CFAES

OHIO STATE UNIVERSITY EXTENSION



Vita Guide for OSU Extension Employees

If you have printed this document, please make sure you are using the most recent version by checking out the "Helpful Documents" section of the Learning and Organizational Development website at http://go.osu.edu/OSUEvitaHelpCheck the "Vita Guide" posted and compare it to the date to the right.



5/29/20









Table of Contents

Use the clickable links in the table of contents to navigate directly to an item of interest.

Getting Started

Sign into Vita

Add Your Supervisor as a Proxy/Delegate

Access Extension Specific Data

Programs, Events, Specializations, Goals and Curriculum Narratives

Add New Programs

Edit, Copy, or Delete a Program

Share a Program with Team Members

Accept or Reject a Shared Program

Add New Events

Edit, Copy, or Delete an Event

Add or Edit Specializations

Add New Goals

Edit or Copy a Goal

Delete a Goal

Add New Extension Curriculum Narratives

Edit or Copy Extension Curriculum Narratives

Delete Extension Curriculum Narratives

Reporting Other Work

Report teaching not related to Programs

Report Creative and Scholarly Works

Report Service

Report Awards

Report Funding

Report unique works that don't seem to fit anywhere

Printing

Print My Annual Report

Additional Resources

Vita Glossary

Best Practices and Helpful Tips for Programs

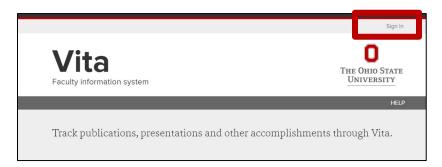
Best Practices and Helpful Tips for Events

Best Practices and Helpful Tips for Goals

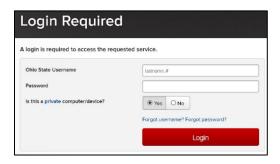
Best Practices and Helpful Tips for Extension Curriculum Narratives

Sign In to Vita

- 1. Go to: vita.osu.edu
- 2. Click the "Sign In" link in the top right corner of the screen.



 Log onto Vita using your OSU lastname.# and password (same password used for eLeave, eRequests, etc). If you can't remember your password, go to http://my.osu.edu to reset or retrieve it. NOTE: You will need to use BuckeyePass to log in.

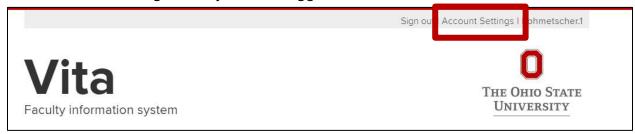


- ☐ If this is your first time in Vita, click on the "Curate Elements Data" tile/button to activate your account. **This is an automated, overnight process.**
- ☐ You will know you are logged in by looking in the upper right-hand corner: you should see your name.#., "Account Settings" and a place to sign out:

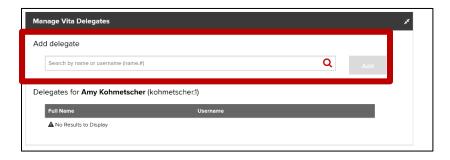


Add Your Supervisor as a Proxy/Delegate

1. Click "Account Settings" after you have logged in.



- 2. In the "Add delegate" search box, type the name.# of the person you want to grant access.
- 3. Click on their name once it appears below the search box.



4. Click the red "Add" button.

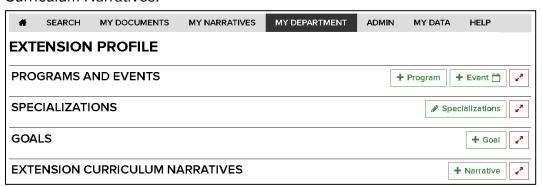


Access Extension-Specific Data

- 1. Hover over "DEPARTMENT" in the gray navigation bar; then left click "EXTENSION" when the pop-up menu appears.
 - a. Note: If you do not see "DEPARTMENT" in the navigation bar, email vita@osu.edu with the subject line: "please add to Extension in Vita".



2. Clicking on "Extension" will bring up the Extension Profile screen, which includes four sections: Programs and Events, Specializations, Goals, and Extension Curriculum Narratives.



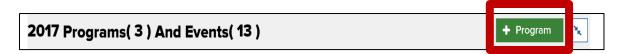
Add New Programs

1. Access Extension-specific data by clicking the "Extension" link found under the "Department" tab in the navigation bar.

