Step-by-Step Scorecard Guide for the Common Metrics Initiative

May 2019
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Entering Common Metrics Data and TTC Plans into Scorecard

Purpose

This document includes the steps and examples to assist hubs as they enter their numerical data and Turn the Curve Plans into the Scorecard software. The goal is to increase the consistency and comparability of hub data to enhance the quantitative and qualitative analysis in the annual report.

It is intended that hubs will upload their data annually. As part of the CLIC’s reporting process, both quantitative and qualitative data are analyzed. Qualitative analysis is conducted from the built-in sections of the Turn the Curve plan – Story Behind the Curve, Partners, What Works, and Strategies.

The Scorecard software includes templates with built-in sections. Clear Impact provides the CLIC with a data extract from the built-in fields of the TTC plan. It is important that hubs enter their TTC plans in the built-in sections of Scorecard, and not create extra sections.

How to use this document

This document is designed to provide detailed step-by-step guidance, screen shots and examples for each metric, with regard to where numerical data and TTC Plans should be entered into the Scorecard software.

Supplemental Materials

Supplemental materials are available to assist hubs in the reporting of the common metrics. It is recommended that hubs use this Step-by-Step Guide in conjunction with the supplemental materials. The suggested materials are listed below. For links to these materials, please see the Resources section found on page 100.

- Common Metrics Operational Guidelines
- Common Metrics Implementation Guide
- Common Metrics Reporting Guidance
- TTC Plan Development Tool
- TTC Plan Examples
- TTC Plan Worksheet
- Using the Results-Based Accountability (RBA) Framework Webinar
- ICM Worksheet
- Common Metrics Numeric and TTC Plan Checklist
Careers in Clinical and Translational Research Metric

Accessing the Careers in Clinical and Translational Research Metric

The Careers in Clinical and Translational Research metric collects data on two education programs:

- **KL2**: This award supports mentored research career development for clinical investigators who have recently completed professional training and who are commencing basic, translational and/or clinical research.
- **TL1**: This award supports students seeking a practical introduction to clinical and translational research by providing full-time research training support for pre-doctoral candidates and combined health-professional doctorate-master’s candidates as well as postdoctoral fellows seeking additional training in clinical research.

Refer to the [Common Metrics Reporting Guidance](#) for the performance measures and TTC plans required. Please note, if hubs are funded for both metrics (KL2 and TL1) they are only required to enter TTC plans for one of the metrics. It is at the hub’s discretion to determine whether they will enter TTC plans for the KL2 or TL1 metric.

2. From the Home Screen, click the drop-down arrow – select **Common Metrics**. The list of common metrics and their associated performance measures are displayed.
(Sample Common Metrics Scorecard)
3. Scroll down to the **Careers in Clinical and Translational Research** metric scorecard.

<table>
<thead>
<tr>
<th>Practice</th>
<th>Careers in Clinical and Translational Research</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• of KL2 graduates who are currently engaged in clinical and translational research</td>
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<td>• Of the TL1 graduates who are currently engaged in clinical and translational research</td>
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<td>• % of TL1 graduates who are currently engaged in clinical and translational research</td>
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<td>• Of the TL1 graduates who are currently engaged in clinical and translational research, the # of women</td>
</tr>
<tr>
<td></td>
<td>• Of the TL1 graduates who are currently engaged in clinical and translational research, the % percent of women</td>
</tr>
</tbody>
</table>
Entering Data for KL2

# of KL2 graduates who are currently engaged in clinical and translational research

1. Click the Performance Measure (PM) icon for # of KL2 graduates who are currently engaged in clinical and translational research to display the pop-up window.

2. Select Add Data Values to display the data entry measures for the value.

3. Enter the Actual Value. Note: If your hub does not collect data for the performance measure, leave the field blank.

 отметить Hubs are not required to enter information in the Data Source field or the Target Value for this metric. Hubs may use these fields at their own discretion.
4. To add an additional year(s) for past or future years, click the green plus sign. The **Rows to add**: pop-up window displays.

   ![Rows to add: pop-up window](image)

5. Enter the number of years to be added in the text box, click **Okay**.
6. If you add too many rows, click the red minus sign to remove them.
7. Repeat step 3 for each year added.
8. To save the changes, click **Save**. To close the window **without** saving changes, click **Close**.
% of KL2 graduates who are currently engaged in clinical and translational research

1. Click the Performance Measure (PM) icon for % of KL2 graduates who are currently engaged in clinical and translational research to display the pop-up window.

2. Select Add Data Values to display the data entry measures for the value.

3. Enter the Actual Value. Note: If your hub does not collect data for the performance measure, leave the field blank.

 diá Hubs are not required to enter information in the Data Source field or the Target Value for this metric. Hubs may use these fields at their own discretion.
4. To add an additional year(s) for past or future years, click the green plus sign. The **Rows to add:** pop-up window displays.

```
Rows to add:

Enter number of rows (years) to add
```

5. Enter the number of years to be added in the text box, click **Okay**.

6. If you add too many rows, click the red minus sign to remove them.

7. Repeat step 3 for each year added.

8. To save the changes, click **Save**. To close the window **without** saving changes, click **Close**.
Of the KL2 graduates who are currently engaged in clinical and translational research, the # of underrepresented persons

1. Click the Performance Measure (PM) icon for Of the KL2 graduates who are currently engaged in clinical and translational research, the # of underrepresented persons to display the pop-up window.

2. Select Add Data Values to display the data entry measures for the value.

3. Enter the Actual Value. Note: If your hub does not collect data for the performance measure, leave the field blank.

- Hubs are not required to enter information in the Data Source field or the Target Value for this metric. Hubs may use these fields at their own discretion.

4. To add an additional year(s) for past or future years, click the green plus sign. The Rows to add: pop-up window displays.
5. Enter the number of years to be added in the text box, click Okay.

6. If you add too many rows, click the red minus sign to remove them.

7. Repeat step 3 for each year added.

8. To save the changes, click Save. To close the window without saving changes, click Close.

Of the KL2 graduates who are currently engaged in clinical and translational research, the % of underrepresented persons

1. Click the Performance Measure (PM) icon for Of the KL2 graduates who are currently engaged in clinical and translational research, the % of underrepresented persons to display the pop-up window.

2. Select Add Data Values to display the data entry measures for the value.

3. Enter the Actual Value. Note: If your hub does not collect data for the performance measure, leave the field blank.
Hubs are not required to enter information in the Data Source field or the Target Value for this metric. Hubs may use these fields at their own discretion.

4. To add an additional year(s) for past or future years, click the green plus sign. The **Rows to add:** pop-up window displays.

