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Chapter 1

Getting Started

The Step UP Performance Management System application was designed to give the Oklahoma State Department of Health/direct report service/direct report areas a defined system to promote thoughtful planning and decision making toward creative programmatic and organizational goals and objectives, enhance the development of innovative activities and strategies for meeting those objectives, and assure periodic measurement of quantifiable performance measures important to achieving the selected goals and objectives.

Step 1: To access the Step UP Performance Management System Application, navigate to https://www.ok.gov/health/stepup.

The Step UP Performance Management System application login page will appear.

Step 2: There is a one time registration process. If you have already completed the registration process, enter your Login and Password and select the ‘Submit’ button.

Step 3: If you are a first time user, click on the “First Time User?” link. This will open the First Time User setup page.
Step 4: Enter your email address and select the ‘Next’ button.

This will open the Account Set-up page.

Note: Email is used throughout the application to notify the user of status changes.
Step 5: The red asterisk (*) indicates the required fields. Enter all of the required fields and select the ‘Next’ button.

Step 6: Enter all of the required fields and select the ‘Submit’ button. This will open the Thank you page.

An email notification will be sent to the email address that you entered with a URL link and an activation code. Make a note of the activation code.

Open the email and select the URL link. This will open a window that will allow you to enter the activation code provided. After entering the activation code in the space provided, select the ‘Submit’ button. This completes the one-time registration process and you are now ready to login with your login and password.
Introduction: This chapter describes the Overview and Public Health System Alignment Template. Both this template and the Strategic Plan and Performance Measure Template (described further in Chapter 3) must be completed in order to submit the Annual Review.

Tip: A complete submission of the strategic plan includes the County Health Department Overview and Public Health System Alignment template as well as the Strategic Plan and Performance Measure template (described further in Chapter 3). These are due by August 31st of each year.

Step 1: From the Main Menu, click on the Overview and Public Health System Alignment Template link to open the Overview and Public Health System Alignment template page.
**Step 2:** Once you have the template page open, you will use the pull-down menu to make your service area selection. Next, select the ‘Add/Load Overviews’ button.

**Tip:** If you are looking for a template from a specific fiscal year, type that year in the box called ‘Fiscal year.’ If this field is left blank, the system will load all of the previous years’ templates.

After adding or loading overviews, you will have to make the choice whether to ‘Add New Template’ or ‘Copy Selected Template.’

**Tip:** ‘Add New Template’ is only used when creating a template for the very first time. For each year following, you will use ‘Copy Selected Template.’

**Step 3a:** If you have never created a template before, your screen will look like this. You will want to add a new template. This selection automatically brings up a blank template for you to enter your information.
Step 3b: If you have previously created a template and simply need to review and update it for the current year, your screen will look like this. If several years worth of templates are shown in the table, use the column called ‘Status’ to identify the most recent approved version.

Select the latest approved template and click the button called ‘Copy Selected Template.’ After doing that, you will find that a new template has been added to your table as shown below (notice the fiscal year has not yet been entered and the status shows pending submission).

From this point you will select that new template and click ‘Edit’ to begin your entry updates.

There are three tabs to the Overview. The first tab is the National Framework tab.
Step 4: If all required fields are entered and you are ready to continue to the next section, select the ‘Save and Continue’ button. This will verify you have completed all required information on the current page and open the Oklahoma Framework section.

Tip: The asterisk (*) indicates the required fields.

Tip: For additional information on any of the fields, select the (?) icon next to the area you need help with. This will be available throughout the entire application.
Step 5: In the Oklahoma Framework Section, you will address how your service area aligns to the OSDH vision, mission, and values; the OSDH focus areas; and the OSDH strategic map. Select ‘Save and Continue’ when you are finished.
The last tab in the Overview and Public Health System Alignment template is the Overview tab. See below.
If you answer ‘Yes’ to the **Target Population** question, a series of questions will appear and you must specify at least one target question.

If you answer ‘Yes’ to the **Customer Satisfaction** question, you must give a brief description.

