**Action Plans**

Every agent should have at least four (one signature, one 4-H and two others) ‘Individual’ action plans and every specialist should have at least one (more are recommended including ‘special projects’) ‘Individual’ action plan. The reason is that next January all agents and specialists will be expected to submit at least one impact statement. Within PEARS, the only way to create an individual impact statement is from an individual action plan.

To create an ‘Individual’ action plan, open PEARS, look under the ‘Plan’ tab.

Select the ‘Action Plans’ option.
If you haven’t entered anything yet, you might get a message like this.

If you click the ‘x’ by your name, you will remove that filter and you may see something like this. A combination of ‘Individual’ and ‘State/PFT’ action plans.
To narrow down the options, use the ‘Filter’ function. It is very powerful.

The easiest way to make an ‘Individual’ plan is to copy the ‘State/PFT’ to your ‘Individual’ action plan, and then edit the plan to fit your planned individual actions. As an example, I want to create an ‘Individual’ action plan from a ‘State/PFT’ action plan. I selected the current reporting year and my name to find the ‘State/PFT’ action plan I had created earlier. Click on the blue hyperlink under ‘Title’ to access a ‘State/PFT’ action plan.
You should see a page something like this. Click on ‘Copy Signature Plan to…’ and choose ‘My Individual Plan’.

You should see a message something like this below. Notice the title has ‘(Copy) after it. You can customize the title to fit your ‘Individual’ action plan. Also, you may want to remove ‘Other contacts for this plan’.

The action plan "Adopting PEARs at NDSU Extension" was copied with the current reporting period (2017-2018) successfully.

Update Action Plan

Title

Adopting PEARs at NDSU Extension (Copy)

Reporting Period

2017 - 2018

Level

Individual
Since it is my ‘Individual’ action plan, I deleted all ‘Other contacts for this plan’. That way I am the only one who can edit this plan, unless I give permission to someone else.
Go to the ‘Plan’ tab and select ‘Action ‘Plans’. You should see something like this.

You are now ready to track your ‘Program Activities’. This is where you record and track all the great programming you do. You will find the ‘Program Activities’ section under the ‘Track’ tab.
Click on the ‘+Add’ button. This will bring up at ‘Add Program Activity’ module. Here is where you record the time, date, how many people attended and evaluation if you are using PEARS to record participant responses.

**Update Program Activity**

Program Activities track information about direct education meetings or interventions. Each activity should represent a unique intervention but may include multiple sessions or meetings with the same audience.

**Program activity name**

Educating specialists on how to create an ‘individual’ action plan

This is a name you give the program activity for your reference.

**Reporting period**

2017 - 2018

**Program areas**

Administrative Team

**Action plan**

Adopting PEARs at NDSU Extension, Dr. Charlie Individual Action Plan, 2018...

PFT action plans are listed in PEARs to assist PFTs in developing their Action Plan Impact Statements.

**Site**

NDSU Extension Service

Choose the site where this program was delivered. You may also select an organization that includes multiple sites (e.g. a school district or grocery chain). What are inactive sites?

**Unit**

North Dakota (State)

This is the unit where the program activity was delivered.

**Delivery people**

Charles Stoltenow

These are the names of the people who delivered the program activity if you helped.
As you work through the ‘Program Activity’ you can add demographic information immediately using a Smart Phone, iPad or computer. The ‘Auto Calculate’ function is available only if a survey within PEARS is used to collect the demographic information.
If you cannot find what you are looking for just cannot seem to get PEARs to work, CHECK THE FILTER function. It can help you find whatever you are looking for.

*What to do with all the program activity work you do that does not fit nicely into one of the ‘Individual’ action plans you created? We suggest you create an ‘Individual’ action plan with a name like “Special Projects”.*