Instructions for Looking Up CX Data on PETS

These instructions are intended to assist PETS users in looking up the policy data listed on the Partners CX Core Indicator & Asset Data page, which will be used to complete the CX worksheets in the CX Manual.

> **Important Note:** LLAs will be able to get the Quality & Reach scores and policy searches described below when your LLA's data is uploaded to the site. CX data is being added to PETS in stages, and each LLA will be notified when your CX data is available on PETS.

Step 1: What CX data do I need to look up?

- Log into Partners and go to Resources > Communities of Excellence > Core Indicator & Asset Data

- The Core Indicator & Asset Data page lists the Core Indicators along with the various Data Sources and worksheets related to that Indicator.

- You will use PETS to find data on each indicator in two areas that are listed on this page: "Policy Quality and Reach (Worksheet D and Worksheet E)," and "Policy/System Change Adopted (Worksheet C)."

Step 2: Where do I find CX data on PETS?

- **Go to the new PETS website at https://pets.tcspartners.org/**

  - **Important Note: The new PETS website does not yet have CX data available for all LLAs.** You will be able to get the Quality & Reach scores and do the policy searches described in this document once your LLA's CX data is uploaded to the site.

  - If you are first prompted to log into your Partners account, you will then be taken directly to PETS.

- **First, familiarize yourself with the new PETS website.**

  - The layout and design of PETS has changed, but many features remain similar to the prior website. The topics in the left-hand column have been condensed into drop-down features that can be clicked to view all options.

  - The topics in the left-hand column that will be used to look up CX worksheet data are:

    - **County Details:** In the drop-down menu, select your county to see its Quality and Reach scores by CX Indicator and by policy type.

    - **Policy Type Searches:** In the drop-down menu, click one of the four policy types to go to a page with the questions and answer options for that topic. The search feature allows you to select one or more questions and responses, which will then generate a list of all jurisdictions that meet your specified criteria. **See Step 3** below for how to search for data on each CX Indicator.

- **Second, familiarize yourself with the new content on PETS.**
  - The four policy types covered by PETS are: Comprehensive Smokefree (SHS), Smokefree Multi-Unit Housing (MUH), Comprehensive Sales/Tobacco Retail Sales (SALES), and Flavored Tobacco (FLA). Flavored Tobacco replaces the prior category on Sampling.
  - Each of the four policy types has a rubric, which contains the questions, response options, and grading points that are used to score each policy. In the drop-down menu, select Documentation > Policy Rubrics to view the rubrics that list all the questions that policies will be analyzed against.
  - **Important note #1: The PETS website is in Phase 1 of analysis.** In Phase 1, policies are being graded against **only a sub-set** of the rubric questions, which are directly related to the CX indicators, in order to generate Quality and Reach scores and allow policy searches related to each Indicator. For example, this means that you will be able to see which jurisdictions have a Minimum Pack Size requirement, but you are not yet able to see what the required pack size is for each type of product covered by the policy. In Phase 2, the many details of policies will be available on PETS once policies are analyzed and graded against **all** rubric questions to provide a more detailed picture of policy coverage.
  - **Important note #2:** During Phase 1, each LLA's data will be uploaded to PETS as analysis and grading is completed for their jurisdictions. Tier 1 counties will be uploaded first, then Tier 2 counties, and then Tier 3 counties. **Each LLA will be notified** directly when your data is uploaded to PETS. Until your data is uploaded, the CX indicator values and search features will not be current for your LLA.

Step 3: How do I look up the CX data on PETS?

Part 1: Quality and Reach Scores

- The Quality and Reach scores on PETS are used to fill out Worksheet D and Worksheet E for each Indicator.
- To refresh your memory on what Quality and Reach Scores mean, see definitions on PETS at Reports > CX Reports.
- **Once your county's data is available on PETS:** Under County Details in the drop-down list, select your county. You will see a Quality score and a Reach score for each Indicator.
- **Quality Scores:** Use the percent listed for the Quality score for each Indicator to select the appropriate Quality Rating on Worksheet D.

  > **Example:** For Ventura County, *Indicator 1.2.10 on Minimum Retail Price/Package/Volume Size* has a Quality score of 12.5%. That score falls in the 1% - 20% range, which has a Rating of 1. So, you will put 1 in Box D-1.

- **Reach Scores:** Use the percent listed for the Reach score for each Indicator to select the appropriate Reach Rating on Worksheet E.

  > **Example:** For Ventura County, *Indicator 1.2.10 on Minimum Retail Price/Package/Volume Size* has a Reach score of 35.8%. That score falls in the 21% - 40% range, which has a Rating of 2. So, you will put 2 in Box E-1.

- **Note:** The Quality and Reach scores (and charts) for the **4 main policy types** at the top of each county's page reflect policy scores based on grading policies against all rubric questions, including those that remain un-scored during Phase 1 of updating PETS. The Quality and Reach scores (and charts) for **each individual Indicator** show each jurisdiction's scores based on the sub-set of rubric questions that are currently being analyzed for the CX process. These individual Indicator charts and scores are where you'll find your data for the CX process.

