# QUICK START GUIDE



# **Contributor User Guide**

We have made Achieveit as intuitive as possible for our users to easily track and report on their strategic and operational plans all in a single place. As a Contributor user, you have the ability to provide critical progress updates on plans and access reports that will help your organization achieve its most important goals and objectives. This Quick Start Guide will walk you through the basics of how to get started.

#### Creating Plans: This part has already been completed for you!

Based on the goals of your organization, your assignments have already been created. In most cases, a regular update frequency, start dates, and due dates have already been identified for your assignments.



#### New Assignment Email Notifications

In most cases, once your new plan is activated, you will receive an email from **notifications@achieveit.com** informing you of all the plan items that you have been assigned to prove updates on throughout your planning cycle. There is no action required from you regarding this email - it is simply to inform you of your upcoming assignments.

From: notifications@achieveit.com [mailto:notifications@achieveit.com] Sent: Tuesday, October 07, 2014 3:00 AM To: _Tom Smith Subject: AchieveIt New Assignment	
	achieveit
	Your New Assignments
	FY15 Strategic Plan
	CMS Best Practices Implemented was assigned to you by Bob Jones Start: 10/1/2014 Due: 9/30/2015
	Login to Achievelt

## **Progress Update Email Notifications**

On a regular cadence determined by your plan administrator, you will receive automatic notifications about your assigned items. These notifications will ask you to provide an update on progress for a specific time period (the past month or quarter, for example). Select 'Click to Update All' to provide progress updates on any items with an outstanding request:

achieve <b>it</b>		
Your Progress Updates		
Drew Swinney has requested an update on the follo to update all of your items. You will not be required days.	owing item: I to log in, b	s. Click the button below ut the link will expire in 7
Click to Update A	All	
2019 Strategic Plan		
Item Increase Existing Markets Revenue for 2019 H1	Status On Track	<b>End of Period</b> 4/10/2020
Click to Update A	All	

## **Providing Progress Updates**

Clicking the link within your email notification will redirect you to your own customized landing page. On this page, you will be able to select the relevant status and provide commentary about your assigned item's current status. Achievelt always recommends providing commentary to explain how you're doing with work on this item, as well as what you'll be focused on next to continue progress. If your assignment is a measurable item, you will also be required to provide the item's current value in the 'Current Value' field. Do **not** include symbols for the unit of measurement, such as \$ or %. Only include the numeric value.

Once you mark an assigned item as **Achieved**, **Not Achieved** or **Canceled** the software will no longer send you notifications for additional progress updates throughout the remainder of your plan's lifecycle.

Э	achieveit	0 Late	Login to Achievelt
	Hawkins Labworks (Demo)		
	1.1 - Stabilize & Decrease Patient Wait Times		
	PLAN 🌲 Operating Plan FY 2022 - 2023		
	ALIGNS TO Lab Operations		
	LEVEL Goal		
	DESCRIPTION Sample description h V		
	CURRENT STATUS START DATE DUE DATE METRIC On Track 1/1/2002 12/21/2002 Statu between baceling of 5 and target of 16	BASELINE TARGET CURRENT VALUE	
	Show Previous Update		$\sim$
	For Period Update Due Apply This Date To Update Status	Current Value Progress Update Comment	
	5/9/2022 - 5/15/2022 5/13/2022 🗊 Select	Conter Progress Update Comment	
	Update Schedule: Weekly NOTE: You will be asked for updates until the status is changed to Achieved, N	Not Achieved, or Canceled	



#### **Progress Update Email Notifications**

Although Achievelt recommends utilizing the progress update email notifications for prompts to provide updates on your assigned items, you always have the option to log into Achievelt and provide updates within the platform as well.

- Navigate to my.achieveit.com
- Enter your email address and password. For first-time logins, you'll need to provide your temporary password. This can be confirmed with your plan administrator.

If you are having trouble getting logged in, you can always reset your password by clicking the "Reset Password" button just beneath the login button. Or you can call our 24-help desk at (866) 438-8993.

achieveit
Login
Email Address
Email Address
Password
Password
Remember Me     Reset Password     Login
Click here to login with your organization's credentials

#### My Dashboard

Your My Dashboard view will be the first page you see upon logging in. This view is custom-tailored to each individual user and will show your assigned items across any plans that you are contributing to. You can customize the information that displays on this view by clicking the 'Show/Hide Columns' button in the top right-hand corner.

You can update any of your assignments by clicking on the "Name" or "Status." Then you will be able to click the "Update Progress" button.

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My Deebbeer	d									(	$\frown$
iviy Dashboar	u 🖂									Q	Show/Hide Columns
ASSIGNED TO YOU	$\sim$	Plan	Level	Name	Status	Start	Due	Metric	Current Value	Assigned To	Updates
BY UPDATE STATUS		Operating Plan FY 2022 - 2023 😁	Goal	Stabilize & Decrease Patient Wait Times	\Theta On Track	1/1/2022	12/31/2022	Maintaining between 5 and 16	15	Rachel Santos (Achievelt Admin)	
🛱 Late Updates	0	Operating Plan FY 2022 - 2023 😌	Initiative	Online Check In Process	\Theta On Track	1/1/2022	6/1/2022	Staying above 50%	27%	Rachel Santos (Achievelt Admin)	
Pending Updates	1	Operating Plan FY 2022 - 2023 🕤	Initiative	E-Record Portal	On Track	1/1/2022	12/31/2022			Rachel Santos (Achievelt Admin)	
BY DUE DATE											
O Past Due Items	0										
O Due in Next 7 Days	0										
o bue in the xt bo buys											
O Not Started	0										
O Not Started	0										
On Track	3										
Off Track											
At Risk	0										
⊗ Achieved	0										
Not Achieved	0										
Canceled	0										
BY PLAN											
Operating Man FY 2022 - 202	3 3										
BY TAG	Any										
high priority	3										



