

Section 8 – EFNEP Annual Update/5-Year Plan

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Background on Annual Update/5-Year Plan

The Annual Update/5-Year Plan is the program plan each Land-Grant University must write and submit for approval. It is one of the Expanded Food and Nutrition Education Program’s (EFNEP) yearly reporting requirements. Each year either an Annual Update or a 5-Year Plan is due; not both. The Annual Update/5-Year Plan is completed through the Web-Based Nutrition Education Evaluation and Reporting System (WebNEERS). The Annual Update/5-Year Plan is important because without approval, Federal Funds (first quarter funds of the next fiscal year) will not be released to the university.

Overview of the Reporting Requirement

	5-Year Plan	Annual Update
Brief Description	A strategic plan of what is to be accomplished over the next five years – includes some reporting of baseline values.	An update/revision to the proposal reported through the 5-Year Plan – includes some reporting of results from the previous year. <u>**Approved 5-Year Plans are transferred to the next reporting year to complete the Annual Update.</u>
Due Date	July 1 st	July 1 st
Frequency of Submission	Once every five years (FY2015, FY2020, FY2025, etc.)*	Once per year except year in which a 5-Year Plan is due.*
Information Required	Narrative information and data related to the situation, program approach, budget inputs, program priorities, delivery sites and partnerships, and impacts.	Same as the 5-Year Plan.
Review Process	Formal Federal Review.	Federal review for accuracy and completeness.

**Process for handling Annual Updates if a new Extension Director/Administrator is hired after the 5-Year Plan is approved. The incoming Director/Administrator has the option to let the previous administrator’s signature serve as approval from the office for the remainder of the 5-year plan period or the incoming Director/Administrator may choose to review the annual update themselves their first year for the remaining 5-year plan period.*



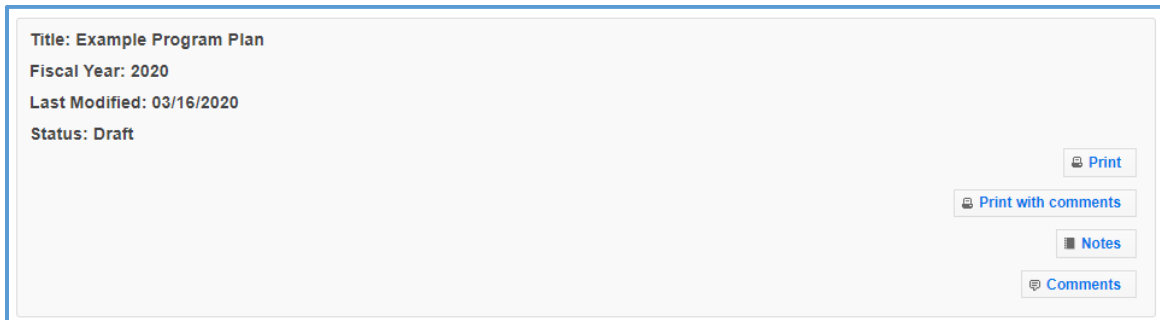
If the incoming Director/Administrator ***chooses to use the previous administrator’s signature***, then coordinators should ***transfer the approved annual update to the next year and edit the annual updates*** as usual only changing the administrator’s name in the contact info section of the annual update.

Alternatively, if the incoming Director/Administrator ***chooses to review the annual update***, then coordinators should ***copy the previous year's file, then transfer the copied file and edit the annual update***. Copying will remove the previous administrator's signature. Coordinators can edit the name in the contact info section and when they are ready to submit, they can send the annual update to the new administrator for signature before it is submitted to the national office.

The Main Plan Page

The Annual Update/5-Year Plan has a main plan page. The main plan page is what is seen when the plan is first established, as well as what is seen when opening an existing plan. The top provides descriptive information about the plan, the center includes buttons to access each section of the plan, and the bottom includes options for managing the submission and transfer of the plan to the next year.

Top Section – Main Plan Page



The screenshot displays the top section of the main plan page. On the left side, there is a list of metadata: "Title: Example Program Plan", "Fiscal Year: 2020", "Last Modified: 03/16/2020", and "Status: Draft". On the right side, there are four action buttons: "Print", "Print with comments", "Notes", and "Comments". Each button has a small icon to its left.

Center Section – Main Plan Page

Section Groupings

The buttons for each section of the plan are grouped according to the type of information/data needed in the report.

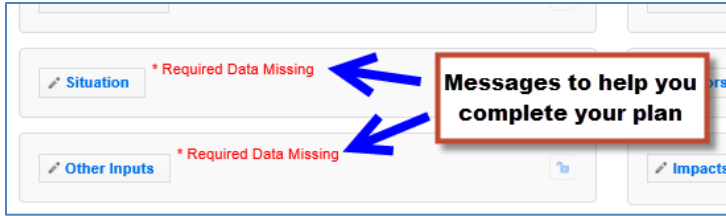
1. General Information and Program Plan – The buttons under this heading capture the contact information for the program and the overview of intended accomplishments in upcoming years.
2. Program Plan and Results from Previous Year – The buttons under this heading serve a dual purpose. They provide an overview of intended accomplishments in upcoming years, as well as report some of the results achieved.
3. Results from Previous Year – The buttons under this heading report program impacts from the previous year.
4. Director Signature – The button under this heading is used to secure your Extension Director or Administrator’s signature.





Plans are submitted in July which is in advance of the next fiscal year. For example, the FY2017 Annual Update is due July 01, 2016, which is 3 months prior to the start of FY2017. This means that the results reported “from the previous year” will technically be for the previous fiscal year (in this example FY2015) and include projections for the remainder of the year.

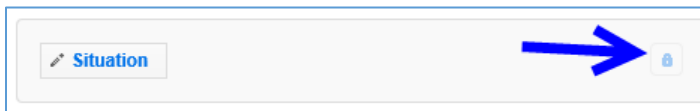
Red Asterisk Messages

The center section includes **red asterisk messages** are alerts to sections within which required data is missing and to sections that are empty. A plan cannot be submitted if required data is missing. If **no red asterisk messages** are present, the plan can be submitted. Those sections are optional; the message serves as a visual cue that something additional can be included. Red asterisk messages disappear when addressed.



Lock Feature

The **lock**  and the **unlock icons**  on the main plan page help identify the current status of each section: locked = approved; unlocked = not approved or not yet approved.



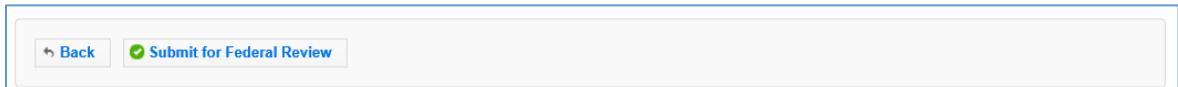
Locked sections prevent users from making edits. For plans that are:

- “Under Review”, sections are locked because the National Office is in the process of reviewing the plan.
- “Approved” or “Needs Revision”, sections are locked because the information contained in that section is approved by the National Office and does not need further editing.
- Transferred into the next programming year, sections are locked because the data was approved the year prior and if still accurate, can be resubmitted without any additional edits.

Locked sections should only be unlocked if edits are needed. Instructions for unlocking a section are in the [Plan Marked “Approved”](#) section below.

Bottom Section – Main Plan Page

This section of the plan changes based on the status of the plan. This is an example from a plan that was revised after it was sent back as “Needs Revision”.



The submission button will only be visible if the Director’s approval has been completed.

New Extension Director/Administrator

Annual Updates, when a new Extension Director/Administrator is hired after the 5-Year Plan is approved, are to be handled at the discretion of the Institution. The incoming Director/Administrator has the option to let the previous administrator's signature serve as approval from the Office for the remainder of the 5-year plan period or the incoming Director/Administrator may choose to review the annual update themselves their first year for remainder of the 5-year plan period. See Annual Update Cheat Sheet for additional information.

Quick Tips

Entering Data

The Annual Update/5-Year Plan was set up so you can enter all of your information at once or enter it one section at a time. This means you can save a section within your plan and return later even if some fields (even required ones) are incomplete. This is different than other data entry screens in WebNEERS.

Cancel, Save, and Save and Next Buttons

The **Cancel**, **Save**, and **Save and Next** buttons are located at the bottom of each section. The **Cancel** and **Save** buttons will cancel or save edits made in the section and return you to the main plan page. The **Save and Next** button saves any edits made in the section and advances you to the next section so you can keep working. All required fields must be complete to submit the plan, but as mentioned above, they do not have to be complete to save your changes.

Multiple Users

The Annual Update/5-Year Plan can be edited by any Institution Level user who has permission to access the **Manage Annual Update Section**. If someone is already editing a section, a message will display at the top of the screen. When this happens, close the section and wait for the other user to finish. Do not make edits when someone else is in the section. This is important because changes made by one user may override changes made by another user if edits are made at the same time.



Switching Years – Finding Your Plan

Your plan may reside in a different year than the current reporting year. When this happens, use the year dropdown on the top right of the WebNEERS home screen to change years. This is particularly important when transferring a plan to the next reporting year.

1. If you are not in the year that contains your plan, select the correct year in the dropdown.

Federal Test Institute	2013 ▼
	2012
	2013
	2014

Note:

The years listed in your dropdown may vary from the screenshot above.

2. Click **OK** to confirm that you want to switch years.
3. Remember to switch back to the current year after you finish what you are doing!

Note:

If completing an Annual Update on an Approved Plan, it will be important to return to the year in which the plan was approved and transfer the data to the appropriate program year.

5-Year Plan Cheat Sheet – Brief Overview of Instructions

This overview walks you through the steps to complete a 5-Year Plan at a high level. For detailed instructions follow the links below to the appropriate sections.

1. As an Institution Level user, use the dropdown to select the current reporting year.

Federal Test Institute 2013 ▼
 2012
 2013
 2014

2. Click on **Manage Annual Update / 5-Year Plan**
3. Click on the Add New 5-Year Plan button.

[+ Add New 5 Year Plan](#)

4. Enter your 5-year plan as follows (see [Enter/Revise Plan Information and Data](#) section for detailed instructions on completing each section)


GENERAL INFORMATION AND PROGRAM PLAN SECTIONS	WHAT YOU NEED TO DO
Contact Info	Enter the 5-Year Plan name, fiscal year (e.g., 2020, 2025, etc.), Program Coordinator’s contact information and Extension Director/Administrator’s name.
Situation	<p><i>Situation:</i> Provide a general description of the situation in your state/territory that justifies the need for the program. Include a public value statement and any relevant statistics (e.g., poverty levels, obesity rates, etc.) as well as external factors or assumptions that may impact programming now or in the next 5 years. The situation should be written so that a person unfamiliar with the program can understand.</p> <p><i>Geographic Area:</i> Select the counties/parishes your program will provide education in during the upcoming 5 years. If you will not provide education, but you have an important partnership in a location, do not check the box. Instead describe it in the <i>Description of Geographic Area</i> section.</p> <p><i>Description of Geographic Area:</i> For the locations selected in the <i>Geographic Area</i> section, briefly describe the reasons they were selected. Include any plans to expand, eliminate or relocate programming along with an explanation of how and why.</p>

	<p><i>Inter-Organizational Relationships:</i> Review the list of agencies, organizations, and other partners in the table. For each partner you work with think about the relationship at the state/territory level. If you have more than one type of relationship with an agency, organization, or partner determine which type of relationship is primary. Select the corresponding radio button in the appropriate column of the table.</p> <p><i>Description of Inter-Organizational Relationships:</i> Summarize any plans to change, develop/enhance or expand interorganizational relationships in the next 5 years. Describe with whom, how, and why.</p> <p><i>Target Audience:</i> Define your target audience within programmatic guidelines and briefly describe how you are targeting them. If you intend to change your target audience or your approach to reaching them in the next 5 years, describe how and why.</p>
<p>Program Approach</p>	<p><i>Adult Curricula:</i> Name and describe curricula selected and include audience appropriateness, behavior change emphasis and evidence base.</p> <p><i>Youth Curricula:</i> Name and describe curricula selected and include audience appropriateness, behavior change emphasis and evidence base.</p> <p><i>Technology Use:</i> Indicate the level of technology integration (low, medium, high) and strategies to be utilized. Implementation of a high level technology will require prior approval of the institution’s Technology Plan from the Federal Office.</p> <p><i>Volunteer Use:</i> Indicate what types of volunteers will be used and what duties volunteers will have. Implementation of a Formal Volunteer Plan will require prior approval from the Federal Office.</p>
<p>PROGRAM PLAN & RESULTS FROM PREVIOUS YEAR SECTIONS</p>	<p>WHAT YOU NEED TO DO</p>
<p>Program Priorities</p>	<p>Think strategically about where you want you program to be in 5 years. Determine effective, implementable strategies to meet those goals. Develop 4-6 SMART program priorities to focus on for the next 5 years. Three (3) must directly measure Core Areas; one (1) must focus on the Secondary Area of Technology; others may focus on other Secondary Areas*. There must be at least one</p>

