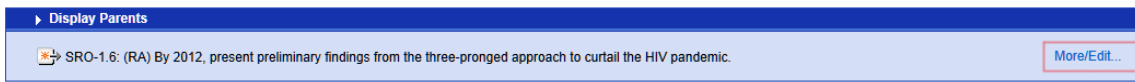


Figure 28 – More/Edit... Link to Edit a Measure

Adding a Target for a Qualitative Measure

To add a target for a qualitative measure, click on the Add Target button located directly beneath the measure dropdown. This will open up the Mini Wizard where you can proceed to complete all of the fields. Once the target has been created, you can edit the target from within the Results module by clicking on the More/Edit... link located to the right of the target name, as illustrated in Figure 29.

Targets	2010	2011	2012
Target Title	Complete enrollment of two important studies that will support the "Test and Treat" approach - HPTN 061 and HPTN 064.	Identify at least one new strategy to target residual HIV in treated patients.	Present preliminary findings from the three-pronged approach to curtail the HIV pandemic, which includes Test, Link to Care, Plus Treat (TLC-Plus) and Pre-Exposure Prophylaxis (PrEP) studies, and basic research to eliminate HIV reservoirs.
	More/Edit...	More/Edit...	More/Edit...

Figure 29 – More/Edit... Link to Edit a Target



GENERATING PRE-DEFINED REPORTS

The PPTS has a variety of reports that have been pre-defined to meet the specific formatting requirements of HHS. Reports are accessed from the Reports menu from within any module. To access a report, mouse over the Reports menu to display a list of available reports, as illustrated in Figure 30, and then click on the report of your choice.



Figure 30 – Reports Menu

After selecting a report, a report settings screen will be displayed. Although each report settings screen is slightly different to provide a variety of options for generating the report, they all work in the same way. Using the Selected Measure List Report as an example, the report settings screen is displayed in Figure 31.

In this example, the user has selected to generate the report for three programs within ACF. Using the checkboxes beside the elements in the GPRA Plan Elements field, you can select the elements that you would like to include in the report. For example, you could choose to generate the report for an entire HHS submission, or a single agency, or for only a few measures.

Each measure is categorized as a Budget Measure, Performance Plan Measure, HHS Strategic Plan Measure, etc. Use the checkboxes to select the measure categories that you would like to include. Additionally, each measure is designated with a measure type. Use the checkboxes to select the measure types that you would like to include in the report.

For handling of discontinued measures, you can specify if discontinued measures should be included in the report, excluded from the report, or if the report should contain only discontinued measures.

For this particular report, the user is also prompted to select the fiscal year that will be used for the results column, and the fiscal year that will be used for the out-year column. These two fields default to values based on the budget year of the GPRA submission that you have chosen to include in the report.

Some of the report settings screens also provide the option to specify how the report will be ordered. Using a dropdown, you can select the column by which the report will be ordered.

You can choose to open the report in either Microsoft Word or Adobe PDF format by clicking on the appropriate button.

Usage Tip

Make use of the **User Preferences** to store your regular selections so that you do not have to make the same selections each time you generate the report.

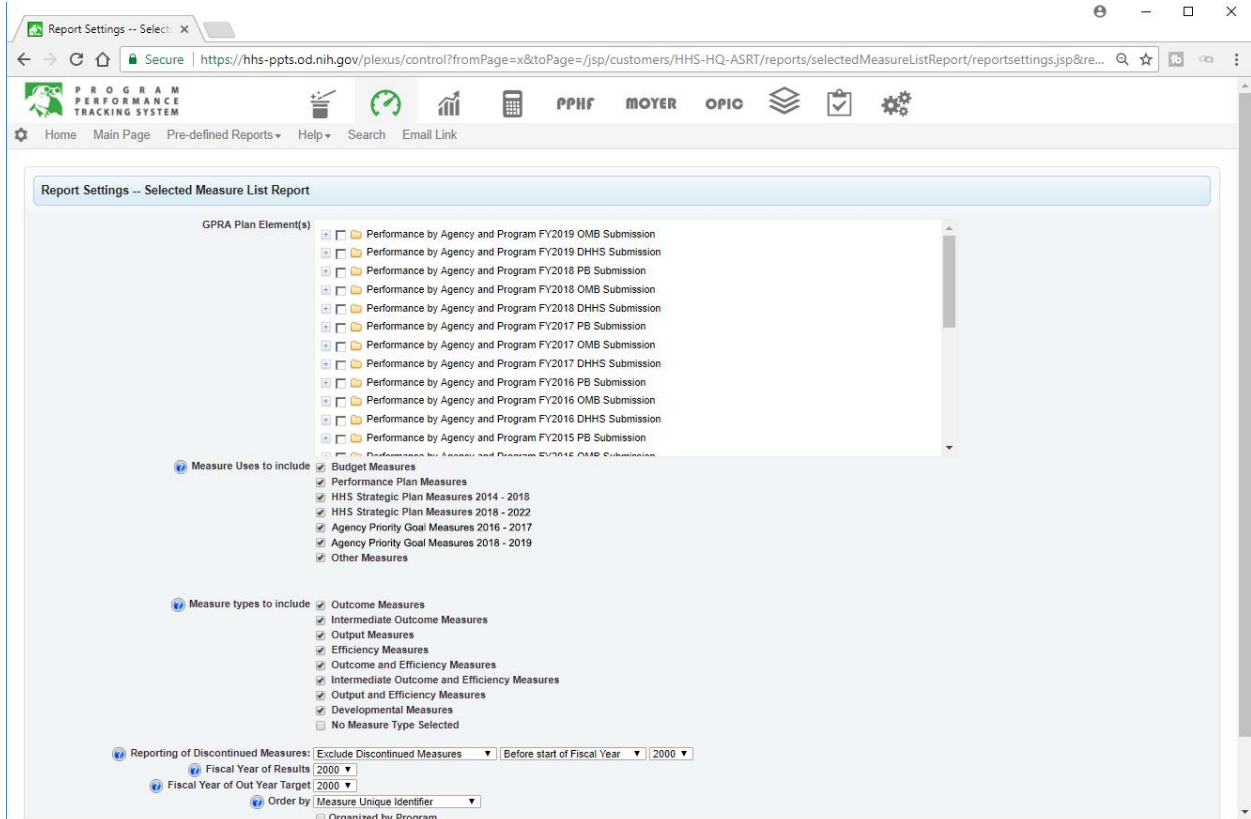


Figure 31 – Sample Report Settings Screen

At the bottom of the screen there is a User Preferences section that is collapsed by default. You can click on the User Preferences bar to make a selection, as illustrated in Figure 32.