5. Enter the number of years to be added in the text box, click **Okay**.

6. If you add too many rows, click the red minus sign to remove them.

7. Repeat step 3 for each year added.

8. To save the changes, click **Save**. To close the window **without** saving changes, click **Close**.
Of the KL2 graduates who are currently engaged in clinical and translational research, the # of women

1. Click the **Performance Measure (PM)** icon for of the KL2 graduates who are currently engaged in clinical and translational research, the **# of women** to display the pop-up window.

2. Select **Add Data Values** to display the data entry measures for the value.

3. Enter the **Actual Value.** *Note: If your hub does not collect data for the performance measure, leave the field blank.*

* Hubs are not required to enter information in the Data Source field or the Target Value for this metric. Hubs may use these fields at their own discretion.
4. To add an additional year(s) for past or future years, click the green plus sign.
   The **Rows to add:** pop-up window displays.

```
Rows to add:

Enter number of rows (years) to add

Okay Cancel
```

5. Enter the number of years to be added in the text box, click **Okay**.
6. If you add too many rows, click the red minus sign to remove them.
7. Repeat step 3 for each year added.
8. To save the changes, click **Save**. To close the window **without** saving changes, click **Close**.

**Of the KL2 graduates who are currently engaged in clinical and translational research, the % of women**

1. Click the **Performance Measure (PM)** icon for
   **Of the KL2 graduates who are currently engaged in clinical and translational research, the % of women** to display the pop-up window.

```
PM  CTR Of the KL2 graduates who are currently engaged in clinical and translational research, the % of women
```

2. Select **Add Data Values** to display the data entry measures for the value.
3. Enter the **Actual Value**. *Note: If your hub does not collect data for the performance measure, leave the field blank.*

Hubs are not required to enter information in the Data Source field or the Target Value for this metric. Hubs may use these fields at their own discretion.

4. To add an additional year(s) for past or future years, click the green plus sign. The **Rows to add:** pop-up window displays.

5. Enter the number of years to be added in the text box, click **Okay**.

6. If you add too many rows, click the red minus sign to remove them.

7. Repeat step 3 for each year added.

8. To save the changes, click **Save**. To close the window **without** saving changes, click **Close**.
Entering the TTC Plans for Careers in Clinical and Translational Research – KL2

Note: You will only need to enter a total of three TTC Plans. One for each of the following:

♦ % of KL2 graduates who are currently engaged in clinical and translational research
♦ Of the KL2 graduates who are currently engaged in clinical and translational research the % of underrepresented persons
♦ Of the KL2 graduates who are currently engaged in clinical and translational research, the % of women.

The TTC Plan consists of 5 components. Enter a narrative for each of these sections:

♦ Story Behind the Curve
♦ Partners
♦ What Works
♦ Strategies

In the Actions section, enter the specific actions that will be implemented to support each strategy.

KL2 TTC Plan 1

1. For the first TTC Plan, click the Performance Measure (PM) icon for % of KL2 graduates who are currently engaged in clinical and translational research to display the pop-up window.

2. Select View to display the TTC Plan window.

The TTC Plan window includes a graph of the data values and the sections of the TTC Plan are listed below the graph.
3. If necessary, scroll down to see the components of the TTC Plan.

4. Click the **Edit Note** icon to open the desired TTC plan section.

5. Enter the text for the TTC plan section.

6. To save the entry, click **Save**. To close the window *without saving*, click **Cancel**.
   
   **Please do not** click **Delete** – as this will **permanently** remove the note text and all note histories.

7. Repeat steps 4-6 for each section of the TTC Plan.
8. Click the back button on the top left hand of the screen to return to the Careers Metric homepage.

KL2 TTC Plan 2

1. For the second TTC Plan, click the Performance Measure (PM) icon for Of the KL2 graduates who are currently engaged in clinical and translational research, the % of underrepresented persons to display the pop-up window.

2. Select View to display the TTC Plan window.

The TTC Plan window includes a graph of the data values and the sections of the TTC Plan are listed below the graph.
3. If necessary, scroll down to see the components of the TTC Plan.

4. Click the **Edit Note** icon to open the desired TTC plan section.

5. Enter the text for the TTC plan.

6. To save the entry, click **Save**. To close the window *without saving*, click **Cancel**.

   Please do *not* click **Delete** – as this will **permanently** remove the note text and all note histories.

7. Repeat steps 4-6 for each section of the TTC Plan.
8. Click the back button on the top left hand of the screen to return to the Careers Metric homepage.

KL2 TTC Plan 3

1. For the third TTC Plan, click the Performance Measure (PM) icon for Of the KL2 graduates who are currently engaged in clinical and translational research, the % of women to display the pop-up window.

2. Select View to display the TTC Plan window.

The TTC Plan window includes a graph of the data values and the sections of the TTC Plan are listed below the graph.
3. If necessary, scroll down to see the components of the TTC Plan.
4. Click the **Edit Note** icon to open the desired TTC plan section.

5. Enter the text for the TTC plan section.
6. To save the entry, click **Save**. To close the window **without saving**, click **Cancel**.

   Please *do not* click Delete – as this will **permanently** remove the note text and all note histories.

7. Repeat steps 4-6 for each section of the TTC Plan.
8. Click the back button on the top left hand of the screen to return to the Careers Metric homepage.

Actions

Actions are the discrete activities that support the strategies entered in the TTC Plan. Actions that are entered in Scorecard include these components:

- Name of the action
- Detailed description of the action
- Name of the individual assigning the action
- Name of the individual assigned the action (these individuals must be Scorecard license holders)
- Start date
- End date
- Percent completion

Entering Actions

1. From the Common Metrics Scorecard, click the Performance Measure (PM) icon for the performance measure of your choice to display the pop-up window.

2. Select View to display the TTC Plan window.

3. Scroll down to view Actions.
4. Click **New Action** to display the Add New Action window.

5. Click in the **Name** text box and enter the name of the action.

6. Click in the **Description** text box and enter a detailed description of the action.

7. Click the down arrow in the **Status** box, select the appropriate description from the drop-down list (On Track, Behind Schedule, Ahead of Schedule, Cancelled, Completed, Not Started, N/A).

8. Click the down arrow in the **Assigned By** box, select the appropriate name from the drop-down list for the assigner.
9. Click the down arrow in the **Assigned To** box, select the name of the appropriate assignee from the drop-down list.

10. Click in the **Start Date** box to display a pop-up calendar. You may need to use the « or » arrows on the calendar to scroll to the appropriate date.

11. Click in the **End Date** box to display a pop-up calendar. You may need to use the « or » arrows on the calendar to scroll to the appropriate date.

12. Click in the **Percent Complete** box and enter the percentage of completion for the action, if appropriate.

13. To save the changes, click **Save**. To close the window **without** saving changes, click **Cancel**.

### Editing Actions

1. From the Common Metrics Scorecard, click the **Performance Measure (PM)** icon for the performance measure of your choice to display the pop-up window.