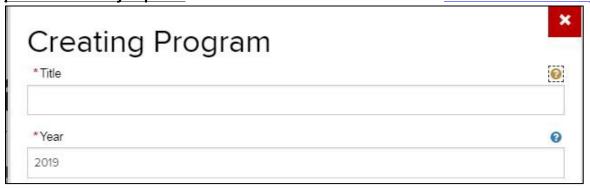


2. To <u>ADD A NEW</u> PROGRAM, click the "+ **Program**" icon next to the "PROGRAMS AND EVENTS" header OR the plus icon next to any Program/Event YEAR header.





3. Fill out <u>all required</u> informational fields in the Programs dialog box, <u>and days</u> planned and days spent. Not sure what all those terms mean? <u>Visit the Vita Glossary</u>



Edit, Copy, or Delete a Program

1. Access Extension-specific data by clicking the "Extension" link found under the "Department" tab in the navigation bar.



2. Click the outward pointing red arrows icon to expand the Programs list.



3. <u>To edit</u> Program details, click the blue pencil icon. After editing, be sure to click "Submit" to save changes.



4. <u>To copy</u> a Program, click the copy icon (orange overlapping pages). Note: Programs can be copied from one reporting year to the next. Events should only be copied within the same reporting year.



5. Make the necessary changes to the copied program. Click "Submit" to save.

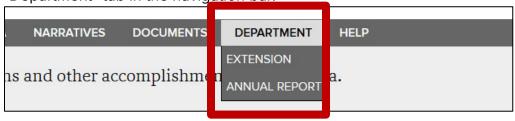


6. <u>To Delete</u> a Program, click the red trash can icon. A dialog box will appear. Click "Yes" to confirm.



Share a Program with Team Members

1. Access Extension-specific data by clicking the "Extension" link found under the "Department" tab in the navigation bar.



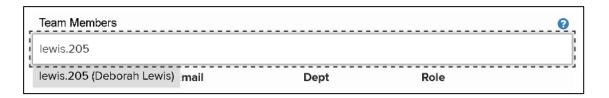
2. Click the outward pointing red arrows icon to expand the Programs list.



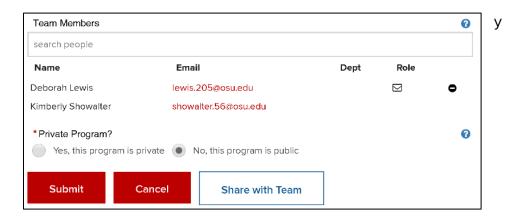
3. **To edit** Program details, click the blue pencil icon.



4. Scroll down to find the "Team Members" field in the Program details. Type the name.# of the team member to add, and select the correct person from the drop down list.

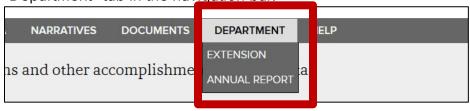


5. Once you have added all Team Members, click "Share with Team".



Accept or Reject a Shared Program

1. Access Extension-specific data by clicking on the "Extension" link found under the "Department" tab in the navigation bar.



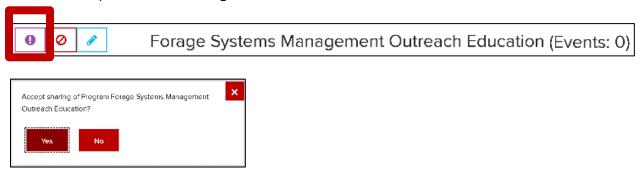
2. Click the outward pointing red arrows icon to expand the Programs list.



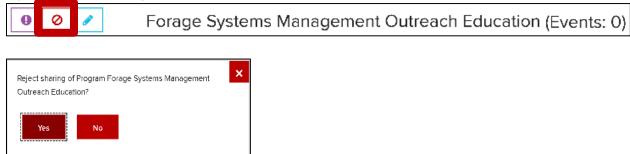
3. A shared program will appear under the year in which the original program creator set it. Initially, it will have different icons than Programs you created in your profile.



4. **To accept the Program**, click the purple exclamation point icon. Then click "Yes" to confirm acceptance of the Program.

