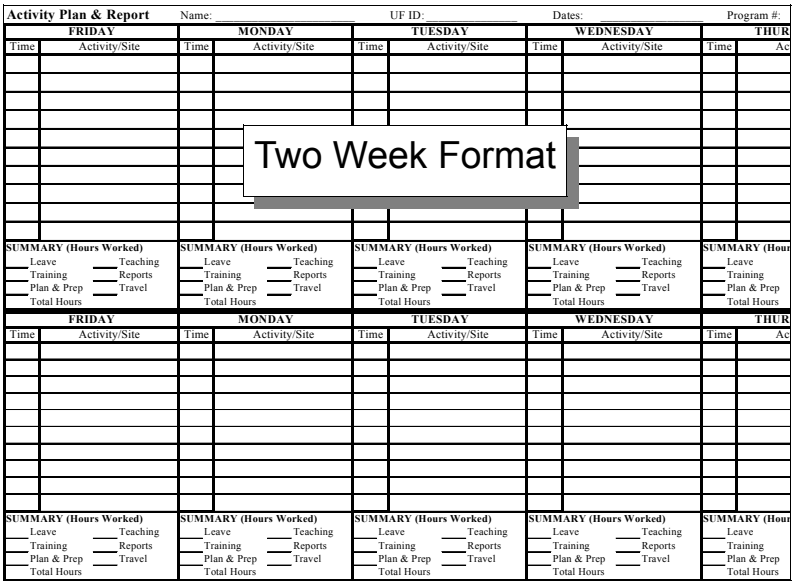
Activity Plan and Report

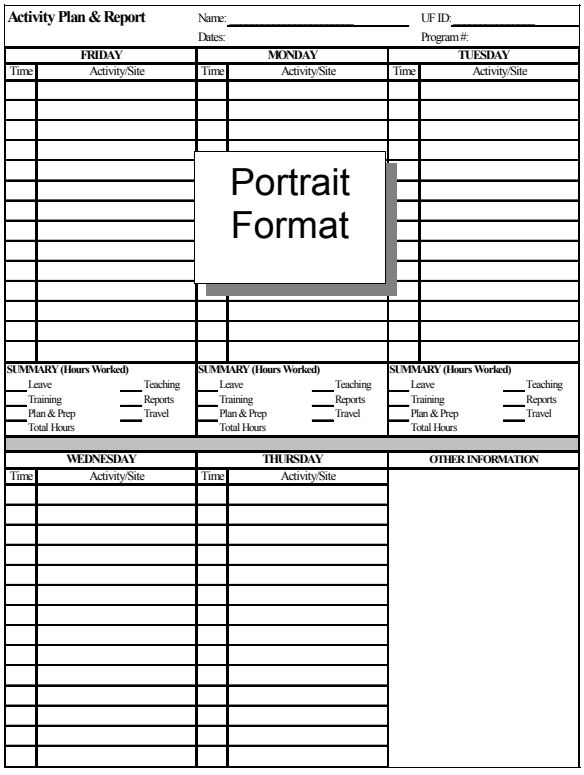
The Activity Reports that Program Assistants complete serve multiple purposes for our program. It gives the Supervisor an idea of what the projected plan for the week is and can be used in evaluating the Program Assistant's use of time. It is also an auditing tool for the State Office to use with time cards, leave slips, and travel reimbursement requests. All of the forms are in Excel and are formatted for easy computer entry.

Format Choices

Youu have four different choices as to which format of the Activity Plan and Report you would like to use. All forms include the basic information that the state office needs.

1. Two-week: Two weeks of activities can be put on one page.
2. Portrait: Gives more space to write activities. It also includes a small "other" section for any additional information you would like.
3. FAS-Compatible: Designed to assist you in completing your FAS report.
4. Custom: Blank bottom half. Since this is in Excel, Supervisors can edit the form to include any information that they need to collect to help their program better meet its reporting goals.





Setting Up the Files for Use

1. Create a new folder on your computer.
   a. Double click on My Computer.
   b. Go to the C drive or wherever you save most of your work.
   c. Go to File, New, Folder.
   d. Type Activity Reports and Enter.
2. Save the file activity report.xls to the folder Activity Reports. This will be your main document. If you make any changes to customize it, I would save it as activity report2.xls.
3. Rename activity report.xls to denote the Program Assistant and year.
   a. Double click on activity report.xls. This should open it in Excel.
   b. Go to File, Save As.
   c. Save this file with the year and PA's name. If this is FY 2003 and you have a PA named Jane Doe, here are some choices:
      i. Doej2003
      ii. 2003doej
   d. Click Save as.
   e. Repeat these steps for each PA.

