**Leadership Coach Program Data Export Report Documentation**

**Program Meeting Schedules Worksheet**

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| **Program Meeting Schedule Key** | **Leadership Coach** | **Program Key** | **Program** | **Year** | **Total Meetings** | **January – December Meeting?** |
| *This is a unique identifier for the meeting schedule record.* | *The username of the leadership coach assigned to this meeting schedule.* | *This is a unique identifier for the program record that is associated with the meeting schedule record.* | *This the program name for the program record that is associated with the meeting schedule record.* | *The year that the meeting schedule covers.* | *The total number of meetings scheduled for the year.* | *“Yes” if a meeting is scheduled for the month. “No” otherwise.* |

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| **State Key** | **State** | **Added by** | **Date Added** | **Last Edited by** | **Last Edit Date** |
| *This is a unique identifier for the state record that is associated with the meeting schedule record.* | *This is the state name for the state record that is associated with the meeting schedule record.* | *This is the username of the user that added the meeting schedule record to PIDS.* | *This is the date that the meeting schedule record was added to PIDS.* | *This is username of the user that last edited the meeting schedule record.* | *This is the date that the meeting schedule record was last edited.* |

**Programs Dropped by Coaches Worksheet**

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| **Program Drop Key** | **Leadership Coach** | **Program Key** | **Program** | **Stop Date** | **Reason for Dropping Out** | **State Key** | **State** | **Added by** | **Date Added** | **Last Edited by** | **Last Edit Date** |
| *This is a unique identifier for the program drop record.* | *The username of the leadership coach assigned to this program drop record.* | *This is a unique identifier for the program record that is associated with the program drop record.* | *This the program name for the program record that is associated with the program drop record.* | *The date that the coach stopped coaching the program.* | *The reason the coach stopped coaching the program.* | *This is a unique identifier for the state record that is associated with the program drop record.* | *This is the state name for the state record that is associated with the program drop record.* | *This is the username of the user that added the program drop record to PIDS.* | *This is the date that the program drop record was added to PIDS.* | *This is username of the user that last edited the program drop record.* | *This is the date that the program drop record was last edited.* |

**Program Meeting Debriefs Worksheet**

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| **Program Meeting Debrief Key** | **Leadership Coach** | **Program Key** | **Program** | **Year** | **Address** | **Primary Contact Email** | **Primary Contact Phone** |
| *This is a unique identifier for the meeting debrief record.* | *The username of the leadership coach assigned to this meeting debrief.* | *This is a unique identifier for the program record that is associated with the meeting debrief record.* | *This the program name for the program record that is associated with the meeting debrief record.* | *The year that the meeting debrief covers.* | *The address for the meeting debrief.* | *The primary contact email for the meeting debrief.* | *The primary contact phone for the meeting debrief.* |

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| **State Key** | **State** | **Added by** | **Date Added** | **Last Edited by** | **Last Edit Date** |
| *This is a unique identifier for the state record that is associated with the meeting debrief record.* | *This is the state name for the state record that is associated with the meeting debrief record.* | *This is the username of the user that added the meeting debrief record to PIDS.* | *This is the date that the meeting debrief record was added to PIDS.* | *This is username of the user that last edited the meeting debrief record.* | *This is the date that the meeting debrief record was last edited.* |

**Program Session Debriefs Worksheet**

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| **Program Session Debrief Key** | **Program Meeting Debrief Key** | **Year** | **Program Key** | **Program** | **Session Date** | **Session Start Time** | **Session End Time** |
| *This is a unique identifier for the session debrief record.* | *This is a unique identifier for the meeting debrief record associated with the session debrief record.* | *The meeting debrief year.* | *This is a unique identifier for the program record that is associated with the session debrief record.* | *This the program name for the program record that is associated with the meeting session debrief record.* | *The session debrief date.* | *The session debrief start time.* | *The session debrief end time.* |