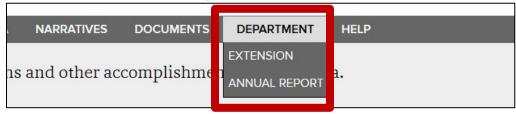


5. **To reject the program**, click the red stop sign icon. Then click "Yes" to confirm rejection of the Program.

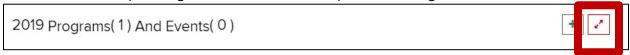


Add New Events

1. Access Extension-specific data by clicking on the "Extension" link found under the "Department" tab in the navigation bar.



2. Click the outward pointing red arrows icon to expand the Programs list.



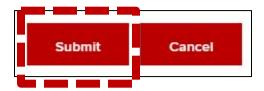
3. Click the "+" icon next to the Program to which you are adding an event.



4. Fill out <u>all required fields</u>. This will include <u>quantitative</u> data for direct and indirect contacts and indicators.

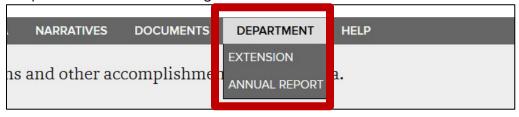


5. Click the red "Submit" button to save the event.



Edit, Copy, or Delete an Event

1. Access Extension-specific data by clicking the "Extension" link found under the "Department" tab in the navigation bar.



2. Click the expand icon next to the Program name that contains the event you want to edit.



3. <u>To edit</u> the event, click the blue pencil icon next to the event title. After editing the event, <u>click "Submit" to save changes.</u>



4. **To copy** the event, click the copy icon (orange overlapping pages). **NOTE**: Use "copy related" to make sure the event appears as ONE line in your table. Only copy events WITHIN a given reporting year (not from one year to the next).

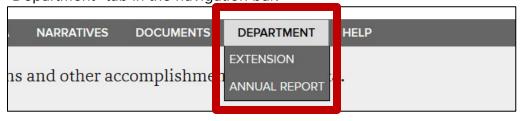


5. **To Delete** the event, click the red trash can icon.

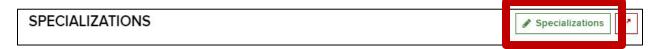


Add or Edit Specializations

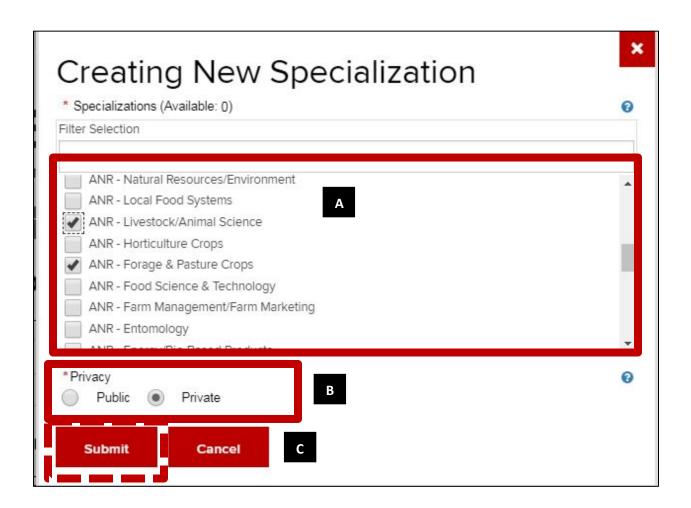
1. Access Extension-specific data by clicking the "Extension" link found under the "Department" tab in the navigation bar.



2. Click the Add/Edit Specializations button.

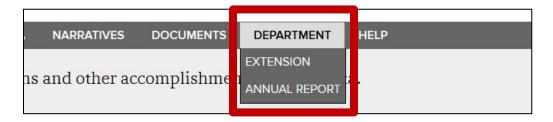


- 3. Select up to two Specializations from the list [A].
- 4. Set them as Public or Private by clicking the associated radio button [B].
- 5. Click Submit to Save [C].



