LHD PEARS Q&A: 2019 LIA Forum

General

Can we use a shared user name and password for everyone in our organization to report into PEARS?

No. Following industry-wide IT standards, each individual PEARS user should have their own login credentials. This practice maintains the security of your organization and your own security. When each user reports into PEARS under their own credentials, it also helps our team with quality assurance and technical assistance. PEARS entries show the user that created and edited an entry, allowing us to identify the appropriate contact for any questions relating to a specific entry.

Sometimes users want to be able to edit each other's entries. You can grant permission to another PEARS user to access and edit your entries while logged in under their own credentials. To do this:

1. Navigate to the Manage Account page. (Your Name / Manage Account).
2. Click on the Permissions tab in the upper left.
3. In the box below, start typing the user's name to search and select the user you want to add.
4. Click save.

If you need a PEARS account, please use the *PEARS Account Request Form.*

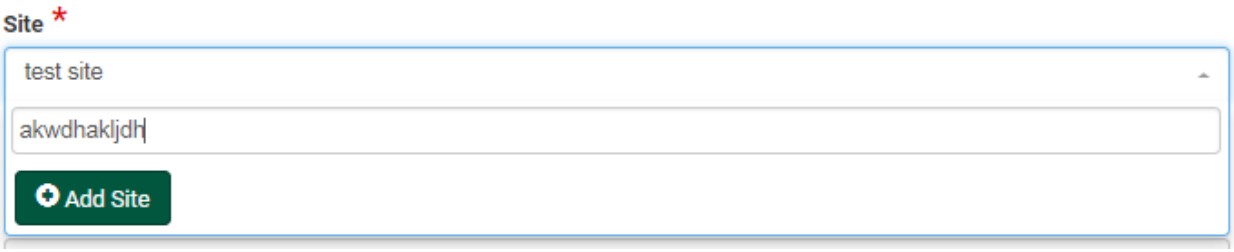
What is the "attach files" button used for? When I enter an class in Program Activities, for example, do I need to attach everything I used for that activity?

The "attach files" section of PEARS modules is an optional place for adding the materials related to an event or activity. Materials can be, but are not limited to, handwritten follow-up notes from the educator, PDFs of the handouts, pictures taken at an event, or flyers promoting an event. Attaching files is optional in most modules, although they are an important and strongly encouraged component of a Success Story submission. Please note that whenever you attach photographs of people, you must also attach all relevant photo release forms.

I have an approved site that is not on my site list. How do I add it?

First, make sure that the site is not in PEARS by search for the street name or street address, as well as other common names for the site. For example, if you are looking for MLK Elementary at 123 Main street, you should first try to search for "main", "123" or "123 main" to find the site. If that doesn't work, you can also try other spelling of the site name. In this example, you would

also try “Martin Luther”, “MLK” only, “King” or other ways that MLK elementary might be entered. Once you are certain that the site is not in PEARS, you can add the site using the “Add Site” button. The “Add Site” button only appears if there are no matches in the search. If you cannot get the “Add Site” button to show up, then enter in a string of random letters, e.g. “akwdhakljdh”, and the “Add Site” button will show. See the screenshot below for an example.



Where do we report meetings or trainings that are part of our IWP?

PEARS is not designed to track many of the current or future work plan activities you do. It is made to track only activities that directly impact evaluation framework indicators.

We know how important it is to track all of your work plan activities! We've had conversations with many of you about this, and we know that you generally have local processes in place for this. For example, many of you track your meetings and trainings in an Excel spreadsheet. Those processes are all that you need at this time.

If a meeting or training is part of a PSE activity or partnership, then there are ways to report them within the PSE and partnership modules. In the PSE module, you can report the meeting or training in the "complementary activities" section. In the Partnerships module, you can report it in the "meetings and events" section. Just remember, a training on its own is not considered to be either a PSE activity or a partnership.

