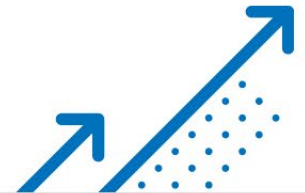


# Instructions for Action Plan Owners



- Action plan updates are required quarterly
- Action plan progress is updated through a three-part process:
  1. Narrative (the following template items are in bold below):
    - **Highlights** and **Barriers**: this portion of the update includes an overview of the work to date including anything the action plan team encountered that went well or presented challenges
    - **Next Steps**: this portion of the update includes outline where the team expects to see progress in the next quarter
  2. Status: choose the status that best corresponds to the narrative update. Status options include:
    - On Track
    - Some Disruption
    - Major Disruption
    - Completed
  3. Progress: set the progress bar at the appropriate progress percentage for your project
    - Action plans with weighted checklists will not have the progress option when submitting an update. Progress is automatically updated when you check an item off the list



# Upcoming Reporting Dates



FY23 Action Plan Updates	
Email Notification from Envisio	Due On
Nov. 2, 2022	Nov. 9, 2022
Feb. 2, 2023	Feb. 9, 2023
May 3, 2023	May 10, 2023

FY24 Action Plan Updates	
Email Notification from Envisio	
Aug. 3, 2023	Aug. 10, 2023
Nov. 1, 2023	Nov. 8, 2023
Feb. 1, 2024	Feb. 8, 2024
May 2, 2024	May 9, 2024

FY25 Action Plan Updates	
Email Notification from Envisio	Due On
Aug. 1, 2024	Aug. 8, 2024
Oct. 31, 2024	Nov. 7, 2024
Jan. 31, 2025	Feb. 7, 2025
May 1, 2025	May 8, 2025
Aug. 1, 2026	Aug. 8, 2025

Please note, while the final update for FY25 falls in FY26, it will be considered part of the FY25 update cycle