2. Select **View** to display the TTC Plan window.

3. Scroll down to view the **Actions** list.

4. Double-click on the specific action to be updated to display the Action Details window.

5. Click **Edit**

6. Make changes as appropriate (Status, Percent Complete, etc.).
7. To save the changes, click **Save**. To close the window **without** saving changes, click **Cancel**.

![Cancel Save buttons]

**Completing Actions**

1. From the Common Metrics Scorecard, click the **Performance Measure (PM)** icon for the performance measure of your choice to display the pop-up window.

2. Select **View** to display the TTC Plan window.

![View options]

3. Scroll down to view the **Actions** list.

4. Double-click on the specific action to be updated to display the Action Details window.

![Action Details window]

5. Click **Edit**

6. Click the down arrow in the **Status** box, select the appropriate description from the drop-down list, click **Completed**.

![Status dropdown list]
7. To save the changes, click **Save**. To close the window **without** saving changes, click **Cancel**.

Deleting Actions

1. From the Common Metrics Scorecard, click the **Performance Measure (PM)** icon for the performance measure of your choice to display the pop-up window.
2. Select **View** to display the TTC Plan window.
3. Scroll down to view the **Actions** list.
4. Click the trash icon for the action to be deleted.
5. When prompted to delete the action, click **OK** to delete the action or click **Cancel** to keep the action.
Entering Data for TL1

# of TL1 graduates who are currently engaged in clinical and translational research

1. Click the Performance Measure (PM) icon for # of TL1 graduates who are currently engaged in clinical and translational research to display the pop-up window.

2. Select Add Data Values to display the data entry measures for that value.

3. Enter the Actual Value. Note: If your hub does not collect data for the performance measure, leave the field blank.

ihil Hubs are not required to enter information in the Data Source field or the Target Value for this metric. Hubs may use these fields at their own discretion.
4. To add an additional year(s) for past or future years, click the green plus sign. The **Rows to add**: pop-up window displays.

The **Rows to add**: pop-up window displays.

- **Enter number of rows (years) to add**

5. Enter the number of years to be added in the text box, click **Okay**.  

6. If you add too many rows, click the red minus sign.  

7. Repeat step 3 for each year added.

8. To save the changes, click **Save**. To close the window **without** saving changes, click **Close**.
% of TL1 graduates who are currently engaged in clinical and translational research

1. Click the Performance Measure (PM) icon for % of TL1 graduates who are currently engaged in clinical and translational research to display the pop-up window.

2. Select Add Data Values to display the data entry measures for the value.

3. Enter the Actual Value. Note: If your hub does not collect data for the performance measure, leave the field blank.

Stars: Hubs are not required to enter information in the Data Source field or the Target Value for this metric. Hubs may use these fields at their own discretion.
4. To add an additional year(s) for past or future years, click the green plus sign. The **Rows to add**: pop-up window displays.

![Rows to add: pop-up window](image)

Enter number of rows (years) to add

5. Enter the number of years to be added in the text box, click **Okay**.

6. If you add too many rows, click the red minus sign to remove them.

7. Repeat step 3 for each year added.

8. To save the changes, click **Save**. To close the window **without** saving changes, click **Close**.
Of the TL1 graduates who are currently engaged in clinical and translational research, the # of underrepresented persons

1. Click the Performance Measure (PM) icon for
   Of the TL1 graduates who are currently engaged in clinical and translational research, the # of underrepresented persons to display the pop-up window.

2. Select Add Data Values to display the data entry measures for the value.

3. Enter the Actual Value. Note: If your hub does not collect data for the performance measure, leave the field blank.

☆ Hubs are not required to enter information in the Data Source field or the Target Value for this metric. Hubs may use these fields at their own discretion.
4. To add an additional year(s) for past or future years, click the green plus sign. The **Rows to add**: pop-up window displays.

5. Enter the number of years to be added in the text box, click **Okay**.

6. If you add too many rows, click the red minus sign to remove them.

7. Repeat step 3 for each year added.

8. To save the changes, click **Save**. To close the window **without** saving changes, click **Close**.
Of the TL1 graduates who are currently engaged in clinical and translational research, the % of underrepresented persons

1. Click the Performance Measure (PM) icon for Of the TL1 graduates who are currently engaged in clinical and translational research, the % of underrepresented persons to display the pop-up window.

2. Select Add Data Values to display the data entry measures for the value.

3. Enter the Actual Value. Note: If your hub does not collect data for the performance measure, leave the field blank.

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4. To add an additional year(s) for past or future years, click the green plus sign. **Rows to add:** pop-up window displays.

   **Enter number of rows (years) to add**

5. Enter the number of years to be added in the text box, click **Okay**.

6. If you add too many rows, click the red minus sign to remove them.

7. Repeat step 3 for each year added.

8. To save the changes, click **Save**. To close the window **without** saving changes, click **Close**.
Of the TL1 graduates who are currently engaged in clinical and translational research, the # of women

1. Click the Performance Measure (PM) icon for
   Of the TL1 graduates who are currently engaged in clinical and translational research, the # of women to display the pop-up window.

2. Select Add Data Values to display the data entry measures for the value.

3. Enter the Actual Value. Note: If your hub does not collect data for the performance measure, leave the field blank.

_written image of a table with fields for Future Value, Actual Value, Target Value, and Is Baseline / Comments.

 punishable field: Hubs are not required to enter information in the Data Source field or the Target Value for this metric. Hubs may use these fields at their own discretion.
4. To add an additional year(s) for past or future years, click the green plus sign. The **Rows to add** pop-up window displays.

5. Enter the number of years to be added in the text box, click **Okay**.
6. If you add too many rows, click the red minus sign to remove them.
7. Repeat step 3 for each year added.
8. To save the changes, click **Save**. To close the window without saving changes, click **Close**.

*Of the TL1 graduates who are currently engaged in clinical and translational research, the % of women*

1. Click the **Performance Measure (PM)** icon for *Of the TL1 graduates who are currently engaged in clinical and translational research, the % of women* to display the pop-up window.

2. Select **Add Data Values** to display the data entry measures for the value.

3. Enter the **Actual Value**. *Note: If your hub does not collect data for the performance measure, leave the field blank.*
Hubs are not required to enter information in the Data Source field or the Target Value for this metric. Hubs may use these fields at their own discretion.

4. To add an additional year(s) for past or future years, click the green plus sign. The **Rows to add**: pop-up window displays.

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6. If you add too many rows, click the red minus sign to remove them.
7. Repeat step 3 for each year added.
8. To save the changes, click **Save**. To close the window without saving changes, click **Close**.
Entering the TTC Plans for Careers in Clinical and Translational Research – TL1

**Note:** You will only need to enter a total of three TTC Plans. One for each of the following:

- % of TL1 graduates who are currently engaged in clinical and translational research
- Of the TL1 graduates who are currently engaged in clinical and translational research, the % of underrepresented persons
- Of the TL1 graduates who are currently engaged in clinical and translational research, the % of women.