Indirect Activities

Sometimes we give materials and resources to partner agencies, and then they distribute them to the target audience. How do I track this in PEARS?

Either you or your partner agency (but not both) can report this material distribution to the target audience as an indirect activity.

How do I identify the best intervention name for an Indirect Activity when none on the list seems to fit? What about the intervention channel?

Please select the intervention name or channel that is the closest fit. Ideally, we prefer that you avoid using the “other” category whenever possible. We spend a lot of time reviewing data recorded as “other” and recoding them back into the existing categories. *Note that this is also*

true for selecting your PSE setting when you report PSE activities. Choose the closest setting name whenever you can and try to avoid the "other" write-in options.

When adding intervention channels, remember that you can include more than one intervention channel within a single Indirect Activity entry. For example, if you hosted a booth at a community event where you distributed flyers, and you also had a radio PSA about that event, each of those could be entered as an intervention channel within a single Indirect Activity entry. There is no need to enter three Indirect Activities. Likewise, there is no need to identify a single intervention channel that describes them all, because you can report each one as its own channel.

PSE

I am starting work with some mobile vendors on a variety of activities, such as changing the default beverage for meals to be water, making menu items healthier, adding healthy recognition decals, holding taste tests, and handing out recipe cards. I think that some of this is PSE, but my colleague thought it was all Indirect. What should we do?

This is a great question and one that we get a lot. For this specific example, you are both correct. While all of these activities could be considered different kinds of promotion-based strategies, for SNAP-Ed reporting purposes, we separate these into Indirect and PSE.

In the Indirect Activities module on PEARS, here are the intervention channels that are most closely related to the recognition decals, taste tests and recipe cards:

- Hard copy materials (e.g. fact sheets, flyers, pamphlets, activity books, posters, banners, postcards, recipe cards, or newsletters for mailings)
- Point-of-sale or distribution signage (e.g. displays or window clings in retail stores)

For the changes to the menu items and adding water as a default, those are activities that would go under the PSE module:

- Improved menus/recipes (variety, quality, offering lighter fares)
- stablished healthy food/beverage defaults (whole wheat bread, salad, or fruit instead of fries, water instead of soda, etc.)

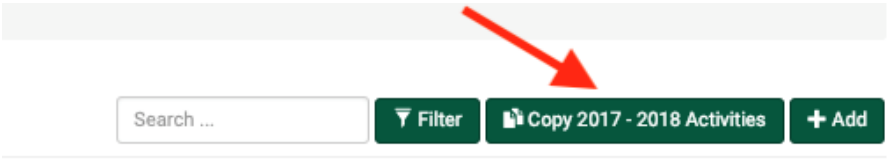
Please note that in this example, the mobile vendors are similar to food trucks, so the appropriate setting is mobile vending/food trucks, under the Eat domain, but we realize that many LHDs also work with mobile vendors that are more similar to a mobile farm stand or a mobile grocery store. In that case, you would choose the closest category, under the Shop domain (most likely farmers' market or small food store).

Here is a previous Q&A sheet that we wrote up after a webinar that may help you as well. Both are posted to our CDPH PEARS resources website.

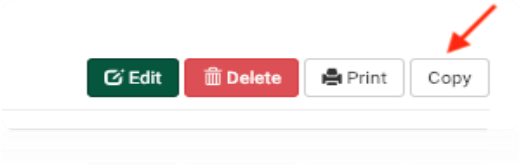
If we are working on largely the same PSE activities at the same sites from last year to this year, do I need to enter everything over again?

No, you do not! There is a feature to replicate entries from the previous year and entries for the current year if you are implementing the same PSEs at different sites.

To copy from a previous year: From the "track" dropdown menu, click on "PSE Site Activities." A list of your current activities should be listed. At the top right, there will be a button that says "Copy 2017-2018 Activities." Clicking this button will bring up a list of your previous year's entries. Select the check box of the entry or entries you want to copy.