	<p>(1) goal targeting adults and one (1) targeting youth. You may create more than 6 priorities, but a maximum of 6 may be submitted to the National Office.</p> <p>*If your institution’s carryover is >150%, one (1) priority must focus on the secondary area of Management/Leadership.</p> <p>For each priority, enter the title, select the Core Area, Secondary Area(s), and Target Audience. Next, enter a description that clearly states your priority, explains why you selected it, defines your SMART goal, outlines how you will measure the priority, and discusses strategies for success.</p> <p>Next indicate if the priority can be measured quantitatively, select the data source and the unit of measure for the priority and enter the baseline and target values into the table. The baseline year for the 2020-2024, 5-year plan is 2019. Targets are set for each subsequent year, i.e., 2020, 2021, 2022, 2023, and 2024. The baseline and targets should connect to the description that was entered above.</p> <p>For priorities that cannot be measured quantitatively, enter the baseline and target values into the table. Take care so that the baseline and target values connect to the description entered above.</p> <p>Actual values will be entered in Annual Update years.</p>
<p>Delivery Sites and Community Partnerships</p>	<p>Summarize any plans to expand, eliminate, or relocate program delivery sites/locations or to change, develop/enhance, or expand community partnerships in the next 5 years. Also, describe any plans to expand or change program efforts/involvement in policy, systems, and environmental change (PSEs) efforts in the upcoming years.</p>
<p>RESULTS FROM THE PREVIOUS YEAR SECTION</p>	<p>WHAT YOU NEED TO DO</p>
<p>Impacts</p>	<p>Program Impacts are needed every year. PSE Impacts will be entered in Annual Update years.</p>
<p>Signature</p>	<p>Request Director/Administrator Signature.</p>
<p>Comments</p>	<p>Add comments if there are items you need to explain to the National Office that are beyond what you included in the various sections.</p>

Annual Update Cheat Sheet – Brief Overview of Instructions

If you have completed an Annual Update in the past, you may not need all the detailed instructions. This overview walks you through the steps at a high level. For detailed instructions, skip to p.13 or follow the links below to the appropriate sections.




Note:

Plans are submitted in July which is in advance of the fiscal year. So, for example, the FY2018 Annual Update is due July 01, 2017, which is 3 months prior to the start of FY2018. This means that the results you report “from the previous year” will technically be from the last fiscal (in this example FY2016) and include projections for the remainder of the year.


New Extension Director/Administrator

The incoming Director/Administrator has the option to let the previous administrator’s signature serve as approval from the Office for the remainder of the 5-year plan period or the incoming Director/Administrator may choose to review the annual update themselves their first year for remaining the 5-year plan period.



Note:

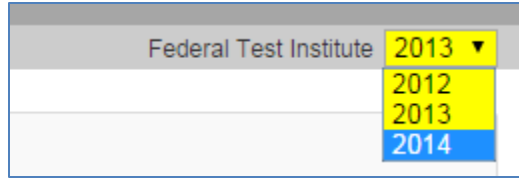
*If the incoming Director/Administrator **chooses to use the previous administrator’s signature**, then coordinators should **transfer and edit the annual updates** as usual only changing the administrator’s name in the contact info section of the annual update.*



Note:

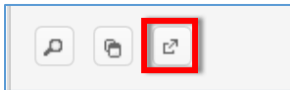
*If the incoming Director/Administrator **chooses to review the annual update**, then coordinators should **copy the previous year’s file, transfer the copied file and edit the annual update**. Copying will remove the previous administrator’s signature. Coordinators can edit the name in the contact info section and when they are ready to submit they can send the annual update to the new administrator for signature before it is submitted to the national office.*


5. As an Institution Level user, use the dropdown to select the year containing the Annual Update/5-Year Plan you wish to transfer into the current reporting year.



It is important to transfer approved plans forward, as each year, of the 5-Year Plan, builds upon the information entered from the previous years.

6. Click on **Manage Annual Update / 5-Year Plan**
7. Locate your “Approved” plan, click the transfer this annual update to the next year button, and follow the steps to transfer your plan into the new year (see [Transfer Steps](#) section for detailed instructions)



8. Move into the new year using the year dropdown
9. Click on the “” icon to open the transferred plan.
10. Revise/Update your plan as follows (see [Enter/Revise Plan Information and Data](#) section for detailed instructions on completing each section)

GENERAL INFORMATION & PROGRAM PLAN SECTION	WHAT YOU NEED TO DO
Contact Info	Review for accuracy. If changes are needed, unlock the tab and make them. If not, continue to the next section.
Situation	Review for accuracy. Think about what you need to do in the coming year. If changes are needed, unlock the tab and make them. If not, continue to the next section.
Program Approach	Review for accuracy. Think about what you need to do in the coming year. If changes are needed, unlock the tab and make them. If not, continue to the next section. <i>Adult Curricula:</i> Name and describe curricula selected and include audience appropriateness, behavior change emphasis and evidence base. <i>Youth Curricula:</i> Name and describe curricula selected and include audience appropriateness, behavior change emphasis and evidence base.

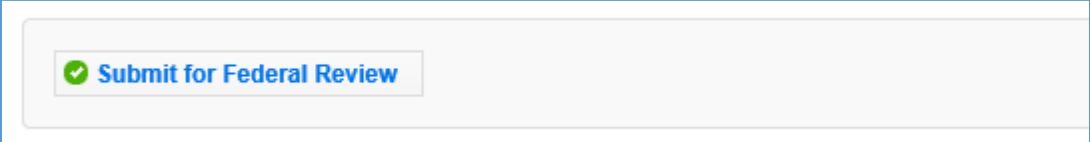
	<p><i>Technology Use:</i> Indicate the level of technology integration (low, medium, high) and strategies to be utilized. Implementation of high level technology will require prior approval of the institution’s Technology Plan from the Federal Office. No action will be needed if there is no change in the current use of technology.</p> <p><i>Volunteer Use:</i> Indicate what types of volunteers will be used and what duties volunteers will have. Implementation of a Formal Volunteer Plan will require prior approval from the Federal Office. No action will be needed if there is no change in the current use of volunteers.</p>
PROGRAM PLAN & RESULTS FROM PREVIOUS YEARS SECTION	WHAT YOU NEED TO DO
Budget Inputs	Complete preliminary budget in the Manage Budget section of WebNEERS and continue to the next section.
Program Priorities	For each priority update the table with the most recent “Actual” value (e.g., for the FY2017 Annual Update the last complete dataset is 2015, so you enter the corresponding value in the 2015 column on the “Actual” row). If you need to explain your results, use the comments field at the bottom.
Delivery Sites and Community Partnerships**	Have regions complete their Delivery Sites and Community Partnerships chart or add it at the <u>Institute Level</u> (See Manage Delivery Sites section for detailed instructions). Update the description, if needed.
RESULTS FROM PREVIOUS YEAR SECTION	WHAT YOU NEED TO DO
Impacts**	<p>Have regions enter their <i>Program Impacts</i> or add them at the <u>Institute Level</u> (see Manage Program Impacts section for detailed instructions). Select the three you want to include using the check boxes.</p> <p>Have regions enter their <i>PSE Impacts</i> or add them at the <u>Institute Level</u> (see Manage Settings and Sectors: Policy, Systems and Environmental (PSE) Change section for detailed instructions). Select the two you want to include using the check boxes.</p>
Signature	No action is needed; the signature is already attached.
Comments	Review comments from the previous year and address any pending items. Add comments if there are items you need to

	explain to the National Office that are beyond what you included in the various sections.
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***Data/information reported for sections with the double asterisks above should be for the fiscal year that ends September 30 and should include projections for the remaining months of the year (if applicable) – e.g., for the 2018 Annual Update, FY2017 data should be reported including projections for the upcoming months between now and the end of September.*

11. Click **Submit for Federal Review** at the bottom of the plan



Transfer an Annual Update/5-Year Plan to a New Reporting Year

Overview of Transferring

On Annual Update years, you have the option to transfer your plan into the new reporting year. This allows you to work from your existing plan rather than starting from scratch. Please note that the transfer affects each section of the plan differently. This chart explains which sections carry their data forward when you transfer to a new year, whether or not the section is locked (pre-approved) and whether you need to fully update a section or simply need to review it and make revisions, where needed.



If you choose not to transfer the plan, you will be required to enter Program Priorities information from previous years of the 5-Year Plan. Securing the Directors Signature may also be required before you will be able to submit your plan for federal review.



*If you have a new Director/Administrator who **chooses to review the annual update**, then coordinators should **copy the previous year's file and transfer the copy to the new reporting year**.*

Table 1: Overview of Transferring

General Information & Program Plan Section	Does Data Carry Forward to New Year?	Locked?	Action Required
Contact Info	YES	YES	Review. Revise, if needed
Situation	YES	YES	Review. Revise, if needed
Program Approach	YES	YES	Review. Revise, if needed
Program Plan & Results from Previous Year Section	Does Data Carry Forward to New Year?	Locked?	Action Required
Budget Inputs	NO	NO	Update
Program Priorities	YES	NO	Update
Delivery Sites and Partnerships	Chart = NO Description = YES	NO	Update
Results from Previous Year Section	Does Data Carry Forward to New Year?	Locked?	Action Required
Impacts	NO	NO	Update
Signature Section	Does Data Carry Forward to New Year?	Locked?	Action Required
Request Director Signature	YES	YES	None, unless the Federal Office specifically requests



You can transfer multiple plans or you can transfer the same plan multiple times, if needed, but you should only submit one to the Federal Office.

Pre-Approved Sections

The **Contact, Situation, Program Approach, and Request Director Signature** sections are pre-approved (locked) from your previous year’s submission. They only need to be unlocked if something has changed and you need to make revisions. If you leave them locked, it indicates to the Federal Reviewer that nothing changed. If you unlock them, they must undergo Federal review for approval.


When Pre-Approved Sections Require Unlocking

If your Institution is changing the way in which volunteers are used and/or the roles they play within the program or if increased use of technology will occur, the Program Approach section must be unlocked.

To unlock a section:

1. Click the button to open the section



2. Click the “” button on the top right of the screen
3. Click **Ok** on the warning message to confirm that you want to unlock and edit the section or **Cancel** to return to the preview of the page without unlocking it



If you unlock a section by mistake, you can still cancel the change by clicking cancel at the bottom of the screen

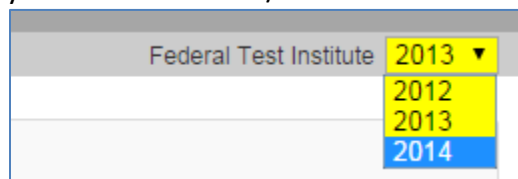
Sections you need to Update Each Year

The **Budget Inputs, Program Priorities, Delivery Sites and Community Partnerships, and Impacts** sections must be revised each year. These sections are unlocked. You can simply make edits/additions to them and click save. These undergo Federal review for approval.

Transfer Steps

WebNEERS Instructions

1. Log in as an Institution Level user
2. Use the year dropdown on the top right to select the year containing the Annual Update/5-Year Plan you wish to transfer/ forward into the new year

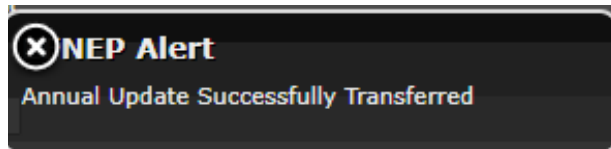


The years listed in your dropdown may vary from the screenshot above.

3. Click **OK** to confirm that you want to switch years
4. Select **Manage Annual Update/5-Year Plan** from the **WebNEERS Home Page**
5. Locate your “Approved” plan and click the transfer this Annual Update to the next year button



6. Use the dropdown to select the reporting year you wish to migrate Annual Update/5-Year Plan into
7. Click **Transfer** to migrate the plan into the selected year or click **Cancel** to return to the plan without transferring
8. Watch for a message in the top right that the transfer was successful

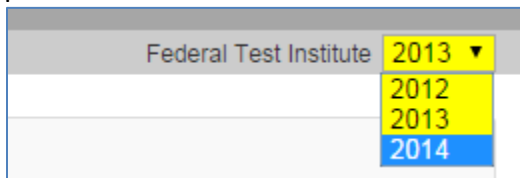


Sometimes the alert message is quick, if you do not see it, try moving on to step 9. If your plan is not listed in the year you tried to transfer it into, return to step 2 and try again! If you get a red alert message, contact the [help desk](#) for assistance.