# How to Submit an Action Plan Update



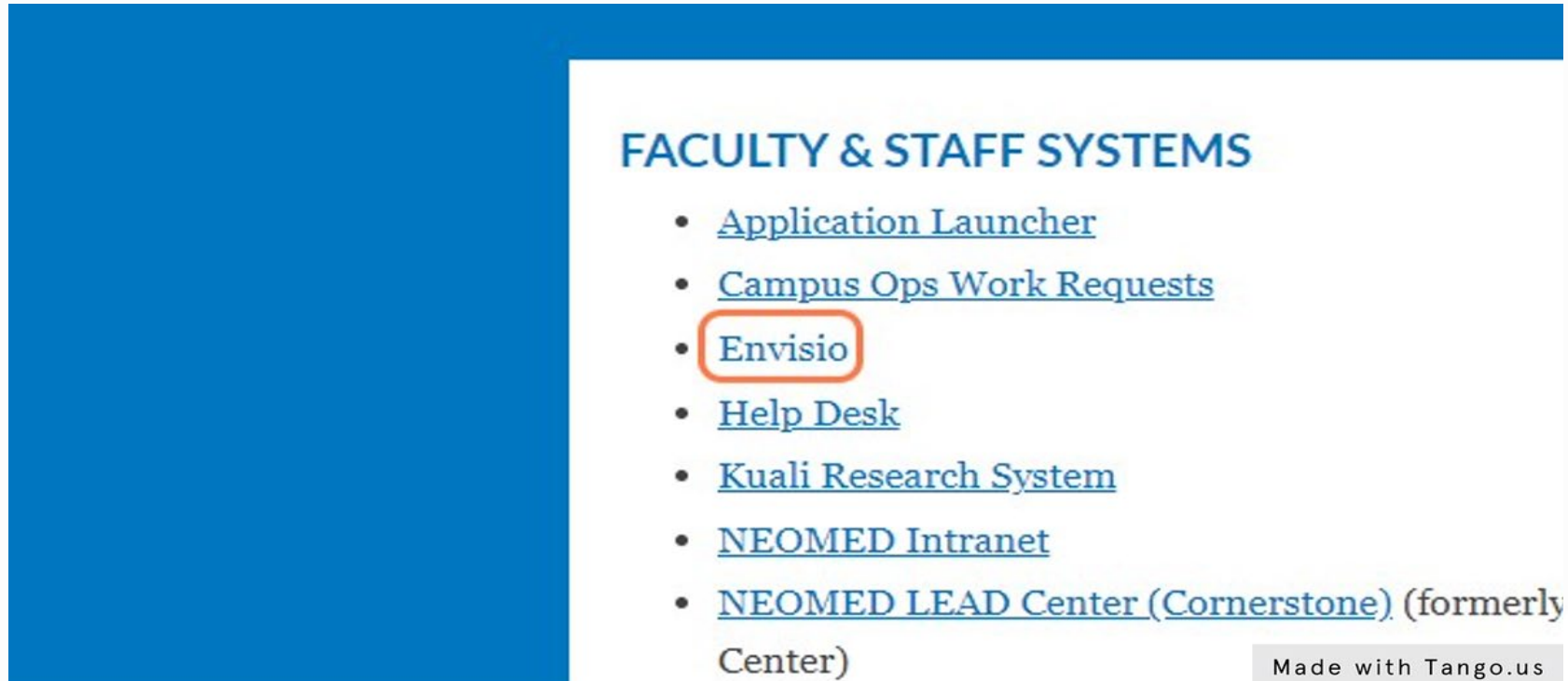
CREATING TRANSFORMATIONAL LEADERS

STEP 1

[Go to Resources & Quick Links for Faculty & Staff | NEOMED](#)

STEP 2

Click on Envisio



**FACULTY & STAFF SYSTEMS**

- [Application Launcher](#)
- [Campus Ops Work Requests](#)
- [Envisio](#)
- [Help Desk](#)
- [Kuali Research System](#)
- [NEOMED Intranet](#)
- [NEOMED LEAD Center \(Cornerstone\)](#) (formerly Center)