To copy from the current year: From your list of entries, click on the one you would like to make a copy of. At the top right, there will be a button that says "copy."

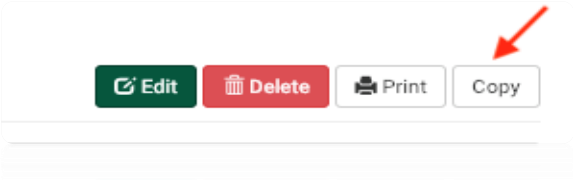


Once you've finished duplicating last year's entries for the sites you want, review through the entries and make changes as needed (e.g. reach, planning stage, assessments conducted, etc.)

If we are implementing the same PSE activities at several different sites, do I need to create a separate report for each site?

Yes, every site needs its own report, but if you are doing similar activities at multiple sites, you can use a duplicate/copy report feature to reduce your data entry time.

To copy from the current year: From your list of entries, click on the one you would like to make a copy of. At the top right, there will be a button that says "copy."



Remember to review through each entry and make any necessary changes so that each report reflects what happened at each site. For example, in most cases you will need to change the reach!

The PSE slides that NPI sent to us provided a granular detail of the work we did. How do we make sure that the work that the PSEs do is actually highlighted and captured?

Since there is no way to "highlight" a PSE in PEARS the best way to showcase a PSE is to use the success stories. Make sure to follow the Success Story Instructions that CDPH shared in 2018. If you want a refresher on how to create a compelling success story and submit it via PEARS, you can watch the recorded Success Story Instructions Webinar, too.

Is the auto-calculate feature to automatically fill in reach demographics for school sites available in the PSE module yet?

Not yet, but it will be added in the future. As soon as this is available, we will update users.

Surveys 2.0

Can I use the new Surveys 2.0 features to create and distribute a survey to our participants? Can I enter in a survey that is for our organization only or a qualitative survey about the lesson?

Yes, it's similar to a mini Survey Monkey! There is a library of questions to help you build a survey, or you can program in your own survey questions. There are also features that allow you to distribute the survey directly to your respondents, and their answers will get entered/tabulated directly in PEARS, linked to the appropriate Program Activity.

Here are some more resources about PEARS surveys.

Surveys 2.0 is still being rolled out and the CA SNAP-Ed team is working on guidelines and instructions on how California LIAs can make best use of the Survey feature.

Using PEARS data, exports, PEARS dashboard

Can the dashboard include the whole county? Is there a way for subs to see all of the subcontractor group's work on the dashboard, rather than by user?

Not at this time. The dashboard will only show a single user's entered data.

How do I see (or export) entries from everyone who has entered data within my LHD?

When you open one of the modules in "track", the default settings include two filters: the current fiscal year and the entries you have entered. You can see this just below the name of the module.

To see all the entries for your jurisdiction (LHD), click the "x" by your name to remove the filter that limits entries to only your own.

You can do the same thing in the export menu. The default filters are the same: the current fiscal year and your own entries. If you want to see all entries for your jurisdiction (LHD), click on the "x" by your name.

PEARS resources

Will there be LHD slides for PSE activities this year?

We are unfortunately unable to provide LHD-level slides for FY18. We are working with KSU to see if there is a way for PEARS to create a similar output so that LHDs would be able to make their own reports.

Is your website linked from the PEARS site?

The PEARS "resources" page links to the CDSS PEARS resources website which has resources for all California LIAs, but not to our page of CDPH-specific resources. You can find our site linked from all our monthly newsletters and in our email signature.

Our website: https://ucanr.edu/sites/CDPH_PEARS/
Archived newsletters: https://ucanr.edu/sites/CDPH_PEARS//Newsletters_560
Email address: EvaluateSNAPEd@ucanr.edu

If you have a PEARS account, you are on our newsletter mailing list, unless you've requested otherwise. If you have a PEARS account and have not received our newsletters, please check your spam folder, then let us know if you still cannot find it. We can check our mailing list.