

# Directions and Demonstration of the Electronic Tier 1 and Tier 2 Worksheets

## Presenter Notes

- *Before presentation, be sure to have the following open on the computer:*
  - *'Test Links to Demonstrate Electronic Tier 1 and Tier 2 Worksheets' document*
  - *Internet tabs with the login page of both worksheets loaded*
  - *Outlook email (so you can demonstrate how the 'save and continue' feature works)*
- *Have printouts of the following:*
  - *Paper Tier 1 and Tier 2 Worksheets (just in case - for your reference only)*
  - *Handouts for each CWG member that includes their username and password.*
- *Demonstrate each task as it is explained.*

## Introduction

- We wanted to give you a quick overview of the electronic Tier 1 and Tier 2 Worksheets to help you complete your homework to submit additional information about your management actions before the November meeting.
- The basic use of both the Tier 1 and 2 Worksheets is the same, so we will focus mostly on demonstrating the Tier 1 Worksheet (Critical Information Needed from the Community Working Groups) as an example, then I will show you a few additional tricks in the Tier 2 Worksheet (Supplementary Information Needed from the Community Working Groups and SEFCRI).
- Both worksheets will be accessed online.
  - We still need to plug your final list management actions into the worksheets (based on the output of this meeting), so they will be available to you by the end of the day this Friday, October 24<sup>th</sup>.
  - Meghan will send you the links to each worksheet, and they will also be posted on the OFR website.

## Log in to the Survey

- When you click the link for each survey it will first take you to a **Login Page**.
  - Each CWG members will have a unique Username, which will follow the following format: Last Name\_First Initial (e.g., Bohnsack\_K)
  - Each CWG member will also have a unique Password to access the forms.
    - This ensures that only you as CWG members will be able to input information about YOUR management actions.
  - NOTE: Both login and password fields are case-sensitive.
  - Before you leave for the day we will give each of you handout with your Username, Password and an outline of the instructions we are presenting today.
    - Please do not leave without obtaining this piece of paper from Meghan!
    - NOTE: This will also be emailed out to you on Friday along with the links to the Tier 1 and Tier 2 worksheets.
  - If you lose your password, you will need to email us to retrieve it.

- *Please do not use someone else's username and password – that will only confuse things. Let us know if you misplace it and we can re-send it to you.*

### Select a Management Action

- Once logged in, you simply choose the management action for which you would like to submit data. (Again, we just have placeholders at the moment because we're waiting until after this meeting to add your final list).
  - Management actions will be organized by Focus Area (based on how they are categorized at the end of today's meeting) and listed by an assigned code followed by a shortened title.
    - You will be given a cheat sheet of all of the management actions and codes so that you can more easily find the appropriate one here.
    - When you select a management action, the associated description will also appear.
    - If you look back at your paper copy of the Tier 1 worksheet, you'll notice that in this electronic version, all of the items at the top of the form, including question 1 are all combined into one step (e.g., Management Action, Code, Short Title, and Focus Area).
- Next simply fill in all the questions, which will be in the same order as the paper handouts of the Tier 1 and Tier 2 worksheets you were given.

### Option to 'Save and Continue'

- If at any point you would like to stop working on the survey and return to it later, you can select this 'Save and Continue' button located at the bottom of the survey to save your progress. It prompts you to enter your email address and will then send you an email with a unique link to this exact survey so that you do not lose any of the information you already entered.
  - You will only be able to continue filling out the same worksheet by using the unique link that is emailed to you. Please try not to lose those emails and links.
    - If for some reason you do misplace the link, **DO NOT RESTART THE WORKSHEET FOR THAT MANAGEMENT ACTION.** We can retrieve those edit links for you.
    - That isn't very efficient since we have to go in and do it manually then send it to you, but we can if necessary.
  - With this feature, be aware that the emails do not show you which management action you were working on until you click the link.
  - Be careful - if you are using the save and continue feature to work on several management actions at the same time you may get confused about which link applies to which management action!
    - When you return to the survey, the management action that you were working on will be listed at the top.
    - If you do have multiple surveys 'saved' to continue later on, be sure to check that you are filling in information for the correct management action!

### Marine Planner Information

- On Tier 1, you have the option of completing the Marine Planner Information or not.

- Remember at today's meeting you took a first stab at identifying which actions might need this filled out. This is just to help guide you.
- If you think a management action would benefit from the marine planner, but you aren't ready to supply that information yet, remember you can 'save and continue' to come back to this page (same directions as above).

### Specific Information for Tier 2

- As a reminder, you will access, login, and select a management action in the Tier 2 worksheet in exactly the same way.
  - [\(login to this worksheet and select a management action as you repeat this reminder\)](#)
- Tier 2 it is organized so that each section (e.g., WHY? WHEN? WHO? and HOW?) is a separate page.
  - Your selected management action will appear at the top of each page so you can remember which one you are filling out information for.
  - Note there is a back button so you can skip between pages.
  - This worksheet also has the 'Save and Continue' feature.
- Two questions in this sheet refer you to reference guides (Goals and Objectives to be Achieved and Lead Agency or Organization for Implementation) – those guides are linked directly in the questions in the survey so you can view the PDFs in a new window.
- Finally, with both forms, please press 'Next' or 'Submit' at the end of every page. **YOU ARE NOT DONE WITH THE ONLINE FORM UNTIL YOU SEE THE THANK YOU Page!!**

### Wrap-Up

- Questions?
- Recap:
  - This online survey **MUST** be completed to submit information about management actions. We will not accept paper copies!
  - **Today** you will receive a handout with your Username, Password and instructions for completing the electronic worksheets.
  - **Friday** you will receive:
    - Links to the Tier 1 and Tier 2 Worksheets
    - Copy of the handout with your Username, Password and instructions.
    - Cheat sheet of your final list of management actions from this meeting, which will be organized by Focus Area and include their new code, a short title, and the management action description that is currently on the templates.