Purpose
This guide will demonstrate how designated action planners can view/edit previously submitted action plans and create new action plans.

Access action plans
- Use this link 2021 Oklahoma State Employee Engagement Survey Dashboard or follow the steps below to access the 2021 Oklahoma State Employee Engagement Survey dashboard.
  - Log in to Qualtrics.com and open the project titled 2021 Oklahoma State Employee Engagement Survey.
  - Navigate to the Dashboards tab and select 2021 Oklahoma State Engagement Survey Dashboard.
- Select the Action Plans icon in the toolbar.
- Your agency’s submitted action plans will now be displayed.
Create an action plan

- After accessing the action plans from the [2021 OKSEES dashboard](#), select + Action Plan.
- Under the focus area drop-down, select Categories. A full list of OKSEES survey questions and categories can be found on the [Employee Engagement Action Planning Guide](#).
- Under the Select item drop-down, choose the desired action plan category. (These overarching categories correspond to the questions in the pulse survey.)
- Select Create Action Plan.
- Note: All changes are saved automatically.
Define an action plan

Details

The **Details** section displays the overall action plan status. The chosen category will appear at the top of the page.

- **Status** should be set and manually adjusted by the action planner to reflect the overall status of the actions associated with this action plan.
  - **Not Started**: Action plan has been created but not yet started.
  - **On Hold**: Action plan has begun but has been placed on a temporary hold.
  - **In Progress**: Action plan is actively in progress.
  - **Complete**: All items in the action plan are complete.
  - **Cancelled**: Action plan was created, but business needs have changed, requiring this action plan to be cancelled. Please leave a comment explaining why this action plan was cancelled.

- **Due Date** is the date all action(s) will be completed.

- **Owners** should list the agency leader (agency head, HR representative, etc.) with 2021 OKSEES Dashboard access who is responsible for updating action plans. Since owners are not automatically notified of the status, action planners should ensure their team members are made aware when they are listed as an action plan owner.

- **Org hierarchy** will automatically display the user’s agency.

- Using the **Area(s) for Improvement** drop-down, select the designated OKSEES Survey Question(s) the action plan addresses. The question(s) selected must fall under the designated OKSEES survey category. A complete list of OKSEES categories can be found on the homepage of the action plan dashboard.

- The **Person Responsible** text box should list the first and last name(s) of the responsible parties. The person responsible is not required to have access to the action planning dashboard.

- List relevant tools, metrics, events, etc. in the **Resources** text box.

- List quantifiable and/or identifiable key metrics in the **Success Measures** text box.

- **Describe Outcome Once Status is set to Complete** should detail the outcomes of the action plan once the action plan is completed. Document the relevant wins and opportunities related to the action plan.
Actions

The **Actions** section displays the individual tasks required to complete the action plan.

- To add additional actions to the action plan, select **+ Create action**.
- The progress of each action is displayed at the top of the action dialogue box. To change the status, select the default status of **Not Started**. Each action status can be updated by an action planner at any time.
- Within the **New Action** header, list the recommended action to address the selected category.
- Specific steps and notes for each action can be added in the **Add some details...** dialogue box.
- The due date for each action can be specified at the bottom of the action box by choosing **Add Date**.
- If the **Details** section was entered first, the due date will carry over for each new action. To edit the date field for an action, select inside the **Due** date box and choose a new date.

Modify action plans

- From the **Action Plans Dashboard**, select the **Action Plans** icon in the toolbar.
- To edit an existing action plan, hover and select the action plan. Changes are saved automatically.
- To copy or delete an existing action plan, select the ellipsis under the **Actions** column and choose **Copy action plan** or **Delete action plan**. Note: It is not advised to delete action plans as the content and details within that plan cannot be recovered.

Edit existing action plans

![Action Plans Dashboard](image)
Copy or delete action plans

Example of created action plan

Notes

- Link to the 2021 Oklahoma State Employee Engagement Survey dashboard: https://omes.co1.qualtrics.com/reporting-dashboard/#/dashboard/60f1a451aa866f0011ab243d?pageld=Page_9f40e9db-1fc2-48c9-af9e-e38fb596c96f
- Link to the Employee Engagement Action Planning Guide: https://app.powerbigov.us/view?r=eyJrIjoiYTRiODg4N2EtYzUwOS00YzktNGYzLTdlZTMtNGQ4YjE0ODEwOWQ3IiwidCI6IjlhMzA3ODY0LTNlOTgtNGYwOC1iOTBhLTcyODMzNmMmZjNSJ9
- All changes made to the action plans are saved automatically, there is no save button. Changes cannot be undone; however, they can be edited, copied and deleted.
- Once an action plan is deleted it cannot be recovered.