Your Manage Annual Updates page will refresh, but you will not see the transferred plan. You must change to the year you transferred the plan to see the transferred plan (Step 9).

9. Use the year dropdown on the top right to switch to the year you transferred your plan into.



The years listed in your dropdown may vary from the screenshot above.

10. Click **OK** to confirm that you want to switch years.
11. Click on the “” icon to open the transferred plan. The transferred plan will be tagged “Transferred” and have the date it was transferred in the **Plan Name**.



- Follow the instructions in the [Enter/Revise Plan Information and Data](#) section to complete your plan.




Enter/Revise Plan Information and Data

If you just created the plan, you will automatically land on the main plan page. Please skip ahead to the [General Information and Program Plan](#) instructions below. If you are accessing a plan you created earlier, follow these steps to open your plan.

WebNEERS Instructions

- Log in as an Institution Level user.
- Select “**Manage Annual Update/5-Year Plan**” from the **WebNEERS Home Page**.
- Locate your plan in the table. The table displays the most recently updated plan at the top, but you can click the up/down arrows in any column to re-sort ascending or descending or use the SEARCH option to quickly locate your plan.


- Use the “” icon to edit your plan or the “” icon to preview your plan.

SEARCH: <input type="text"/>		SHOW <input type="text" value="10"/> ENTRIES		
Manage	Plan Name	Fiscal Year	Status	Last Modified
  	Example Program Plan	2015	Draft	2015/05/06 21:46:49

Note:

You will see either the edit or the preview icon. The edit icon is only visible if the plan’s status is draft. If the plan has been submitted or returned, the preview icon will be visible.

Note:

If there is a plan you no longer need, use the “” icon to delete the plan. The delete icon is only visible if the plan has not been submitted; you cannot delete a plan if it has been submitted to the Federal Office.

General Information and Program Plan

The buttons included under the **General Information and Program Plan** grouping include: **Contact Information**, **Situation**, and **Program Approach**. The buttons under this heading capture the contact information for your program and the overview of what you intend to accomplish in upcoming years. These need to be reviewed each year and revised, as needed.

Figure 1 - Main Plan Page: General Information & Program Plan

The screenshot displays a web interface for a plan page. On the left, a blue-bordered box highlights the 'General Information & Program Plan' section, which includes three buttons: 'Contact Info', 'Situation', and 'Program Approach'. The 'Situation' and 'Program Approach' buttons are marked with a red asterisk and the text '* Required Data Missing'. To the right of this section is the 'Results from Previous Year' section, featuring an 'Impacts' button with a red asterisk and the text '* Section is empty'. Below this is a 'Signature' section with a button labeled 'Request Director Signature (plan must be completed before signature can be requested)'. Further down is the 'Program Plan & Results from Previous Year' section, which contains three buttons: 'Budget Inputs', 'Program Priorities', and 'Delivery Sites and Partnerships'. The 'Program Priorities' and 'Delivery Sites and Partnerships' buttons are marked with a red asterisk and the text '* Required Data Missing'.

Contact Information

The **Contact Info** section is completed when you create the plan (see above) so you may only need to open this section on Annual Update years to review and revise, as needed.

Annual Update Years: If you transfer your plan, this section is locked and is pre-populated with the information from the previous year. Only unlock it if you need to make edits, otherwise it is pre-approved.

Note:

If there is a new Director/Administrator, do not transfer the plan directly. Create a copy of the previous year's file and transfer the copy.

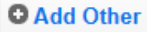
WebNEERS Instructions

1. From the main plan page, click on the **CONTACT INFO** button.
2. Enter/revise the information as needed.
3. Click **Save** to save and close this section, **Cancel** to close the section without saving, or **Save and Next** to save this section and automatically advance to the next section.

Situation

Annual Update Years: If you transfer your plan, this section is locked and is pre-populated with the information from the previous year. Only unlock it if you need to make edits, otherwise it is pre-approved.


WebNEERS Instructions

1. From the main plan page, click on the **SITUATION** button.
2. Enter/revise the narrative description of your **Situation**.
3. Click the checkboxes to select/deselect your **Geographic Area**.
4. Enter/revise the narrative **Description of Geographic Area**.
5. Enter/revise your **Inter-Organizational Relationships**. Make sure you select one option for each row even if the relationship is “None”.
 6. Use the “  ” button to add additional organizations not listed in the chart.
7. Enter/revise the **Description of Inter-Organizational Relationships**.
8. Enter/revise the narrative description of the **Target Audience**.
9. Click **Save** to save and close this section, **Cancel** to close the section without saving, or **Save and Next** to save this section and automatically advance to the next section.

Description of Fields

Name of the Field	Description
Description of Situation	<p>Provide a general description of the situation in your state/territory that justifies the need for the program. Include any relevant statistics (e.g., poverty levels, obesity rates, etc.) as well as <u>external factors</u> or <u>assumptions</u> that may impact programming now or in upcoming years. The situation should be written so a person unfamiliar with the program can understand. It may include a public value statement. (4000 characters or less)</p> <p><i><u>External Factors:</u> elements in the environment which may positively or negatively influence programming. Examples include: cultural differences, the economy, politics, the media, etc.</i></p> <p><i><u>Assumptions:</u> principles, ideas, or beliefs that may influence decisions. Examples include: theories about the program, the people involved, or the way we think the program will work.</i></p>

Name of the Field	Description
Geographic Area	Select the counties/parishes where your program will provide education during the upcoming fiscal year. If you do not provide education, but you have an important partnership in a location, do not check the box in this section. Instead, describe it in brief in the "Description of Geographic Area" section below.
Description of Geographic Area	For the locations selected above, please briefly describe the reasons they were selected. If there are locations you have partnerships with, but you did not select them above because you do not provide education there, you can briefly describe them here. Please include any plans to expand, eliminate or relocate programming in upcoming years along with an explanation of how and why. (4000 characters or less)
Inter-Organizational Relationships	<p>Review the list of agencies, organizations, and other partners in the table. For each partner you work with think about the relationship at the state/territory level. If you have more than one type of relationship with a particular agency, organization, or partner determine which type of relationship is primary. Select the radio button in the appropriate column of the table to indicate the primary type of relationship. Options are: <u>Network</u>, <u>Cooperator</u>, <u>Coordinator/Partnership</u>, <u>Coalition</u>, or <u>Collaborator</u>. If no relationship exists, select "none".</p> <ul style="list-style-type: none"> • <u>Network</u>: getting together. • <u>Cooperator</u>: building trust and ownership. • <u>Coordinator/Partnership</u>: developing strategic plans. • <u>Coalition</u>: taking action. • <u>Collaborator</u>: establishing long-term commitment.
Description of Inter-Organizational Relationships	Summarize any plans to change, develop/enhance or expand inter-organizational relationships in upcoming years. Briefly describe with whom, how and why (1000 characters or less).

Name of the Field	Description
Target Audience	<p>Define your target audience within programmatic guidelines and briefly describe how you are targeting them. If you intend to change your target audience or your approach to reaching them in upcoming years, briefly describe how and why. (4000 characters or less)</p> <p> Note: For EFNEP, this must include programming to low-income families and low-income youth. For further information see EFNEP's Policy Document.</p>

Program Approach

Annual Update Years: If you transfer your plan, this section is locked and is pre-populated with the information from the previous year. Only unlock it if you need to make edits, otherwise it is pre-approved.




Situations Requiring Unlocking

If your Institution is changing the way in which volunteers are used and/or the roles they play within the program or if increased use of technology will occur, the Program Approach section must be unlocked and updated.

WebNEERS Instructions

1. From the main plan page, click on the **PROGRAM APPROACH** button.
2. Enter/revise the name(s) and narrative description of your **Adult Curricula**.
3. Enter/revise the name(s) and narrative description of your **Youth Curricula**.
4. Enter/revise the narrative description of your **Technology Use**.
5. Enter/revise the narrative description of your **Volunteer Use**.
6. Click **Save** to save and close this section, **Cancel** to close the section without saving, or **Save and Next** to save this section and automatically advance to the next section.

Description of Fields

Name of the Field	Description
Adult Curricula	<p>Name and briefly describe the key university approved curricula for adult programming. Describe curricula with respect to audience appropriateness, behavior change emphasis, and evidence-base. Make sure it is clear that each <u>core area</u> is addressed with adult curricula. If you intend to change or revise curricula in upcoming years, briefly describe how and why. (4000 characters or less)</p> <p><i>Core areas (EFNEP): Diet Quality/Physical Activity, Food Resource Management, Food Safety, Food Security</i></p> <p> <i>Note: This should not be an exhaustive list of curricula, but rather a list of the primary curricula used across the state/territory.</i></p>
Youth Curricula	<p>Name and briefly describe the key university approved curricula for youth programming. Describe curricula with respect to audience appropriateness, behavior change emphasis, and evidence-base. Make sure it is clear that each <u>core area</u> is addressed with youth. If you intend to change or revise curricula in upcoming years, briefly describe how and why. (4000 characters or less)</p> <p><i>Core areas (EFNEP): Diet Quality/Physical Activity, Food Resource Management, Food Safety, Food Security</i></p> <p> <i>Note: This should not be an exhaustive list of curricula, but rather a list of the primary curricula used across the state/territory.</i></p> <p> <i>Note: Some grades do not cover food resource management or food security. So, for K-2nd or 3rd-5th grades, your youth curricula may not include all core areas.</i></p>

Name of the Field	Description
Technology Use	Please briefly describe your technology plan. Include: 1) the level of technology that is planned (low, medium, or high); 2) the type of technology that will be used (texting, social media, websites, remote learning, computer interactions, etc.); 3) the purpose for using the technology (recruitment, administrative reminders, supplementing, reinforcing, or replacing lessons, etc.); 4) how dosage will be measured – if applicable; and 5) how you will determine success. Also, indicate if this is a new use of technology or if you are continuing or building upon what you are already doing. If more than one level is planned, a description will be needed for both. If you wish to do a high-level plan and have not already been approved by the national office, you will need send a separate proposal with additional details, addressing the respective elements of the technology policy to Helen Chipman, the National Program Leader. (4000 characters or less)
Volunteer Use	Please indicate what types of volunteers will be used and what duties volunteers will have. Implementation of a Formal Volunteer Program will require prior approval from the National Office. You will need send a separate proposal with additional details, addressing the respective elements of the volunteer policy to Helen Chipman, the National Program Leader. If volunteers will not be used, the statement below should reflect that. (2000 characters or less)

Program Plan and Results from Previous Year

The buttons included under the **Program Plan and Results from Previous Year** grouping include: **Budget Inputs**, **Program Priorities**, and **Delivery Sites and Partnerships**. The buttons under this heading serve a dual purpose. They provide an overview of what you intend to accomplish in upcoming years as well as report some of the results you achieved. These include fields that need to be reviewed and revised, as needed as well as fields that are updated each year.



Plans are submitted in July which is in advance of the fiscal year. So, for example, the FY2018 Annual Update is due July 01, 2017, which is 3 months prior to the start of FY2018. This means that the results you report “from the previous year” will be from the most recent complete annual dataset (in this example FY2016) and include projections for the remainder of the FY2017 year.

Figure 2 - Main Plan Page: Program Plan & Results from Previous Year

Budget Inputs

Annual Update Years: When you transfer your plan, this section is unlocked and is empty. You need to update this information every year.

WebNEERS Instructions

1. From the main plan page, click on the **BUDGET INPUTS** button.
2. If applicable, click on the hyperlinks to preview your most recently approved **Final Budget** and complete your **Preliminary Budget**.



Note:

*Final Budgets and Preliminary Budgets are only visible if you have an approved budget submission in WebNEERS**. **When you initially submit your plan, your final budget and preliminary budget may not be visible, but they will appear once approved.***



Note:

For instructions on budget submission, see “EFNEP Budget, Including Justification”, available https://www.webneers.net/documents/budget_justification_instructions.pdf

3. Click **Save** to save and close this section, **Cancel** to close the section without saving, or **Save and Next** to save this section and automatically advance to the next section.



