

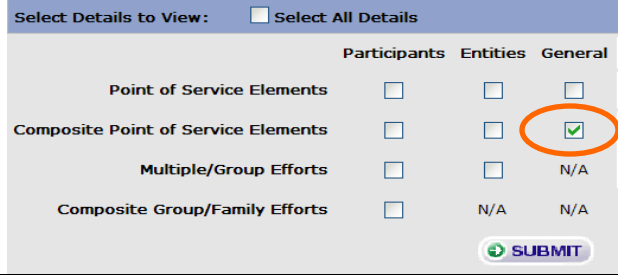
Introduction This job aide is intended to provide a quick reference guide for the basic steps to review and edit data previously entered in SMART FACTS. For detailed instructions and information, see the SMART FACTS Operations Manual, chapter 7.

Reviewing Data Entered in SMART FACTS (under your username)

To review data entered under your username, take the following steps:

Step	Action
1	Make sure that you are in the program for which you would like to view data. If not, Change Program to select the correct program.
2	On the right side navigation bar, select My Work , then click the sub-topic Review My Efforts .
3	On the left, enter the date range (or use date links) for the data you would like to review, then click Submit .
4	On the Review Staff Efforts screen, you will see the program selected in the upper left corner. If a different program is desired, click the View other Programs button towards the right.
5	Scroll down through the Summary Statistics section to the Select Details to View section. Check the appropriate boxes for the program you are in, then click Submit .

Note: Data appears on the following page in an easier-to-read format.

Program	Boxes to checkmark																				
Issues & Inquiries	For both Issues & Inquiries and Outreach and Education programs, in the General column, select Composite Point of Service Elements																				
Outreach & Education	 <table border="1"> <thead> <tr> <th></th> <th>Participants</th> <th>Entities</th> <th>General</th> </tr> </thead> <tbody> <tr> <td>Point of Service Elements</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Composite Point of Service Elements</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Multiple/Group Efforts</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td>N/A</td> </tr> <tr> <td>Composite Group/Family Efforts</td> <td><input type="checkbox"/></td> <td>N/A</td> <td>N/A</td> </tr> </tbody> </table>		Participants	Entities	General	Point of Service Elements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Composite Point of Service Elements	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Multiple/Group Efforts	<input type="checkbox"/>	<input type="checkbox"/>	N/A	Composite Group/Family Efforts	<input type="checkbox"/>	N/A	N/A
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Point of Service Elements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																		
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Multiple/Group Efforts	<input type="checkbox"/>	<input type="checkbox"/>	N/A																		
Composite Group/Family Efforts	<input type="checkbox"/>	N/A	N/A																		
Volunteer Tracking & Management	In Volunteer Tracking & Management, in the Entities column, select the boxes in all three rows: Point of Service Elements , Composite Point of Service Elements , and Multiple/Group Efforts .																				



Reviewing Data Entered in SMART FACTS (under your username), *continued*

6	Scroll down to the green headings (i.e. General Outcome), and click Toggle Point of Service Element Details next to any item you wish to review in detail. If an additional option to Toggle Client Details appears, click on it. All details will appear for the selected activity during the selected timeframe.
7	Repeat as needed for additional activities, or to view all activity in this program, click Open All Toggles . Tip: To close the detailed list, click each individual Toggle link again, or click the button which now says Close All Toggles .
8	To print, scroll to the top and click the Print button in the upper right corner of the screen. Note: All open toggles will be included in the printout, which may lead to multiple pages being printed.
9	To view other data for other programs in SMART FACTS, see step 4.

Editing or Deleting Data Entered in SMART FACTS (under your username)

To edit or delete data previously entered under your username, take the following steps:

Step	Action				
1	Identify the date that the data was entered in SMART FACTS. Tip: Follow the steps above to view your data to find the entry date.				
2	Change Program as needed to select the appropriate program.				
3	From the My Work menu option, select the sub-topic Edit My Efforts .				
4	Select the date for the activity to edit or delete, then click Submit .				
5	Scroll down to find the item you wish to edit or delete. <table border="1" data-bbox="548 1478 1383 1614"> <tr> <td>Edit</td> <td>To edit the item, click Edit Composite Effort. Make changes as needed and scroll down to click Update Effort.</td> </tr> <tr> <td>Delete</td> <td>To delete the item, click the Delete Composite Effort link, then click Yes to confirm the deletion.</td> </tr> </table>	Edit	To edit the item, click Edit Composite Effort . Make changes as needed and scroll down to click Update Effort .	Delete	To delete the item, click the Delete Composite Effort link, then click Yes to confirm the deletion.
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Editing Staff Efforts (under all usernames for your SMP)

In addition to individual data, site administrators have access to review all data for your SMP. The steps are similar to those above, using the **Program Administration** menu to **Review Staff Efforts**. See the SMART FACTS Manual, ch. 7 for details.