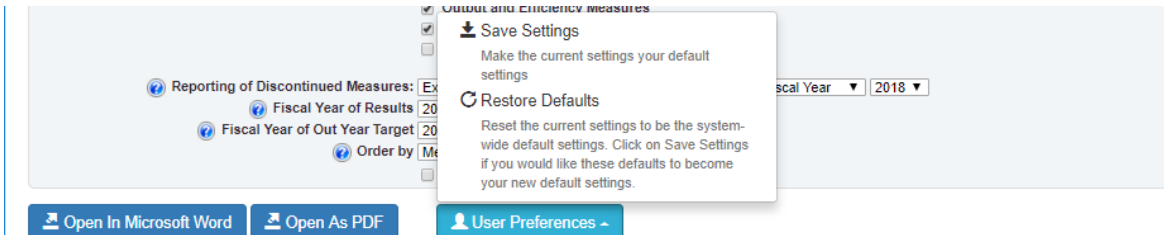


Figure 32 – User Preferences

After you have made your selections on the report settings screen, you may choose to make these your preferences for this report. If you do this, then the next time you run the report, the report settings screen will be automatically selected with these options. For example, if you are responsible for two programs within the agency, you may always wish to generate the report for those two programs, so you could select those programs and then save this as your preference.

To save your current selections as your user preferences, click on Save Settings. If you would like to remove your user preferences and restore the system default settings, click on the Restore Defaults button.



SEARCHING FOR INFORMATION

The Search feature is available from the menu bar within any of the modules. To activate the search, click on the "Search" menu item, as illustrated in Figure 33.

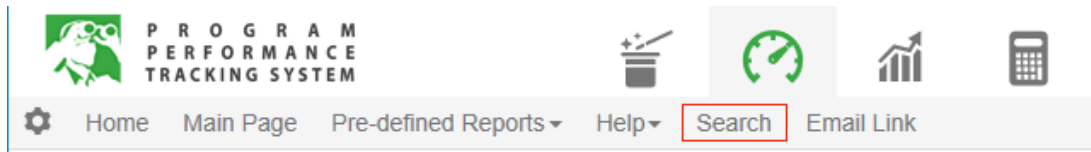


Figure 33 – Activating the Search Feature

GENERAL FEATURES

There are two methods for performing a search: a Simple search, and an Advanced search. By default, you are taken to the Simple search after clicking on the Search menu. Before discussing how to use each of these search methods, there are several general features that need to be described.

Search Within

You are able to specify what you want to search within to narrow down the possible results. By default, you will search within the current GPRA submission, but you can elect to search within another submission, many submissions, or be more narrowly focused to search within a specific agency or program.

To change what you are searching within, click on the hyperlinked name located just to the right of "Search within:" and highlighted in red in Figure 34. This will cause a pop-up window to open, and you can make selections of the elements that you would like to search within. If you would like to search within all data in the system, you can click on "Search All" to select everything.

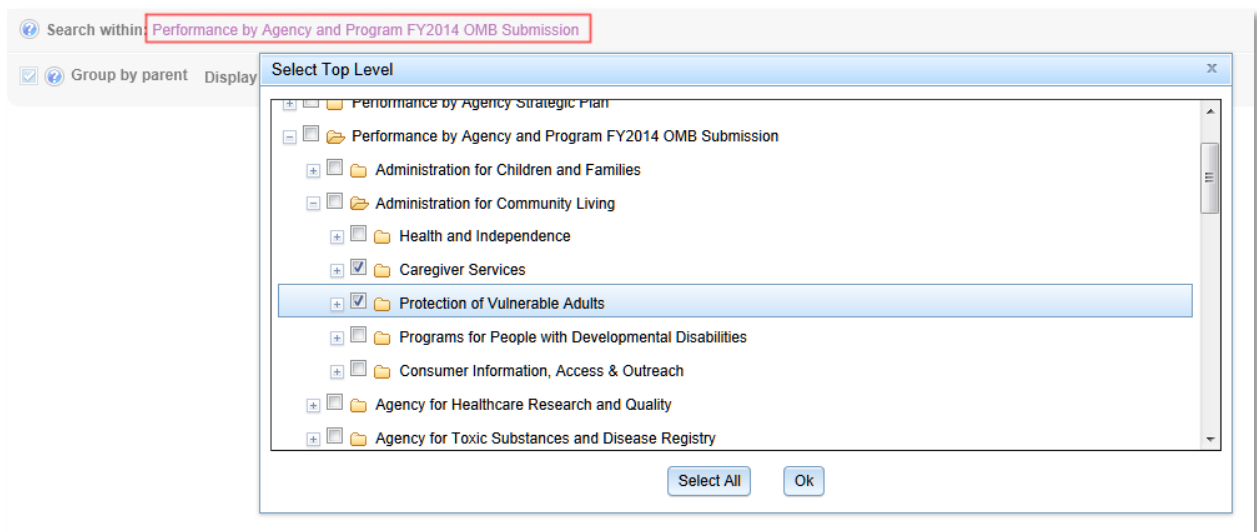


Figure 34 – Search Within

Group by Parent

By default, the Group by Parent checkbox is checked. This means that the search results are organized by the parent elements. For example, if you are searching for a list of measures that meet your search criteria, the measures will be organized into the parent structures (e.g. Programs) to help you identify what the measure belongs to. If you prefer to not have the search results grouped by parent, simply uncheck this checkbox and try your search again.



Number of Results per Page

Some of the searches you perform will have many results that are returned. By default, the PPTS limits the number of results to 20 results per page. This helps to improve performance of the search. However, in some cases, you may want to have all of the results displayed on a single page. For example, if you would like to sort the results, the PPTS sorts only what is displayed on the page, so it would be advantageous to have all search results displayed on a single page.

Specifying the Display Columns

By default, only the Title/Identifier of an element is returned in the search results. You can add other columns to be returned as part of the search results. This provides a means of creating your own ad hoc reports. To add other columns, click on "Specify Display Columns" illustrated in Figure 35.

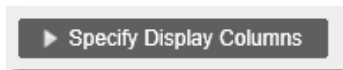


Figure 35 – Specify Display Columns button

After clicking on this button, the screen will appear similar to that shown in Figure 36.

