

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 Staff | NEOMED](#)

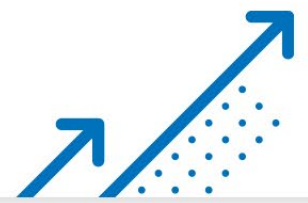
STEP 2

Click on Envisio

FACULTY & STAFF SYSTEMS

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

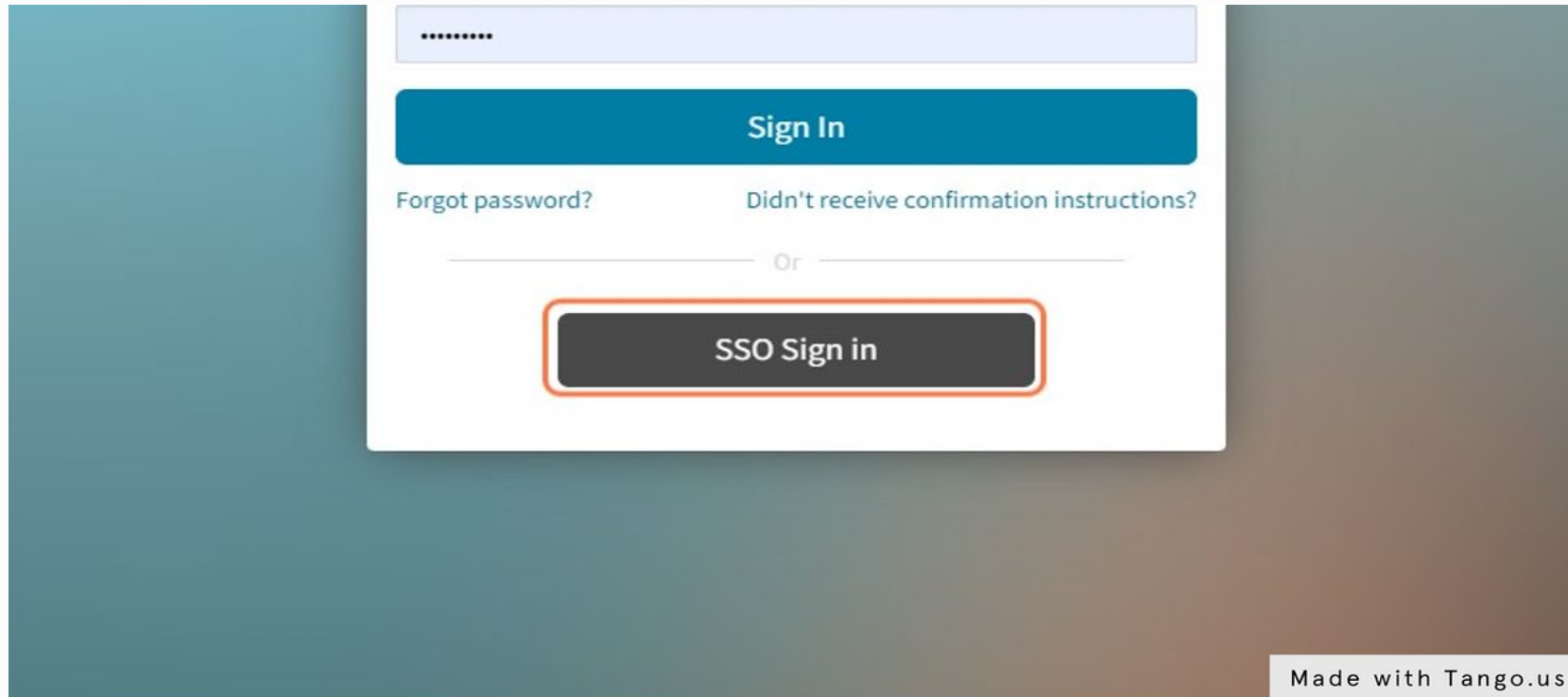
Made with Tango.us



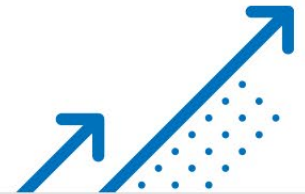
How to Submit an Action Plan Update

STEP 3

Click on SSO Sign in



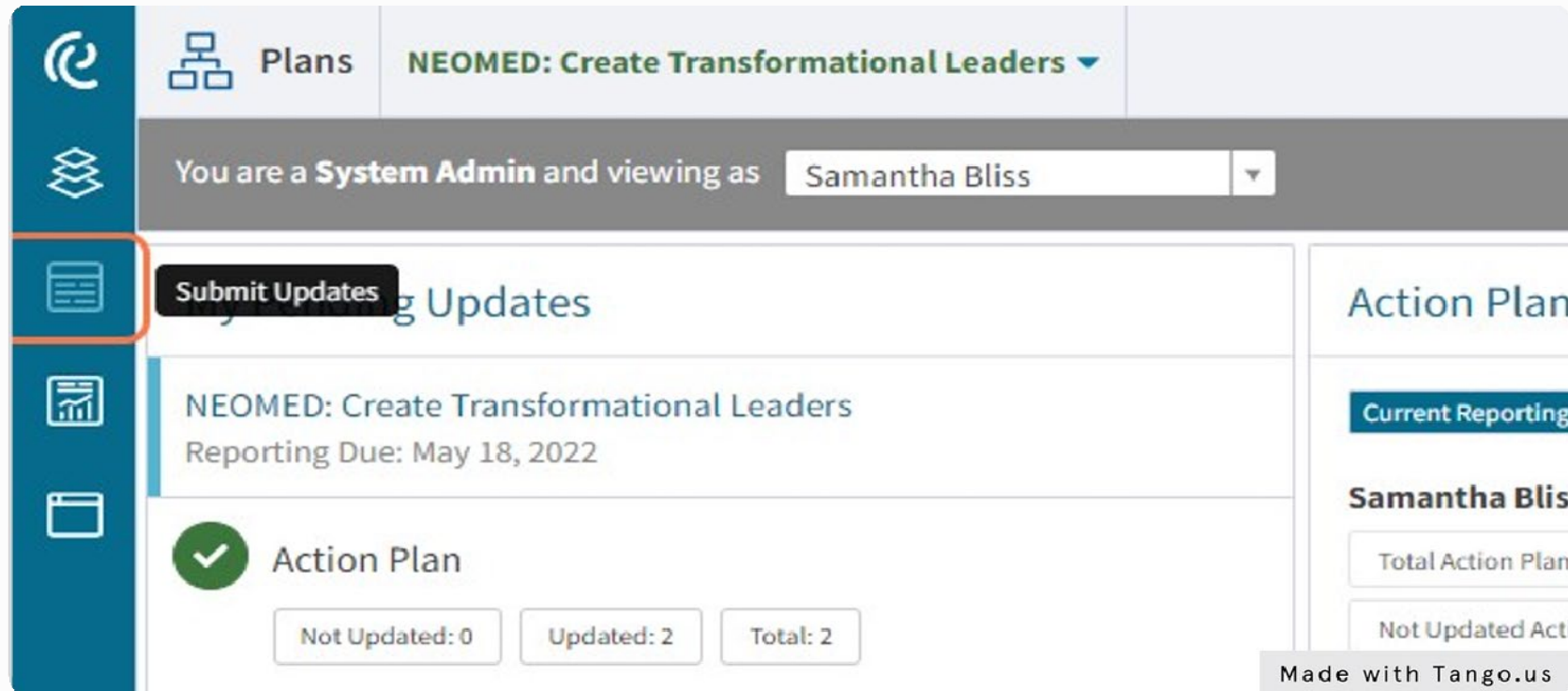
A screenshot of a login interface. At the top is a light blue input field containing a masked password (*****). Below it is a large blue button labeled "Sign In". Underneath the "Sign In" button are two links: "Forgot password?" on the left and "Didn't receive confirmation instructions?" on the right. A horizontal line with the word "Or" in the center separates these links from the "SSO Sign in" button below. The "SSO Sign in" button is a dark grey button with a thin orange border, and it is highlighted with a red rectangular box. The background of the login form is white, set against a dark teal and brown gradient background. A small watermark "Made with Tango.us" is visible in the bottom right corner of the screenshot.



How to Submit an Action Plan Update

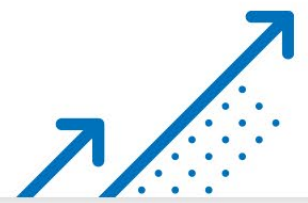
STEP 4

Click on the Submit Updates icon



The screenshot shows a web interface for 'NEOMED: Create Transformational Leaders'. The user is logged in as 'Samantha Bliss', a System Admin. The dashboard includes a sidebar with navigation icons, a main content area with a 'Submit Updates' button highlighted by an orange box, and a right-hand panel with reporting statistics. A 'Made with Tango.us' watermark is visible in the bottom right corner of the screenshot.

