



# PEARS Tracking Tips

CTAHR Conference

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# Information Sources

- All PEARS training videos can be accessed in the Resources section of PEARS (<https://pears.io/resources/>)

- PEARS support (<https://support.pears.io/>)
  - Step-by-step instructions
  - Email support

The screenshot shows the PEARS website's Resources section. At the top, there is a navigation bar with the PEARS logo and menu items: Plan, Track, Review, and Analyze. Below the navigation bar, the word "Resources" is displayed. Underneath, there is a link for "support.pears.io". The main content area is titled "University of Hawaii at Manoa CTAHR Extension" and "Recorded PEARS Trainings (2024):". A list of 11 training topics is provided:

1. Introduction to PEARS
2. Action Plans
3. Program Activities
4. Direct Contacts
5. Indirect Activities
6. Action Plan Outcomes
7. Reports and Exports
8. Partnerships and Coalitions
9. Success Stories
10. Community Relationships (CRM)
11. Surveys

The screenshot shows the PEARS Support Documentation page. At the top, there is a "Need Help?" section with a search bar and a "Contact PEARS Support" link. Below this, the "PEARS Support Documentation" section is displayed. It features a "Getting Started" card with a link to "Newest information to help you get started in PEARS" and an "Updates & Announcements" card with a link to "Learn about current PEARS data to 10/25/2024". The main content area is organized into a grid of categories:

- Plan**: Action Plans, Surveys, Professional Development, Performance Review Data
- Track**: Action Plan Outcomes, Contact's Effects, Direct Contacts, Indirect Activities, Success Stories, Indirect Activities, Evaluation, Contacts, CRM Data Analysis, Fund Development Solicitation, Performance Reviews, Community Relationship Data
- Analyze**: Reports, Surveys Data, PEARS Data
- Review**: Action Plans, Outcomes, Development Data, Direct Contacts, Performance Reviews
- Management**: Workflow Data, Direct Contacts, Surveys, Workflow Status, Add New Data
- Account & Permissions**: Program Area Team, Roles and Permissions, Allow Another User to Manage Data, Add New Data, Add New Data



# Program Activities Tips



Program Activities is where **group direct education** is reported

- Report group classes (i.e., workshops, seminars)
- Individual and one-way interactions are **NOT** reported in the Program Activities module.

## [Program Activity training](#)

Before starting a Program Activity record:

- Get the complete address of the site where the program activity was conducted
- If you are estimating the demographic information (i.e. school data), get the required demographic information



# Program Activities – General Information

- Create a unique name for each record
  - The name *could be* the location or group where the activity took place.
- You may copy a previous Program Activity record
  - If you are copying a previous record, please see <https://support.pears.io/copy-a-program-activity/>
- Sessions – you can record single or multiple sessions
  - Record multiple sessions if you deliver a series of lessons to the same audience
  - NOTE: Start time and # Participants do not have a red asterisk (\*) and therefore do not require data to continue
- Delivery Site
  - Delivery Site will be a required field if you select In Person in “Method used to deliver this program”. In any other case it will remain optional.
  - You can search for sites by the site name, with any part of the address (street name, zip code, etc.)
    - If the site is not shown in the list, click Add Site to enter the site information manually.
    - The only required fields are: Name, Address, City, State and Zip code. (All other fields are optional)
      - (NOTE: If the city is not in PEARS, please contact a PEARS administrator to add the city)
- For more information on creating a Program Activity Record, please see <https://support.pears.io/create-a-program-activity/>
- To continue you need to click the Save and Continue button



# Program Activities - Collaborators

- Allows others to view or edit
- It can also be used to give other users who were involved credit and to describe their contribution.
- More information on collaborators can be found at <https://support.pears.io/collaborators/>



# Program Activities - Evaluation

- If this program activity has an evaluation component, select YES
  - If No is selected, then click the Save and Continue button
- If you are using a survey created in PEARS
  - click the Attach Survey button and select the appropriate survey
- If you are evaluating the program with a survey or assessment that was NOT created in PEARS, do not click the Attach Survey button
- For more information on attaching a survey to a program activity see <https://support.pears.io/attach-a-survey-to-a-program-activity/>
- Collecting and entering survey data
  - with a public link see <https://support.pears.io/collect-survey-response-data-with-a-public-link/>
  - with paper surveys see <https://support.pears.io/enter-survey-response-data/>
- For more information on editing and deleting surveys see the bottom of page 1 and beginning of page 2 on <https://support.pears.io/category/track/program-activities/>
- To continue you need to click the Save and Continue button



