

"Plan Review"
(menu button on left) will take you to the bottom of your "plan summary" page. This section will show you a summary of the elements that are in your plan, as well as some things that may be missing.

A Help Manual is available at all times and can be accessed via the gray bar at the top right of each page. The text that appears will be relevant to the section you are working on.

Editing, Submitting, and Approving Individual Plans of Work

Once you have given your plan a name and identified the "parent" program/team plans that it is based on, the plan will be saved in PRISM. You can then edit the plan at any time until it has been approved by your supervisor or designated plan "approver."

To Edit Your Individual Plan:

After logging onto PRISM, click on "edit plan" on the left side menu under the heading "Planning." A window will pop up where you can select your plan by clicking on "Edit." This will take you to the summary view of your plan where you can review the details of your plan and choose the section(s) of your plan that you want to edit. These sections appear on the menu on the left side of the screen under "Plan."

Submitting your plan:

On the plan summary page, at the bottom, there is a rectangular box (just above the UMass Extension Logo) that indicates the current status of your plan. If you have designated your plan as "practice" in the name and parents section, then **"this is a practice plan"** will be displayed in that box. (Note: If you would like other system users to be able to view your plan while it is being drafted, you should remove the practice designation.) When the practice designation is removed **"submit plan for approval"** will appear in the box at the bottom of your summary page. When you click on that button, a message will be sent to your supervisor/approver, asking that person to review your plan. While you are waiting for approval, the box will display **"plan is pending approval."** When your plan has been approved, that message will change to **"this plan has been approved."** Once approved, access to your plan will be locked and the plan can only be changed by contacting the system administrator (wamiller@umext.umass.edu).

One Plan for each person:

Plans should contain all the projects that you are contributing to. Make sure to delete all other plans.

Have an idea for "Reflections"?

Email to: [William Miller](#)

Additional resources

for planning can be accessed on the Extension website under "About Extension" by clicking on [Program Reports, Plans & Resources](#)

Submitting your plan (Continued):

Prior to submitting your plan for approval, check it over carefully. At the bottom of the summary page there is a "Plan Review Section." Red dots in the section will flag items that are potentially, but not necessarily a problem. For example, any project that is in your plan should have output(s). Also, any outcomes that you have identified should have associated indicators. The plan review section will also show (with red dots) when you have outputs without any defined audiences, or a number (for how many of that specific output you are planning). There are certain output delivery types (e.g. applied research) for which you may not want/need to have a number planned or a defined audience. Similarly, outputs related to administrative activities do not need that kind of information. When outputs describe direct or indirect outreach activities (e.g. workshops, newsletters, etc...) you should attempt to fully describe your planned outputs with the number planned, the audience type and the number of participants to be reached.

Approving Plans

If you are a supervisor/approver, you can see a summary and status view of all the plans you are responsible for approving by logging onto PRiSM and selecting "My Plans" under the "Planning" heading from the menu on the left side. Scroll to the bottom of the page to see the table with the plans you approve and click on "Review Plan" in the "Action" column. In addition to reviewing the details of the plan in each of the four sections (name and parents, plan information, outcomes and inputs/outputs), the "Plan Review" section on the bottom will alert you with a series of red and blue dots about elements that are potentially missing. Not all red dots indicate problems however (see above: Submitting Your Plan). If you are satisfied with the plan, click the approve button at the very bottom of the summary page (just above the UMass Extension logo). If you would like changes or additions, you must communicate directly with the plan author who can continue to make changes while the plan remains under "pending approval" status.

Coming in the next issue of Reflections:
Reporting your progress toward plans!