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| **Next Session Date** | **Next Session Start Time** | **Next Session End Time** | **Action Plan Reviewed?** | **BOQ Reviewed?** | **TPITOS Reviewed?** | **TPOT Reviewed?** | **Other Focus Item Reviewed?** | **Specify Other Focus Item** | **Meeting Summary** | **Next Steps Before Next Meeting** |
| *The next scheduled session debrief date.* | *The next scheduled session debrief start time.* | *The next scheduled session debrief end time.* | *“Yes” if an action plan was reviewed during the session. “No” otherwise.* | *“Yes” if a Benchmark of Quality form was reviewed during the session. “No” otherwise.* | *“Yes” if a TPITOS observation was reviewed during the session. “No” otherwise.* | *“Yes” if a TPOT observation was reviewed during the session. “No” otherwise.* | *“Yes” if an other focus item was reviewed during the session. “No” otherwise.* | *More details about the other focus item (if applicable).* | *The summary of the session.* | *The next steps to take before the next meeting.* |

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| **State Key** | **State** | **Added by** | **Date Added** | **Last Edited by** | **Last Edit Date** |
| *This is a unique identifier for the state record that is associated with the session debrief record.* | *This is the state name for the state record that is associated with the session debrief record.* | *This is the username of the user that added the session debrief record to PIDS.* | *This is the date that the session debrief record was added to PIDS.* | *This is username of the user that last edited the session debrief record.* | *This is the date that the session debrief record was last edited.* |

**Program Session Attendees Worksheet**

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| **Program Leadership Team Member Key** | **Team Member** | **Program Session Debrief Key** | **Session Date** | **Program Key** | **Program** | **State Key** | **State** | **Added by** | **Date Added** | **Last Edited by** | **Last Edit Date** |
| *This is a unique identifier for the program leadership team member record associated with the session debrief record.* | *The ID number and name of the team member.* | *This is a unique identifier for the session debrief record associated with the team member record.* | *The session debrief date.* | *This is a unique identifier for the program record that is associated with the session debrief record.* | *This the program name for the program record that is associated with the session debrief record.* | *This is a unique identifier for the state record that is associated with the team member and session debrief records.* | *This is the state name for the state record that is associated with the team member and session debrief records.* | *This is the username of the user that added the association between the team member record and session debrief record.* | *This is the date that the association between the team member record and session debrief record was added to PIDS.* | *This is username of the user that last edited the association between the team member record and the session debrief record.* | *This is the date that the association between the team member record and session debrief record was last edited.* |

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| **Intent:** This report is designed to export all the Program records that exist on the Leadership Coach dashboard for the specified timeframe and selected program(s)/state(s).  **Program Meeting Schedules Worksheet:** This worksheet includes all the Program Meeting Schedules that meet the following criteria:   1. The meeting schedule’s year is contained within the Start Date criteria and End Date criteria. For example, if the Start Date is 02/01/2022 and the End Date is 08/30/2022, only schedules with the year 2022 will be included. 2. The meeting schedule is within the selected program(s)/state(s).   **Programs Dropped by Coaches Worksheet:** This worksheet includes all the Programs that coaches are no longer working with that meet the following criteria:   1. The stop date is between the Start Date criteria and End Date criteria. 2. The program is within the selected program(s)/state(s).   **Program Meeting Debriefs Worksheet:** This worksheet includes all the Program Meeting Debriefs that meet the following criteria:   1. The meeting debrief’s year is contained within the Start Date criteria and End Date criteria. 2. The meeting debrief is within the selected program(s)/state(s).   **Program Session Debriefs Worksheet:** This worksheet includes all the Program Session Debriefs for the meeting debriefs that are included in the Program Meeting Debriefs Worksheet.  **Program Session Attendees Worksheet:** This worksheet includes all the Program Session Attendees for the session debriefs that are included in the Program Session Debriefs Worksheet. | | | | | |
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| **Criteria Name** | | **Optional?** | | **Description** | |
| Start Date | | No | | This date forms the start of the window that determines what records to include in the report. | |
| End Date | | No | | This date forms the end of the window that determines what records to include in the report. | |
| Program(s) and State(s) | | No | | This filters the records that are included in the report.  All programs and states that are selected will be combined into a distinct list of programs. This is accomplished by determining what programs exist in the selected states, and then adding that list of programs to the list of specific programs that were selected by the user. After that, any duplicate programs in the combined list are removed. Only records that are for the programs in the de-duplicated list will be included in the report. | |