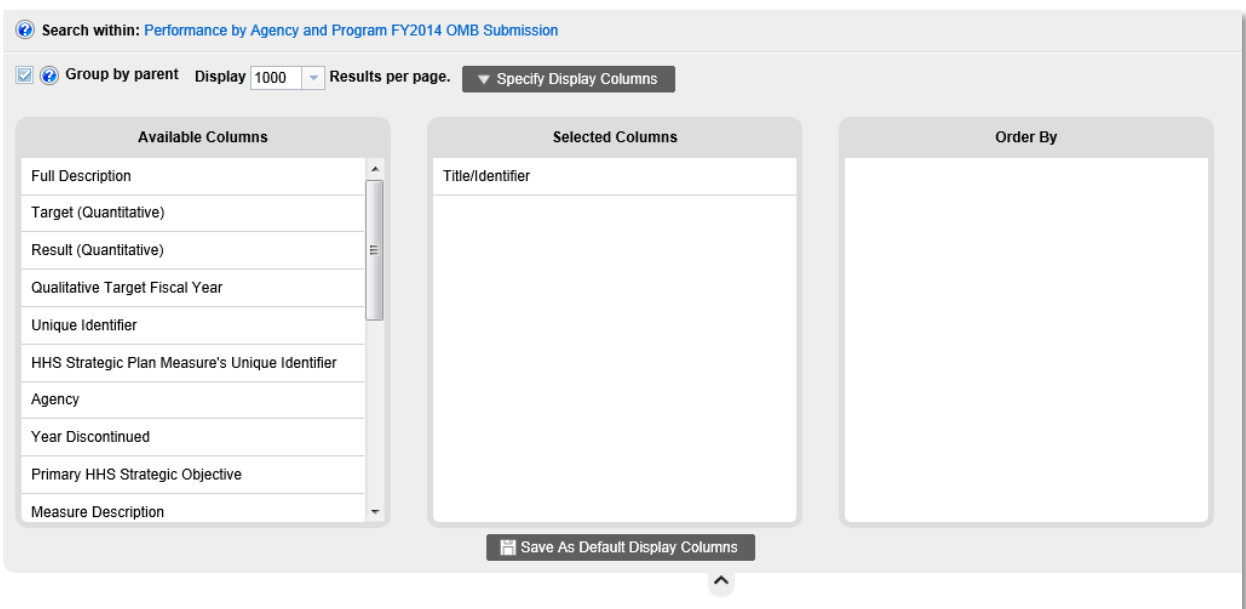


Figure 36 – Specifying Display Columns

The columns that are available for display in the search results are listed in the leftmost panel called "Available Columns." The columns that will appear in the search results appear in the center panel called "Selected Columns." To add a column to the search result, you can click on one of the columns listed in the Available Columns and, with the mouse button still held down, drag it over to the Selected Columns panel and then release the mouse button.

You can remove one of the selected columns by following a similar process by clicking on the name of the selected column and dragging it back to the list of available columns.

If you would like to change the order in which the columns appear (e.g., display the Unique Identifier to the left of the Title/Identifier) you can reposition them within the list of selected columns by dragging and dropping them to the desired location. The illustration in Figure 37 shows an example where the search results will contain the Agency, Unique Identifier, Qualitative Target Fiscal Year, and Title/Identifier.

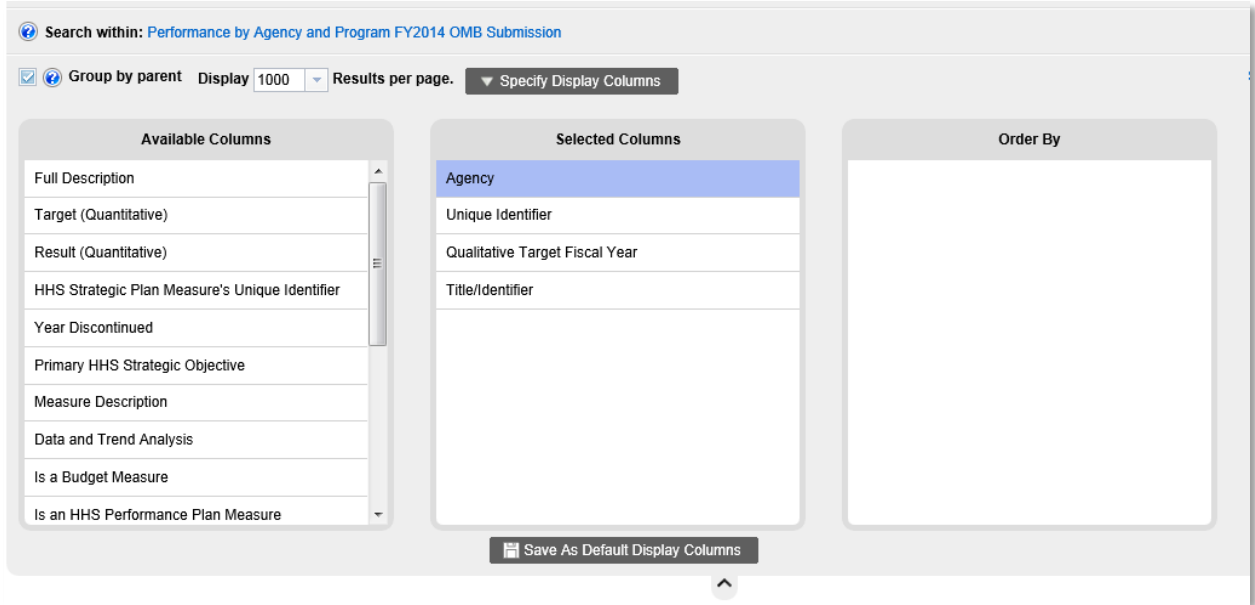


Figure 37 – Example with Four Selected Columns

Specifying the Ordering of the Search Results

You can specify the ordering of the search results by adding one or more columns to the Order By panel. The columns that you add to this panel can be columns that are displayed (from the Selected Columns panel), or those that are not displayed.

To add a column to the Order By panel, mouse over the column name so that the sort icon (🔼🔽) appears to the right of the column name. Click on the sort icon to add the column to the Order By panel, as illustrated in Figure 38.