If you select ‘Fee’ or ‘Other’ to the **Funding Source** question, you must specify in the field provided.

If you answer ‘Yes’ to the **Mandate** question, you must give a brief description.

If you answer ‘Yes’ to the **Advisory Board/Council** question, you must give a brief description.

If you select the ‘Save’ button, the fields you entered will be saved.

If you enter all of the required fields and select the ‘Submit’ button, the form is verified and will be submitted for review.

**Tip:** You may be able to edit the Template until it is approved. Once approved, you can only view the Template. The Template will be displayed in the Overview and Public Health System Alignment Template page as shown here.

To view the Template, you can select the ‘View’ button.

You can select the ‘Edit’ button to make any changes to the Template. If you make any changes to a Template, the previous version will be saved to archive and the current version sent to the deputy for review and approval. You may view archived Templates by selecting the ‘Archived Versions’ button. This will open the Archived Versions page.
The page is sorted by the Last Modified Date. You may select the ‘View & Print’ button to view or print any archived versions.
Introduction: This chapter describes the Strategic Plan and Performance Measure Template. The Strategic Plan and Performance Measure Template includes several levels and screens. A Strategic Plan and Performance Measure Template includes Goals, and within Goals include Objectives, and within Objectives include Performance Measures. In order to submit the Strategic Plan and Performance Measure Template, all of these elements must be completed.

Step 1: From the Main Menu, select the Strategic Plan and Performance Measure Template link. If you have not already created a Strategic Plan and Performance Measure Template, it will take you directly to the add screen as shown below.

Step 2: Enter all of the required fields and select the ‘Save’ button.

Note. To submit a Strategic Plan and Performance Measure Template, you must have at least two Goals. To add a Goal, select the ‘Add Goal’ button. This will open the Goal page. You must select one choice from both of the following drop-down lists: “Relationship to Strategic Map Goals” and “Relationship to Focus Areas”.

Step 3: Enter all of the required fields and select the ‘Save’ button.

Note. To submit a Strategic Plan and Performance Measure Template, you must have at least two Objectives. To add an Objective, select the ‘Add Objective’ button. This will open the Objectives page.
Step 4: Enter all of the required fields and select the ‘Save’ button.

Note. To submit a Strategic Plan and Performance Measure Template, you must have at least one Performance Measure. To add a Performance Measure, select the ‘Add Performance Measure’ button. This will open the Performance Measure page.

Step 5: Enter all of the required fields and select the ‘Save and Continue’ button.

If you enter all of the required fields and select the ‘Submit’ button, the form is submitted and will be sent for review. If you are not ready to Submit the template, click ‘Save’ and return to the ‘Main Menu’ by clicking that button.

Please note that for target data, you need to enter target information for current year and next five years.
Also, please note that to minimum/maximum means which direction is favorable. If the goal is to increase in number, percentage or dollars, you would mark "To Maximum," but if goal is to decrease in number, percentage or dollars, you would mark "To Minimum."

**Note:** To view the Graphs, click ‘View Line Graph’ or ‘View Bar Graph’. The graph will display. If you would like to save a copy of the graph image, place your mouse on the graph image and right-click with your mouse. Choose “Save Picture As” which will allow you to choose where you want to save the graph image. Click ‘Save’

**Note:** You may be able to edit until it is approved by your Deputy or Chief Operating Officer. Once approved, you can only view the Template.

The Template will be displayed in the Strategic Plan and Performance Measure Template page as shown here.

To view the Template, you can select the ‘View’ button.
You can select the ‘Edit’ button to make any changes to the Template.
You can also view the Plan Status by selecting the ‘Show Plan Status’ button. The Plan Status will display which part of the Strategic Plan and Performance Measure Template is completed and which part is missing. Here is a sample of the Plan Status. **Note:** If an item is not complete, the Status will be labeled as “Incomplete”
**Introduction:** This chapter describes the Annual Review. In order for this option to be available, both the Overview and Public Health System Alignment Template and the Strategic Plan and Performance Measure Template must be submitted and approved.