The TTC Plan consists of 5 components. Enter a narrative for each of these sections:

- Story Behind the Curve
- Partners
- What Works
- Strategies

In the Actions section, enter the specific actions that will be implemented to support each strategy.

**TL1 TTC Plan 1**

1. For the first TTC Plan, click the **Performance Measure (PM)** icon for % of TL1 graduates who are currently engaged in clinical and translational research to display the pop-up window.

2. Select **View** to display the TTC Plan window.

The TTC Plan window includes a graph of the data values and the sections of the TTC Plan are listed below the graph.
3. If necessary, scroll down to see the components of the TTC Plan.
4. Click the **Edit Note** icon to open the desired TTC plan section.

5. Enter the text for the TTC plan section.
6. To save the entry, click **Save**. To close the window *without saving*, click **Cancel**.
   
   *Please do not* click **Delete** – as this will *permanently* remove the note text and all note histories.

7. Repeat steps 4-6 for each section of the TTC Plan.
8. Click the back button on the top left hand of the screen to return to the Careers Metric homepage.

TL1 TTC Plan 2

1. For the second TTC Plan, click the **Performance Measure (PM)** icon for
   Of the TL1 graduates who are currently engaged in clinical and translational, the % of underrepresented persons and to display the pop-up window.

2. Select **View** to display the TTC Plan window.

   The TTC Plan window includes a graph of the data values and the sections of the TTC Plan are listed below the graph.
3. If necessary, scroll down to see the components of the TTC Plan.
4. Click the Edit Note icon to open the desired TTC plan section.
5. Enter the text for the TTC plan section.
6. To save the entry, click Save. To close the window without saving, click Cancel.
   Please do not click Delete – as this will permanently remove the note text and all note histories.
7. Repeat steps 4-6 for each section of the TTC Plan.
8. Click the back button on the top left hand of the screen to return to the Careers Metric homepage.

TL1 TTC Plan 3

1. For the third TTC Plan, click the Performance Measure (PM) icon for Of the TL1 graduates who are currently engaged in clinical and translational research, the % of women to display the pop-up window.

2. Select View to display the TTC Plan window.

The TTC Plan window includes a graph of the data values and the sections of the TTC Plan are listed below the graph.
3. If necessary, scroll down to see the components of the TTC Plan.
4. Click the **Edit Note** icon to open the desired TTC plan section.
5. Enter the text for the TTC plan section.
6. To save the entry, click **Save**. To close the window *without saving*, click **Cancel**.
   
   **Please do not** click **Delete** – as this will **permanently** remove the note text and all note histories.
7. Repeat steps 4-6 for each section of the TTC Plan.
8. Click the back button on the top left hand of the screen to return to the Careers Metric homepage.

Actions

Actions are the discrete activities that support the strategies entered in the TTC Plan. Actions that are entered in Scorecard include these components:

- Name of the action
- Detailed description of the action
- Name of the individual assigning the action
- Name of the individual assigned the action (these individuals must be Scorecard license holders)
- Start date
- End date
- Percent completion

Entering Actions

1. From the Common Metrics Scorecard, click the Performance Measure (PM) icon for the performance measure of your choice to display the pop-up window.

2. Select View to display the TTC Plan window.

3. Scroll down to view Actions.
4. Click New Action to display the Add New Action window.

5. Click in the Name text box and enter the name of the action.

6. Click in the Description text box and enter a detailed description of the action.

7. Click the down arrow in the Status box, select the appropriate description from the drop-down list (On Track, Behind Schedule, Ahead of Schedule, Cancelled, Completed, Not Started, N/A).

8. Click the down arrow in the Assigned By box, select the appropriate name from the drop-down list for the assigner.
9. Click the down arrow in the **Assigned To** box, select the name of the appropriate assignee from the drop-down list.

10. Click in the **Start Date** box to display a pop-up calendar. You may need to use the « or » arrows on the calendar to scroll to the appropriate date.

11. Click in the **End Date** box to display a pop-up calendar. You may need to use the « or » arrows on the calendar to scroll to the appropriate date.

12. Click in the **Percent Complete** box and enter the percentage of completion for the action, if appropriate.

13. To save the changes, click **Save**. To close the window **without** saving changes, click **Cancel**.

![Cancel Save Button]

**Editing Actions**

1. From the Common Metrics Scorecard, click the **Performance Measure (PM)** icon for the performance measure of your choice to display the pop-up window.

2. Select **View** to display the TTC Plan window.

3. Scroll down to view the **Actions** list.

4. Double-click on the specific action to be updated to display the Action Details window.

![Action Details]

5. Click **Edit**

6. Make changes as appropriate (Status, Percent Complete, etc.).
7. To save the changes, click **Save**. To close the window **without** saving changes, click **Cancel**.

![Save and Cancel buttons]

**Completing Actions**

1. From the Common Metrics Scorecard, click the **Performance Measure (PM)** icon for the performance measure of your choice to display the pop-up window.

2. Select **View** to display the TTC Plan window.

![View options]

3. Scroll down to view the **Actions** list.

4. Double-click on the specific action to be updated to display the Action Details window.

![Action Details window]

5. Click **Edit**

6. Click the down arrow in the **Status** box, select the appropriate description from the drop-down list, click **Completed**.

![Status dropdown]

50
7. To save the changes, click **Save**. To close the window without saving changes, click **Cancel**.

![Save and Cancel Buttons]

**Deleting Actions**

1. From the Common Metrics Scorecard, click the **Performance Measure (PM)** icon for the performance measure of your choice to display the pop-up window.

2. Select **View** to display the TTC Plan window.

![View Menu]

3. Scroll down to view the **Actions** list.

![Actions List]

4. Click the trash icon for the action to be deleted.

![Trash Icon]

5. When prompted to delete the action, click **OK** to delete the action or click **Cancel** to keep the action.
Informatics Metric

Accessing the Informatics Metric

The Informatics Metric collects data on eight data domains and requires only one TTC Plan. Refer to the Common Metrics Reporting Guidance for the performance measures and the TTC plan required. Following are instructions on entering these requirements.

2. From the Home Screen, click the drop-down arrow – select Common Metrics.
   The list of common metrics and their associated performance measures are displayed.
3. Scroll down to display the **Informatics** metric scorecard.
Entering Data for the Informatics Metric

**Note:** There are 8 data domains for the Informatics Metric. Data values need to be entered for each of the domains:

- Percentage of patients with an age or date of birth value
- Percentage of patients with administrative gender value
- Percentage of patients with LOINC value
- Percentage of patients with RxNorm value
- Percentage of patients with ICD 9/10 or SNOMED value
- Percentage of patients with ICD 9/10 or CPT Procedure value
- Percentage of patients with free text data
- Observations Present (Y=1, N=0)
1. Click the **Performance Measure (PM)** icon for a data domain to display the pop-up window.