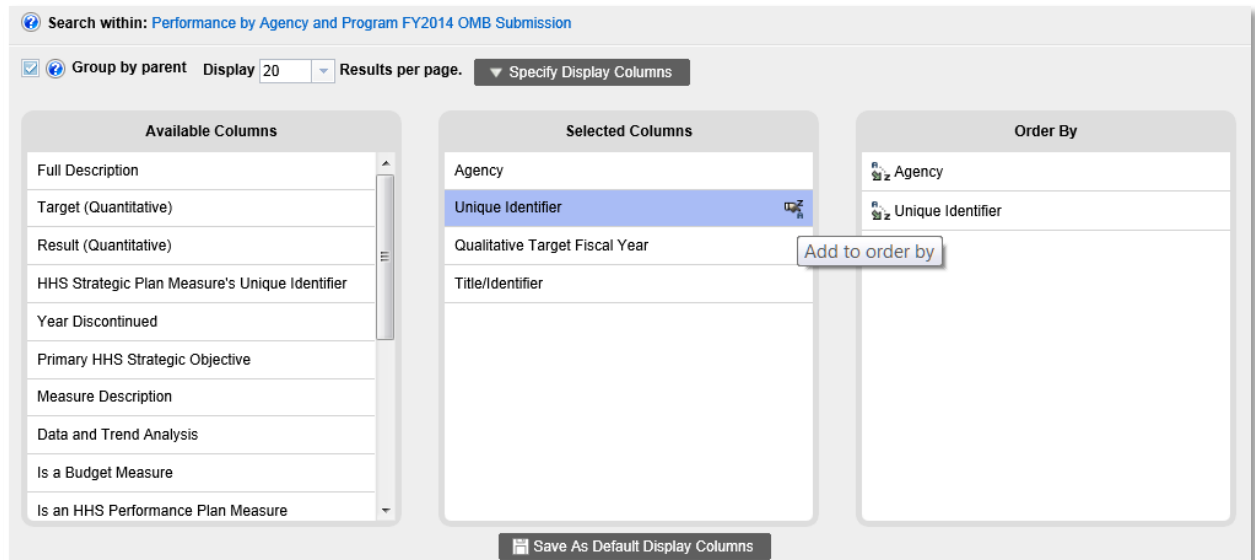


Figure 38 – Specifying the Sort Order of the Search Results

By default, the columns specified in the Order By panel are ordered in ascending order, as designated by the ascending order (🔼) icon located to the left of the column name. If you would like to change this to



sort in descending order, click on the icon to display the descending order (Z-A) icon. Click again to return it to ascending order.

You can specify multiple columns to use for ordering. If you have two columns specified for the ordering, the search results will first be sorted by the first column, and then each of those results will be sorted by the second column, similar to how the ordering is done with Microsoft Excel. You can change the order of the Order By columns to define which column takes ordering precedence by dragging the column name to a higher or lower position.

To remove a column from the Order By panel, mouse over the column name until the remove icon (X) appears, and then click on the remove icon.

Defining the Default Display Columns

Once you have specified your selected columns and ordering, you may want to make this your default. If you have defined default selected columns and ordering, this will be used as the default for all searches where selected columns and ordering are not defined.

To save the current selected columns and ordering, click on the "Save As Default Display Columns" button located immediately below the Selected Columns panel, as illustrated in Figure 39.



Figure 39 – Save As Default Display Columns

PERFORMING A SIMPLE SEARCH

A simple search is triggered as soon as you begin typing characters into the Search field, similar to popular search engines on the web. The Search field is highlighted below in Figure 40. If you type "can" it will find all elements in the system (within the Search Within element(s)) that have those 3 consecutive characters in any of the fields. However, you can continue to type "cancer" and the search results will be narrowed down as you type. Typing "can" returns 932 elements from the 2014 OMB submission, whereas "cancer" returns 117 elements, and "cancers" returns 26 matching elements.

Search

cancers

Search within: Performance by Agency and Program FY2016 OMB Submission

Group by parent Display 20 results per page. [Switch To Advanced Search](#)

Displaying 1 - 20 of 26 of matching elements. [Export to Excel](#)

Result	Agency	Unique Identifier	Qualitative Target Fiscal Year	Title/Identifier
Promote evidence-based interventions to improve nutrition, increase physical activity and reduce obesity.				
<input type="checkbox"/>	CDC	4.11.9		Increase the proportion of adults (age 18 and older) that engage in leisure-time physical activity.
Improve health outcomes related to cancer.				
<input type="checkbox"/>	CDC	4.K		Number of breast cancer screenings provided by the National Breast and Cervical Cancer Early Detection Programs (NBCCEDP).
Reduce age-adjusted mortality due to chronic disease: Cancer, Heart Disease and Stroke.				
<input type="checkbox"/>	CDC	4.1.4R		Decrease the age-adjusted rate of invasive cervical cancer per 100,000 women ages 20+ screened through the NBCCEDP (excludes invasive cervical cancer diagnosed on the initial program screen).

Figure 40 – Simple Search Field and Sample Search Results



PERFORMING AN ADVANCED SEARCH

In some cases, the Simple search may return too many search results, requiring you to use the Advanced search capabilities to be more specific with your search criteria. The Advanced search feature enables you to specify multiple search criteria, and to limit the fields to which the search criteria apply.

Defining the Search Criteria

Defining the advanced search criteria enables you to limit the search to a specific element type, specific data types, specific fields, and matching criteria, as described in the following sections.

Searching Across Element Types

You can specify the element type that you want to search for by selecting the element type from the "Across these elements" dropdown. For example, if you want to search for all of the measures that match your search criteria, you can select "All Measures." If you would like to search only for qualitative measures, then you can select "Measures (Qualitative only)."

Searching for Specific Data Types

You can specify the data type that you want to search within. By making a selection from the "For this data type" dropdown, this narrows down the fields that will be used to match with the search criteria. For example, if you selected "Date" then only fields that contain dates will be searched. Table 9 below defines each data type and provides examples of field that apply to this data type.

Table 9 – Definition of Data Types

Data Type	Definition	Example Fields
Any Type	All fields	All fields
Text	Only fields that contain text	Unique Identifier, Measure Description, Data Source
Number	Only numeric fields	Target, Result
Date	Only date fields	Date Expected
True/False	Fields defined by a checkbox	Performance Plan Measure, HHS Strategic Plan Measure
Object/List	Fields whose values are selected from a dropdown list	Agency, Year Discontinued, Primary HHS Strategic Objective
Dimensional	Fields from a multi-select list	<i>This type applies only to Programmatic Risks</i>

After you make a selection of the Data Type, the list of fields in the "In these fields" will be reduced to only those fields that are of that data type. You also may see a change in the "That" dropdown that is used to select the matching criteria.

Searching within Specific Fields

The "In these fields" dropdown contains a list of fields that can be searched within. For example, if you would like to search only within the Unique Identifier field, you can select that field from the dropdown to narrow your search. This will usually make the search a little faster.

Specifying Matching Criteria

The options for defining the matching criteria depend on the selections you have made for the data type and the specific fields to search within. For example, if you are searching for a number, you might want to search for all measures that have a target greater than your search criteria whereas in other cases you might want to search for an exact match. Table 10 below defines the matching criteria, to which data types they apply, and any additional qualifiers that are needed.




