

## How To Set Up Activities for Automatic Milestone Completion (outcomes reporting)

With the newest MIS update (patch 41), we now have the ability to link the completion of activities to the achievement of a Milestone (which should be linked to the National Performance Indicator for ROMA reporting – please see the Organization Setup Guide for more details on milestones and target area/NPI links). Read on for the details on setting up activities to automatically update the Milestone Status. Also, please see the short training video on the MACA web site for a demonstration of how this works from the user's perspective.

[http://www.communityaction.org/files/MIS/Recording\\_Services\\_with\\_automatic\\_Milestone\\_Status\\_change.swf](http://www.communityaction.org/files/MIS/Recording_Services_with_automatic_Milestone_Status_change.swf)

**NOTE:** This is completely optional – if no action is taken, there is no impact or change to any page or user process.

On the Program Setup page, in the Activity container (the bottom section), there is a new field labeled “Complete?” with a text box. If an activity is one that completes a Milestone (i.e., achieves an outcome), type in “Complete” in this text box. If completing the activity does not result in achieving the outcome, leave this field blank.

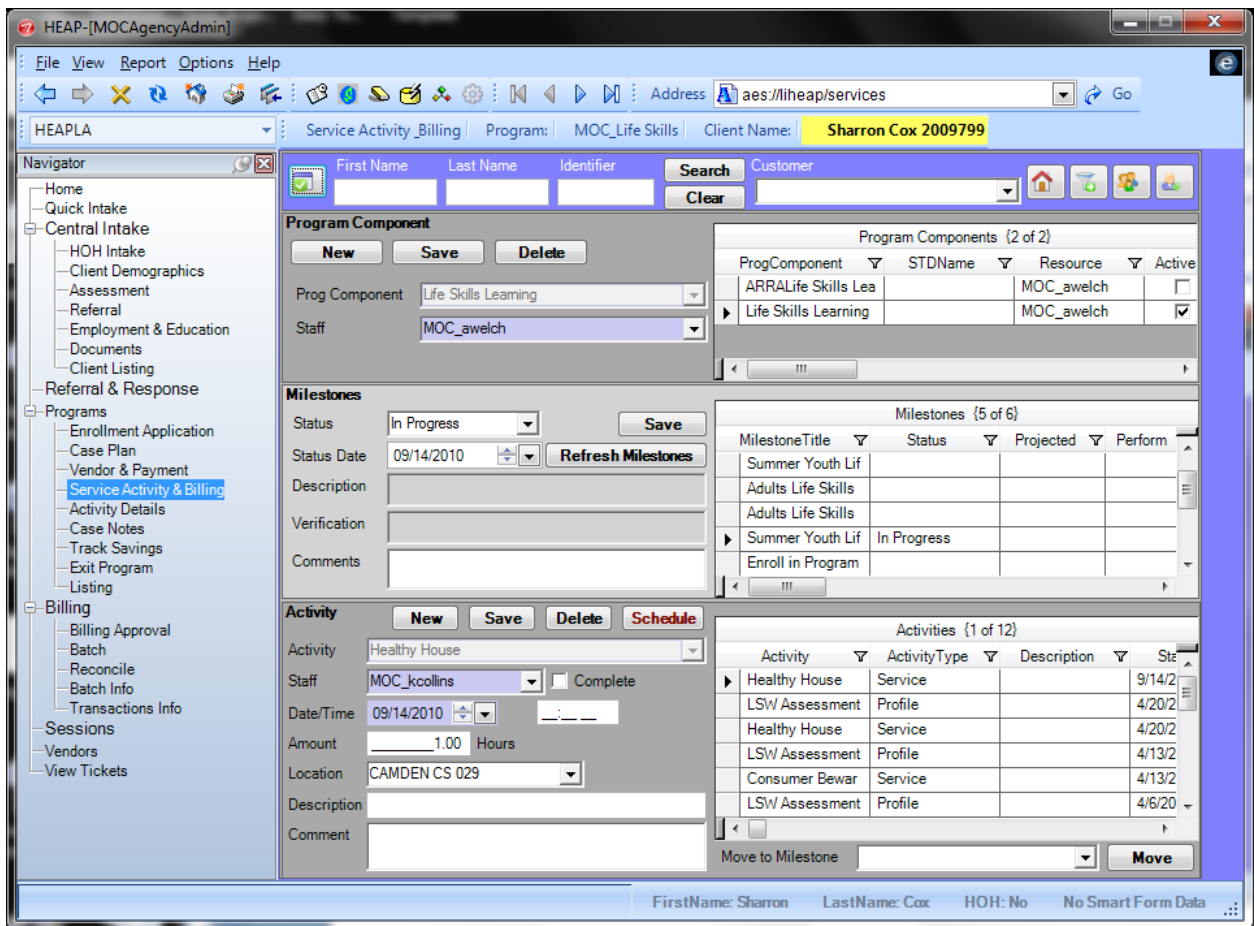
The screenshot displays the 'Organization-[MOCAgencyAdmin]' web application interface. The main content area is titled 'Program Setup' and is organized into several sections:

- Organization Name:** MOCA, Type: CAP. A 'Show Active Program Only' checkbox is present.
- Program:** MOC\_Life Skills. Includes dropdowns for Question Code (LS Entry) and Standard Name (Life Skills). A 'Details' button and 'Auto Create' checkbox are also visible.
- Program Component:** Life Skills Learning. Includes a dropdown for Question Code and a 'Description' field. 'Auto Create' and 'Active' checkboxes are present.
- Activity:** Healthy House. Includes dropdowns for Activity Type (Service), Units (1 Hours), Unit Cost (22.00), Question Code, Standard Name (Life skills), FundingCode (CSBG Funding), Instructor, Billing (Yes), Focus Code, and EstimatedTime (1). A 'Description' field is also present.
- Activity Configuration:** Date-Days Offered, Modality, Client Daily Limit (0), Daily Limit (0), and Category. Includes checkboxes for 'Swipe', 'Kit', and 'Show in RSM', and an 'Auto Create' checkbox.
- Activity Table:** A table with columns 'Activity' and 'Description'. The 'Healthy House' activity is highlighted. Other activities listed include Family Strengths, Fire Prevention S, Floods, Food and Fitness, Foundations of Fa, General Prepared, Getting on the Ro, Go For It, Having Fun, Home Safety, and Hurricanes.

At the bottom of the Activity section, there is a 'Complete?' text box. The page also features a 'Navigator' on the left and a 'Life Skills Learning' / 'Healthy House' breadcrumb at the bottom.

On the Service Activity and Billing page, there is a new checkbox. This checkbox will only appear if the “Completed?” field on the Program Setup page is populated (see above), and the label will match what was typed in that field on the Program Setup page.

When this checkbox appears, one of two things will happen. If the user leaves the checkbox empty, the Milestone Status will change to In Progress when the activity is saved. If the user checks the box, the Milestone Status will change to Completed when the activity is saved. This will automate the recording of outcomes achieved (when those outcomes are contingent on a service/activity).



Please note that this does not apply to activities with an Activity Type of “Energy” (i.e., vendor payment activities). Those activities will update the Milestone Status when the batch is reconciled (the system sets the payment status to Paid and will update the milestone status to Completed).

If the “Completed?” field on the Program Setup page is left blank, there is no change to the Service Activity & Billing page. The screen shot below does not contain the new checkbox, because the selected activity was not set to automatically update the Milestone Status. For these activities, a user can still update the Milestone Status manually by selecting a dropdown value and clicking the Save button in the middle container.