Name of the Field	Description
Final Budget	Nothing is required here. This is simply a way to preview the most recently approved final budget.
Preliminary Budget	Nothing is required here. This is simply a link to take you to the Manage Budget section of WebNEERS to complete your preliminary budget.

Program Priorities


5-Year Plan Years: When create a new 5-Yer Plan, this section is empty. You need to add your 4-6 program priorities for the next five years.


Annual Update Years: When you transfer your plan, this section is unlocked, but is pre-populated with the information from the previous year(s). You need to update the “actual” value in the data chart each year and revise other sections as needed.

WebNEERS Instructions

1. From the main plan page, click on the **PROGRAM PRIORITES** button.
2. Click “  ” to add a new priority or the “  ” icon to open an existing priority.



If needed, use the “  ” icon to delete a priority. The delete icon is only visible if the priority is not part of a submitted plan; you cannot delete a priority if it has been submitted to the Federal Office.




3. Enter/revise the **Title** for the priority.
4. Select the **Core Area** that the priority addresses.
5. Select the **Target Audience** of the priority.
6. Check the boxes to select/deselect the **Secondary Areas**.
7. Click “  ” to add an additional focus area.
8. Enter/revise the narrative **Description**.
9. Use the dropdown to select/verify the **Measurement** type.
10. Select **Yes** for quantitative (numeric) measures.
 - a. Select the **Data Source** for the outcome measure of the priority.

- b. Select/verify the **Unit of Measure**.
- c. If it is a **5-Year Plan** year
 - i. Enter the **actual** numeric value for the baseline year.
 - ii. Enter the **target** values for all five upcoming years.
- d. If it is an **Annual Update** year,
 - i. Enter the **actual** numeric value for the year that just ended.



Only enter numbers in the table.

- 11. Select No for qualitative (narrative) measures.
- 12. If it is a **5-Year Plan** year
 - a. Enter the **actual** descriptive value for the baseline year.
 - b. Enter the **target** descriptive values for all five upcoming years.
- 13. If it is an **Annual Update** year,
 - a. Enter the **actual** descriptive value for the year that just ended.
- 14. If it is an **Annual Update** year, enter **Comments** for any targets not met. (optional)
- 15. Click "**Save**" to save the priority or the "**x**" at the top of the popup to cancel without saving.
- 16. Repeat Steps 2-15 until you have added/updated all of your priorities.
- 17. Check the checkbox in the "**Select**" column to include the priority in your submission.


Select	Options	Title
<input type="checkbox"/> 	 	Example Program Priority



You may add as many priorities as you want, but a maximum of six can be selected to send forward to the Federal Office. The Federal Office can only see the ones you select.

- 18. Click **Save** to save and close this section, **Cancel** to close the section without saving, or **Save and Next** to save this section and automatically advance to the next section.

Description of Fields

Name of the Field	Description
Program Priorities	<p>Develop 4-6 SMART (specific, measurable, action-oriented, realistic, timely) program priorities to focus on over the next five years. Three (3) must directly measure Core Areas; one must focus on the Secondary Area, Technology, others may focus on other Secondary Areas. You may create more than 6 priorities, but a maximum of 6 may be submitted to the National Office. There must be at least 1 priority targeting adults and 1 targeting youth. Make sure you check the boxes in the select column for those priorities you want to submit to the National Office. Only checked items will be visible at the Federal Level.</p> <p><u>Core areas:</u> Diet Quality, Physical Activity, Food Resource Management, Food Safety, Food Security.</p> <p><u>Target Audience:</u> Adults, Youth, Pregnant</p> <p><u>Secondary areas:</u> PSE (Sectors/Settings) Management/Leadership, Technology, Volunteers.</p> <p> Note: <i>Secondary areas should not be the focus of your nutrition education program. They can support program goals, but should not be programmatic content areas.</i></p>

Delivery Sites and Community Partnerships

This section displays a list of all of your regions. If they entered Delivery Sites/Locations and Community Partnership (DSP) data you can include it in your submission. The list also includes any DSP data added by Institution level users. If you want to quickly review each region's submission or if you need to add additional examples, return to the WebNEERS home screen and click on **Manage Delivery Sites/Partnerships** (see the [Manage Delivery Sites and Community Partnerships](#) section for instructions).

Annual Update Years: *When you transfer your plan, this section is unlocked and is empty. You need to update this information every year.*

WebNEERS Instructions

From the main plan page, click on the **DELIVERY SITES AND PARTNERSHIPS** button.

1. Click the checkboxes to select/deselect the region(s) and/or the Institution Level record(s) you want to include in your **Delivery Sites/Locations and Community Partnerships (DSP)** submission.



You cannot add an Institution Level record within a plan, see the [Manage Delivery Sites and Community Partnerships](#) section below for instructions.

2. If needed, manually update the data in the chart.



If you manually update the data and then check or uncheck a checkbox, the manual changes are lost/overridden. If possible, it is better to contact your [Region Level](#) users and have them make updates/edits.

3. Enter/revise the narrative **Description** of your Delivery Sites/Locations and Community Partnerships.
4. Click **Save** to save and close this section, **Cancel** to close the section without saving, or **Save and Next** to save this section and automatically advance to the next section.

Description of Fields

Name of the Field	Description
Delivery Sites/Locations and Community Partnerships (DSP) Chart	Report the total number of delivery sites and the total number of community partnerships for each type of site/location listed below. If you wish to include the data submitted by your regions, select them from the list below. You can manually change the data, if needed, but you must click “save” to save the changes.
Delivery Sites/Locations and Community Partnerships (DSP) Chart - continued	If you later check/uncheck a region, your manual changes will be lost. To enter the data at the institution level, return to the home screen, click on Manage Delivery Sites and Partnerships and select add a new Institution level record. After saving, the Institution level record will appear in the chart.
Description of DSPs and Policy, Systems, and	Summarize any plans to expand, eliminate or relocate program delivery sites/locations or to change, develop/enhance or expand community partnerships. Also describe any plans to expand or change <u>program efforts/involvement in policy, systems, and</u>

Name of the Field	Description
Environmental change efforts	<u>environmental change (PSE) efforts</u> in upcoming years. Briefly describe with whom, how, and why. (1000 characters or less)

Results from Previous Year

The buttons included under the **Results from Previous Year** grouping includes **Impacts**. The buttons under this heading report results from the previous year. These need to be reviewed, revised, and updated each year.



Plans are submitted in July which is in advance of the fiscal year. So, for example, the FY2018 Annual Update is due July 01, 2017, which is 3 months prior to the start of FY2018. This means that the results you report “from the previous year” will technically be for the year you are currently part of (in this example FY2017).

Figure 3 - Main Plan Page: Results from Previous Year

The screenshot shows a web interface with several sections. On the left, under 'General Information & Program Plan', there are buttons for 'Contact Info', 'Situation' (with a red asterisk and 'Required Data Missing'), 'Program Approach' (with a red asterisk and 'Required Data Missing'), 'Budget Inputs', 'Program Priorities' (with a red asterisk and 'Required Data Missing'), and 'Delivery Sites and Partnerships' (with a red asterisk and 'Required Data Missing'). On the right, the 'Results from Previous Year' section is highlighted with a blue border and contains an 'Impacts' button with a red asterisk and the text '* Section is empty'. Below this is a 'Signature' section with a button that says 'Request Director Signature (plan must be completed before signature can be requested)'.

Impacts



This section displays all program impacts (qualitative examples) and PSE impacts entered by Region Level and Institution Level users. If you want to quickly review each region’s submission or if you need to add additional ones, return to the WebNEERS


home screen and click **Manage Program Impacts** (see the [Manage Program Impacts](#) and Manage Settings and Sectors: Policy, Systems, and Environmental (PSE) Change section for instructions). You cannot add impacts or examples from within the plan.

5-Year Plan Years: Program Impacts are entered every year, including when you create a new 5-Year Plan.


Annual Update Years: When you transfer your plan, this section is unlocked and is empty. You need to update this information every year.

WebNEERS Instructions


1. From the main plan page, click on the **IMPACTS** button.
2. In the **Program Impacts** section:
 - Use the “” icon to preview/edit the impact. If the “” icon is visible and you need to make edits, uncheck the checkbox in the “**Select**” column, click **Save**, and click the **IMPACTS** button to reopen the section.


 **Note:**


If no impacts exist, the table will be empty.


 **Note:**

If you edit a regional impact at the Institution level, those edits are also visible to the Regional Level user.

- Use the “” icon to hide the impact, if needed.

 **Note:**

*If you hide an impact by mistake, return to the WebNEERS home screen, click on **Manage Program Impacts**, click on the **View Hidden Program Impacts** button, and click the “” icon to unhide it.*

 **Note:**



You will see either the edit and delete icons or the preview icon. The edit and delete icons are only visible if the impact is not associated with a plan submitted to the Federal Office. If the impact was submitted, only the preview icon will be visible.



3. Check the checkbox in the “**Select**” column to include up to three (3) **Program Impacts**.



4. Click **Save** to save and close this section, **Cancel** to close the section without saving, or **Save and Next** to save this section and automatically advance to the next section.

Description of Fields

Name of the Field	Description
Program Impacts	<p>Submit up to 3 qualitative (narrative/descriptive) examples highlighting the impact of your program. Program impacts are related to work at the individual level (i.e., work with participants or collaborators). Choose ones which: show behavior change, provide evidence of improved quality of life, and best represent the work of your program. Consider tying qualitative program impacts to program priorities. This can be done by clicking the wrench icon to open the impact and checking the box to select the related program priority in the Program Priorities Section. Make sure you check the boxes in the select column to include impacts in your submission. Only checked items will be visible at the Federal Level.</p> <p> Note: <i>This option is only available within the program plan. To add a program impact, return to the home screen and go to the “Manage Program Impacts” section.</i></p> <p> Note: <i>If your program impact is selected for use at the Federal level, the text may be edited to fit the space.</i></p>

Name of the Field	Description
PSE Impacts	<p>Submit up to 2 examples highlighting Settings and Sectors: Policy, Systems and Environmental (PSE) Change impact. Select 1 Setting and 1 Sector. PSEs will be able to roll into the next fiscal year if necessary. Make sure you check the boxes in the select column to include PSE impacts in your submission. Only checked items will be visible at the Federal Level.</p> <p> <i>Note: This option is only available within the program plan. To add a PSE impact, return to the home screen and go to the “Manage Settings and Sectors: Policy, Systems and Environmental (PSE) Change” section.</i></p> <p> <i>Note: If your program impact is selected for use at the Federal level, the text may be edited to fit the space.</i></p>

Signature

The section included under the **Signature** grouping is: **Request Director Signature**. This is used to secure your Extension Director or Administrator’s signature, a requirement for 5-Year Plan years. The signature only needs updating in Annual Update years if required by your university or if specifically requested by the Federal Office. You will only be able to request your Director’s/Administrator’s signature if you have completed all required sections of the plan. And, you should only send your plan to your Director/Administrator after your plan is finalized because any changes you make to your plan after it is approved will have to be reapproved (i.e., they will negate your approval status). After your Director/Administrator approves your plan, the submit button will appear.


 *Note: Your Director/Administrator does not need access to WebNEERS to review and approve the plan. He/she will receive an email from “EFNEP Admin” with a link to an html (onscreen view) of the plan. At the bottom there is an option to ‘Approve’ or to send it back as ‘Needs Revision’.*

Figure 4 - Main Plan Page: Signature

The screenshot displays a web interface for a plan page. It is divided into two main columns. The left column is titled 'General Information & Program Plan' and contains several sections: 'Contact Info', 'Situation' (with a red asterisk and 'Required Data Missing'), 'Program Approach' (with a red asterisk and 'Required Data Missing'), 'Budget Inputs', 'Program Priorities' (with a red asterisk and 'Required Data Missing'), and 'Delivery Sites and Partnerships' (with a red asterisk and 'Required Data Missing'). The right column is titled 'Results from Previous Year' and contains an 'Impacts' section (with a red asterisk and 'Section is empty') and a 'Signature' section. The 'Signature' section is highlighted with a blue border and contains a button labeled 'Request Director Signature (plan must be completed before signature can be requested)'. Below the main content area, there is a section titled 'Program Plan & Results from Previous Year' with a 'Budget Inputs' section and two other sections with red asterisks and 'Required Data Missing'.



If there is a new Director/Administrator, the incoming Director/Administrator has the option to let the previous Administrator's signature serve as approval from the Office for the remainder of the 5-year plan period or the incoming Director/Administrator may choose to review the annual update themselves their first year for the 5-year plan period.