Table 10 – Matching Criteria

That	Applies To	Additional Qualifier
Contains	Any Type	This exact wording, one or more of these; all of these words (in any order)
Starts with	Text	This exact wording, one or more of these; all of these words (in any order)
Ends with	Text	This exact wording, one or more of these; all of these words (in any order)
Is equal to	Number, Date, Object/List	
Is not equal to	Object/List	
Is greater than	Number, Object/List	
Is greater than or equal to	Number	
Is less than	Number, Object/List	
Is less than or equal to	Number	
Is before	Date	
Is after	Date	
Is between	Date	End date
Is true	True/False	
Is false	True/False	

Defining Multiple Search Criteria

Unlike the Simple search, the Advanced search enables you to specify multiple criteria to further narrow down your search result.

Adding Search Criteria

To add additional search criteria, click on the  icon located at the right side of the screen, as shown in Figure 41 below (highlighted with a red box). This will add a new set of search criteria that you can specify following the same steps used to define the first set of search criteria.

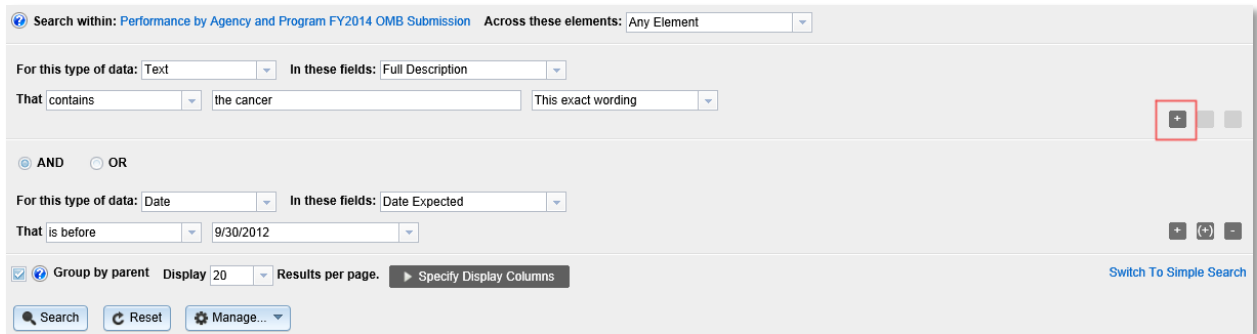



Figure 41 – Adding Search Criteria

The search criteria are linked together either with "AND" or "OR" that are selected with the radio buttons that appear before each of the additional search criteria.

Removing Search Criteria

Any of the additional search criteria can be removed by clicking on the  icon, as illustrated below in Figure 42.



Search within: Performance by Agency and Program FY2014 OMB Submission Across these elements: Any Element

For this type of data: Text In these fields: Full Description

That contains the cancer This exact wording

AND OR

For this type of data: Date In these fields: Date Expected

That is before 9/30/2012

Group by parent Display 20 Results per page. Specify Display Columns Switch To Simple Search

Figure 42 – Removing Search Criteria

Using Parentheses

For more complex queries with multiple sets of criteria, you may need to use parentheses to ensure that the search criteria are evaluated in the proper order. For example, "Description contains glaucoma" AND "Date Expected is before 09/30/12" OR "Is an HHS Performance Plan Measure is True" would be evaluated differently than "Description contains glaucoma" AND ("Date Expected is before 09/30/12" OR "Is an HHS Performance Plan Measure is True").

Careful use of parentheses will help to ensure that the PPTS understands your intention when you have multiple search criteria. You can add parentheses by clicking on the **(** icon. You can also add multiple levels of parentheses to have them nested within each other, if needed. To remove parentheses, click on the **)** icon located beside one of the parentheses. Although there is a **-** icon beside each parenthesis, you need only to remove one (either the opening parenthesis or the closing parenthesis) and the PPTS will take care of removing the other one.

Reordering Search Criteria

After you have added multiple search criteria with parentheses, you may need to move the criteria around to place them in the proper location within the parentheses. You can do this by clicking on one of the search criteria and dragging it to the desired position. When you begin moving the search criteria, the header of the criteria will be colored red; it will turn green when you are at a position when the criteria is allowed to be placed, as illustrated below in Figure 43. Although you cannot reposition the parentheses themselves, you can drag the search criteria to reposition them to be within or external to the parentheses.

Search within: Performance by Agency and Program FY2014 OMB Submission Across these elements: Any Element

For this type of data: Any Type In these fields: Any Field

That contains the cancer This exact wording

AND OR

(

For this type of data: Date In these fields: Date Expected

That is before 9/30/2012

)

AND OR

For this type of data: Any Type In these fields: Any Field

That contains This exact wording

Group by parent Display 20 Results per page. Specify Display Columns Switch To Simple Search

Figure 43 – Repositioning Search Criteria

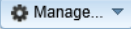


You cannot reposition the first set of search criteria, so it is important to plan your search before creating it. For example, if the first set of search criteria needs to be within parentheses, then it should not be created as the first set of criteria; the set of criteria that does not need to be within parentheses should be created first. This is a minor drawback of the search feature, but this is easily overcome with experience.

Managing Search Criteria

You are able to manage search criteria so that it can be reused. You are able to save search criteria, share your search criteria with others, and load saved search criteria to perform your search.

Saving New Search Criteria

After defining your search criteria, you can save it by clicking on the  button and selecting Save. This will open a dialog where you can enter a name for the search criteria, as well as a more detailed description to explain the purpose of the search.

Making Saved Search Criteria Public or Private

By default, the saved search will be private and accessible only to you. You can make your search filter public so that other PPTS users can make use of the filter. To make a search public, check the "Public search" checkbox. You can change any of your searches back to being private by unchecking the "Public search" checkbox.

Making a Saved Search available for use in Navigation Screen Filtering

If you would like to use this saved search in the Navigation Screen for the purposes of filtering out information, click on the checkbox in the save dialog entitled "Add as a filter for the Navigation Screen."

Loading Existing Search Criteria

You can load your saved search criteria, or any of the other public search criteria by selecting it from the Load Search Criteria dropdown located in the upper right corner of the screen, as illustrated in Figure 44. The username of the user that created the search criteria is displayed in parentheses after the name of the search.

