**Training**

Carol S Category set-up issues in Managed Reports

Jim Reporting value of categories / How do clients use it

Heather Category set-up in HSTM databases

Debbie Stull Survey Types and Survey ID’s in PM

Self Find unique examples. See how it works in reporting

Elaine S How to set-up categories in PM / How to fix categories in PM

**Short Term Goals**

High Importance – Training for Brian & Nzinga (10/30/15)

High Importance - Update ED-OP categories for 2016 Q1 (Complete by 12/1/15)

High Importance – QA Heather’s category list for 2016 HSTM Databases (Complete by 12/1/15)

Low Importance - Give Heather Additional Databases that are needed for 2016 Databases (Complete by 11/15/15)

**Long Term Goals**

Documentation for category definitions (reference)

Documentation for how to set-up categories (training)

Training

Identify which surveys needs to be fixed

Cleaning of all surveys used by HSTM (start with the most common surveys)

Documentation of how the cleaning needs to be done

Plan for ongoing maintenance and QA (quarterly)