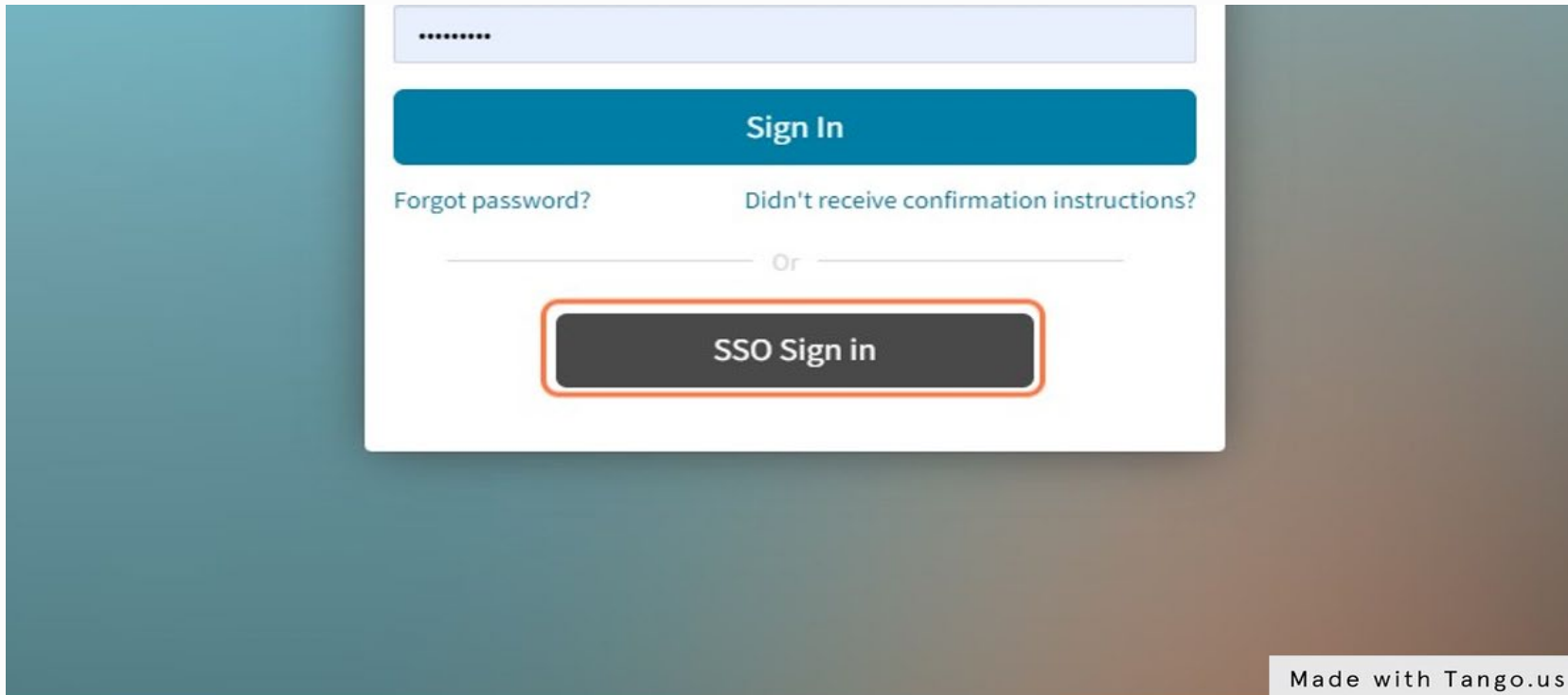
Made with Tango.us



# How to Submit an Action Plan Update

## STEP 3

Click on SSO Sign in



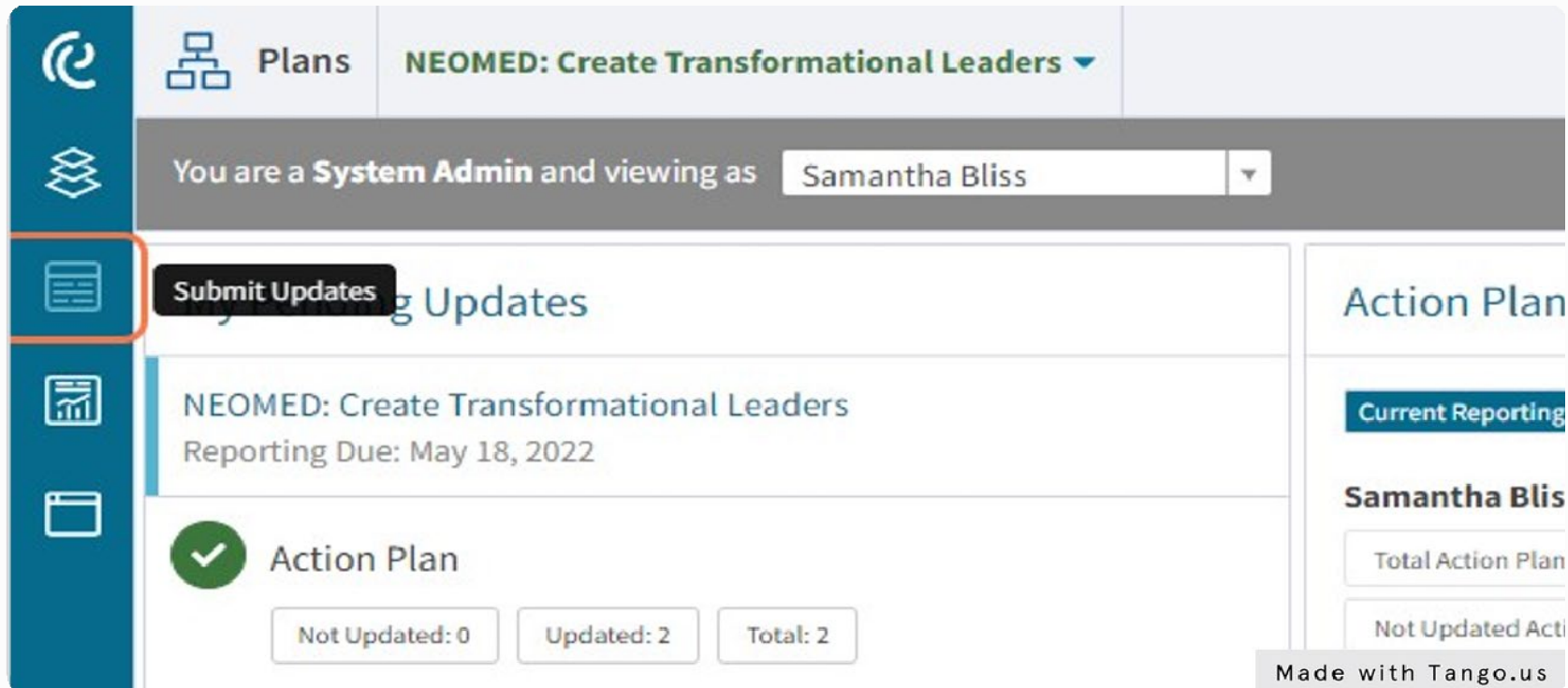
A screenshot of a login interface. At the top is a light blue password input field with a masked password "\*\*\*\*\*". Below it is a blue "Sign In" button. Under the button are two links: "Forgot password?" and "Didn't receive confirmation instructions?". Below these links is a horizontal line with the word "Or" in the center. At the bottom is a dark grey button with the text "SSO Sign in", which is highlighted with an orange rectangular border. The background of the interface is a gradient of teal and brown. In the bottom right corner of the interface, there is a small white box with the text "Made with Tango.us".