Add New Goals

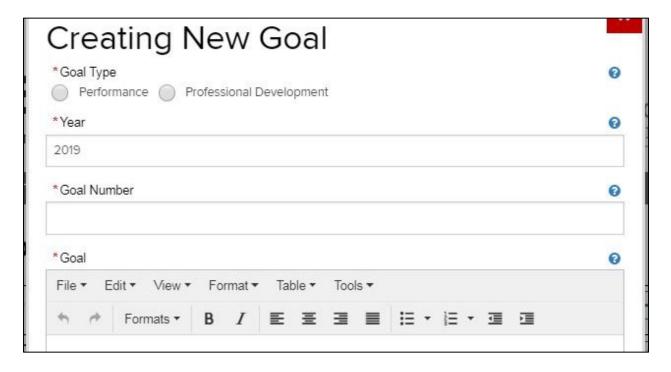
1. Access Extension-specific data by clicking the "Extension" link found under the "Department" tab in the navigation bar.



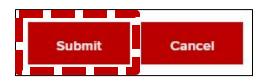
2. In the Extension Profile, click "+ Goal" to add a new Goal.



3. Fill in all required fields including Goal Type, Goal Number, Progress, and Privacy Settings. Remember to edit Progress later in the year as well. Need help filling this out? Visit the <u>Vita Best Practices and Helpful Tips for Goals</u>.



4. Click Submit to save.

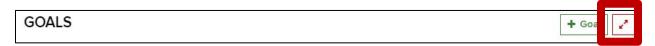


Edit or Copy a Goal

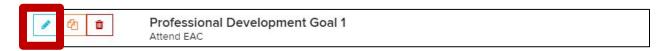
1. Access Extension-specific data by clicking the "Extension" link found under the "Department" tab in the navigation bar.



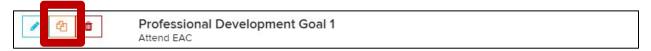
2. Click the expand icon to expand the goal list.



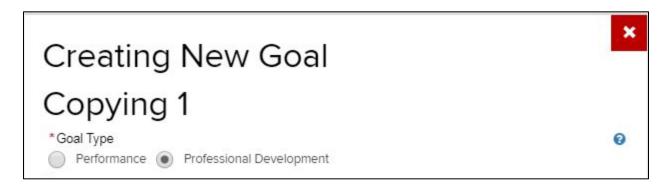
3. **To edit the goal**, click the blue pencil icon next to the goal title. Edit the details as needed, and click "Submit" to save changes.



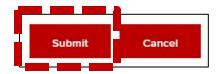
4. **To copy** the goal, click the copy icon (orange overlapping pages) next to the goal title.



5. After clicking the copy icon, make the necessary changes to update the copied goal. Copying is useful to create a similar goal for upcoming years.



6. Click Submit to save the new (copied) goal.

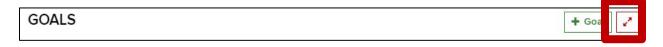


Delete a Goal

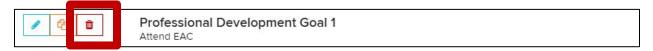
1. Access Extension-specific data by clicking the "Extension" link found under the "Department" tab in the navigation bar.



2. Click the expand icon to expand the goal list.



3. To delete the goal, click the red trash can icon next to the goal title. NOTE: Do not delete a goal without first discussing it with your supervisor. It is best practice to explain in the "progress against the goal" field WHY the goal was not accomplished.



4. Click "Yes" to confirm deletion of the goal.

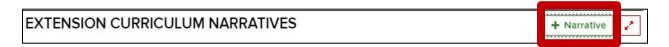


Add New Extension Curriculum Narratives

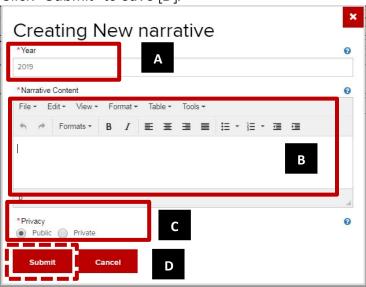
1. Access Extension-specific data by clicking the "Extension" link found under the "Department" tab in the navigation bar.



2. In the Extension profile, locate "Extension Curriculum Narratives" and click the green "+ Narrative" button.



3. Add the correct year [A], narrative content [B], and choose the privacy settings [C]. Click "Submit" to save [D].



4. Click "Yes" to confirm saving the new narrative.



Need help with Narrative Content? Visit the <u>Best Practices and Helfpul Tips for Extension Curriculum Narratives.</u>

Edit or Copy Extension Curriculum Narratives

1. Access Extension-specific data by clicking the "Extension" link found under the "Department" tab in the navigation bar.