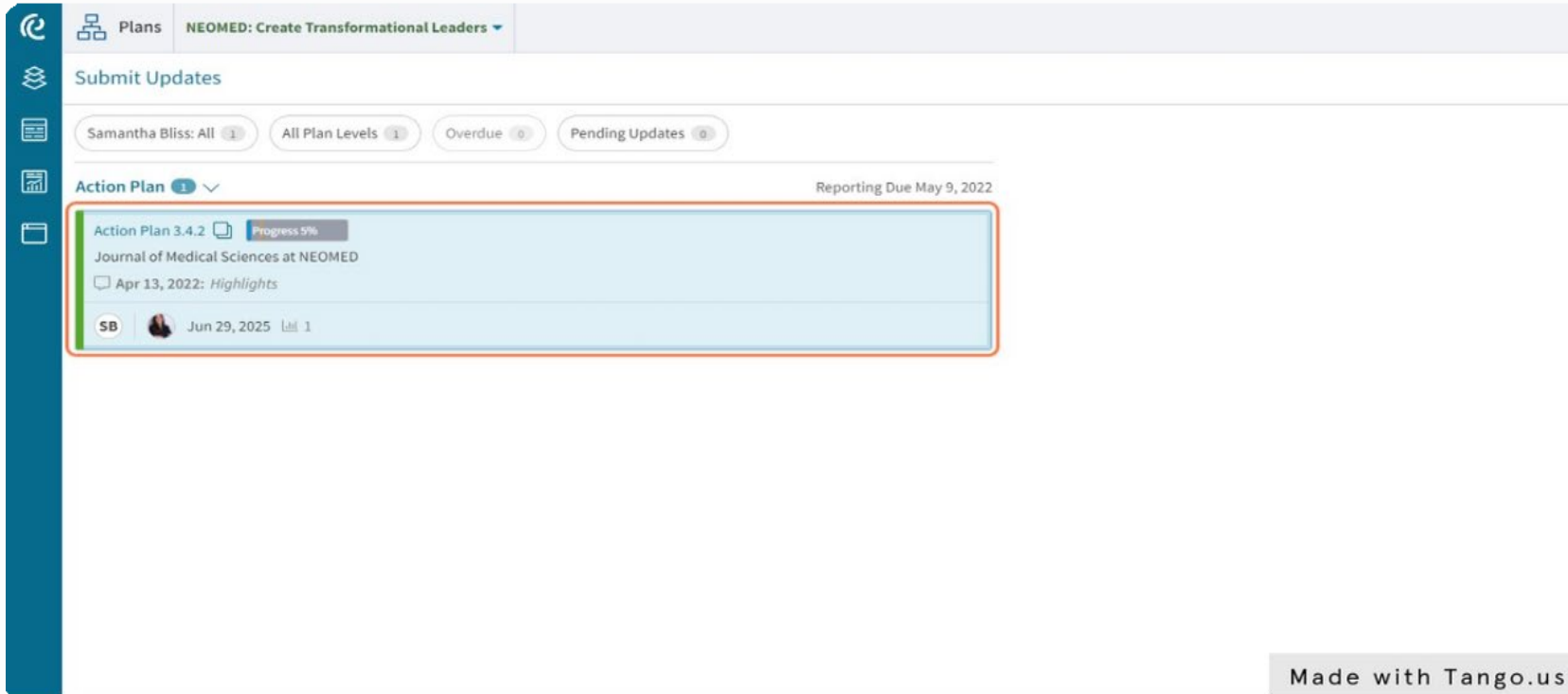
Category	Count
Not Updated	0
Updated	2
Total	2



How to Submit an Action Plan Update

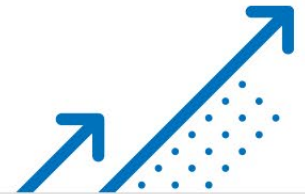
STEP 5

Click on your assigned action plan



The screenshot shows a web application interface for submitting updates. At the top, there is a navigation bar with a 'Plans' tab and a dropdown menu showing 'NEOMED: Create Transformational Leaders'. Below this is a 'Submit Updates' section with filters for 'Samantha Bliss: All', 'All Plan Levels', 'Overdue', and 'Pending Updates'. The main content area is titled 'Action Plan' and shows a reporting due date of 'May 9, 2022'. A specific action plan is highlighted with a red border, showing 'Action Plan 3.4.2' with 'Progress 5%'. The plan is for the 'Journal of Medical Sciences at NEOMED' and includes a task for 'Apr 13, 2022: Highlights'. The user 'SB' is shown with a date of 'Jun 29, 2025' and a count of '1'.