# How to Submit an Action Plan Update

## STEP 4

Click on the Submit Updates icon



The screenshot shows a web application interface for 'NEOMED: Create Transformational Leaders'. The top navigation bar includes a 'Plans' tab and a dropdown menu. Below this, a status bar indicates the user is a 'System Admin' viewing as 'Samantha Bliss'. The main content area features a sidebar with four icons: a refresh icon, a hierarchy icon, a document icon (highlighted with an orange box), and a chart icon. The document icon is labeled 'Submit Updates'. The main content area displays the title 'NEOMED: Create Transformational Leaders' and 'Reporting Due: May 18, 2022'. Below this, there is a green checkmark icon and the text 'Action Plan'. At the bottom, there are three buttons: 'Not Updated: 0', 'Updated: 2', and 'Total: 2'. On the right side, there is a section titled 'Action Plan' with a 'Current Reporting' button and a 'Samantha Bliss' header. Below this, there are two buttons: 'Total Action Plan' and 'Not Updated Acti'. A watermark 'Made with Tango.us' is visible in the bottom right corner of the screenshot.

# How to Submit an Action Plan Update



## STEP 5

Click on your assigned action plan

Plans NEOMED: Create Transformational Leaders

Submit Updates

Samantha Bliss: All All Plan Levels Overdue Pending Updates

Action Plan Reporting Due May 9, 2022

Action Plan 3.4.2 Progress 5%

Journal of Medical Sciences at NEOMED

Apr 13, 2022: Highlights

SB Jun 29, 2025 1

Made with Tango.us

# How to Submit an Action Plan Update

## STEP 6

### Click on Updates


dent-led, peer-reviewed scholarly journal ...


Oct 1, 2021

Jun 30, 2025





Priority

N/A ▾

Outcome  1 >

**Updates**  2 ▾

New Update (Reporting Period Feb 18, 2022 - May 17, 2022)

B I U |≡ ▾ |≡ ▾    

Highlights:

Barriers:

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# How to Submit an Action Plan Update

## STEP 7

Enter your update in the box. Be sure to include highlights, barriers and next steps

N/A

Outcome  1 >

Updates  2 v

New Update (Reporting Period Feb 18, 2022 - May 17, 2022)

B I U     

Copy from: Last Update

Highlights:

Barriers:

Next Steps:

Status 

On Track

Progress  5%

Submit Update

Reset

End of previous reporting periods

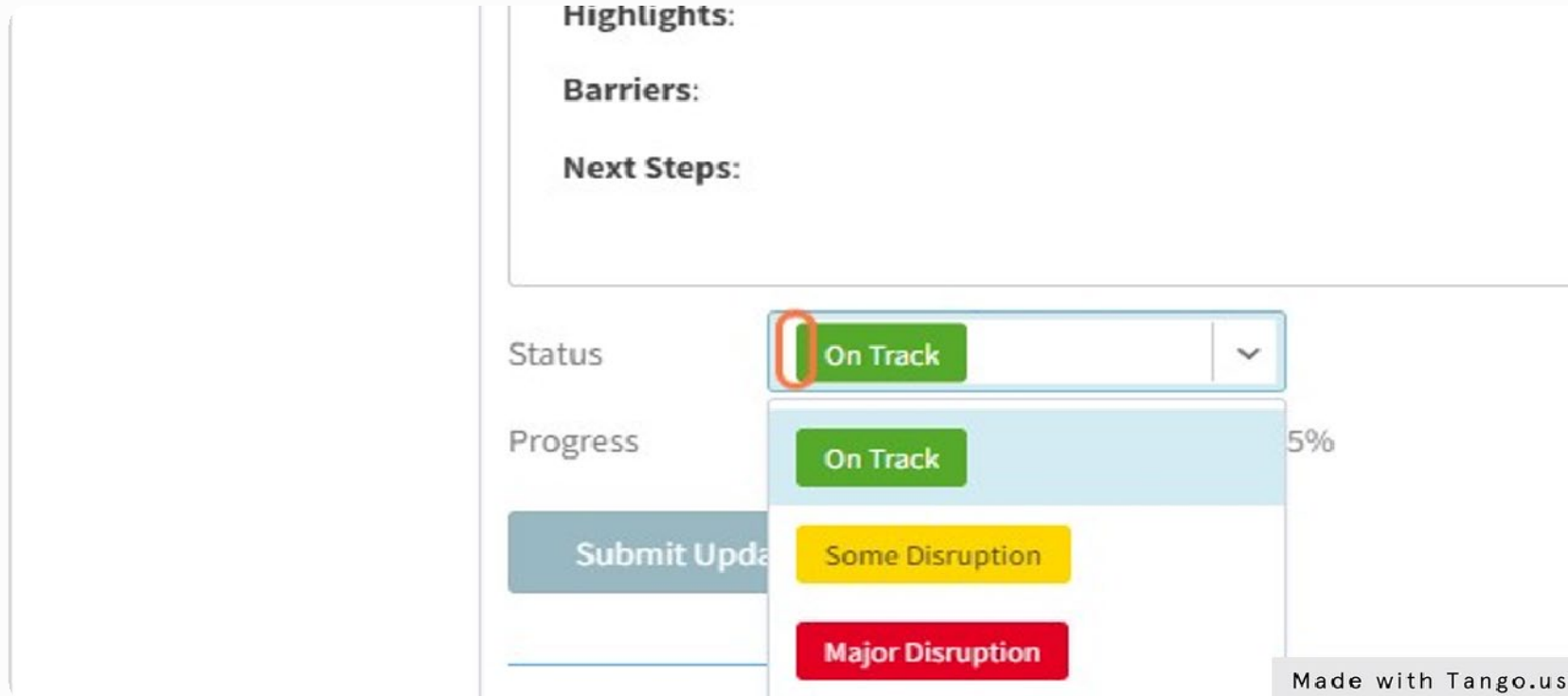
Made with Tango.us



# How to Submit an Action Plan Update

## STEP 8

Click on Status...