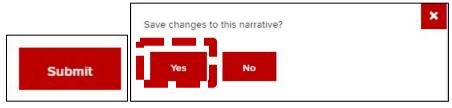
2. In the Extension profile, locate "Extension Curriculum Narratives". Click the outward pointing arrows to expand the list of narratives.



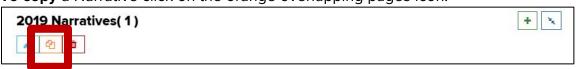
3. To edit a Narrative click on the blue pencil icon.



4. Once edits are complete, click "Submit". Then click "Yes" to confirm saving changes.



5. **To copy** a Narrative click on the orange overlapping pages icon.



6. Edit the copied narrative as needed. Click "Submit".



7. Click "Yes" to confirm saving the new narrative.



Delete Extension Curriculum Narratives

1. Access Extension-specific data by clicking the "Extension" link found under the "Department" tab in the navigation bar.



2. In the Extension profile, locate "Extension Curriculum Narratives". Click the outward pointing arrows to expand the list of narratives.



3. To delete a Narrative click on the red trash can icon.

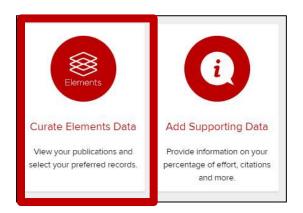


4. Click "Yes" to confirm deleting the narrative.



Report Teaching Not Related to Programs

1. From the Vita homepage, click "Curate Data Elements".



2. Click the "+ add" button under Teaching Activities.



3. Select "Extension and continuing Education".



4. Enter all required information and any additional supporting information.





Report Creative and Scholarly Works

What counts as Creative or Scholarly Work?

1. From the Vita homepage, click "Curate Data Elements".



2. Click the "+ add" button under Publications.



3. Select the most applicable option from the list of publication types.



4. Search for an existing publication or enter all required information and any additional supporting information.





Report Service

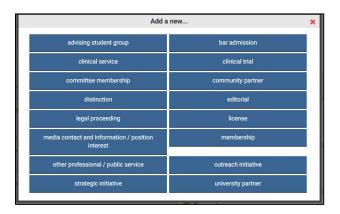
1. From the Vita homepage, click "Curate Data Elements".



2. Click the "+ add" button under Professional Activities.



3. Select the most applicable option from the list of Professional Activities.



4. Enter the required essential information for the selected Professional Activity.





Report Awards

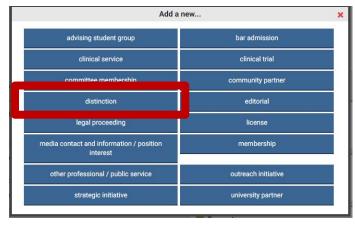
1. From the Vita homepage, click "Curate Data Elements".



2. Click the "+ add" button under Professional Activities.



3. Select "Distinction" from the list of Professional Activities.



4. Enter the essential information for the award (Distinction).



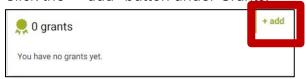


Report Funding

1. From the Vita homepage, click "Curate Data Elements".



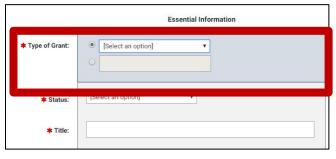
2. Click the "+ add" button under Grants.



3. Click "Grant" on the next dialog box.



4. Add required essential information. This allows you to specify the type of grant (research, gift, etc.)





Reporting Unique Works That Don't Seem to Fit Anywhere

Not sure how to report something? OSU Extension Learning and Organizational Development (LOD) Unit can help with that! Contact Debby Lewis (lewis.205@osu.edu) or Brian Butler (butler.143@osu.edu) for further assistance.

Print My Annual Report

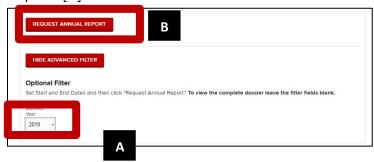
1. In the navigation bar, hover over DEPARTMENT, then click "Annual Report".



2. Click "Show Advanced Filter".



3. Select the correct year from the drop down menu [A]. Then click "Request Annual Report" [B].



4. Review the generated report. If it is correct, click "Save as Word". Then print the resulting Word doc.



Vita Glossary

Award: listed under Service and "Distinction" in Vita. Examples of awards include honors or awards for teaching, service, Extension, research, etc.

