

Annual Tasks

Some tasks will need to be completed each year, including renewing Contracts, creating new Milestones, and creating a new forecast. For more information about each task, see the corresponding page earlier in this Guide.


Annual Contract Renewal

Renew Contract

Start on the Agency Listing page:

- 1 Find Contract to renew in CONTRACTS GRID
- 2 Click RENEWAL button
- 3 Click on Contracts page link in Navigator Bar to open that page
- 4 Find Contract in top section
 - a Contract that was active on Agency Listing page should be active here
 - b Use blue arrows in toolbar to scroll through Contracts
- 5 New record will now be available in second section
 - a If not immediately visible, click REFRESH button
- 6 Check Start and End Dates
- 7 Enter new Contract Number
- 8 Enter Contract Amount
- 9 Enter or select other Contract information
- 10 Click SAVE button in second section
- 11 Check the Target Area link in the third section to make sure the Target Links are still correct

If additional Target Areas need to be linked:

- 12 Click NEW in third section
- 13 Click the PERFORMANCE MEASURE button to open the popup window 
- 14 Select the Target Area
- 15 Click the SELECT button
- 16 Enter Title of Performance Measure
- 17 Enter Performance number
 - a This is the number of people the Agency is contracted to get to this Target Area
- 18 Click to create a checkmark in the IS NUMBER box if this number is a whole number rather than a percentage
- 19 Make sure ACTIVE box is checked
- 20 Click SAVE in third section
- 21 Repeat for additional Performance Measures
- 22 Check to make sure Contact information is still correct

If new Contacts need to be added:

- 23 Click NEW button in bottom section
- 24 Enter Contact information
- 25 Click SAVE button in bottom section
 - a Use DELETE to remove unneeded Contact

Update Funding Code Details

Funding codes will need to be updated only if using multiple Contracts in the Funding Code and percentages and/or dates have been assigned to each one:

- 1 Find Funding Code to update in FUNDING CODE GRID on left
- 2 Linked Contracts will appear in the Funding Code Contracts Grid at bottom left
- 3 Click DETAILS button
- 4 Click NEW button
- 5 Enter Start and End Dates of new Contract
- 6 Enter Percentage this Contract will contribute
- 7 Enter Comments
- 8 Click SAVE button
- 9 Use NEXT and PREVIOUS buttons at top to bring up other Contracts linked to this Funding Code
- 10 Repeat process for each Contract
- 11 Click CLOSE when finished

Annual Program Closeout Date

Create new Closeout Date for each Program

- 1 Select the Program in the PROGRAMS GRID on the Program Setup page
- 2 Click the DETAILS button
- 3 In the popup window, enter the new Closeout Date
 - a This can be done any time before the actual date
- 4 Use NEXT or PREVIOUS button to jump to next Program, repeat for each Program

Annual Program Component and Milestone Renewal/Creation


Create new Program Components and Milestones

Milestones for each Program Component need to be recreated each year. Last year's Milestones may be copied or new ones can be created from scratch; if they are copied, they can still be edited. Milestones can be recreated for one Program Component one by one or for the entire Program at once.

Copy Milestones of ONE Program Component to new Milestone Year

- 1 Select Program in the Program dropdown at the top of page
 - 2 Select Program Component in the dropdown
 - 3 Select Year to Copy TO in dropdown below NEW and SAVE buttons
 - 4 Click COPY TO button
 - a This creates the same set of Milestones for the new Milestone Year, you may need to edit Title
 - b It uses the same Start and End Dates with the new year
 - c It also copies the link with any Target Areas that were created for the copied set of Milestones
- See the Program Targets page for more information about editing any of the Milestones.

Copy Milestones of ALL Program Components of an entire Program to new Milestone Year

- 1 Select Program in the Program dropdown at the top of page
- 2 Click COPY MILESTONES FOR SELECTED PROGRAMS button in the top section 
- 3 Message will appear saying successful copy was completed
- 4 This copies the Milestones for ALL Program Components of the selected Program to the next Milestone Year
- 5 When NEXT button is clicked, Milestone Year will jump to next year, Start and End Date will indicate same dates with new year and Milestones will appear in MILESTONE GRID

See the Program Targets page for more information about editing any of the Milestones.