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How to Submit an Action Plan Update



CREATING TRANSFORMATIONAL LEADERS

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 ▾

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

 Copy from: Last Update

Highlights:

Barriers:

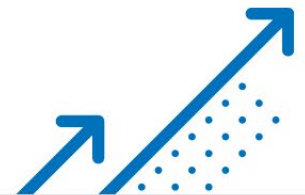
Next Steps:

Status

Progress  5%

End of previous reporting periods

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How to Submit an Action Plan Update

STEP 8

Click on Status...

Highlights:
Barriers:
Next Steps:

Status On Track ▼

Progress On Track 5%

Submit Update

Some Disruption

Major Disruption

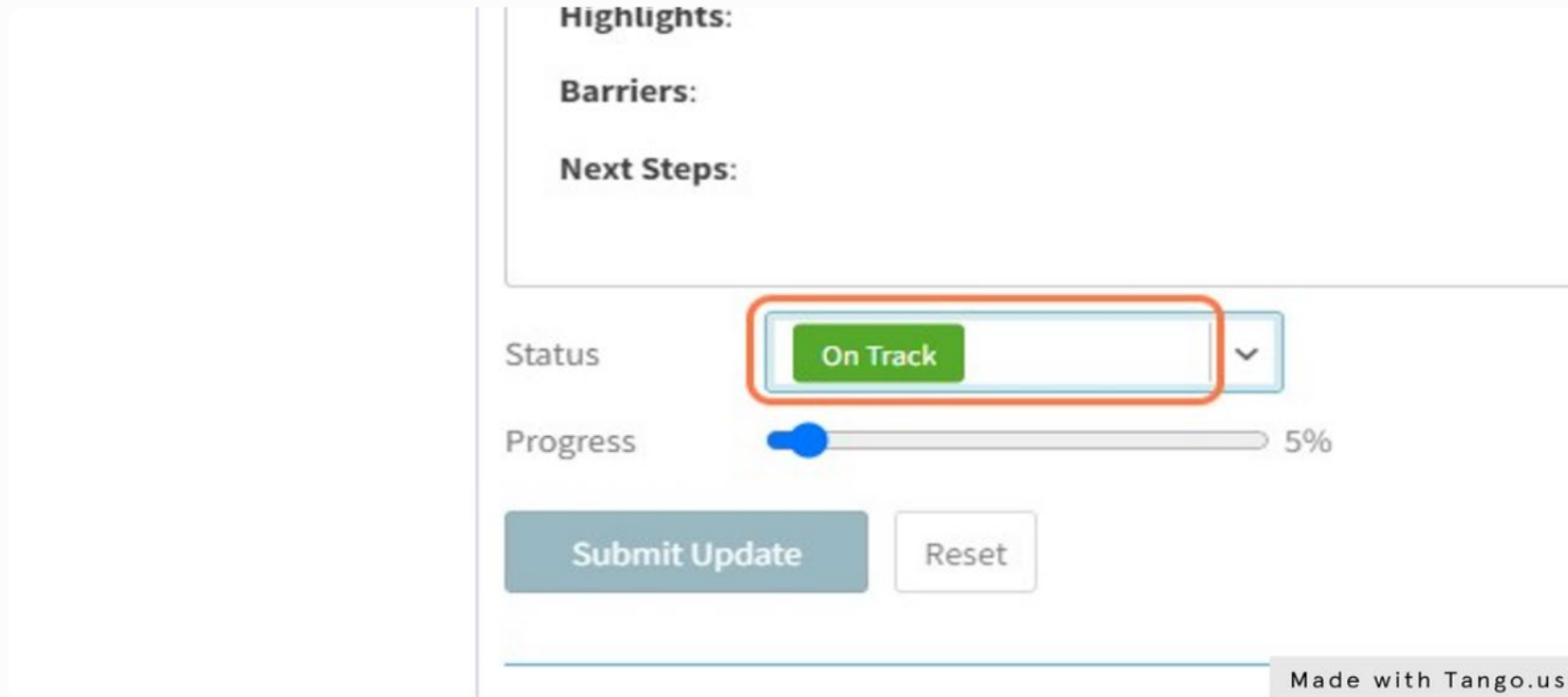
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How to Submit an Action Plan Update

STEP 9

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




Highlights:

Barriers:

Next Steps:

Status On Track ▼

Progress  5%

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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-reviewed journal. 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:

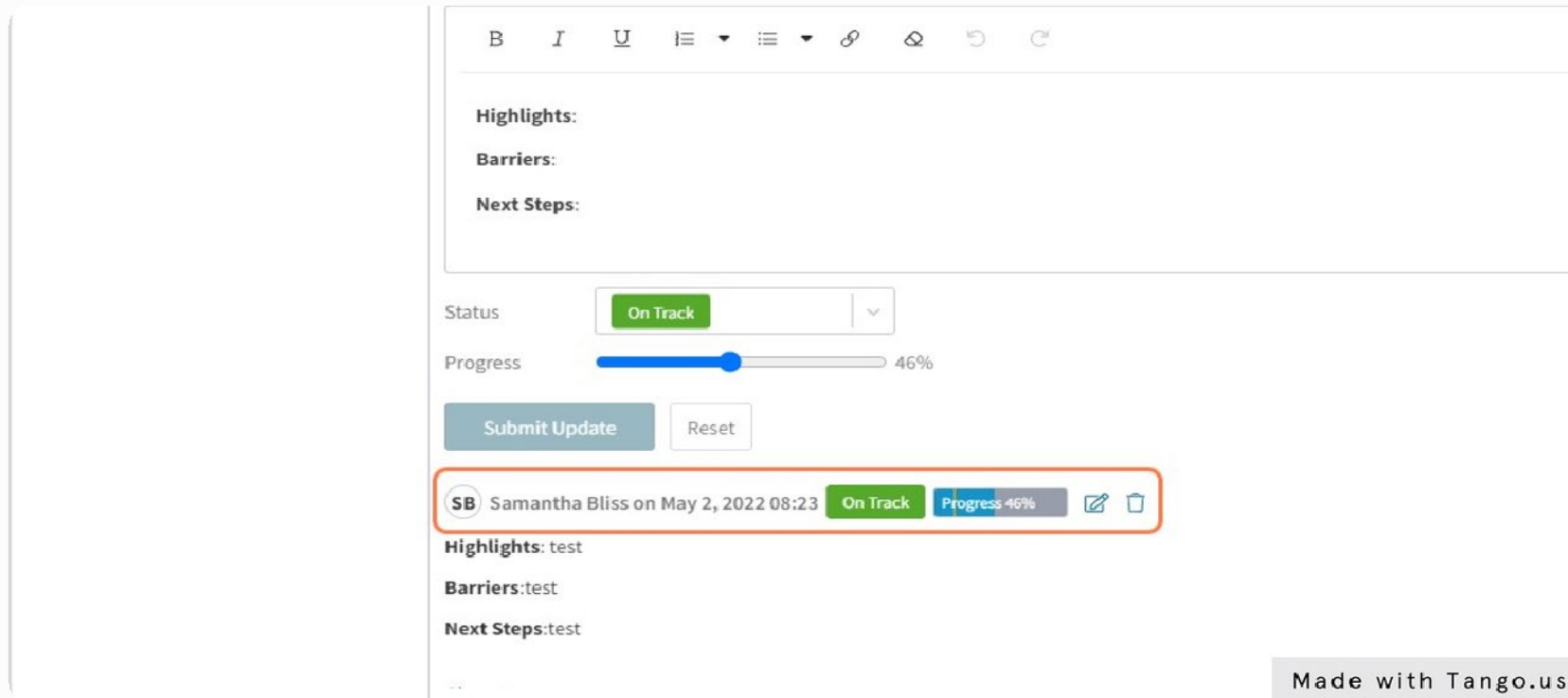
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How to Submit an Action Plan Update

STEP 12

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



The screenshot shows a web interface for submitting an action plan update. At the top is a rich text editor with a toolbar containing icons for Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Link, Unlink, Undo, and Redo. Below the editor are three text input fields labeled "Highlights:", "Barriers:", and "Next Steps:". Underneath these fields is a "Status" dropdown menu currently set to "On Track" (highlighted in green). Below the status is a "Progress" slider showing 46% completion. There are two buttons: "Submit Update" (grey) and "Reset" (white). A red rectangular box highlights a summary row for an update by "SB Samantha Bliss on May 2, 2022 08:23". This row includes a green "On Track" status indicator, a blue "Progress 46%" indicator, and two small icons: a pencil (edit) and a trash can (delete). Below this row are three text input fields labeled "Highlights:", "Barriers:", and "Next Steps:", each containing the text "test".

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