Request Director Signature

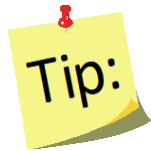
This Request Director Signature option is only available after you complete all required sections of your plan. A signature can be requested if “**section is empty**” messages are displayed; these sections are optional.

Annual Update Years: When you transfer your plan, this section is locked and is pre-populated with the signature from the previous year. Only unlock it if you need to get a new signature per your university requirements or per a special request from the Federal Office, otherwise it is pre-approved.

WebNEERS Instructions

1. From the main plan page, click on the **REQUEST DIRECTOR SIGNATURE** button.

2. Enter your Extension Director or Administrator's email address. Make sure it is accurate.
3. Click **Send to Director for Approval** to send an email to your director requesting his/her approval of the plan or **Cancel** to return to the main plan page without sending.

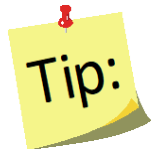


It is a good idea to notify your Director that he/she should watch for a message from "EFNEP Admin" which will provide the link he/she needs to approve your plan. Messages are sent instantly and should arrive within minutes, but occasionally these messages get filtered as junk mail so an Administrator may need to check there as well. To assist your Director, you may also want to print off or provide him/her with the [Director Instructions](#).

4. If you need to resend the email or request a signature from someone different, click the **"Cancel Request for Signature"** button and then repeat steps 1-3.
5. If your plan comes back as "Needs Revision", contact your Director to see what changes you need to make, update your plan, click the **"Resubmit with Changes"** and repeat steps 1-3 to resend to your Extension Director or Administrator.



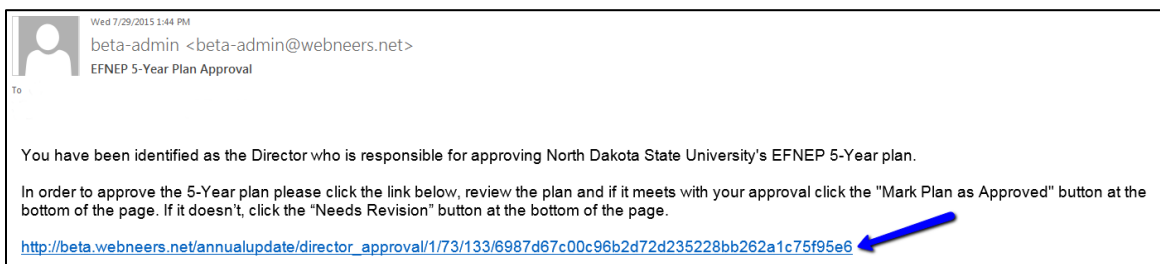
As soon as your Director clicks "approve" your plan will be submitted to the Federal Office. This happens automatically.



You may want to log into your plan periodically to make sure your Director approved it. If he/she has not, you might want to follow-up by phone or email.

Director Instructions

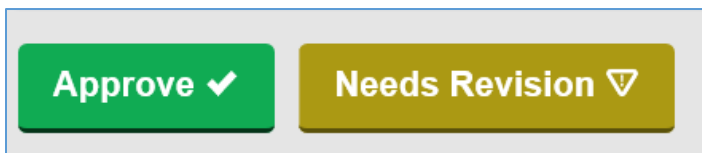
1. Watch for an email from EFNEP Admin (EFNEP-admin@webneers.net).
2. Click on the link within the email message to access the plan.





If the request for signature was cancelled by the plan preparer, the link will no longer work; you must request a new one.

3. Review the plan.
4. If it is acceptable click **“Approve”** at the bottom of the plan; if not, click **“Needs Revision.”**



*This director approval feature was designed for people without WebNEERS accounts. If the Director has an account and is logged in when he/she clicks **“Approve”** or **“Needs Revision”** a red error message may flash and it may return him/her to a page that says “page cannot be found”. This does not affect the approval process and can be disregarded.*

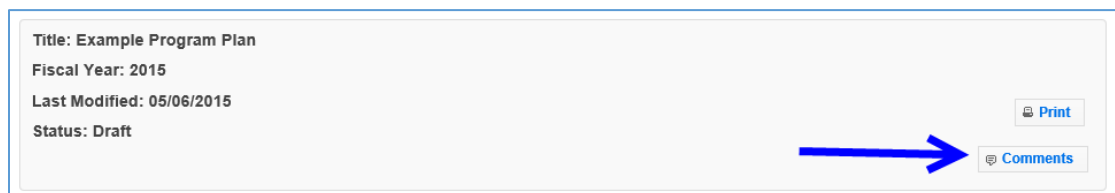
Comments (optional)

The **Comments** feature (button on top right of main plan page) allows two-way communication between the Institution Level submitter and the Federal Level reviewer. You can use this to send any additional comments to the Federal reviewer and they will use this to send you feedback on your plan after they review it.

Annual Update Years: *When you transfer your plan, all institution and federal comments from previous years will be visible.*

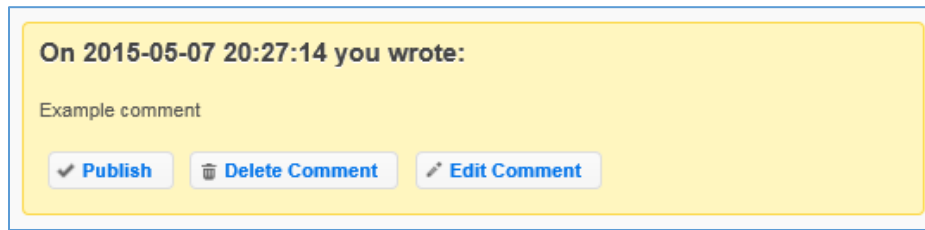
WebNEERS Instructions

1. From the main plan page, click on the **Comments** button on the top right of the screen.



2. Enter your comment in the **Add Comment** field.

3. Click the **Add Comment** button to add the comment. After doing so, it will look like this:



4. Click **Publish** to make the comment visible to the Federal level upon submission.
5. Click **Delete Comment** to delete the comment.
6. Click **Edit Comment** to edit the comment.



*Only published comments are visible at the Federal level. If you publish a comment by mistake, you can click **Unpublish**. This will save the comment, but make it invisible to the Federal level upon submission.*

7. Click the “x” on the top right of the pop-up to close the **Comments** section/return to your plan.

Plan Submission

After you complete your Annual Update/5-Year Plan, you must submit it to the Federal Office for approval.

Understand ‘Submission Status’

Your plan’s status will always be one of the following. You can find the status by clicking “**Manage Annual Update/5-Year Plan**” from the *WebNEERS Home Page* and viewing the “**Status**” column or by opening your plan and looking at the [top section of the main plan page](#).

1. **Draft:** This status indicates that you have not submitted your plan. It is in draft form.
2. **Pending:** This status indicates that you have submitted your plan, but the Federal Office has not begun its review. While your submission is “Pending” review you can still make edits to your plan or cancel your submission.
3. **Under Review:** This status indicates that the Federal Office has begun reviewing your plan. While your submission is “Under Review” you cannot cancel your submission or make edits. If you unlock a section, make edits, and click save, the system will generate a copy of your plan inclusive of your changes.
4. **Needs Revision:** This status indicates that the Federal Office has reviewed your plan and discovered one or more issues. You will need to address the issues and resubmit your plan (see “[Revise and Resubmit Annual Update/5-Year Plan](#)” for instructions).

See additional notes below.

Tip:

Sections that are locked are approved; sections that are unlocked need revision. Notes from the reviewer(s) about your plan and what needs to be revised can be found in the [“Comments”](#) section.


5. **Approved:** This status indicates that the Federal Office has reviewed your plan and has approved it. No further action is needed.

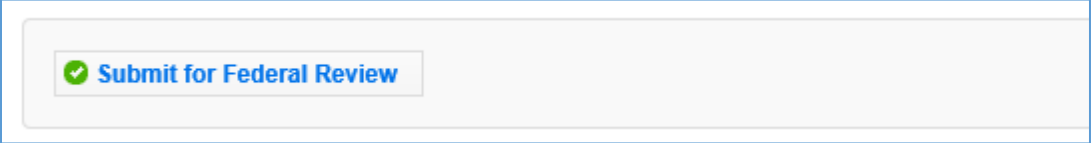
Tip:

When the plan is approved, all sections are locked. Notes from the reviewer(s) about your plan can be found in the [“Comments”](#) section.

Submit Annual Update/5-Year Plan for Federal Review

WebNEERS Instructions

1. Select **“Manage Annual Update/5-Year Plan”** from the **WebNEERS Home Page**.
2. Click the “” icon to open your plan.
3. Click **Submit for Federal Review** at the bottom of the plan.

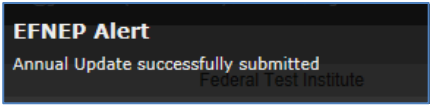


Note:

The submission button is only be visible if you already have a Director Signature and you are working on an Annual Update or making edits to a plan that was sent back “Needs Revision”. If a Director Signature is required, the user will not have access to the submit button and should not have to click the submit button to submit for Federal Review; the plan is submitted automatically when the Director clicks the “approve” option (see [Request Director Signature](#) section for more information).

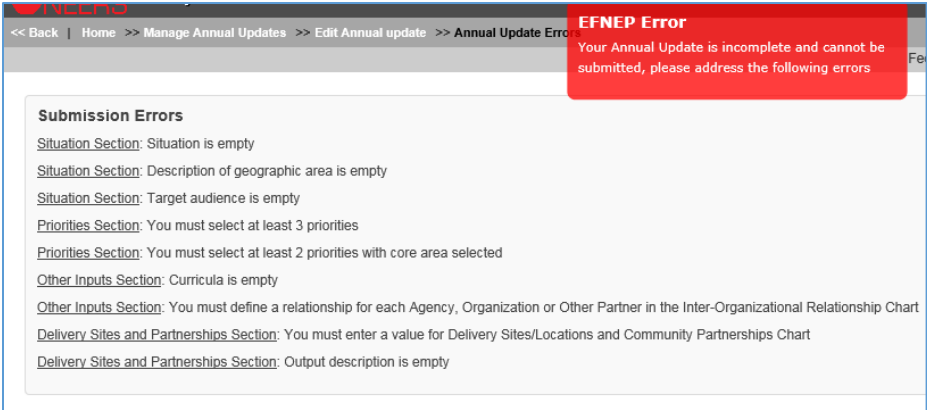
4. Click **OK** to submit the plan or **Cancel** to cancel the submission.

If your submission was successful, you will receive an EFNEP Alert that your submission was successful, and you will be returned to the **Manage Annual Update/5-Year Plan** screen.

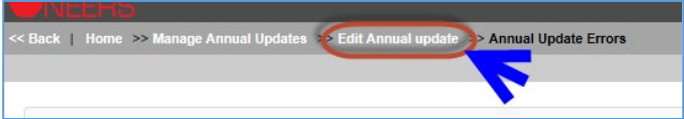


Sometimes the alert message is quick, if you don't see it, move on to step 5. If your status is still "Draft", return to step 2 and try again!

If your submission failed, you will get a red EFNEP Error alert message in the top right corner of your screen and a list of Submission Errors. The submission errors represent required fields (any outlined in red within your plan) that are incomplete. These must be fixed before you can successfully submit your plan.



- 5. To fix submission errors, review and make note of items that need to be fixed.
- 6. Click "Edit Annual update" on the breadcrumb trail to return to your plan.



- 7. Click on the section(s) with the error(s) and make corrections.
- 8. Scroll to the bottom and click "Submit for Federal Review". If the submission fails again, complete these steps again.
- 9. After you submit, confirm your Status is "Pending" on the Manage Annual Update/5-Year Plan screen.

Manage	Plan Name	Fiscal Year	Status
	Example Program Plan	2015	Pending

- a. Use the "Preview icon" icon to preview the plan you submitted.
- b. Use the "Duplicate icon" icon to duplicate your plan.



The “✖” icon will only be visible if the plan has not been submitted. If you need to delete a plan that was submitted, you will need to cancel the submission first (see below for instructions).



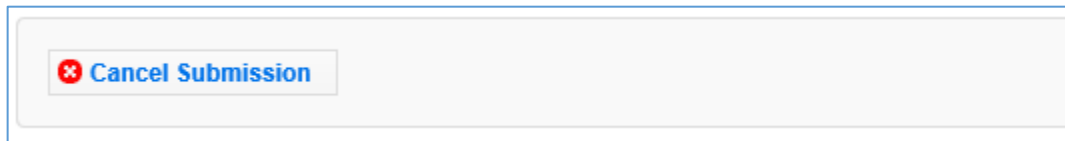
If you notice a mistake before the Federal Office begins its review, you can make edits within the plan and save them. All saved changes to a “**Pending**” plan are automatically visible to the Federal Office after you save.