   ![Performance Measure Icon]

   **Percentage of patients with an age or date of birth value**

2. **Select Add Data Values.**

   ![Add Data Values]

3. Click the **Performance Measure (PM)** icon to display the pop-up window for the desired performance measure (numerator or denominator).

   ![Pop-up Window]

   **Disaggregated Performance Measures that are used to calculate this Performance Measure**

   - **Numerator**
   - **Denominator**

4. Enter the **both** the numerator and the denominator. **Do not enter commas in the values.**

   **Note:** You will only need to enter the denominator **one time.** The denominator will automatically populate the other data domains.

5. Click one of the **Performance Measure (PM)** icons to display the pop-up window.
6. Select **Add Data Values** to display the data entry measures for the value.

7. Enter the **Actual Value**. Note: *If your hub does not collect data for the performance measure, leave the field blank.*

- Hubs are not required to enter information in the Target Value for this metric. Hubs may use this field at their own discretion.

8. To **Add** an additional year(s) for past or future years, click the green plus sign. The **Rows to add**: pop-up window displays.

9. Enter the number of years to be added in the text box, click **Okay**.

10. If you add too many rows, click the red minus sign to remove them.
11. Repeat step 7 for each year added. For the Observations Present data domain, the Actual Value will be either a 1 or a 0 (zero). Enter 1 if observations are collected in the hub’s research data warehouse (RDW). Enter 0 if observations are not collected in the RDW.

12. To close the window without saving changes, click Close.

13. To save the data entered, click Save.

14. Click Save a second time.

(Sample Scorecard with completed Performance Measure)

Note: the denominator “Count of all patients in the data repository” is populated for all performance measures. The percentage is calculated based on the values entered.

15. Click the Performance Measure (PM) icon to display the data point on the graph for a performance measure.
16. Repeat steps 1-14 to enter the value for each data domain.
**Entering the Data Source**

The data source is the data model/script that was used to access data from the hub’s research data warehouse (RDW). The four supported data models are i2b2/ACT, TriNetX, OMOP and PCORnet. Scripts for these data models are available on the Github website. This information only needs to be entered once.

1. From the Informatics Scorecard, click the **Performance Measure (PM)** icon for **Observations Present** to display the pop-up window.

   ![Performance Measure Icon](pm_icon.png)

2. Select **Add Data Values** to display the pop-up window.  
   *(Note: the data model can be entered in any performance measure in the Informatics scorecard.)*

   ![Add Data Values Button](add_data_values.png)

3. Enter the Data Source the hub is using: **i2b2/ACT, TriNetX, OMOP, or PCORnet**.

   ![Data Source Input](data_source_input.png)
4. To close the window *without* saving changes, click **Close**.
5. To save the data entered, click **Save**.
6. Click **Save** a second time.
Uploading a Worksheet into Scorecard

Hubs will run a script (from [Github](https://github.com)) on their research data warehouse. This script generates data output.

1. Enter or copy/paste the data output into the worksheet (see example below). The worksheet is available on the CLIC website [here](https://www.clic.org).

   ![Example of data output from PCORnet model to be into the worksheet](image)

2. In Scorecard, in the Informatics scorecard, click the **Performance Measure (PM)** icon for **Observations Present** to display the pop-up window.

3. Select **View** to display the TTC Plan window.

4. Scroll down to view **File Attachments**. It is located near the bottom on the right-hand side of the window.
5. Click **Upload File**.

6. An Open dialog displays - select the file to be uploaded.

7. Click **Open**.

8. The file name displays in the **File Attachments** box.

9. Click **Upload File**.
Entering Date Ranges

Hubs will enter the date range for each data domain. The dates represent the range of years for the data for which the hub has access.

1. From the Informatics Scorecard, click the **Performance Measure (PM)** icon for **Observations Present** to display the pop-up window.

2. Select **View** to display the TTC Plan window.

3. Scroll down to the **Inclusion/Exclusion Decisions** section.

4. Click the **Edit Note** icon to open the desired TTC plan section.

5. Click in the text box to the right of the data domain and enter the Date Range for each **Data Domain**. These are the dates for which the hub has access to and is reporting data for each of these domains. For example: **1997-2018**.

   *Do not enter days or months – just the year. Do not enter any text.*
6. Click **Save**.

Enter the date range for **each** domain (the dates the hub has access to and is reporting for the domain).
Entering the TTC Plan for the Informatics Metric

Note: Only one TTC Plan is required for the Informatics Metric.

The TTC Plan consists of 5 components. Enter a narrative for each of these sections:

- Story Behind the Curve
- Partners
- What Works
- Strategies

In the Actions section, enter the specific actions that will be implemented to support each strategy.

1. From the Informatics Scorecard, click the Performance Measure (PM) icon for Observations Present to display the pop-up window.

2. Select View to display the TTC Plan window.

3. Click the Edit Note icon to open the desired TTC plan section.

4. Enter the text for the TTC plan section.
5. To save the entry, click **Save**. To close the window *without saving*, click **Cancel**.

   Please *do not* click Delete – as this will permanently remove the note text and all note histories.

6. Repeat steps 3-5 for each section of the TTC Plan.

**Actions**

Actions are the discrete activities that support the strategies entered in the TTC Plan. Actions that are entered in Scorecard include these components:

- Name of the action
- Detailed description of the action
- Name of the individual assigning the action
- Name of the individual assigned the action (these individuals must be Scorecard license holders)
- Start date
- End date
- Percent completion

**Entering Actions**

1. From the Common Metrics Scorecard, click the **Performance Measure (PM)** icon for the performance measure of your choice to display the pop-up window.

2. Select **View** to display the TTC Plan window.

3. Scroll down to view **Actions**.
4. Click **New Action** to display the Add New Action window.

5. Click in the **Name** text box and enter the name of the action.

6. Click in the **Description** text box and enter a detailed description of the action.

7. Click the down arrow in the **Status** box, select the appropriate description from the drop-down list (On Track, Behind Schedule, Ahead of Schedule, Cancelled, Completed, Not Started, N/A).

8. Click the down arrow in the **Assigned By** box, select the appropriate name from the drop-down list for the assigner.

9. Click the down arrow in the **Assigned To** box, select the name of the appropriate assignee from the drop-down list.

10. Click in the **Start Date** box to display a pop-up calendar. You may need to use the « or » arrows on the calendar to scroll to the appropriate date.
11. Click in the **End Date** box to display a pop-up calendar. You may need to use the « or » arrows on the calendar to scroll to the appropriate date.

12. Click in the **Percent Complete** box and enter the percentage of completion for the action, if appropriate.

13. To save the changes, click **Save**. To close the window **without** saving changes, click **Cancel**.

![Cancel Save]

**Editing Actions**

1. From the Common Metrics Scorecard, click the **Performance Measure (PM)** icon for the performance measure of your choice to display the pop-up window.