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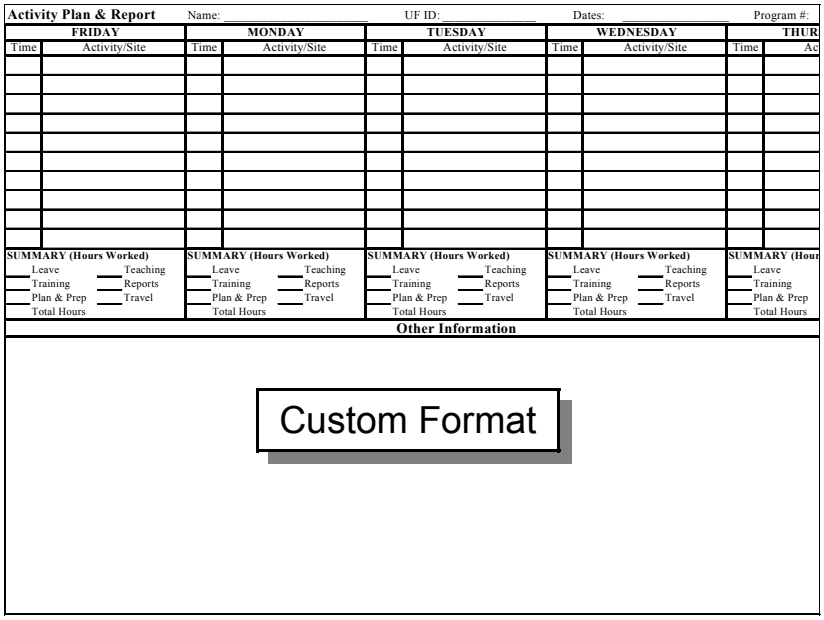

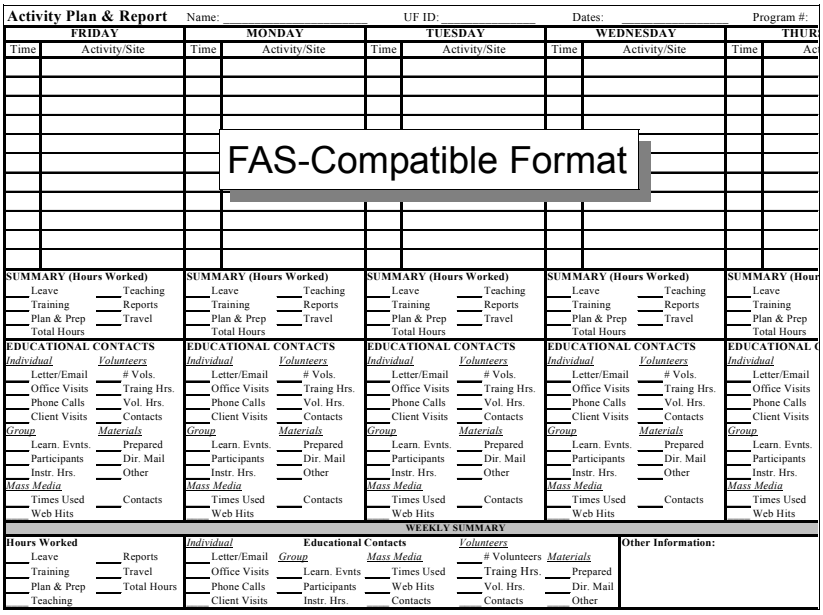

Filling Out the Form

1. Open the file with your name on it.
2. Click on the tab at the bottom of the screen for the week you are working on. For example, if this is the third week in July, click on Jul3.
3. At the top, type in your name, the dates for the week, your UF ID, and your major program number.
4. Time: Type in the time you BEGAN the activity. There is not room for the ending time, unless you put in on the line below. If you do not have an ending time, we will assume you ended the previous activity when you began the next.
5. Activity/Site: This is what you were doing during this time: travel, teaching, meeting with groups, etc. Advisory committee meetings should be included under the title teaching. Do not write TS&G or Groups for everything you do when you are not at the office. If you are at a school, write the name of the school; if you are shopping, write the name of the store.
6. Summary (Hours Worked). These columns should add up to the total number of hours you worked during the day. This is an excellent way to determine if time is being used effectively.
7. All other information is at your Supervisor's discretion
8. Be sure to save your work before you close.
9. At the end of the month, print out all the pages for that month.
10. Mail to the state office with your Travel Reimbursement Request by the 10th of the following month.