

EMPLOYEE ENGAGEMENT

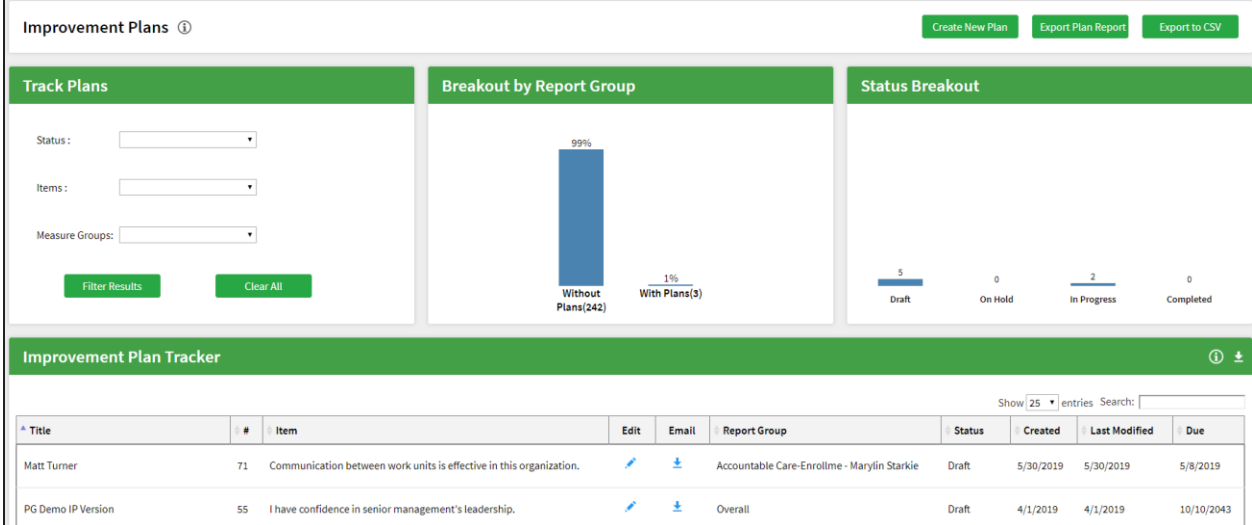
NAVIGATING THE IMPROVEMENT PLANS PAGE

This resource will help you navigate and understand the Improvement Plans page.

Page Overview

The Improvement Plans page provides information useful for creating and managing improvement plans. Additionally, it allows you to track and report progress on the completion of plans.

The home page is laid out with a series of summary tiles that offer quick access to desired improvement plan information, as described next.



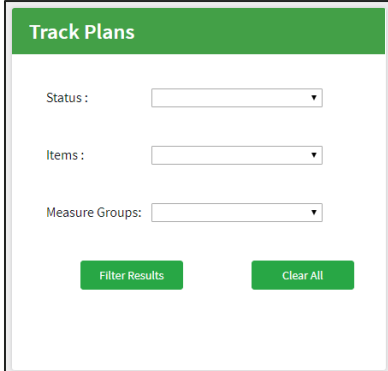
The screenshot shows the 'Improvement Plans' dashboard. At the top right, there are buttons for 'Create New Plan', 'Export Plan Report', and 'Export to CSV'. The dashboard is divided into three main sections: 'Track Plans', 'Breakout by Report Group', and 'Status Breakout'. Below these is the 'Improvement Plan Tracker' table.

Title	#	Item	Edit	Email	Report Group	Status	Created	Last Modified	Due
Matt Turner	71	Communication between work units is effective in this organization.			Accountable Care-Enrollee - Marylin Starkie	Draft	5/30/2019	5/30/2019	5/8/2019
PG Demo IP Version	55	I have confidence in senior management's leadership.			Overall	Draft	4/1/2019	4/1/2019	10/10/2043

TRACK PLANS TILE

The Track Plans tile allows you to manage the improvement plan tracker section at the bottom of the screen. From this tile, you can filter by a status, by items, or by a measure groups—which includes metrics, domains, themes, and modules.