2. Select **View** to display the TTC Plan window.

![View]

3. Scroll down to view the **Actions** list.

4. Double-click on the specific action to be updated to display the Action Details window.

![Action Details]

5. Click **Edit**

6. Make changes as appropriate (Status, Percent Complete, etc.).

7. To save the changes, click **Save**. To close the window **without** saving changes, click **Cancel**.

![Cancel Save]
Completing Actions

1. From the Common Metrics Scorecard, click the **Performance Measure (PM)** icon for the performance measure of your choice to display the pop-up window.

2. Select **View** to display the TTC Plan window.

3. Scroll down to view the **Actions** list.

4. Double-click on the specific action to be updated to display the Action Details window.

5. Click **Edit**

6. Click the down arrow in the **Status** box, select the appropriate description from the drop-down list, click **Completed**.

7. To save the changes, click **Save**. To close the window **without** saving changes, click **Cancel**.
Deleting Actions

1. From the Common Metrics Scorecard, click the **Performance Measure (PM)** icon for the performance measure of your choice to display the pop-up window.

2. Select **View** to display the TTC Plan window.

3. Scroll down to view the **Actions** list.

4. Click the trash icon for the action to be deleted.

5. When prompted to delete the action, click **OK** to delete the action or click **Cancel** to keep the action.
Median IRB Review Duration Metric

Accessing the Median IRB Review Duration in Metric

The Median IRB Review Duration Metric collects data on one performance measure and requires only one TTC Plan. Refer to the Common Metrics Reporting Guidance for the measures required and the TTC plan required. Following are instructions on entering these requirements.

2. From the Home Screen, click the drop-down arrow – select Common Metrics.
   The list of common metrics and their associated performance measures are displayed.
### Common Metrics

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>P</td>
<td>Median IRB Review Duration</td>
</tr>
<tr>
<td>PM</td>
<td>Median # of days to IRB approval</td>
</tr>
<tr>
<td>P</td>
<td># of pilot research projects that have expended pilot funds since January 1, 2012</td>
</tr>
<tr>
<td>PM</td>
<td>% of pilot research projects that have at least one research publication</td>
</tr>
<tr>
<td>PM</td>
<td>% of pilot research projects that have at least one subsequent research award</td>
</tr>
<tr>
<td>P</td>
<td>Careers in Clinical and Translational Research</td>
</tr>
<tr>
<td>PM</td>
<td># of KL2 graduates who are currently engaged in clinical and translational research</td>
</tr>
<tr>
<td>PM</td>
<td>% of KL2 graduates who are currently engaged in clinical and translational research</td>
</tr>
<tr>
<td>PM</td>
<td>Of the KL2 graduates who are currently engaged in clinical and translational research, the # of underrepresented persons</td>
</tr>
<tr>
<td>PM</td>
<td>Of the KL2 graduates who are currently engaged in clinical and translational research, the % of underrepresented persons</td>
</tr>
<tr>
<td>PM</td>
<td>Of the KL2 graduates who are currently engaged in clinical and translational research, the # of women</td>
</tr>
<tr>
<td>PM</td>
<td>Of the KL2 graduates who are currently engaged in clinical and translational research, the % of women</td>
</tr>
</tbody>
</table>

*(Sample Common Metrics Scorecard)*
Entering Data for Median IRB Performance Measure

1. Click the Performance Measure (PM) icon for Median # of days to IRB approval display the pop-up window.

2. Select Add Data Values to display the data entry measures for the value.

3. Enter the Actual Value measure. Note: If your hub does not collect data for the performance measure, leave the field blank.

íst Hubs are not required to enter information in the Data Source field or the Target Value for this metric. Hubs may use these fields at their own discretion.
4. To **Add** an additional year(s) for past or future years, click the green plus sign. The **Rows to add** pop-up window displays.

![Rows to add window]

Enter number of rows (years) to add

5. Enter the number of years to be added in the text box, click **Okay**.

6. If you add too many rows, click the red minus sign to remove them.

7. Repeat step 3 for each year added.

8. To save the changes, click **Save**. To close the window *without* saving changes, click **Close**.
Entering the TTC Plan for Median IRB Review Duration

The TTC Plan consists of 5 components. Enter a narrative for each of these sections:
- Story Behind the Curve
- Partners
- What Works
- Strategies

In the Actions section, enter the specific actions that will be implemented to support each strategy.

1. Click the Performance Measure (PM) icon for Median # of days to IRB approval display the pop-up window.

2. Select View to display the TTC Plan window.

3. Click the Edit Note icon to open the desired TTC Plan section.

4. Enter the text for the TTC plan section.

5. To save the entry, click Save. To close the window without saving, click Cancel.

Please do not click Delete – as this will permanently remove the note text and all note histories.
6. Repeat steps 3-5 for each section of the TTC Plan.

**Actions**

Actions are the discrete activities that support the strategies entered in the TTC Plan. Actions that are entered in Scorecard include these components:

- Name of the action
- Detailed description of the action
- Name of the individual assigning the action
- Name of the individual assigned the action (these individuals must be Scorecard license holders)
- Start date
- End date
- Percent completion

**Entering Actions**

1. From the Common Metrics Scorecard, click the Performance Measure (PM) icon for the performance measure of your choice to display the pop-up window.

2. Select View to display the TTC Plan window.

3. Scroll down to view Actions.

4. Click New Action to display the Add New Action window.
5. Click in the **Name** text box and enter the name of the action.
6. Click in the **Description** text box and enter a detailed description of the action.
7. Click the down arrow in the **Status** box, select the appropriate description from the drop-down list (On Track, Behind Schedule, Ahead of Schedule, Cancelled, Completed, Not Started, N/A).
8. Click the down arrow in the **Assigned By** box, select the appropriate name from the drop-down list for the assigner.
9. Click the down arrow in the **Assigned To** box, select the name of the appropriate assignee from the drop-down list.
10. Click in the **Start Date** box to display a pop-up calendar. You may need to use the « or » arrows on the calendar to scroll to the appropriate date.
11. Click in the End Date box to display a pop-up calendar. You may need to use the « or » arrows on the calendar to scroll to the appropriate date.

12. Click in the Percent Complete box and enter the percentage of completion for the action, if appropriate.

13. To save the changes, click Save. To close the window without saving changes, click Cancel.

---

**Editing Actions**

1. From the Common Metrics Scorecard, click the Performance Measure (PM) icon for the performance measure of your choice to display the pop-up window.

2. Select View to display the TTC Plan window.

3. Scroll down to view the Actions list.

4. Double-click on the specific action to be updated to display the Action Details window.

5. Click Edit

6. Make changes as appropriate (Status, Percent Complete, etc.).

7. To save the changes, click Save. To close the window without saving changes, click Cancel.
Completing Actions

1. From the Common Metrics Scorecard, click the **Performance Measure (PM)** icon for the performance measure of your choice to display the pop-up window.