You can update any of your assigned items by clicking on the plan item's name in the Name column. Once your plan item's details appear, look for the outstanding update on your item's Timeline. Pending update requests will display in blue and late updates will display in orange.

			es		<ul><li>∠</li></ul>
	5	Current Stay between baseline	5 t Value e of 5 and tai	16 rget of 16	
îmeline ↓	,	Update	Progress	Request Update	
) N	/lay 9 - 15, 2022	2 Scheduled Progress L	Jpdate		1 day until late
т	he following upda	ate represents progress as	s of 5/13/202	22 🕶	
s	tatus		Value		
	Select	~	Enter Va	alue	
Р	rogress Commer	nt			
	Enter comment al	bout the progress of this ite	em		

Click the 'Status' drop-down menu to select the appropriate status, provide a current value if required, and relevant commentary in the Progress Comment field. Then make sure to click the 'Submit' button in the bottom left-hand corner of the outstanding update request on the timeline.

Status		Value	
Select	1~	Enter Value	
		Entervalde	
Progress Comment			



#### Viewing Your Plan

In addition to your My Dashboard, you also have access to see the plan(s) you are contributing to regularly. To view the plan, click the 'Plans' drop-down in your top navigation bar, then select the 'Plans' option.



On the plans page, you'll be able to review a list of all the plans you've been granted access to within your organization's account. Simply click the Plan Name to be redirected into the plan's full details.

Plans       elect a plan in the list to see plan details and add/edit plan items.       Active and Inactive     Archived       + New     Find a Plan											
Name	State ↑	Created By	Start Date	Due Date	Total Items	Item Overview					
ABC Healthcare Strategic Plan 2022	ः Active	Stuart Childs (Achievelt Admin)			259	1 162 17 12 64 2 1 0 0					
Conference Center Project	ःष्टुः Active	Lindsey LeFaivre (Achievelt Admin)			19	5 8 3 0 3 0 0 0 0					
Health Care Strategic Plan by Department	∛? Active	George Sparrow (Achievelt Admin)			260	3 161 17 12 64 2 1 0 3					
Strategic Plan	ିଦି <sup>:</sup> Active	Joseph Krause (Achievelt Admin)			61	4 31 13 6 6 1 0 1 0					

If it is your first time viewing the plan, it will open to your Tree View. This view gives you a visual representation of your plan and shows how all individual items are aligned and connected together. To navigate the tree, click the bottom left triangle to expand and collapse supporting items within the plan.

	PLAN	C On Track	
	Strategic Plan		
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	4 30 13		
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C C C C C C C C C C C C C C C C C C C	e inexe		On Track
lusiness Development	Customers	Finance	Product
2 10 7 2 1 1 • • • •	<ul> <li>▲ 1 3</li> <li>✓</li> <li>▲ 0</li> </ul>		722
GOAL	II GOAL	I GOAL	II GOAL
Off Track Increase New Business Revenue by 10%	On Track Decrease Customer Complain Rate	O Not Started Decrease Customer Acquisition Cost	Achieved      Implement Agile Methodology     Across Product Lines
	프 쓴 성 속		
			<b>321</b> ↓ ± % □
	OBJECTIVE	BJECTIVE	BJECTIVE
On Track     Create Feedback Loop	On Track     Price Realization	At Risk Implement Automated Collection Software	Achiev     Decrease average distribution tir
1 8 1 D	2	E 0	



One of the key benefits of Achievelt is that you can visualize your plan in different ways depending upon preference and need. In the top right-hand corner, you will find your Plan View Menu.



Toggle to the List View to easily consume details around Start and Due Dates, Assigned Users and Latest Comments that have been provided on all of the plan's items.

Strategic Plan	Revenue by 10% lin)								Plan Details 🛛 🤹 🗮
	No filters applied. Add Filters								61 Items
	Name	Status	Start Date	Due Date	Metric Description	Current Value	Last Updated	Assigned To	Last Comment
	Strategic Plan	On Track					1/21/2022		
1	Business Development	On Track	12/30/2018	12/31/2022				Ed Arnold	
1.1	Increase New Business Revenue by 10%	Off Track	1/1/2019	12/31/2022	Move from baseline of \$100,000 to target of \$180,000	\$165,000	1/27/2022	Ed Arnold	We're currently falling behind on our revenue targets. We had three potential deals fall through due to some budget issues but think we have enough deals to make up for it. In the meantime, this month's performance will take a slight dip. I'll update everyone fully during out Weds meeting.
1.1.1	Create Feedback Loop	On Track	1/1/2019	12/31/2022	Move from baseline of 0% to target of 100%	40%	1/27/2022	Rachel Santos (Achievelt Admin)	I'm happy with the progress we're making on our client feedback loop. In the past, it was difficult to know what our prospects and customers were saying about us but with our new approach, we'll have access to that information in real-time.
1.1.1.1	Tracking Solutions Identified	Achieved	1/1/2019	12/31/2021			1/27/2022	Alice Adams	This work was accomplished last week. We selected the vendor of choice and we're working through implementation now.

For more details on how to navigate List View, see the List View Overview article.