Creative and Scholarly Work: materials you have generated for distribution or publishing. This could include such as bulletins/tech reports/fact sheets, journal articles, abstracts and short entries, papers in proceedings, invited presentations, multimedia/database/websites, radio or television, "other creative works".

Days Planned: time allocated to the program in the <u>next</u> reporting year.

- 251 STAFF DAYS = 1 STAFF YEAR (this excludes holidays and weekends)...This indicates the number of days necessary to plan and implement this specific project or program. As you are documenting programs, please remember that 60% of your 251 available staff days per year should reflect planned programming. That 60% would be approximately 100-140 total days (across all programs in your profile).
- If you PLAN to do the program <u>next</u> year, enter the number of days planned in this field and the TITLE of the program will appear in the proper section of your Annual Extension Performance Report.

Days Spent: time that is actually spent on the program during the current reporting year.

- 251 STAFF DAYS = 1 STAFF YEAR (this excludes holidays and weekends)...This indicates the number of days necessary to plan and implement this specific project or program. As you are documenting programs, please remember that 60% of your 251 available staff days per year should reflect planned programming. That 60% would be approximately 100-140 total days (across all programs in your profile).
- NOTE: There MUST be a value listed in the DAYS SPENT field for the program to appear on your Annual Extension Performance Report.

Event: An <u>event</u> is where you will describe a single instance of teaching/delivering the <u>program</u> (curriculum). Event data are heavily quantitative (this is where you will report direct/indirect contacts and indicator data).

Extension Curriculum Narrative: Describe what you have accomplished during the current reporting year regarding the development of Extension curriculum.

To support the development and implementation of standardized teaching curricula for OSU Extension programs, the following essential components should be included in all OSU Extension teaching curricula. It is not an exhaustive list, but it is inclusive of best practices to ensure that consistent, replicable, high-quality curricula are developed that will facilitate documenting statewide impacts.

- A Curriculum Overview that identifies the target audience(s) and provides a summary of the program goal(s), outlines prerequisite content knowledge instructors need, includes a scholarly/research-based reference list, and offers a suggested presentation path when there are multiple lessons.
- Lesson Plan(s)/Instructional Guide with Learning Objectives that include learning activities
 that promote learning transfer, and participant materials (e.g., handouts, worksheets, or
 links to them, etc.).
- 3. Evaluation tool(s) to document program impact, highlighting indicators to be entered in the reporting system (Vita).
- 4. Basic marketing tools such as fliers, news blurbs, media spot scripts, registration form, certificate of completion, etc.
- 5. Branding follows The Ohio State University, CFAES and OSU Extension guidelines.

Funding: Funding sources include grants, contracts, gifts, and fees collected. These can be entered under the "Grants" section in Vita.

Goal: objectives for your performance and professional development in the upcoming year. Be sure to separate your goals by performance and professional development when reporting. Use goal numbers to assign a priority to each goal (1 is top priority, 2 is next and so on). For help writing goals visit the Extension performance planning guidelines

Program: Your <u>program</u> should be the large, overarching concept (think "curriculum"). The <u>program</u> is where you will qualitatively describe the yearlong teaching effort (many of the fields you will fill out when adding a program follow the logic model).

Service: participating in service roles for the organization. This could include serving as a reviewer, serving on a committee, holding an office in a professional society, etc.

Specializations: Choose up to two specializations in alignment with the following <u>Specialization</u> Guidelines

Teaching not related to programs: guest lectures, individual instruction, or other teaching activities that do not relate to your program areas outlined in Vita. <u>Do not report program related teaching here or report non-program related teaching also under programming.</u> This would be double reporting.

Best Practices and Helpful Tips for Programs

Program Titles

Having "2019" in your program <u>title</u> is <u>not</u> the same as associating a 2019 Extension Event with the program. Please do not include the year in the program title field, it will confuse you when you add EVENTS to that program.

Days Planned and Days Spent

You <u>must</u> fill in "Days Planned" and "Days Spent" to have a program display properly in your annual performance report. Learn more about days planned and days spent in the Vita Glossary

Copying programs that recur each year

If you offer a program year after year, you should <u>copy</u> your program from year to year (do <u>not</u> just edit a previous calendar year's program and change the reporting year; this will overwrite your data). Copying will bring forward all the qualitative information you've already entered from the previous year. Once the copy is made (and you have indicated the new program year), you may make edits to the "new year" version of your program.