**Step 1:** From the Main Menu, select the **Annual Review** link. This will open the Annual Review page.

If this is your first Annual Review, you will see an ‘Add’ button. Click ‘Add’ to begin your Annual Review.

If you have already started an Annual Review previously:

To view the Annual Review, select the ‘View’ button. This will open the Annual Review in View-Only mode.

To edit the Annual Review, select the ‘Edit’ button. This will open the Annual Review in Edit Mode.

The page will display all goal, objective and performance measure information that you created in the Strategic Plan and Performance Measure Template as described in Chapter 3.
Note. You must report on each Performance Measure in order to submit. If Performance Measure has not been reported on, it will be marked with an (*)

**Step 2:** Select the ‘Report’ button to report on a Performance Measure. This will open the Performance Measure Report page.

**Step 3:** Enter all of the required fields and select the ‘Save and Continue’ button.

**Step 4:** Repeat Step 2 and Step 3 until all Performance Measures are completed.

If you enter all of the required fields and select the ‘Submit’ button, the Annual Review is submitted for review.

**Note.** You may be able to edit until it is approved. Once approved, you can only view the Annual Review.
Show Performance Measure Details

This option allows you to view the Performance Measure Details. Click on the ‘Show Performance Measure Details’ option to view. Below is a sample of the Details page.

To view the Graphs, click ‘View Line Graph’ or ‘View Bar Graph’. The graph will display. If you would like to save a copy of the graph image, place your mouse on the graph image and right-click with your mouse. Choose ‘Save Picture As’ which will allow you to choose where you want to save the graph image. Click ‘Save’.

To close, select the ‘Close Performance Measure Details’ button.
Step 1: From the Main Menu, click on the Edit Profile link.

This will open the Edit Profile page.

Step 2: Make any necessary changes and select the ‘Update’ button. This will update any changes and return you to the Main Menu.
**Introduction:** This chapter describes the Send/View Comments section. This option allows you to view comments that are sent by the Deputy Area, and gives you the ability to send comments to that Deputy Area.

**Step 1:** From the Main Menu, select the **Comments** link. This will open the Main Comments page.

The page will display all previously received comments and all previously sent comments.
Step 2: To add comments, select the ‘Add Comments’ page. This will open the Add Comments page.

Step 3: Enter a Subject and enter Comments. Then select the ‘Send’ button. This will send the message to the Deputy Area and return you to the Main Comments page.
Introduction: This chapter describes the Reports section. This option allows you to view the different reports.

Step 1: From the Main Menu, select the Reports link. This will open the Reports Menu page.
**Trend & Target Report**

**Step 1:** Select the **Trend & Target Report** link to view. Below is a sample.

You may download the data on the report. This will convert the data displayed on the report to a CSV file.

**Step 2:** To download the data, select the ‘Download’ button. This will open the File Download window.

**File Download**

Do you want to open or save this file?

- Name: Trend_Report_2008-04-23.xls
- Type: Microsoft Excel Worksheet
- From: test:yourOklahoma.com

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. **What’s the risk?**

**Step 3:** Select the ‘Save’ button. This will open the File Save window.

**Step 4:** Select a filename for the file and select the ‘Save’ button.
Data Source Report

Step 1: From the Reports Menu page, select the Data Source Report link. Below is a sample of the report.

You may download the data on the report. This will convert the data displayed on the report to a CSV file.

Step 2: To download the data, select the ‘Download’ button. This will open the File Download window.

Step 3: Select the ‘Save’ button. This will open the File Save window.

Step 4: Select a filename for the file and select the ‘Save’ button.
**Template Status Report**

**Step 1:** From the Reports Menu page, select the Template Status Report link. Below is a sample of the report.

You may download the data on the report. This will convert the data displayed on the report to a CSV file.

**Step 2:** To download the data, select the ‘Download’ button. This will open the File Download window.

**Step 3:** Select the ‘Save’ button. This will open the File Save window.

**Step 4:** Select a filename for the file and select the ‘Save’ button.