

**Introduction** This job aid is intended to provide a quick reference guide for the basic steps to perform the following partnership functions in SMART FACTS:

- 1) Define (create) entity (partner) sub-types
- 2) Add a partner
- 3) Record partner activity
- 4) Review partner data



For related information on SMART FACTS functionality, see the SMART FACTS Operations Manual and/or the SMART FACTS Training Page (see the resources section on page 5 of this job aid for details).

**Overview** The Partnership Development program in SMART FACTS is not required for purposes of the OIG Report. However, it is an optional tool created at the request of SMPs which can help you track partner activity for your convenience or for semi-annual reporting to the Administration on Aging.

**Terms**

**Entity**

- In the Volunteer Tracking & Management Program, Entity = Volunteer
- In the Partnership Development Program, Entity = Partner

**Entity Sub-type**

- In the Partnership Development program, entity sub-types allow you to separate your partners by partner type as determined by your site administrator.

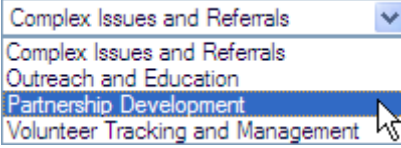

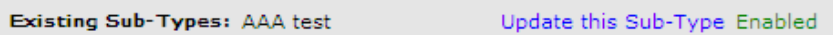

The Partnership Development Program in SMART FACTS is **separate and distinct** from the Volunteer Tracking and Management Program.

- Partners are NOT volunteers; partner activities should NOT be recorded in the Volunteer Tracking and Management Program.
- When you are in the **Partnership Development** Program, all data entered will be for your Partners and will not appear on any reports as volunteer activity.
- The two programs do share menu options, which is why the navigation bar uses the term “Volunteer/Partner” throughout.
- When you are in the Partnership Development Program the second term in the phrase (“Volunteer/**Partner**”) is the one that applies.

## Defining Entity Sub-Types

Prior to adding new partners, the appropriate Entity Sub-types must be created for your SMP partners. Decisions to update entity sub-types require prior approval by the SMART FACTS site administrator for your SMP.

To create entity sub-types in SMART FACTS, take these steps:

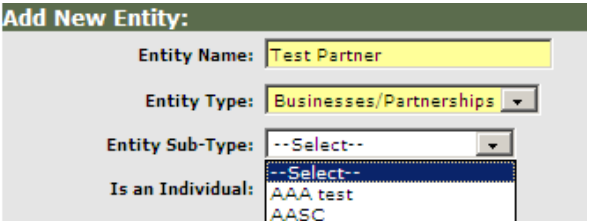
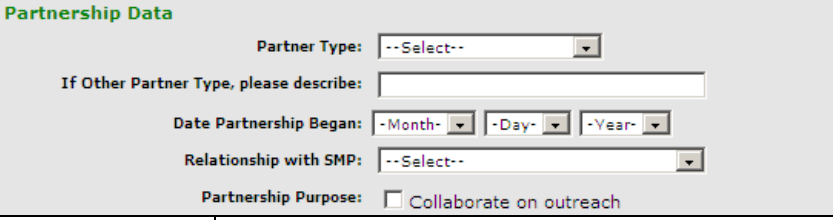
Step	Action
1	Click on <b>Change Program</b> and select the <b>Partnership Development</b> program from the list of options. 
2	On the right side navigation bar, select <b>Volunteers/Partners</b> , then click the sub-topic <b>Define Entity Sub-types</b> .
3	In the <b>Manage Entity Sub-types</b> section on the left, select <b>Businesses/Partnerships</b> as the Entity type. <b><u>For the purposes of SMART FACTS, SMP partner Entity Type will ALWAYS be Businesses/Partnerships (volunteers are always “Individuals”).</u></b>
4	In the <b>Add New Sub-Type</b> field, enter the sub-type name and click <b>Add New Sub-Type</b> . Repeat this step as needed to create all sub-types for your SMP partners. 
5	After adding each sub-type, it will appear in your <b>Existing Sub-Types</b> list. To change the name of any of your sub-types, click the link to <b>Update this Sub-Type</b> .  <p>It will appear in the box below to update the profile name.</p> 

### What if “Partnership Development” is not in the *Change Program* menu?

Site Administrators can add this menu option using: **Site Administration > Manage Staff Accounts > Program Information**. Select **Partnership Development** from **Available Programs** and **Submit** to move to **Current Programs Assigned**.

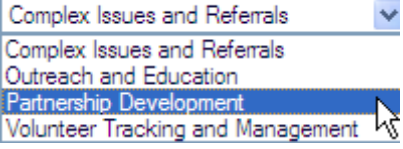
### Adding a New Partner

To add a new partner in SMART FACTS, take the following steps:

Step	Action												
1	Select the <b>Partnership Development</b> program (if not selected).												
2	On the right side navigation bar, select <b>Volunteers/Partners</b> , then click the sub-topic <b>Add New Volunteer/Partner</b> .												
3	<p>Complete the REQUIRED (yellow) fields on the left.</p>  <table border="1"> <thead> <tr> <th>Data Field</th> <th>Explanation</th> </tr> </thead> <tbody> <tr> <td>Entity Name</td> <td>Enter the partner's first name and last name (first name first and last name last).</td> </tr> <tr> <td>Entity Type</td> <td><b><u>For partners, the "Entity Type" should ALWAYS be Businesses/Partnerships.</u></b></td> </tr> <tr> <td>Entity Sub-Type</td> <td>Select the appropriate sub-type, if applicable.</td> </tr> <tr> <td>Is an Individual</td> <td>Leave this box blank for partners.</td> </tr> <tr> <td>Phone Number</td> <td>Tab past this initial <b>Phone Number</b> field (enter phone number in step 4).</td> </tr> </tbody> </table>	Data Field	Explanation	Entity Name	Enter the partner's first name and last name (first name first and last name last).	Entity Type	<b><u>For partners, the "Entity Type" should ALWAYS be Businesses/Partnerships.</u></b>	Entity Sub-Type	Select the appropriate sub-type, if applicable.	Is an Individual	Leave this box blank for partners.	Phone Number	Tab past this initial <b>Phone Number</b> field (enter phone number in step 4).
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4	Complete contact information as desired for your SMP.												
5	<p>Complete the <b>Partnership Data</b> section as desired for your SMP.</p>  <table border="1"> <thead> <tr> <th>Data Field</th> <th>Explanation</th> </tr> </thead> <tbody> <tr> <td>Partner Type / If Other...</td> <td>Another way to categorize partners, especially if your SMP doesn't use entity sub-types.</td> </tr> <tr> <td>Date...</td> <td>Enter the date the partnership began.</td> </tr> <tr> <td>Relationship with SMP</td> <td>Enter the partner relationship, i.e. formal monetary exchange with subcontractors.</td> </tr> <tr> <td>Partnership Purpose</td> <td>Can be used to remind yourself and/or others in your SMP. Check as many boxes as apply.</td> </tr> <tr> <td>Additional Notes</td> <td>Enter additional information as desired regarding this partnership.</td> </tr> </tbody> </table>	Data Field	Explanation	Partner Type / If Other...	Another way to categorize partners, especially if your SMP doesn't use entity sub-types.	Date...	Enter the date the partnership began.	Relationship with SMP	Enter the partner relationship, i.e. formal monetary exchange with subcontractors.	Partnership Purpose	Can be used to remind yourself and/or others in your SMP. Check as many boxes as apply.	Additional Notes	Enter additional information as desired regarding this partnership.
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Additional Notes	Enter additional information as desired regarding this partnership.												
6	Once all data is entered, click <b>Add Entity to the System</b> .												

### Recording Partner Hours/Training

To record partner hours / training in SMART FACTS, take these steps:

Step	Action
1	If you aren't already in the <b>Partnership Development</b> program in SMART FACTS, select it now. 
2	On the right side navigation bar, select <b>Volunteers/Partners</b> , then click the sub-topic <b>Record Volunteer/Partner Hours/Training</b> .
3	Enter <b>Search by</b> criteria in the space provided, or leave the field blank to see all "entities." Click on <b>Search</b> . <b>Tip: Entity = Partner</b>
4	Click on the desired partner in the <b>Entity Name</b> column.
5	Enter data to record the partner's activity.
6	Save your changes using the appropriate <b>Save</b> option at the bottom of the screen.

### Reviewing Partner Data

Reporting data regarding Partnership Development is not currently available in the Letters, Forms, and Reports section of SMART FACTS.

To review partner activity in SMART FACTS, use the following menu options within the **Partnership Development** program:

Menu option	Function
View/Edit Volunteer / Partner	<b>Review / edit</b> partner profile information
Review Volunteer / Partner Work	<b>Review</b> data entered for a specific partner
My Work > Review My Efforts	<b>Review</b> your own partner data entry
My Work > Edit My Efforts	<b>Edit</b> your own partner data entry
Program Administration > Review Staff Efforts & Edit Staff Efforts	Site administrators: <b>review / edit</b> partner data entry done by your staff
<i>ETO Report</i> menu > Volunteer / Partner Work Report	<b>Review</b> totals for individual data entry fields; select the desired data element from the list provided.

See the SMART FACTS Operations Manual and/or the My Work job aid for additional information on reviewing activity in SMART FACTS.

**SMP Resources: Partnership Development**

<b>Resource</b>	<b>Purpose</b>	<b>Access Instructions</b>
SMP Website	SMP online resources	<a href="http://www.smpresource.org">www.smpresource.org</a>
Recorded Webinar: Partnership Development & Dissemination Activities in SMART FACTS	Tutorial on partnership development data entry in SMART FACTS, including a PowerPoint presentation and systems demonstration.	Available at <a href="http://www.smpresource.org">www.smpresource.org</a> : Resources for SMPs > SMART FACTS > SMART FACTS Training
SMART FACTS Job Aids: Partnership Development & My Work	Basic instruction in how to enter, review and edit partnership development data in SMART FACTS	Available at <a href="http://www.smpresource.org">www.smpresource.org</a> : Resources for SMPs > SMART FACTS > SMART FACTS Training
SMART FACTS Operations Manual	Reporting in SMART FACTS	Hard copy of manual available at your agency. Electronic copy available at <a href="http://www.smpresource.org">www.smpresource.org</a> : Resources for SMPs > SMART FACTS
The SMP Resource Center (a.k.a. The Center)	Policy guidance and answers to questions about SMART FACTS data entry and the SMART FACTS Operations Manual	E-mail: <a href="mailto:hflory@smpresource.org">hflory@smpresource.org</a> or <a href="mailto:gpaulson@smpresource.org">gpaulson@smpresource.org</a> Call: 1-877-808-2468