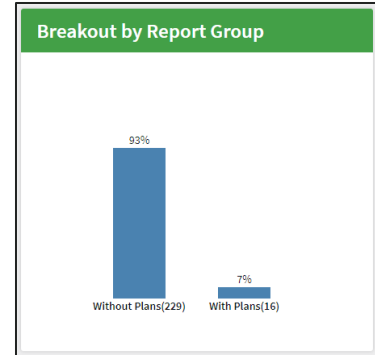
Each dropdown is a single-selection filter. After selecting the type of plan you want to see, click **Filter Results** to apply it to the Improvement Plan Tracker. Click **Clear All** to remove all your selections.



The 'Track Plans' tile contains three dropdown menus for filtering: 'Status', 'Items', and 'Measure Groups'. Below the dropdowns are two buttons: 'Filter Results' and 'Clear All'.

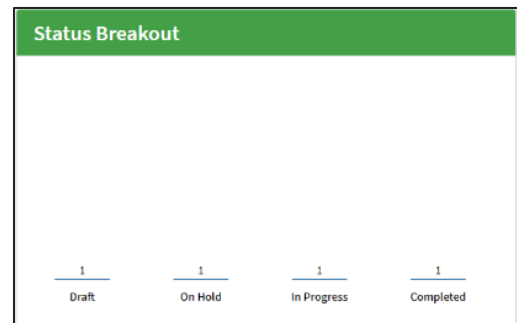
BREAKOUT BY REPORT GROUP TILE

The Breakout by Report Group tile is a summary tile. This graph shows the percentage of units in the organization that have plans submitted, and those that do not. It also shows how many units have plans, and how many do not.



STATUS BREAKOUT

The Status Breakout tile is a summary tile that provides a quick glance view of the status of all created plans. Each status is represented here, and the graph will show you the number of plans assigned to each status.



IMPROVEMENT PLAN TRACKER







The Improvement Plan Tracker at the bottom of the screen is a table that shows all plans created for an organization. It displays this information:

- The group the plan was created for
- The survey item the plan is built for
- The title and status of the plan
- Pertinent dates for the plan: when it was created, when it was last modified, and due date

Improvement Plan Tracker									
Title	#	Item	Edit	Email	Report Group	Status	Created	Last Modified	Due
Example #1	24	This organization provides career development opportunities.			Womens Svcs - Hopedale Medical Center (Arleen Pitt)	Completed	8/17/2021	8/17/2021	8/18/2021

EDITING AND EXPORTING ACTION PLANS

In the Improvement Plan Tracker, you can complete two functions. If you have access to edit action plans, you can click the **Edit** hyperlink within each plan; this will take you directly to the editing page of the plan, from where you can make changes. You can also click the **Email** hyperlink to send a PDF version of the plan via email.

Improvement Plan Tracker									
Title	#	Item	Edit	Email	Report Group	Status	Created	Last Modified	Due
Matt Turner	71	Communication between work units is effective in this organization.			Accountable Care-Enrollme - Marylin Starkie	Draft	5/30/2019	5/30/2019	5/8/2019
PG Demo IP Version	55	I have confidence in senior management's leadership.			Overall	Draft	4/1/2019	4/1/2019	10/10/2043
Sample Contribution to Community Plan	9	This organization contributes to the community.			Overall	Draft	6/6/2019	6/6/2019	8/30/2019

SORTING AND SEARCHING

Sort by column headers or use the Search feature to search for key words.

Improvement Plan Tracker		
▲ Title	▲ #	▲ Item
Staffing perceptions	70	My work unit is adequately staffed.

Search:

Creating New Improvement Plans

At the top of the screen are buttons that allow you to create a new improvement plan, export a plan report to CSV or PDF format.

Export Plan Report will provide you with a pdf report of all plans currently listed in the Improvement Plan Tracker. **Export to CSV** will create a report of all plans currently listed in the Improvement Plan Tracker in CSV format.