# Program Activities - Demographics

- Auto Calculate demographics
  - First attach surveys and record responses
  - For more information on Auto Calculate demographics see <https://support.pears.io/auto-calculate-demographics/>
- Detailed information on reporting demographics manually see <https://support.pears.io/add-demographic-information-to-a-program-activity/>
- NOTE: If you are reporting demographics as an estimate (i.e. school data) – get the estimates before you start the demographics section
- To continue you need to click the Save and Continue button



# Mark as Complete

- Check the record for accuracy
  - You may mark it as complete
  - You can change the record to incomplete, if needed
  - For more information on marking records as complete or incomplete, editing and deleting a record see <https://support.pears.io/category/track/program-activities/page/2/> scroll to the information section you desire



# Direct Contacts Tips

Two-way interactions with clientele where there is an exchange of educational information

- Report individual interactions (i.e., coaching, phone calls, consultations, farm visits)
- Group classes and one-way interactions are NOT reported in the Direct Contacts module.

[Direct Contacts training](#)



# Direct Contacts – General Information

- Date Range is monthly
  - enter the direct contacts for the month selected
- If you are entering data for several months, you will need to create a different Direct Contacts record for each month.
- Create a unique name for each record
- For more information see <https://support.pears.io/add-a-new-direct-contacts-record/>
- To continue click the Save and Continue button



# Direct Contacts - Demographics

- Auto-Calculate
  - Information entered into the Client Records Management (CRM) allows for Auto-Calculating demographics
    - Click on the Auto Calculate button
    - For more information see <https://support.pears.io/add-demographic-information-to-a-direct-contacts-record/>
- Report the total number of unique contacts
  - Unique contacts are a single individual that you have had direct contact with.
    - **Each unique contact may have had more than one interaction but can be counted only one time.**
  - **If you gave information to the same individual on a different topic, they can be counted as another unique contact.**
  - **NOTE: If it is the same individual you have direct contact with on the same topic, over several months, they can only be counted in the first month that you had direct contact with them.**



# Direct Contacts - Demographics

- It is recommended that demographic information be entered for each direct contact
  - If the demographic information is unknown mark the “Demographics are unknown” box. This box can be located above the “Gender” section.
    - Once this box is checked all the demographic information will be populated with “unknown”
- The total of each table must match the total participants to proceed
- For more information please see <https://support.pears.io/add-demographic-information-to-a-direct-contacts-record/>
- To continue you need to click the Save and Continue button



# Mark as Complete

- Check the record for accuracy
  - You may mark it as complete
  - You can change the record to incomplete, if needed
  - For more information on marking records as complete or incomplete, editing and deleting a record see <https://support.pears.io/category/track/direct-contacts/>



# Indirect Activities Tips

## One-way interactions

- where there is an exchange of educational information and
- is not possible to collect participant demographic data
- Report on-way interactions (i.e. educational booths, media, publications, etc.) in the Indirect Activities Module.

[Indirect Activities training](#)



# Indirect Activities – General Information

- Create a unique name for each record
- Activity Date Range
  - Required data entry is once annually
  - Recommend entering data quarterly
- For more information see <https://support.pears.io/create-an-indirect-activity/>



# Indirect Activities – Collaborators

- Allows others to view or edit
- It can also be used to give other users who were involved credit and to describe their contribution.
- More information on collaborators can be found at <https://support.pears.io/collaborators/>



# Indirect Activities – Intervention Channels and Reach

- For complete information with examples see <https://s3-us-west-2.amazonaws.com/wasnap-ed.org/wp-content/uploads/2022/05/Understanding-Reach.pdf>
  - NOTE: This document was developed by SNAP-Ed however, it is applicable to all programs.
- To continue you need to click the Save and Continue button



# Mark as Complete

- Check the record for accuracy
  - You may mark it as complete
  - You can change the record to incomplete, if needed
  - For more information on marking records as complete or incomplete, editing and deleting a record see <https://support.pears.io/category/track/indirect-activities/>