2. Select **View** to display the TTC Plan window.

3. Scroll down to view the **Actions** list.

4. Double-click on the specific action to be updated to display the Action Details window.

5. Click **Edit**

6. Click the down arrow in the **Status** box, select the appropriate description from the drop-down list, click **Completed**.

7. To save the changes, click **Save**. To close the window **without** saving changes, click **Cancel**.
Deleting Actions

1. From the Common Metrics Scorecard, click the **Performance Measure (PM)** icon for the performance measure of your choice to display the pop-up window.

2. Select **View** to display the TTC Plan window.

3. Scroll down to view the **Actions** list.

4. Click the trash icon for the action to be deleted.

5. When prompted to delete the action, click **OK** to delete the action or click **Cancel** to keep the action.
Pilot Funding Publications and Subsequent Funding Metric

Accessing the Pilot Funding Publication Metric

The Pilot Funding Metric collects data on two required performance measures and one that is optional. There is only one TTC Plan required. Refer to the Common Metrics Reporting Guidance for the measures and the TTC plan required. **Note:** Hubs can elect to write an optional TTC plan for a subsequent award under % of pilot research projects that have at least one subsequent research award – this is at the hub’s discretion. Following are instructions on entering these requirements.

2. From the Home Screen, click the drop-down arrow – select **Common Metrics**. The list of common metrics and their associated performance measures are displayed.
### Common Metrics

#### Pilot Funding Publications and Subsequent Funding
- **# of pilot research projects that have expended pilot funds since January 1, 2012**
- **% of pilot research projects that have at least one research publication**
- **% of pilot research projects that have at least one subsequent research award**

#### Careers in Clinical and Translational Research
- **# of KL2 graduates who are currently engaged in clinical and translational research**
- **% of KL2 graduates who are currently engaged in clinical and translational research**
- **Of the KL2 graduates who are currently engaged in clinical and translational research, the # of underrepresented persons**
- **Of the KL2 graduates who are currently engaged in clinical and translational research, the % of underrepresented persons**
- **Of the KL2 graduates who are currently engaged in clinical and translational research, the # of women**
- **Of the KL2 graduates who are currently engaged in clinical and translational research, the % of women**

*(Sample Common Metrics Scorecard)*
Entering Data for a Pilot Funding Performance Measure

# of pilot research projects that have expended pilot funds since January 1, 2012

1. Click the Performance Measure (PM) icon for
   # of pilot research projects that have expended pilot funds since January 1, 2012 to
develop the pop-up window.

2. Select Add Data Values to display the data entry measures for the value.

3. Enter the Actual Value measure. Note: If your hub does not collect data for the
   performance measure, leave the field blank.
Hubs are not required to enter information in the Data Source field or the Target Value for this metric. Hubs may use these fields at their own discretion.

4. To Add an additional year(s) for past or future years, click the green plus sign. The Rows to add: pop-up window displays.

5. Enter the number of years to be added in the text box, click Okay.

6. If you add too many rows, click the red minus sign to remove them.

7. Repeat step 3 for each year added.

8. To save the changes, click Save. To close the window without saving changes, click Close.

% of pilot research projects that have at least one research publication

1. Click the Performance Measure (PM) icon for % of pilot research projects that have at least one research publication to display the pop-up window.

2. Select Add Data Values to display the data entry measures for the value.

3. Enter the Actual Value measure. Note: If your hub does not collect data for the performance measure, leave the field blank.
Hubs are not required to enter information in the Data Source field or the Target Value for this metric. Hubs may use these fields at their own discretion.

4. To **Add** an additional year(s) for past or future years, click the green plus sign. The **Rows to add**: pop-up window displays.

5. Enter the number of years to be added in the text box, click **Okay**. If you add too many rows, click the red minus sign to remove them.

6. Repeat step 3 for each year added.

7. To save the changes, click **Save**. To close the window **without** saving changes, click **Close**.
Entering Data for the *Optional* Pilot Funding Performance Measure

1. Click the *Performance Measure (PM)* icon for
   % of pilot research projects that have at least one subsequent research award to display the pop-up window.

2. Select *Add Data Values* to display the data entry measures for the value.

3. Enter the *Actual Value* measure. *Note: If your hub does not collect data for the performance measure, leave the field blank.*
Hubs are not required to enter information in the Data Source field or the Target Value for this metric. Hubs may use these fields at their own discretion.

4. To **Add** an additional year(s) for past or future years, click the green plus sign. The **Rows to add: pop-up window displays.**

![Rows to add: pop-up window](image)

Enter number of rows (years) to add

5. Enter the number of years to be added in the text box, click **Okay.**

6. If you add too many rows, click the red minus sign to remove them.

7. Repeat step 3 for each year added.

8. To save the changes, click **Save.** To close the window **without** saving changes, click **Close.**
Entering the TTC Plan for Pilot Funding Publications and Subsequent Funding

The TTC Plan consists of 5 components. Enter a narrative for each of these sections:

- Story Behind the Curve
- Partners
- What Works
- Strategies

In the Actions section, enter the specific actions that will be implemented to support each strategy.

1. Click the Performance Measure (PM) icon for%
   of pilot research projects that have at least one research publication to display the pop-up window.

2. Select View to display the TTC Plan window.

3. Click the Edit Note icon to open the desired TTC Plan section.

4. Enter the text for the TTC plan section.
5. To save the entry, click **Save**. To close the window **without saving**, click **Cancel**.

Please **do not** click **Delete** – as this will **permanently** remove the note text and all note histories.

6. Repeat steps 3-5 for each section of the TTC Plan.

**Actions:**

Actions are the discrete activities that support the strategies entered in the TTC Plan. Actions that are entered in Scorecard include these components:

- Name of the action
- Detailed description of the action
- Name of the individual assigning the action
- Name of the individual assigned the action (these individuals must be Scorecard license holders)
- Start date
- End date
- Percent completion

**Entering Actions**

1. From the Common Metrics Scorecard, click the **Performance Measure (PM)** icon for the performance measure of your choice to display the pop-up window.

2. Select **View** to display the TTC Plan window.

3. Scroll down to view **Actions**.

4. Click **New Action** to display the Add New Action window.
5. Click in the **Name** text box and enter the name of the action.

6. Click in the **Description** text box and enter a detailed description of the action.

7. Click the down arrow in the **Status** box, select the appropriate description from the drop-down list (On Track, Behind Schedule, Ahead of Schedule, Cancelled, Completed, Not Started, N/A).

8. Click the down arrow in the **Assigned By** box, select the appropriate name from the drop-down list for the assigner.