Cancel Annual Update/5-Year Plan Submission

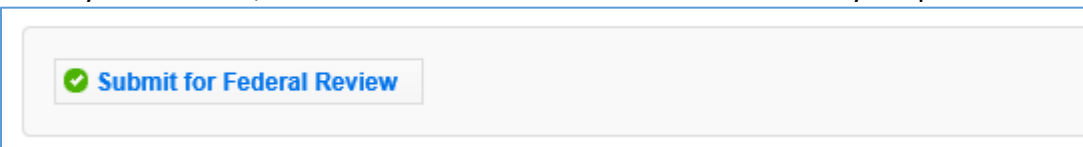
If your Annual Update/5-Year Plan has a status of “**Pending**”, you can cancel the submission.

WebNEERS Instructions

1. From the **Manage Annual Update/5-Year Plan** screen, click the “” icon.
2. Scroll to the bottom and click **Cancel Submission**.



3. Watch for an alert message at the top right confirming that it was successful.
4. Make edits to your plan as needed.
5. When you are done, click **Submit for Federal Review** to resubmit your plan.




The **Cancel Submission** button will only be visible if the plan is still “**Pending**”; you cannot cancel a submission if the status is “**Under Review**”, “**Needs Revision**” or “**Approved**”.





Revise and Resubmit Annual Update/5-Year Plan


Plan Marked “Needs Revision”

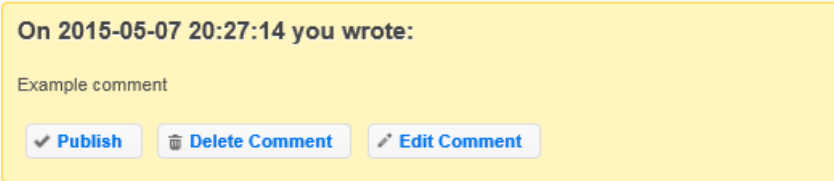
If your Annual Update/5-Year Plan submission is marked as “**Needs Revision**”, you need to determine the issue(s) with your plan, make revisions, and resubmit.

WebNEERS Instructions


1. From the **Manage Annual Update/5-Year Plan** screen, click the “” icon to open your plan.
2. Note which sections are locked and which aren't. Example:

	<p><u>Locked Sections</u> are approved. No further action is needed.</p> <p> Tip: If you need to make revisions, you can unlock the section (see Plan Marked “Approved” section for instructions), but if you do so, the section will have to undergo another review by the Federal Office for approval.</p>
	<p><u>Unlocked Sections</u> need revision. To see why, click the “ Comments” button on the top right of the main plan page and review the Federal Comments.</p>

3. On sections that are unlocked, make revisions based on the Federal Comments.
 - a. If needed, click the “ **Comments**” button to add a response or additional information.
 - b. Enter a comment explaining the change and click the **Add Comment** button to add the comment. After doing so, it will look like this:



4. Click **Publish** to make the comment visible to the Federal level upon submission.
5. Click **Delete Comment** to delete the comment.
6. Click **Edit Comment** to edit the comment.

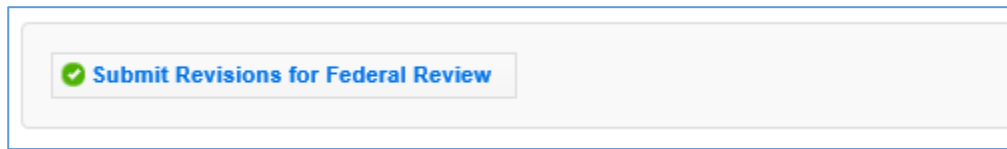


Note:

*Only published comments are visible at the Federal level. If you publish a comment by mistake, you can click **Unpublish**. This will keep the comment, but make it invisible to the Federal level upon submission.*

7. Click the “x” on the top right of the pop-up to close the **Comments** section/return to your plan.

8. Make sure you click **Publish** to make your comment visible to the Federal reviewer.
9. Scroll to the bottom and click **Submit Revisions for Federal Review** to resubmit your revisions.



10. Click **OK** to resubmit the plan or **Cancel** to cancel the resubmission. If your resubmission fails, follow the instructions in the [Submit Annual Update/5-Year Plan for Federal Review](#) section to make corrections and resubmit.

Plan Marked “Approved”

If your Annual Update/5-Year Plan submission is marked as “**Approved**”, but you need to make a change, you must unlock the section you need to modify, make revisions, and resubmit.

See additional notes below.





*Modifying an “**Approved**” plan will create a copy of the plan; you cannot edit a plan that has been approved by the Federal Office. You are essentially creating a new one.*

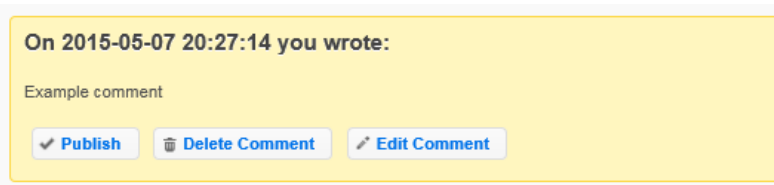
WebNEERS Instructions

1. From the **Manage Annual Update/5-Year Plan** screen, click the “” icon to open your “**Approved**” plan.



2. Open the section you need to modify and click the “” button at the top of the screen.
3. Click **OK** on the warning message to confirm that you want to unlock/edit the section.
4. Click **Cancel** to cancel the action and keep the section locked.
5. Make any edits you need to make.
6. Click **Save** to save and close this section, **Cancel** to close the section without saving, or **Save and Next** to save this section and automatically advance to the next section.
7. Click **OK** to confirm the changes and to create a cloned copy of your plan. The cloned plan will have the same file name, but “ - cloned on xx/xx/xxxx” is appended to it.
8. Make any additional edits.
9. Click on the “ **Comments**” button on the top right.

10. Enter a comment explaining the change in the **Add Comment** field.
11. Click the “**Add Comment**” button to add the comment. After doing so, it will look like this:

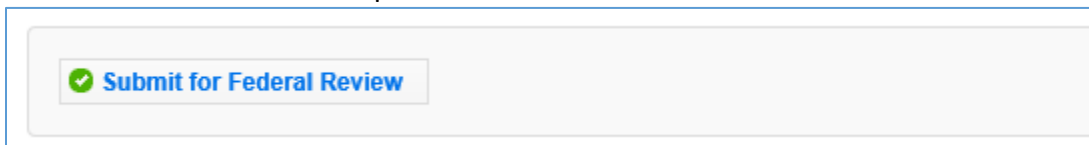


12. Click **Publish** to make the comment visible to the Federal level upon submission.
13. Click **Delete Comment** to delete the comment.
14. Click **Edit Comment** to edit the comment.



*Only published comments are visible at the Federal level. If you publish a comment by mistake, you can click **Unpublish**. This will keep the comment, but make it invisible to the Federal level upon submission.*

15. Click the “x” on the top right of the pop-up to close the **Comments** section/return to your plan.
16. Scroll to the bottom and click “**Submit for Federal Review.**”
17. Click “**OK**” to submit the plan or “**Cancel**” to cancel the submission.



Create New Plan

WebNEERS Instructions

1. Log in as an Institution Level user.
2. Select “**Manage Annual Update/5-Year Plan**” from the **WebNEERS Home Page**.
3. Click **Add New Plan** to create a new Annual Update/5-Year Plan file.
4. Enter a **Plan Name** (example “*Clemson University Annual Update*”).
5. Enter the appropriate **Fiscal Year** – format = YYYY.
6. Enter the **First Name** and **Last Name** of the Program Contact – typically this is the Program Coordinator.
7. Enter the **Phone Number**, **Fax Number**, **Email Address** and **Program Website** for the person listed as the Program Contact (optional).
8. Enter the **First Name** and **Last Name** of the Extension Director or Extension Administrator.

9. Click Save to create the plan or Cancel to return to the Manage Annual Update/5-Year Plan screen without saving.






You can create multiple plans, if needed, but you should only submit one to the Federal Office.

Copy an Annual Update/5-Year Plan



The copy option allows users to duplicate a plan without having to retype all the information. It maintains the lock/unlocked status of each section. This option will not move the plan into the new reporting year. To do so, use the [Transfer Steps](#) above to transfer your plan to the next reporting year.

WebNEERS Instructions

1. Log in as an [Institution Level](#) user.
2. Select “**Manage Annual Update/5-Year Plan**” from the **WebNEERS Home Page**.
3. Locate the plan you want to make a copy of and click the “” icon.
4. Click “OK” to create a duplicate copy of your plan or “Cancel” if you intended to transfer your plan, not duplicate it. The duplicate plan will be listed on your **Manage Annual Update/5-Year Plan** screen and will have “- Copied on DD/MM/YYYY” appended to the plan name.
5. Use the “” icon to edit your copied plan or the “” icon to preview your copied plan.



You will see either the edit or the preview icon. The edit icon is only visible if the copied plan has not been submitted to the Federal Office. If the copied plan has been submitted, the preview icon will be visible.

6. Use the “” icon to duplicate your copied plan.
7. Use the “” icon to delete your copied plan.







The delete icon will only be visible if the plan has not been submitted; you cannot delete a plan if it has been submitted to the Federal Office.

Manage Delivery Sites and Community Partnerships

The **Manage Delivery Sites and Community Partnerships** screen includes all Regional Level and Institution Level Delivery Site and Community Partnership records. There is only one record per region, but the Institution Level can add as many records as needed.


WebNEERS Instructions


1. Log in as an Institution Level user.
2. Select “**Manage Delivery Sites and Partnerships**” from the **WebNEERS Home Page**.
3. Click **Add Institute Level Delivery Site and Partnership Record** to create an Institution Level record.
4. Enter the required data (see [Region Level Instructions](#) for details).
5. Click “**Save**” to save the record or “**Cancel**” to cancel without saving.
6. Use the “” icon to delete your record.
7. Use the “” icon to edit your record or the “” icon to preview the record.



Note:

You will see either the edit or the preview icon. The edit icon will only be visible if the record is not associated with a plan that was submitted to the Federal Office. If the record has been submitted, the preview icon will be visible.

8. For Region Level records, use the “” icon to preview the record.
9. If the data is incorrect, contact the region and have them log into the system and make updates. As soon as they save their changes, they will be visible to you!
See additional notes below.



Note:

Institution Level users cannot edit Region Level records. Within the Annual Update/5-Year Plan, the data can be manipulated, but it will not change the original record. If you want the actual record to be accurate, the Region Level user must make the changes in their system.

Edit Program Delivery Sites and Partnerships – Region Level


The Edit Program Sites and Partnerships reports on the locations at which programming occurs and the partnerships which are formed in the communities.



Tip:

There is only one Delivery Sites and Partnerships screen per region. This means the data for all Region level users is captured in the same place. It is advised that one person per region be responsible for aggregating and entering this data so that data is accurate and edits are not inadvertently overridden.


1. Select **Edit Delivery Sites and Partnerships** from the **WebNEERS Home page**.
2. In the first column, enter the region's total **# of Different Program Delivery Sites/Locations**.



Note:

It is important to record each site only one time under the “# of Different Program Delivery Site/Locations”. This section does not record the number of different activities provided at sites.


3. In the second column, enter the total **# of Community Partnerships** for the region.



Note:

Community Partnerships are local or community-based organizations the university or institution is working with to meet programmatic goals. The relationship should be mutually beneficial and may be formal or informal in nature. They can include networking, cooperating, coordinating, partnerships, forming coalitions or collaborating.

4. Click “Add Other” to add an additional location to the chart.



Note:

Specific details about items added under “Other” are not be visible at the Institute level, but will be aggregated with any other “Other” items added by other regions.

See screenshot below.