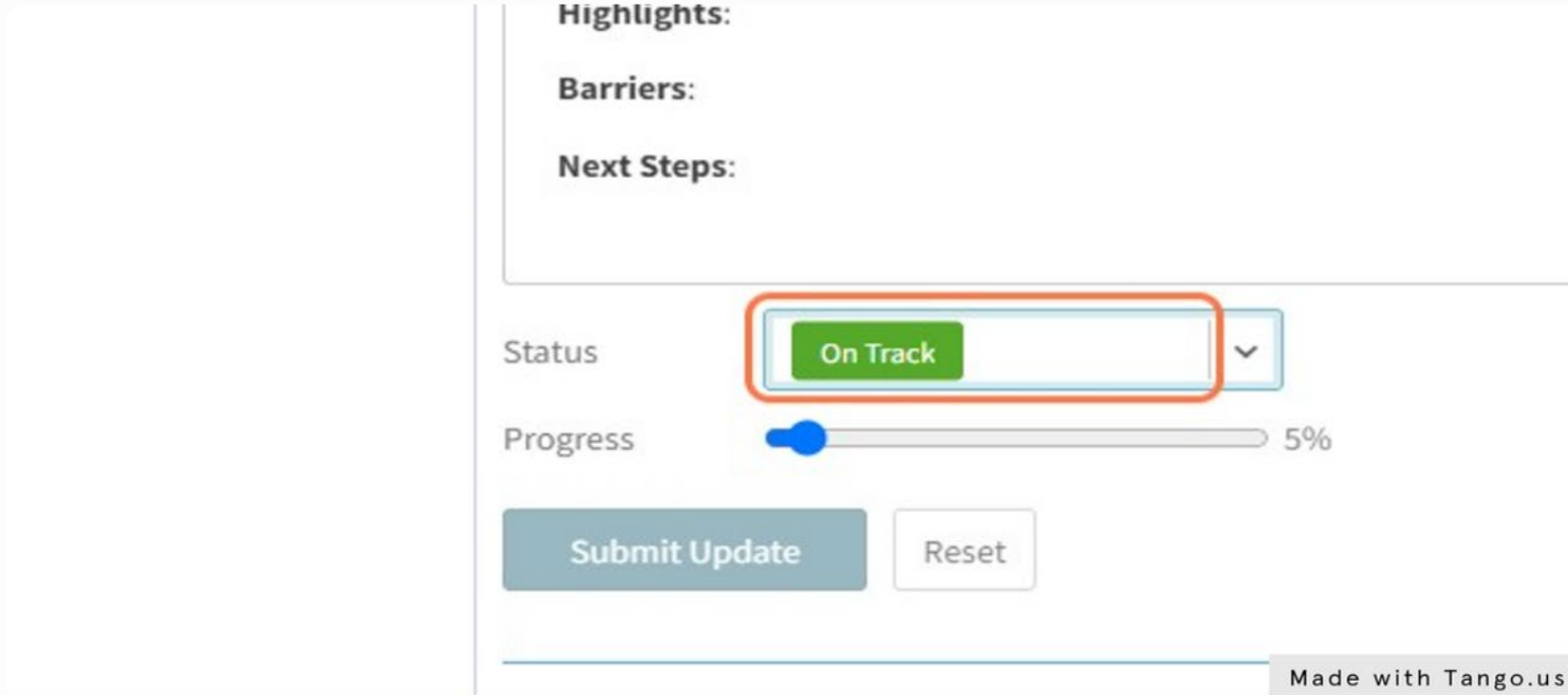
The screenshot shows a web form for submitting an action plan update. On the right side, there are three text input fields labeled "Highlights:", "Barriers:", and "Next Steps:". Below these is a "Status" dropdown menu. A red circle highlights the "On Track" option in the dropdown. The dropdown menu is open, showing three options: "On Track" (green), "Some Disruption" (yellow), and "Major Disruption" (red). To the left of the dropdown is a "Progress" label and a "Submit Update" button. A "5%" progress indicator is visible next to the "On Track" option. A "Made with Tango.us" watermark is in the bottom right corner of the form area.

Field	Value
Highlights:	
Barriers:	
Next Steps:	
Status	On Track
Progress	5%
Submit Update	

# How to Submit an Action Plan Update

## STEP 9

Click on status and choose the appropriate option from the drop down menu




The screenshot shows a form for submitting an action plan update. It includes sections for Highlights, Barriers, and Next Steps. The Status dropdown menu is highlighted with an orange box and shows 'On Track' as the selected option. Below the status is a progress slider set to 5%. At the bottom are 'Submit Update' and 'Reset' buttons. A 'Made with Tango.us' watermark is visible in the bottom right corner of the form area.

Highlights:

Barriers:

Next Steps:

Status **On Track** ▼

Progress  5%

**Submit Update** **Reset**

Made with Tango.us

# How to Submit an Action Plan Update

## STEP 10

Adjust your progress using the progress bar

Highlights:

Barriers:

Next Steps:

Status

On Track

▼


Progress

46%

Submit Update

Reset

End of previous report

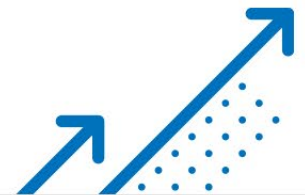
 Lacey Madison on Feb 11, 2022 16:37

On Track

Progress 5%

The Journal of Medical Sciences at NEOMED is an online, student-led, peer

Made with Tango.us



# How to Submit an Action Plan Update



CREATING TRANSFORMATIONAL LEADERS

## STEP II

### Click on Submit Update

**Next Steps:** test


---

Status On Track

Progress 46%

Submit Update Reset

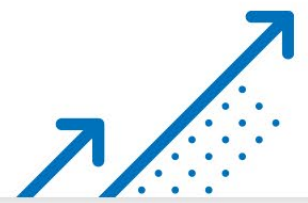
---

 Lacey Madison on Feb 11, 2022 16:37 On Track Progress 5%

The Journal of Medical Sciences at NEOMED is an online, student-led, peer-reviewed journal that provides a platform for students to publish original research, opinion pieces, editorials, reviews, abstracts and more.