9. Click the down arrow in the **Assigned To** box, select the name of the appropriate assignee from the drop-down list.

10. Click in the **Start Date** box to display a pop-up calendar. You may need to use the « or » arrows on the calendar to scroll to the appropriate date.
11. Click in the **End Date** box to display a pop-up calendar. You may need to use the « or » arrows on the calendar to scroll to the appropriate date.

12. Click in the **Percent Complete** box and enter the percentage of completion for the action, if appropriate.

13. To save the changes, click **Save**. To close the window **without** saving changes, click **Cancel**.

   ![Cancel Save Button]

**Editing Actions**

1. From the Common Metrics Scorecard, click the **Performance Measure (PM)** icon for the performance measure of your choice to display the pop-up window.

2. Select **View** to display the TTC Plan window.

3. Scroll down to view the **Actions** list.

4. Double-click on the specific action to be updated to display the Action Details window.

5. Click **Edit**

6. Make changes as appropriate (Status, Percent Complete, etc.).
7. To save the changes, click Save. To close the window without saving changes, click Cancel.

Completing Actions
1. From the Common Metrics Scorecard, click the Performance Measure (PM) icon for the performance measure of your choice to display the pop-up window.
2. Select View to display the TTC Plan window.
3. Scroll down to view the Actions list.
4. Double-click on the specific action to be updated to display the Action Details window.
5. Click Edit.
6. Click the down arrow in the Status box, select the appropriate description from the drop-down list, click Completed.
7. To save the changes, click **Save**. To close the window **without** saving changes, click **Cancel**.

![Cancel Save Button]

**Deleting Actions**

1. From the Common Metrics Scorecard, click the **Performance Measure (PM)** icon for the performance measure of your choice to display the pop-up window.

2. Select **View** to display the TTC Plan window.

![View Menu]

3. Scroll down to view the **Actions** list.

![Actions Table]

4. Click the trash icon for the action to be deleted.

5. When prompted to delete the action, click **Ok** to delete the action or click **Cancel** to keep the action.
Entering the *Optional* TTC Plan for Pilot Funding Publications and Subsequent Funding

**Note:** Entering information for this TTC Plan is *not required.*

The TTC Plan consists of 5 components. Enter a narrative for each of these sections:
- Story Behind the Curve
- Partners
- What Works
- Strategies

In the Actions section, enter the specific actions that will be implemented to support each strategy.

1. Click the **Performance Measure (PM)** icon for

   % of pilot research projects that have at least one subsequent research award
to display the pop-up window.

2. Select **View** to display the TTC Plan window.

3. Click the **Edit Note** icon to open the desired TTC Plan section.

4. Enter the text for the TTC plan section.
5. To save the entry, click Save. To close the window without saving, click Cancel.

Please do not click Delete – as this will permanently remove the note text and all note histories.

6. Repeat steps 3-5 for each section of the TTC Plan.

Actions

Actions are the discrete activities that support the strategies entered in the TTC Plan. Actions that are entered in Scorecard include these components:

- Name of the action
- Detailed description of the action
- Name of the individual assigning the action
- Name of the individual assigned the action (these individuals must be Scorecard license holders)
- Start date
- End date
- Percent completion

Entering Actions

1. From the Common Metrics Scorecard, click the Performance Measure (PM) icon for the performance measure of your choice to display the pop-up window.

2. Select View to display the TTC Plan window.

3. Scroll down to view Actions.
4. Click New Action to display the Add New Action window.

![Add New Action window](image)

5. Click in the Name text box and enter the name of the action.

6. Click in the Description text box and enter a detailed description of the action.

7. Click the down arrow in the Status box, select the appropriate description from the drop-down list (On Track, Behind Schedule, Ahead of Schedule, Cancelled, Completed, Not Started, N/A).

8. Click the down arrow in the Assigned By box, select the appropriate name from the drop-down list for the assigner.

9. Click the down arrow in the Assigned To box, select the name of the appropriate assignee from the drop-down list.

10. Click in the Start Date box to display a pop-up calendar. You may need to use the « or » arrows on the calendar to scroll to the appropriate date.
11. Click in the **End Date** box to display a pop-up calendar. You may need to use the « or » arrows on the calendar to scroll to the appropriate date.

12. Click in the **Percent Complete** box and enter the percentage of completion for the action, if appropriate.

13. To save the changes, click **Save**. To close the window without saving changes, click **Cancel**.

**Editing Actions**

1. From the Common Metrics Scorecard, click the **Performance Measure (PM)** icon for the performance measure of your choice to display the pop-up window.

2. Select **View** to display the TTC Plan window.

3. Scroll down to view the **Actions** list.

4. Double-click on the specific action to be updated to display the Action Details window.

5. Click **Edit**

6. Make changes as appropriate (Status, Percent Complete, etc.).

7. To save the changes, click **Save**. To close the window without saving changes, click **Cancel**.
Completing Actions

1. From the Common Metrics Scorecard, click the Performance Measure (PM) icon for the performance measure of your choice to display the pop-up window.

2. Select View to display the TTC Plan window.

3. Scroll down to view the Actions list.

4. Double-click on the specific action to be updated to display the Action Details window.

5. Click Edit

6. Click the down arrow in the Status box, select the appropriate description from the drop-down list, click Completed.

7. To save the changes, click Save. To close the window without saving changes, click Cancel.
Deleting Actions

1. From the Common Metrics Scorecard, click the Performance Measure (PM) icon for the performance measure of your choice to display the pop-up window.

2. Select View to display the TTC Plan window.

![View]

3. Scroll down to view Actions list.

![Actions]

4. Click the trash icon for the action to be deleted.

5. When prompted to delete the action, click OK to delete the action or click Cancel to keep the action.
TTC Plan Note History

Viewing Note History
Scorecard archives the TTC Plans for previous reporting periods. The history of every entry for each section of the TTC Plan can be viewed.

1. From the Common Metrics Scorecard, click the **Performance Measure (PM)** icon for the performance measure of your choice to display the pop-up window.

2. Select **View** to display the TTC Plan window.

3. Click the **View Note History** icon to open the desired TTC Plan section.

4. To close the history window, click the **View Note History** icon.
Resources

Below are a list of resources available to all hubs for the Common Metrics Initiative and Clear Impact. For questions regarding Common Metrics, please email: common_metrics@clic-ctsa.org

Resources Available through the CLIC Common Metrics Initiative Webpage:

- Common Metrics Website: https://clic-ctsa.org/common-metrics-initiative
- Common Metrics Reporting Page: https://clic-ctsa.org/common-metrics-initiative/reporting
- All Common Metrics: https://clic-ctsa.org/common-metrics-initiative/9316/metric

Resources Available through Clear Impact:

For technical questions related to the Scorecard software:

- Clear Impact Support Webpage: https://support.clearimpact.com/
- Clear Impact Support Email: support@clearimpact.com