Figure 5: Delivery Sites and Community Partnerships Chart

Delivery Sites / Locations and Community Partnerships:
 For applicable types of delivery sites/locations below, indicate the number of sites reached and the number of community partnerships

Types of Sites/Locations	# of Different Program Delivery Sites/Locations	# of Community Partnerships (?)
Adult Education & Training Sites	<input type="text" value="0"/>	<input type="text" value="0"/>
Adult Recreation Centers	<input type="text" value="0"/>	<input type="text" value="0"/>
Churches	<input type="text" value="0"/>	<input type="text" value="0"/>
Community Centers	<input type="text" value="0"/>	<input type="text" value="0"/>
Emergency Food Assistance Sites	<input type="text" value="0"/>	<input type="text" value="0"/>
Extension Offices	<input type="text" value="0"/>	<input type="text" value="0"/>
Farmers Markets	<input type="text" value="0"/>	<input type="text" value="0"/>
Food Stores	<input type="text" value="0"/>	<input type="text" value="0"/>
Head Start Sites	<input type="text" value="0"/>	<input type="text" value="0"/>
Health Care Sites	<input type="text" value="0"/>	<input type="text" value="0"/>
Libraries	<input type="text" value="0"/>	<input type="text" value="0"/>
Other Youth Education Sites	<input type="text" value="0"/>	<input type="text" value="0"/>
Public Housing	<input type="text" value="0"/>	<input type="text" value="0"/>
Schools	<input type="text" value="0"/>	<input type="text" value="0"/>
Shelters	<input type="text" value="0"/>	<input type="text" value="0"/>
SNAP Offices	<input type="text" value="0"/>	<input type="text" value="0"/>
WIC Program Sites	<input type="text" value="0"/>	<input type="text" value="0"/>
Worksites	<input type="text" value="0"/>	<input type="text" value="0"/>

[+ Add Other](#)



Manage Program Impacts

The **Manage Program Impacts** screen includes all Regional Level and Institution Level Program impacts and PSE impacts. Regional impacts are only visible at the Institution Level if the “Submit for Institution Use” box is checked at the Regional Level (note, this box is checked by default). The **SEARCH** box can be used to quickly find examples by their title, type, submitter, keywords, people, focus, or date. Institution Level users can edit Regional impacts, if needed. Those changes will be visible to the Regional Level user.

SEARCH:


WebNEERS Instructions

1. Log in as an Institution Level user.
2. Select “**Manage Program Impacts**” from the **WebNEERS Home Page**.
3. Click **Add Program Impact** to create an Institution Level impact.
4. Select **Program Impact** (individual level) from the dropdown.
5. Click **Save** to create the impact or **Cancel** to cancel the impact.


6. Enter the required data (see [Region Level Instructions](#) for details).
7. Click **Save** to save the impact or **Cancel** to cancel without saving.
8. For Region Level impacts/examples, use the “” icon to preview/edit the impact or the “” icon to preview the impact. Institution Level users can make edits to Region Level impacts/examples and those edits become visible to all users after they are saved.



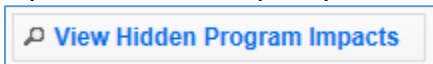
You will see either the edit or the preview icon. The edit icon will only be visible if the impact is not associated with a plan that was submitted to the Federal Office. If the impact has been submitted, the preview icon will be visible.


9. If needed, use the “” icon to hide Region or Institution Level impacts or examples from your view.

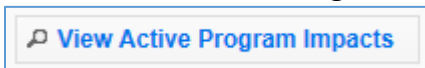


The “” icon will only be visible if the impact has not been submitted; you cannot hide an impact if it has been submitted to the Federal Office.

10. If you hide an example by mistake, click the **View Hidden Program Impacts** button.




11. Click the “” icon to unhide the impact.
12. Click the **View Active Program Impacts** button to return to the list of active impacts.



Add Program Impacts – Region Level

The Manage Program Impacts section collects the qualitative information (success stories) of the program.

1. Select **Manage Program Impacts** from the **WebNEERS Home page**.
2. Select **Program Impact** (individual level) from the dropdown.
3. Click **Save** to create the impact or **Cancel** to cancel the impact.
4. Enter a **Title** for the program impact (be specific).
5. Indicate the **Date Occurred**.
 - a. Type manually as MM/DD/YYYY or
 - b. Select the Calendar Icon () and choose the correct date.
5. Leave checked, to submit, or uncheck to remove the program impact from the Institute level user’s view.

6. Indicate the **Core Area(s)** of the impact.



*More than one **Core Area** can be selected.*

7. Indicate the **Secondary Area(s)** of the impact.



*More than one **Secondary Area** can be selected.*



Additional Areas can be added by clicking “Add Focus” if the list does not provide an adequate description of the area on which the program impact reflects.

8. Indicate the **Key Word(s)** that describe the program impact.



Additional Key Words can be added by clicking “Add Keyword” if the list does not provide adequate options.

9. Indicate the **People** who were involved in facilitating the program impact.



*More than one category of “**People**” can be selected.*



Additional People can be added by clicking “Add People” if the list does not provide adequate options.

10. Type the **Background** of the program impact.

The background is to: Provide a brief narrative description of the circumstances prior to program involvement and the actions, activities or project milestones that took place during the program that led to the outcomes/impacts. Be clear who is telling the story and include

quotation marks where appropriate. Do not use names or personally identifiable information. Include any external factors or assumptions that may have influenced the story. (2000 characters or less)

11. Type the **Outcomes/Impacts**.

*The Outcomes/Impacts section is to: Provide a brief narrative description of the direct benefits or indirect/unintended consequences which occurred as a result of participation in the program. As above, be clear who is telling the story and include quotation marks where appropriate. **Do not use names or personally identifiable information**. The description should demonstrate the need for the program and should describe how participation affected those involved. It may reference benefits at the individual, community, or social level. (2000 characters or less)*

12. Select **Save** when the Program Impact has been added.



WebNEERS does not “spell check” or “grammar check” – it is recommended that the user type the Background and Outcomes/Impacts into a word processor (such as Microsoft Word) prior to adding to WebNEERS to ensure the submission of a program impact that is complete, accurate, and reflects well upon the Region.



Selecting accurate and appropriate Focus Areas, Key Words and People will allow Region and Institute level users to quickly find relevant Program Impacts. These items are all available as searchable terms on the Manage Program Impacts page and therefore can be used to quickly locate a relevant anecdote should a request from a stakeholder, partner or supervisor be received.

Review and Edit the Program Impacts


1. Select **Manage Program Impacts** from the **WebNEERS Home page**.
2. Select the **Wrench icon** () to the left of the **Program Impact** statement to be reviewed.
3. Review the information and make edits as needed:
 - i. Ensure the correct boxes have been selected for **Focus Areas, Key Words, and People**.
 - ii. Read the **Background** and **Outcomes/Impacts** sections for content and meaning. Ensure that the information is presented in a clear, concise and meaningful way, answering the questions being asked and providing the short- and medium-term outcomes expected in programming.
4. Select **Save** when the review and any necessary edits have been completed.
See screenshot below.

Figure 6: Program Impact Data Entry Screen

WebNEERS Beta System Help WebNEERS Manual efneponf@gmail.com (Institute User) Switch to Region Access 22:47 Logout

<< Back | Home >> Manage Program Impacts >> Create Impact >> Create Program Impact

Federal Test Institute | 2018

Submitted by: efneponf@gmail.com

Program Impact

Title

Date Occurred

Focus Areas

Please select which areas this program impact relates to. Select all that apply.

Core Areas

- Diet Quality
- Physical Activity
- Food Resource Management
- Food Safety
- Food Security

Secondary Areas

- PSE (Sectors/Settings)
- Management/Leadership
- Technology
- Volunteer

Key Words

Select any of the following key words that apply to the program impact. Select all that apply:

- Disease Prevention
- Weight Management
- Personal Growth/Confidence
- Positive Impact on Family
- Improved Overall Health

People

Select the people involved in the program impact story. Select all that apply.

Staff

- Paraprofessional
- Professional
- Volunteer
- Coordinator
- Partner/Collaborator

Participant

- Adult
- Pregnant Teen
- Youth

Background

Provide a brief narrative description of the circumstances prior to program involvement and the actions, activities or project milestones that took place during the program that led to the outcomes/impacts. Be clear who is telling the story and include quotation marks where appropriate. Do not use names or personally identifiable information. Include any external factors or assumptions that may have influenced the story. (2000 characters or less)

Outcomes/Impacts

Provide a brief narrative description of the direct benefits or indirect/unintended consequences which occurred as a result of participation in the program. As above, be clear who is telling the story and include quotation marks where appropriate. Do not use names or personally identifiable information. The description should demonstrate the need for the program and should describe how participation affected those involved. It may reference benefits at the individual, community, or social level. (2000 characters or less)

Manage Settings and Sectors: Policy, Systems, and Environmental (PSE) Change

The **Manage Settings and Sectors: Policy, Systems, and Environmental Change** screen includes all Regional Level and Institution Level PSE impacts. Regional PSE impacts are only visible at the Institution Level if the **“Submit for Institute Use”** box is checked at the Regional Level (note, this box is checked by default). The **“SEARCH”** box can be used to quickly find examples by their title, type, submitter, keywords, people, focus, or date. Institution Level users can edit Regional impacts, if needed. Those changes will be visible to the Regional Level user.

SEARCH:

WebNEERS Instructions - Institute Level User



1. Log in as an Institution Level user.
2. Select **“Manage Settings and Sectors: Policy, Systems and Environmental (PSE) Change”** from the **WebNEERS Home Page**.
3. Click **“Add Settings and Sectors: Policy, Systems and Environmental (PSE) Change”** to create an Institution Level impact.
4. Indicate the **title** under the “Settings and Sectors: Policy, Systems and Environmental (PSE) Change” heading.
 - a. An example title may be the name of the agency or the Policy, Systems or Environmental Change effort.

Settings and Sectors: Policy, Systems and Environmental (PSE) Change


Title

5. Identify the effort as **“Organizational Partnership (Settings)”** or **“Multi-Sector Partnerships and Planning (Sectors)”** level of influence under the heading “Is this PSE Effort Classified as Organizational Partnership (Settings) or Multi-Sector Partnerships and Planning (Sectors)?”

Is this PSE Effort Classified as Organizational Partnership (Settings) or Multi-Sector Partnerships and Planning (Sectors)?

- Organizational Partnership (Settings) 
- Multi-Sector Partnerships and Planning (Sectors) 



Descriptions for each are included in WebNEERS by hovering the mouse over the  icon. Definitions are included here. Use *Organizational Partnership (Settings)* to record

information on partnerships at the site (e.g. school), organization (e.g. school district), or complementary level. Multi-Sector Partnerships (Sectors) all have an important role in helping individuals make healthy choices because they either influence the degree to which people have access to healthy food and/or opportunities to be physically active, or they influence social norms and values. Multi-Sector Partnerships should encompass at least 3 diverse sectors.



Note:

Selecting either “Organizational Partnership (Settings)” or “Multi-Sector Partnerships and Planning (Sectors)” will populate the next section in WebNEERS related to the choice selected.

- By selecting “**Organizational Partnership (Settings)**”, a list of settings will appear. List the number by type of partnerships that regularly meet, exchange information, and identify and implement mutually reinforcing activities that will contribute to adoption of one or more organizational changes or policies. Partnerships can include settings such as Homes, Early Child Care and Education, Schools, Worksites, Recreational Facilities, Food Service and Retail Establishments, or Other Community Settings. Enter a number to indicate the number of each setting involved in this PSE. At the bottom of each section, you can select “**Add Other**” to add a setting not represented in this list.

Organizational Partnership (Settings)

List the number by type of partnerships that regularly meet, exchange information, and identify and implement mutually reinforcing activities that will contribute to adoption of one or more organizational changes or policies. Partnerships can include settings such as Homes, Early Child Care and Education, Schools, Worksites, Recreational Facilities, Food Service and Retail Establishments, or Other Community Settings.

List number of partnerships in each setting where the efforts occur (enter all that apply)

Adult education and training sites

Adult rehabilitation centers

Community centers

Early child care centers

Emergency food assistance centers

Extension Offices

Farmers Markets

Food Stores

Head start sites

Health care sites
 Libraries
 Other youth education sites
 Parks and recreational facilities
 Places of worship
 Public housing
 Schools
 Shelters
 SNAP offices
 WIC program sites
 Work Sites

7. By selecting **“Multi-Sector Partnerships and Planning (Sectors)”**, a list of sectors will appear. Select the number and types of organizations represented and enter the number of each involved in this effort. Enter a number to indicate the number of each sector involved in this PSE. These are divided into three sections of systems, organizations, and business and industries. At the bottom of each section, you can select **“Add Other”** to add a sector not represented in this list.

Multi-Sector Partnerships and Planning (Sectors)

Select the number and types of organizations represented and enter the number of each involved in this effort (Select all that apply).