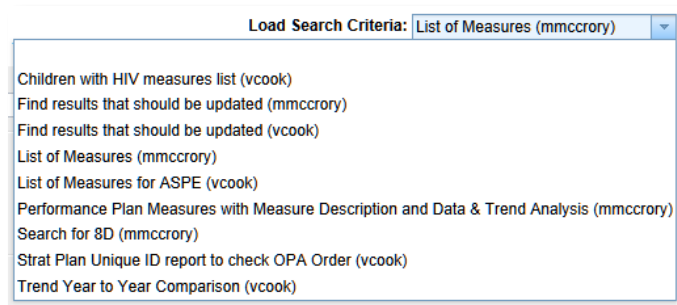


Figure 44 – Load Search Criteria

You can load the public search criteria saved by another user, and you can modify it for your own use, but you will not be able to save any changes to that saved search because it belongs to another user. If you would like to save the changes you have made, click on the Manage button and select Save As to create your own version of that search.

Updating Existing Search Criteria

You can update the search criteria for any of the saved searches that you created. You cannot make any changes to searches that others have created, but you can make a copy of others' searches and then make changes to your copy.



After you have loaded your search criteria, go to the Manage button and select Rename / Edit Description. This will open up the same pop-up window that you used when you initially saved the search criteria, and you will be able to update the name and description, and change whether or not it is available to others.

USING THE SEARCH RESULTS

Navigating to Another Part of the PPTS for the Search Result

You can click on the global navigation icon (☰) located to the left of each element's name to navigate to another part of the PPTS for that element. In this case, since you most likely will want to come back to your list of search results, when you click on the module icon within the global navigation, it will open up in a new browser tab. This makes it easy to return to the browser tab containing your search results so that you do not have to re-execute the search each time.

Displaying the Hierarchical Placement

When your search results are displayed, it is sometimes useful to know where they are located within the hierarchical structure. To display this information, mouse over the Show Hierarchy (📁) icon located to the left of each search result. The screen shot illustrated in Figure 45 shows an example of the display when you mouse over the Show Hierarchy icon. You can click on the global navigation icon (☰) located to the left of each element's name to navigate to another part of the PPTS for that element. In this case, the module does not open up in a new tab automatically. You will need to right-click and select Open in New Tab if you would like that to happen.

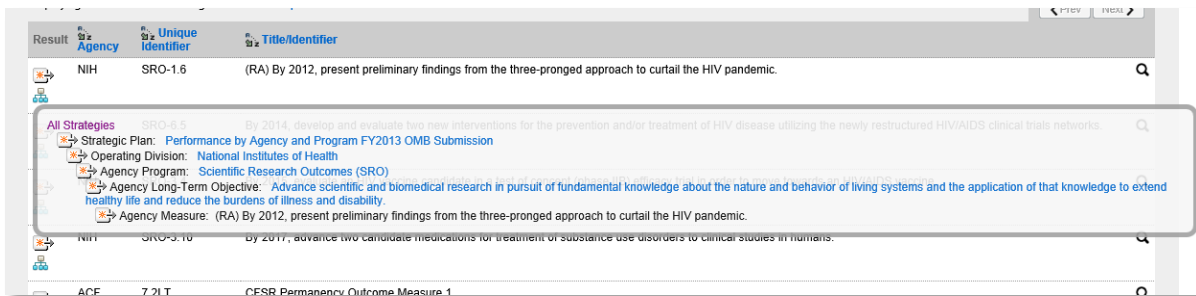


Figure 45 – Show Hierarchy icon displays placement within the hierarchical structure

Displaying Next/Previous Results

If you are not displaying all results on the page, and there is more than one page of results, you can click on the < Prev Next > buttons to see the results one page at a time.

Sorting by a Column

If you would like to sort the search results by one of the columns, and you did not specify that as one of your sort columns, you can click on the column heading to sort by that column. By default, it will sort in ascending order. You can click on the column heading again to reverse the sort order. Each time you click on a column heading, the information is placed in the Order By panel and the search is re-executed.

Displaying Found Fields

You can click on the Show Found Fields (🔍) icon to display the fields in which the search criteria were found. In this example, the search was looking for all measures that have the words "children" and "HIV" in any of the fields. Clicking on the Show Found Fields icon reveals the fields where the information was found, as illustrated in Figure 46. In this example, the word "HIV" was found in the Full Description, the Measure Description, and the "Title/Identifier" of the measure; the word "children" was found in the Full Description of the measure.

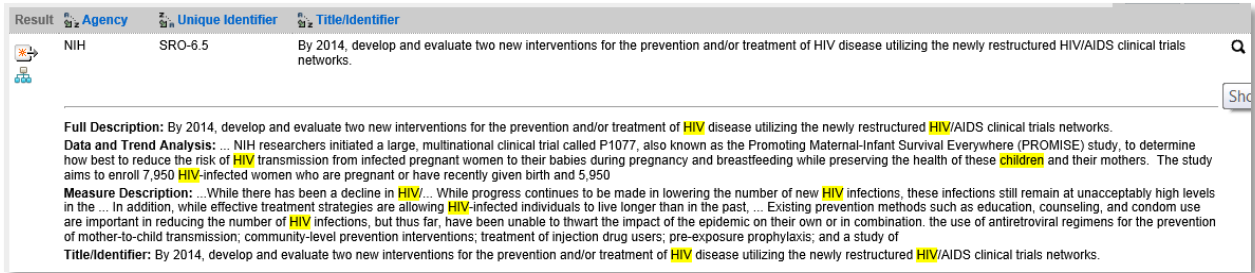


Figure 46 – Showing Found Fields

Exporting to Excel or Word

You can export your search results to Microsoft Excel or Microsoft Word by clicking on the Export to: Excel | Word links located just above the search results. Once the information is in Excel or Word, you can use all of the functionality of that program to format your search results, if applicable.

Filtering the Navigation Screen

After you have created a saved search that is added as a filter for the Navigation Screen, you can return to the Navigation Screen and select the filter from the Filter dropdown located in the upper right corner of the Navigation Screen, as illustrated in Figure 47