Sharing Programs/Adding Team Members

When creating a program, adding team members will allow you to share a <u>snapshot</u> of your program with the other named team members. This helps cut down on data entry for the team members (they can accept your shared program and then make slight changes to the shared program to make the data uniquely fit <u>their</u> contribution to the program).

When adding team members to a <u>program</u>, first communicate with the team to determine who will do the initial data entry. <u>All fields for the program</u> should be completely filled out <u>before</u> you share with team members.

If You Were Added as a Team Member to a Program

If you were added as a team member, you can change anything in that <u>program</u>, and it will <u>only</u> change the program in <u>your profile</u> (not anyone else's). After "accepting" the program into your profile, don't forget to update the "days planned" and "days spent" to reflect your efforts for the program.

Best Practices and Helpful Tips for Events

Associating Events with Programs

You must associate at least <u>one</u> Extension <u>event</u> with <u>each</u> of your Programs. Programs that do not have any events associated with them will <u>not</u> appear on any printed document.

Answering "Did You Teach?" in Event Information

Select "Yes" for any event where you had teaching responsibilities (i.e., got up in front of a group of participants and taught them something). It is perfectly acceptable to have a mix of events where you did and did not teach.

If you used the "Copy" icon to add multiple instances of an event, the "Did you teach?" question/field will only be viewable in the window of the original instance of the event.

Copying Events

Vita copies <u>all</u> your original event data (including date, direct contact numbers, volunteer numbers, etc.). Make <u>all</u> necessary changes before saving the copy of your <u>event</u> to avoid confusion with the original

If you used the "Copy" icon to add multiple instances of an event, the "Did you teach?" question/field will only be viewable in the window of the <u>original</u> instance of the event.

If you used the "Copy" icon to add multiple instances of an event, Vita will sum contacts and tally events to include all those instances of an event in <u>one</u> line of your <u>Extension</u> <u>Teaching</u> table of your printed documents and will display the <u>title</u> of the <u>original instance</u> of the event.

If you Accepted a Shared PROGRAM

If you accept a shared PROGRAM, don't forget that you <u>must</u> add an Extension <u>event</u> with a date that falls within the reporting year for the <u>program</u> so it will print on your Extension Annual Performance Document for that year.

Best Practices and Helpful Tips for Goals

Re-Using a Goal for the Next Year

Use the <u>copy</u> function to utilize a previous year's goal. Do not <u>edit</u> a previous year's goal and change the year of the goal. This will effectively delete that goal from the previous year!

Goal Numbers

The "Goal Number" field allows you to set an order of importance/priority to your goals. The values will drive the order in which the goals display on your Extension Annual Performance Report document (1, 2, 3, etc.)

How to Write Goals

Refer to the OSU Extension Operations website for help on the <u>appropriate number and how to write goals</u> (http://go.osu.edu/OSUEgoals).

What if I didn't accomplish a goal as planned?

If a goal didn't go as planned, do not delete the goal. Explain why the goal isn't accomplished in the "progress" box.

Best Practices and Helpful Tips for Extension Curriculum Narratives

Why utilize Extension Curriculum Narratives Feature?

This feature was created to let you keep track of Extension Curriculum Development activities within a given reporting year. The field prints on an Extension Annual Report, but not your Core Dossier Report. Create only ONE narrative in a given reporting year.

Track Curriculum Development for Promotion Purposes

If you are a faculty member and choose to go for promotion, you should be able to copy and paste the Extension Curriculum Development narratives from the Extension Module into your Curriculum Development Narrative, which is located under the gray Vita navigation bar (NARRATIVES > TEACHING ACTIVITIES > CURRICULUM DEVELOPMENT).

Suggested Outline for Curriculum Development Narrative

- Introduction
- Overview
- Objectives
- Target Audience
- Lesson Plan
- Outline
- Table of Contents
- Literature Review/Background Material
- Instructions for Presenters/Qualifications Needed
- Lessons/Modules
 - Power Point Only
 - Power Point with Script
 - Teaching notes
- Supplemental Teaching Aids (factsheets, podcasts, etc.)
- Marketing Materials (branding)
- Evaluation Tools