Systems

Government
 Education
 Health Care
 Transportation

Organizations

Public Health

Community

Business and Industries

Planning & Development

Agriculture

Food & Beverage

Retail

Media

8. Identify the Focus Areas applying to this PSE effort under the heading **“Focus Areas”**. Select all that apply.

Focus Areas

Diet Quality

Physical Activity

Food Resource Management

Food Safety

Food Security



For each Focus Area selected, additional options will populate below related to each effort.

9. For each of the selected responses under Focus Area including **“Diet Quality”**, **“Physical Activity”**, **“Food Resource Management”**, **“Food Safety”**, and **“Food Security”** that populate, select the type of changes occurring as a result of this PSE effort. Select all that apply.

Diet Quality

Focus Area - Diet Quality [?](#)

What type of changes occurred from this initiative? (select all that apply)

- Environmental Change [?](#)
- Systems Change [?](#)
- Policy Change [?](#)

Physical Activity

Focus Area - Physical Activity [?](#)

What type of changes occurred from this initiative? (select all that apply)

- Environmental Change [?](#)
- Systems Change [?](#)
- Policy Change [?](#)

Food Resource Management

Focus Area - Food Resource Management [?](#)

What type of changes occurred from this initiative? (select all that apply)

- Environmental Change [?](#)
- Systems Change [?](#)
- Policy Change [?](#)

Food Safety

Focus Area - Food Safety [?](#)




What type of changes occurred from this initiative? (select all that apply)

- Environmental Change [?](#)
- Systems Change [?](#)
- Policy Change [?](#)


Food Security

Focus Area - Food Security 

What type of changes occurred from this initiative? (select all that apply)

- Environmental Change 
- Systems Change 
- Policy Change 


Note:

Use the “” icon to view definitions. *Diet Quality: changes related to expanding access or improving healthy eating. Physical Activity: changes related to expanding access or improving physical activity or reduced sedentary behavior. Food Resource Management: changes related to expanding access or improving food resource management. Food Safety: changes related to expanding access or improving food safety. Food Security: changes related to expanding access or improving food security. Environmental Change: related to the physical, economic, or social environment. Systems Change: related to the decisions or changes that result in ways of conducting business that reach people within an organization or community. Policy Change: related to the written, officially adopted statements of position, decision, or course of action.*

10. Identify the number of people influenced by this effort. Under the heading “**Community Members Influenced**”, enter the potential number of persons who encounter the improved environment or are affected by the policy change on a regular (typical) basis and are assumed to be influenced by it during this fiscal year. Use the drop-down arrow to select the appropriate number range.

Community Members Influenced

Potential number of persons who encounter the improved environment or are affected by the policy change on a regular (typical) basis and are assumed to be influenced by it during this fiscal year.

--Select One-- 



11. Identify the type of participants reached under the heading “**Participant Type**”. Select all that apply.


Participant Type

- Adult
- Youth


12. Identify the level of reach under the heading “Local Level vs State Level”.

Local Level vs State Level

- Region 
- State 






Note:


Use the “” icon to view definitions. *Region: For PSE efforts that are in a specific area which does not encompass the entire state. State: For PSE efforts that are statewide.*

13. Identify the Phase under the heading “Phases”.


Phases

Select the phase of this PSE effort:

- Adoption 
- Implementation 
- Maintenance 



Note:

Use the “” icon to view definitions. *Adoption: A coalition or program site is deciding to initiate a PSE effort. Specific changes have been discussed and at least one change has been made. Implementation: Planned PSE efforts have been made or are in process. Maintenance: The PSE efforts are ongoing, with plans, such as policy adoption or resource allocation, in place to sustain these changes long term.*

14. Enter the “PSE Initiative Narrative” by completing each narrative box.

PSE Initiative Narrative

Target Audience (200 character limit)



What was the overall goal? (200 character limit)

What was accomplished and lessons learned? (200 character limit)

Partnerships or collaborations developed as a result of this effort? (200 character limit)

What are plans for long term implementation & maintenance? (200 character limit)

Describe the outcomes of this effort (1000 characters or less)

Normal  **B** *I* U    



15. Select if you would like the PSE initiative to roll into the next fiscal year.

Would you like this PSE initiative to roll into the next fiscal year?


- Yes
 No

16. Click **“Cancel”** to cancel without saving, **“Save”** to save the impact, and **“Save and add another”** to save and report a new effort.


Cancel Save Save and Add Another


17. For Region Level impacts/examples, use the “” icon to preview/edit the impact or the search box to search for impacts. Institution Level users can make edits to Region Level impacts/examples and those edits become visible to all users after they are saved.
18. If needed, use the “” icon to hide Region or Institution Level impacts or examples from the view.




The “” icon will only be visible if the impact has not been submitted; the user cannot hide an impact if it has been submitted to the Federal Office.

19. If the user hides an example by mistake, click the “**View Hidden Settings and Sectors: Policy, Systems, and Environmental (PSE) Change**” button.

 [View Hidden Settings and Sectors: Policy, Systems and Environmental \(PSE\) Change](#)

20. Click the “” icon to unhide the impact.
21. Click the “**View Settings and Sectors: Policy, Systems, and Environmental (PSE) Change**” button to return to the list of active impacts.

 [View Settings and Sectors: Policy, Systems and Environmental \(PSE\) Change](#)

WebNEERS Instructions - Region Level User



1. Log in as a Regional Level user.
2. Select “**Manage Settings and Sectors: Policy, Systems, and Environmental (PSE) Change**” from the *WebNEERS Home Page*.
3. Click “**Add Settings and Sectors: Policy, Systems and Environmental (PSE) Change**” to create a Region Level impact.
4. Select the “**Submit for Institute Use**” box to make this visible at the Institute Level (note, this box is checked by default).
5. Indicate the **title** under the “Settings and Sectors: Policy, Systems and Environmental (PSE) Change” heading.
 - a. An example title may be the name of the agency or the Policy, Systems or Environmental Change effort.

Settings and Sectors: Policy, Systems and Environmental (PSE) Change


Title

6. Identify the effort as “**Organizational Partnership (Settings)**” or “**Multi-Sector Partnerships and Planning (Sectors)**” level of influence under the heading “Is this PSE Effort Classified as Organizational Partnership (Settings) or Multi-Sector Partnerships and Planning (Sectors)?”

Is this PSE Effort Classified as Organizational Partnership (Settings) or Multi-Sector Partnerships and Planning (Sectors)?

- Organizational Partnership (Settings) 
- Multi-Sector Partnerships and Planning (Sectors) 

Note:

Descriptions for each are included in WebNEERS by hovering the mouse over the  icon. Definitions are included here. Use *Organizational Partnership (Settings)* to record information on partnerships at the site (e.g. school), organization (e.g. school district), or complementary level. *Multi-Sector Partnerships (Sectors)* all have an important role in helping individuals make healthy choices because they either influence the degree to which people have access to healthy food and/or opportunities to be physically active, or they influence social norms and values. *Multi-Sector Partnerships* should encompass at least 3 diverse sectors.

Note:

Selecting either “*Organizational Partnership (Settings)*” or “*Multi-Sector Partnerships and Planning (Sectors)*” will populate the next section in WebNEERS related to the choice selected.

7. By selecting “**Organizational Partnership (Settings)**”, a list of settings will appear. List the number by type of partnerships that regularly meet, exchange information, and identify and implement mutually reinforcing activities that will contribute to adoption of one or more organizational changes or policies. Partnerships can include settings such as Homes, Early Child Care and Education, Schools, Worksites, Recreational Facilities, Food Service and Retail Establishments, or Other Community Settings. Enter a number to indicate the number of each setting involved in this PSE. At the bottom of each section, you can select “**Add Other**” to add a setting not represented in this list.

Organizational Partnership (Settings)

List the number by type of partnerships that regularly meet, exchange information, and identify and implement mutually reinforcing activities that will contribute to adoption of one or more organizational changes or policies. Partnerships can include settings such as Homes, Early Child Care and Education, Schools, Worksites, Recreational Facilities, Food Service and Retail Establishments, or Other Community Settings.

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Emergency food assistance centers

Extension Offices

Farmers Markets

Food Stores

Head start sites

Health care sites

Libraries

Other youth education sites

Parks and recreational facilities

Places of worship

Public housing

Schools
 Shelters
 SNAP offices
 WIC program sites
 Work Sites

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Multi-Sector Partnerships and Planning (Sectors)

Select the number and types of organizations represented and enter the number of each involved in this effort (Select all that apply).

Systems

Government
 Education
 Health Care
 Transportation

Organizations

Public Health
 Community

Business and Industries

Planning & Development
 Agriculture

Food & Beverage
 Retail
 Media

9. Identify the Focus Areas applying to this PSE effort under the heading **“Focus Areas”**. Select all that apply.

Focus Areas

Diet Quality
 Physical Activity
 Food Resource Management
 Food Safety
 Food Security



For each Focus Area selected, additional options will populate below related to each effort.

10. For each of the selected responses under Focus Area including **“Diet Quality”**, **“Physical Activity”**, **“Food Resource Management”**, **“Food Safety”**, and **“Food Security”** that populate, select the type of changes occurring as a result of this PSE effort. Select all that apply.

Diet Quality

Focus Area - Diet Quality ?

What type of changes occurred from this initiative? (select all that apply)

Environmental Change ?
 Systems Change ?
 Policy Change ?

Physical Activity

Focus Area - Physical Activity [?](#)

What type of changes occurred from this initiative? (select all that apply)

- Environmental Change [?](#)
- Systems Change [?](#)
- Policy Change [?](#)

Food Resource Management

Focus Area - Food Resource Management [?](#)

What type of changes occurred from this initiative? (select all that apply)

- Environmental Change [?](#)
- Systems Change [?](#)
- Policy Change [?](#)

Food Safety

Focus Area - Food Safety [?](#)

What type of changes occurred from this initiative? (select all that apply)

- Environmental Change [?](#)
- Systems Change [?](#)
- Policy Change [?](#)

Food Security

Focus Area - Food Security [?](#)

What type of changes occurred from this initiative? (select all that apply)

- Environmental Change [?](#)
- Systems Change [?](#)
- Policy Change [?](#)



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Community Members Influenced

Potential number of persons who encounter the improved environment or are affected by the policy change on a regular (typical) basis and are assumed to be influenced by it during this fiscal year.

--Select One-- ▾

12. Identify the type of participants reached under the heading “**Participant Type**”. Select all that apply.

Participant Type

Adult

Youth


13. Identify the level of reach under the heading “**Local Level vs State Level**”.

Local Level vs State Level

Region ?

State ?






Use the “” icon to view definitions. *Region: For PSE efforts that are in a specific area which does not encompass the entire state. State: For PSE efforts that are statewide.*


14. Identify the Phase under the heading “Phases”.

Phases

Select the phase of this PSE effort:

- Adoption 
- Implementation 
- Maintenance 



Use the “” icon to view definitions. *Adoption: A coalition or program site is deciding to initiate a PSE effort. Specific changes have been discussed and at least one change has been made. Implementation: Planned PSE efforts have been made or are in process. Maintenance: The PSE efforts are ongoing, with plans, such as policy adoption or resource allocation, in place to sustain these changes long term.*

15. Enter the “PSE Initiative Narrative” by completing each narrative box.

PSE Initiative Narrative

Target Audience (200 character limit)






What was the overall goal? (200 character limit)

What was accomplished and lessons learned? (200 character limit)

Partnerships or collaborations developed as a result of this effort? (200 character limit)

What are plans for long term implementation & maintenance? (200 character limit)

Describe the outcomes of this effort (1000 characters or less)


Normal  **B** *I* U    


16. Select if you would like the PSE initiative to roll into the next fiscal year.



Would you like this PSE initiative to roll into the next fiscal year?

Yes
 No


17. Click **“Cancel”** to cancel without saving, **“Save”** to save the impact, and **“Save and add another”** to save and report a new effort.


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19. If needed, use the  icon to hide Region or Institution Level impacts or examples from the view.

 **Note:** The  icon will only be visible if the impact has not been submitted; the user cannot hide an impact if it has been submitted to the Federal Office.

20. If the user hides an example by mistake, click the **“View Hidden Settings and Sectors: Policy, Systems, and Environmental (PSE) Change”** button.

 [View Hidden Settings and Sectors: Policy, Systems and Environmental \(PSE\) Change](#)

21. Click the “” icon to unhide the impact.
22. Click the “**View Settings and Sectors: Policy, Systems, and Environmental (PSE) Change**” button to return to the list of active impacts.

 [View Settings and Sectors: Policy, Systems and Environmental \(PSE\) Change](#)