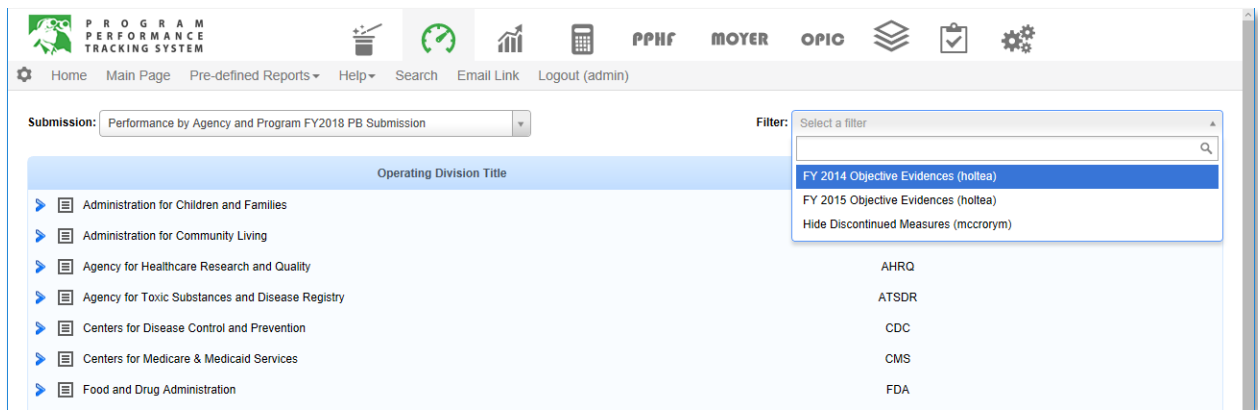


Figure 47 – Selecting a Filter from the Navigation Screen



USING THE COMMENTS FEATURE

UNDERSTANDING TOPICS AND COMMENTS

Comments provide a useful mechanism to hold a collaborative discussion about an element in the system. For example, various users could discuss the definition of a measure and exchange ideas directly in the system. The benefit of using the online comments feature is that the discussion is stored with the element. This is different from a traditional email discussion where the email exchanges are conducted in isolation of the measure. This provides the capability to keep all of the knowledge in the system.

Comments are organized into topics of discussion. Any user with access to comments can start a new topic and then create a comment within that topic, or they can view and respond to comments within an existing topic.

When a comment already exists for an element (e.g., for a measure) the global navigation icon beside that element will be colored to signify that a comment exists. If the icon is colored red, it signifies that there are new comments that have been entered by another user that you have not already viewed. If the icon is colored blue, it signifies that there are comments for this element but you have already viewed them.

To comply with Section 508 requirements, the system does not indicate the presence of comments only with color. If a new comment exists for an element, the mouseover text for the navigation icon will display “xx unread comments available” where xx represents the number of unread comments. If comments exist that you have already viewed, the mouseover text for the navigation icon will display “comments available.”

Figure 48 below illustrates the global navigation icon when there are comments for this element that you have not yet viewed. After you have viewed the comments, the global navigation icon will become blue to indicate that this element has comments, as illustrated in Figure 49.

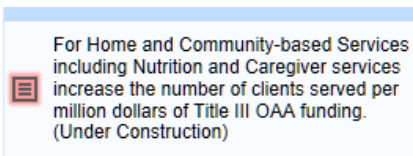


Figure 48 – Global Navigation Icon signifying Unread Comment(s)

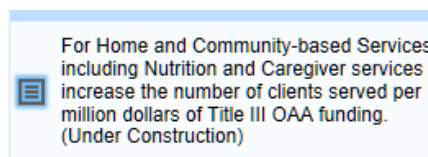


Figure 49 – Global Navigation Icon signifying Read Comment(s)

VIEWING EXISTING COMMENTS

For an element that already has comments, you can click on the colored global navigation icon to display the list of possible actions. Under the View/Manage column, you will see an action entry entitled “View/Add comments.” Next to this action entry, as illustrated in Figure 50, it will indicate the number of unread comments and the number of comments that you have already viewed for this element. Click on “View/Add comments” to view the existing comment(s).

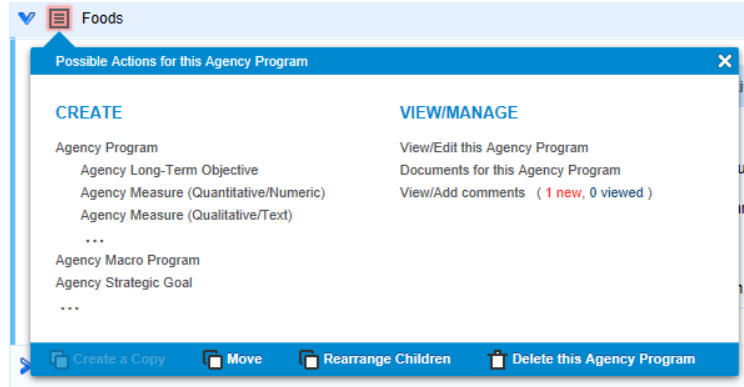


Figure 50 – Global Navigation Pop-up to View/Add Comments

After clicking on “View/Add comments” a pop-up window will open to display the topics and comments that have been entered, as illustrated in Figure 51.

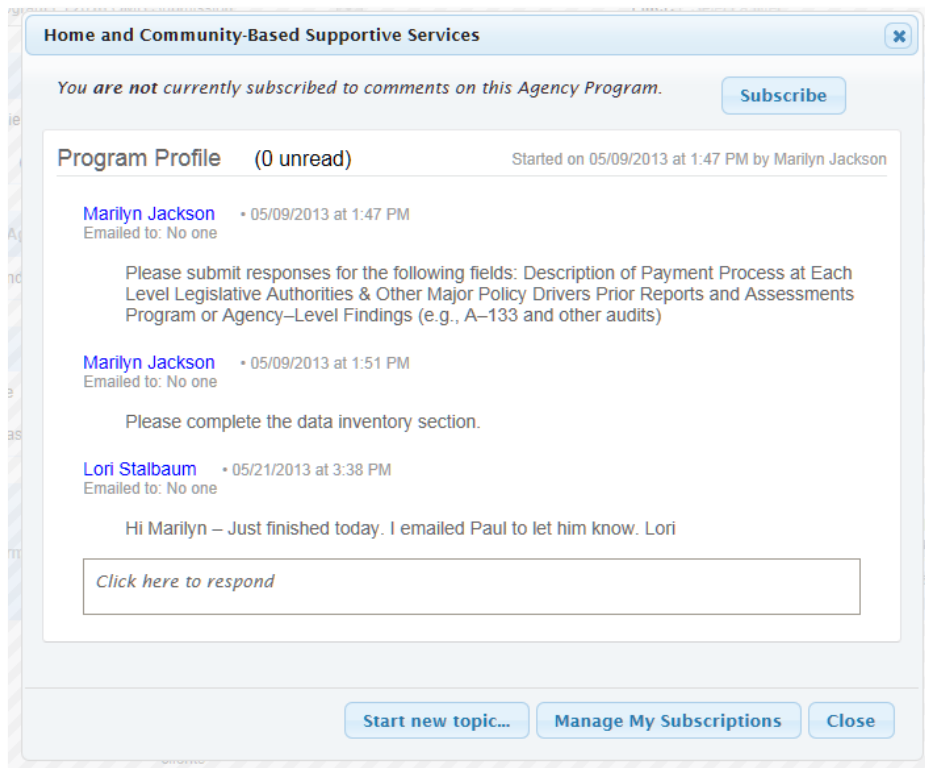


Figure 51 – Pop-up to View/Add Comments

SUBSCRIBING TO COMMENTS

If you would like to be notified any time a new comment has been entered into the system for a particular element (e.g., for a specific measure), click on the **Subscribe** button in the upper right corner of the pop-up. This will cause all future comments entered to be sent to your email account. You can unsubscribe by clicking on the **Unsubscribe** button. The **Unsubscribe** button will appear only if you have already subscribed to comments for this measure.