**Highlights:**

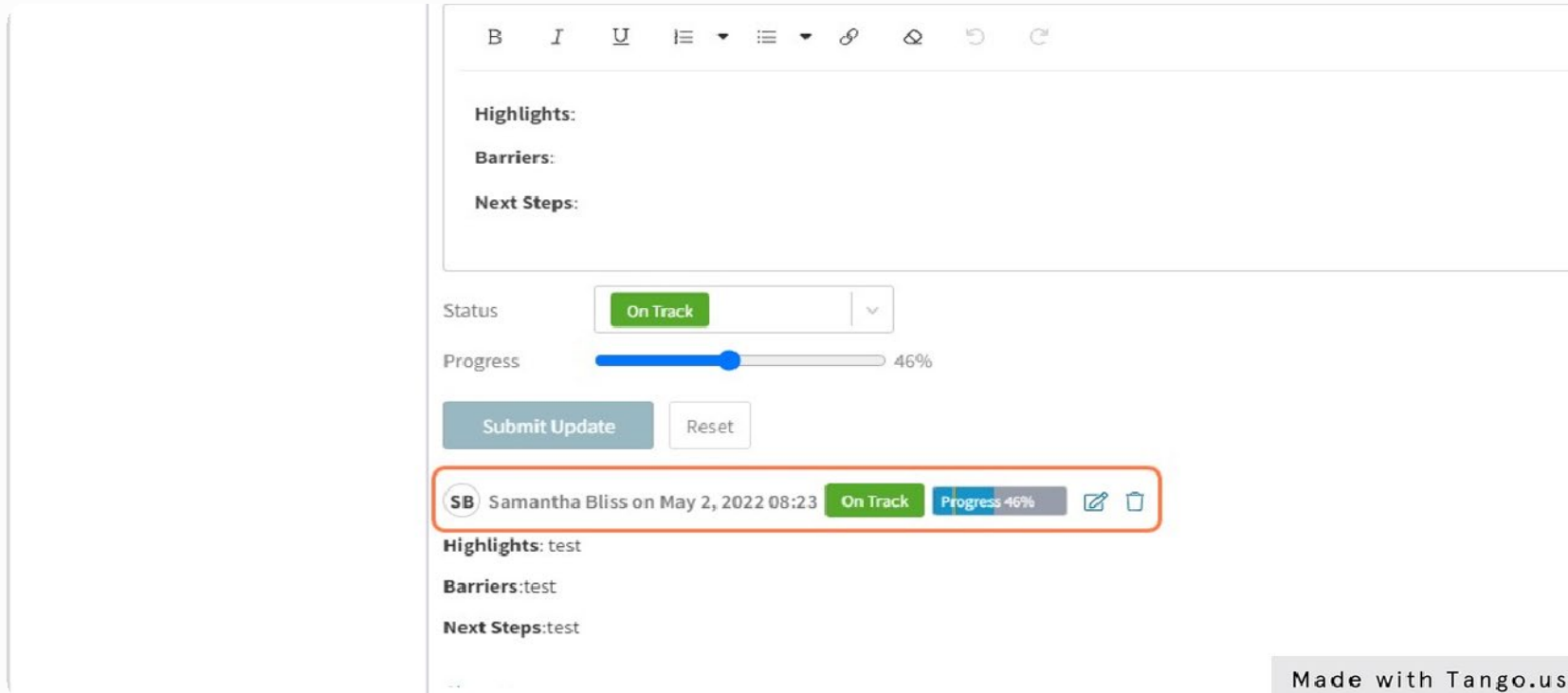
Made with Tango.us









# How to Submit an Action Plan Update

## STEP 12

If you need to edit or delete your update, click on the appropriate icons




B I U      

Highlights:



Barriers:

Next Steps:

Status On Track

Progress  46%

Submit Update Reset

**SB** Samantha Bliss on May 2, 2022 08:23 On Track Progress 46%  

Highlights: test

Barriers: test

Next Steps: test

Made with Tango.us