If you have subscribed to comments from multiple elements, you can click on **Manage My Subscriptions** to display a list of all of your subscriptions. This will display a list of all elements with checkboxes that



indicate which elements you have subscribed to. You can check or uncheck checkboxes and then click on Save to save your changes.

CREATING A NEW TOPIC

If the measure does not already have a comment, you will need to first create a new topic. If the measure already has comments but you would like to start a new topic of discussion, you can also create a new topic. To do this, click on the “Start a new topic...” button and follow the prompts.

CREATING A NEW COMMENT OR RESPONDING TO AN EXISTING COMMENT

To create a new comment or to respond to an existing comment, click on the text field that appears. After clicking on the text box, you will be able to enter formatted text. You will also be prompted to optionally send the comment to a user via email. The comments window will also display the list of subscribers so that you will know who will be receiving the comment before you save it. These fields are illustrated in Figure 52.

The screenshot shows a pop-up window titled "For Home and Community-based Services including Nutrition and Caregiver services increase the number of clients served per million dollars of Title III OAA funding." The window contains the following elements:

- A "Subscribe" button.
- A "Measure Description" section with "(0 unread)" and "Started on 09/13/2014 at 12:59 PM by Lan Marshall".
- A comment by "Lan Marshall" dated "09/13/2014 at 12:59 PM" with "Emailed to: No one".
- The comment text: "This measure requires a more complete and more detailed description of the measure, including how the measure's results will be maintained."
- A text input field with the placeholder "Click here to respond".
- Fields for "Emailed to:" and "CC:".
- A "Subscribers:" section with a checkbox labeled "Send copy to my email address".
- "Send and Post" and "Cancel" buttons.
- At the bottom, "Start new topic...", "Manage My Subscriptions", and "Close" buttons.

Figure 52 – Pop-up Window to Enter a Comment

When a comment is emailed to a user, either by entering an email address or via the subscription method, each user will receive an email notification from the PPTS entitled “New comment entered in PPTS.” The email will contain the text of the comment and provides a hyperlink that can be clicked on to navigate to the comment pop-up in the PPTS.



APPENDIX A –AD HOC REPORTING DATA FIELDS

Table 11 – Ad Hoc Data Fields

Field Name	Definition	Applies To	Where Found in PPTS
Agency	The acronym of the OpDiv or StaffDiv (e.g., FDA)	All elements	Navigation Screen
Agency Type	The type of agency (either OpDiv or StaffDiv)	All elements	Navigation Screen
Budget Year	The budget year of the submission	All elements	Navigation Screen
Data Source	The data source for the measure's results	Measure Target	Results Module
Data Validation	The data validation for the measure's results	Measure Target	Results Module
Data and Trend Analysis	Describes the evolution of the measure's performance in plain language	Measure Target	Results Module
Date Expected	The date that the results are expected to be reported	Measure target	Results Module
Explanation of Performance	A narrative explanation of the performance of the measure	Measure Qualitative Target	Results Module
Fiscal Year	The fiscal year of a measure's target	Target	Results Module
Long Description	The full description of the element	All Elements	Wizard Step 1
Long Term Objective	The name of the long term objective (optional)	Measure Target	Wizard Step 1
Macro Program	The name of the macro program (optional)	Measure Target	Wizard Step 1
Measure Class	Defines the "class" of the measure: either Qualitative or Quantitative	Measure Target	Navigation Screen
Measure Description	The plain language description of the measure	Measure Target	Results Module
Measure Name	The name of the measure	Measure Target	Wizard Step 1 Results Module
Measure Number	The unique identifier of the measure	Measure Target	Wizard Step 1 Results Module
Measure Status	Defines whether the measure is 'Active', 'Discontinuing', or 'Discontinued'	Measure Target	Results Module
Measure Type	Defines the measure Type (Outcome, Output, etc.)	Measure	Wizard Step 1 Results Module Navigation Screen
Measure Uses	The measure uses (e.g., Budget Measure, HHS Performance Plan Measure)	Measure Target	Wizard Step 1



Number of Measures	The number of measures in the system	Measure	Computed from the data
Number of Targets	The number of targets in the system	Targets	Computed from the data
Performance Status Groups	Defines the groups of performance status. For example, Target Met and Target Exceeded are grouped together into Target Met		
Performance Status Items	Defines the individual performance status items that comprise a performance status group. For example, the performance status items of Not Available are Not Collected, Pending, Target Not In Place, and Baseline.	Target	Results Module
Program	Name of the program	Program	Wizard Step 1
Result	Result of a measure for a particular fiscal year. This field can be used for Qualitative and Quantitative measures.	Measure Target	Results Module
Result Value	Numerical result of a measure for a fiscal year. This field can be used only for Quantitative measures.	Measure Target	Results Module
Strategic Plan Objective	Number and name of the HHS Strategic Plan Objective. This is defined for each measure as the “Primary HHS Strategic Plan Objective”	Measure Target	Wizard Step 1 Results Module
Strategic Plan Objective Number	Number of the HHS Strategic Plan Objective	Measure Target	Derived from the Strategic Plan Objective
Submission	The type of submission (e.g., DHHS, OMB, CJ)	All elements	Navigation Screen
Target	The name or value of the target for a particular fiscal year. This field can be used for Qualitative and Quantitative measures.	Target	Wizard Step 1 Results Module
Target Advances or Highlights	Description of the target advances or highlights. For Qualitative measures only.	Target	Results Module
Target Data Source	The data source for the measure’s results	Target	Derived from the measure
Target Data Validation	The data validation for the measure’s results	Target	Derived from the measure



Target Results Summary	Summary of the target's results. For Qualitative measures only.	Target	Results Module
Target Value	Numerical target for a measure for a fiscal year. This field can be used only for Quantitative measures.	Target	
Year Discontinued	The year when a measure begins to be discontinued.	Measure	Results Module Wizard Step 1
Year to Year Comparison Group	Defines the grouping of improvement or decline in performance from one year to the next	Target	Results Module
Year to Year Comparison Item	Defines the individual year-to-year comparison items that comprise the year-to-year comparison groups	Target	Results Module