Part 2: Policy Search Instructions for Each Indicator

- On Partners, the Core Indicator & Asset Data page has a sub-section called **Policy/System Change Adopted (Worksheet C)** for each Indicator. This sub-section identifies one or two lists of policies that need to be looked up for each Indicator.

- The following instructions will help you get those lists of policies, which will help you fill out Worksheet C for each Indicator. You will find all of the information about CX policy searches on the PETS CX Reports page under the Reports tab (including this instructions document).

- **For the less complex Indicators,** you will use the Policy Type Search feature on PETS to generate a list of jurisdictions that have each type of policy. See below for instructions for doing each search.

- **For the more complex Indicators,** there is a report feature that will show a list of jurisdictions with each type of policy. Go to CX Indicator Reports page to click on each Indicator's report.

- **Notes:** The Indicator reports and searches will produce a list of *all* jurisdictions that have the specified type of policy; the lists are not specific to your county. There's an option to export each list as a PDF.

1.1.2: Content Neutral Signage Restriction

- Number of local Tobacco Retailer Licensing policies requiring storefront window covering to be at least 67%-99% clear:

  - In the drop-down menu under Policy Type Search, click Tobacco Retail Sales.
  - Go to **Question 12** and select answer options *No advertising permitted (100% of space is clear)* **and** *67%-99% is clear*.
  - Click *Search* to generate a list of jurisdictions whose policies meet these criteria.

- Number of other local policies covering storefront window signage restrictions:
  - In the drop-down menu under Policy Type Search, click Tobacco Retail Sales.
  - Go to **Question 12** and select answer options *34%-66% is clear* **and** 3*3% per state law requirement – or less – is clear*.
  - Click *Search* to generate a list of jurisdictions whose policies meet these criteria.

1.2.10: Minimum Retail Price/Package/Volume Size

- Number of Local Tobacco Retail License policies with minimum pack size restrictions:

  - In the drop-down menu under Policy Type Search, click Tobacco Retail Sales.
  - Go to **Question 24** and select answer options *Yes-20 or greater* **and** *Yes-less than 20*.
  - Click *Search* to generate a list of jurisdictions whose policies meet these criteria.

- Number of Local Tobacco Retail License policies with minimum price restrictions:

  - In the drop-down menu under Policy Type Search, click Tobacco Retail Sales.
  - Go to **Question 25** and select answer option *Yes*.
  - Click *Search* to generate a list of jurisdictions whose policies meet these criteria.

2.2.6: Smokefree Outdoor Dining/Bars/Service Areas

o Number of Local Outdoor Secondhand Smoke Policies with Smokefree Dining Provisions

- There is a report feature that will generate a list of jurisdictions with policies that require *both* outdoor restaurant dining areas and outdoor bar patios to be smokefree.

- To generate a list, go to the PETS CX Reports page under the Reports tab, and select List of Local Outdoor Secondhand Smoke Policies with Smokefree Dining Provisions.

2.2.9: Smokefree Outdoor Non-Recreational Public Areas

o Number of jurisdictions with Local Outdoor Secondhand Smoke Policies Covering Non-Recreational Public Areas

- There is a report feature that will generate a list of jurisdictions that *regulate* smoking to some degree in outdoor public easements/rights of way (such as sidewalks, plazas, downtown/ business districts, and service lines) *and/or* outdoor transit stops/shelters.

- To generate a list, go to the PETS CX Reports page under the Reports tab, and select List of Local Outdoor Secondhand Smoke Policies Covering Non-Recreational Public Areas.

o Number of Comprehensive Outdoor Secondhand Smoke Ordinances

- There is a report feature that will generate a list of jurisdictions that *prohibit* smoking as well as e-cigarette use and marijuana smoking/vaping in outdoor public easements/rights of way (such as sidewalks, plazas, downtown/ business districts, and service lines) *and* outdoor transit stops/shelters.

- To generate a list, go to the PETS CX Reports page under the Reports tab, and select List of Comprehensive Outdoor Secondhand Smoke Ordinances.

2.2.13: Smokefree Multi-Unit Housing

o Number of Local Smokefree Multi-Unit Housing Policies:

- There is a report feature that will generate a list of jurisdictions with strong or partial policies prohibiting smoking in some or all units of multi-unit housing including balconies and patios.
- To generate a list, go to the PETS CX Reports page under the Reports tab, and select List Jurisdictions with policy prohibiting smoking in some or all units of MUH, including balconies and patios.

2.2.29: Eliminate Tobacco Product Sales to Address Tobacco Waste

o Number of Local Jurisdictions With a Policy That Eliminates the Sale and Distribution of Major Waste-Producing Tobacco Product Classes:

- There is a report feature that will generate a list of jurisdictions that end the sale of tobacco products including e-cigarettes and non-therapeutic nicotine derived products.

- To generate a list, go to the PETS CX Reports page under the Reports tab, and select List of Local Jurisdictions with a Policy That Eliminates the Sale and Distribution of Major Waste-Producing Tobacco Product Classes.

2.2.35: Smokefree Outdoor Public Places

- o Number of smokefree outdoor public places policies:
    - There is a report feature that will generate a list of jurisdictions with smokefree policies addressing *some or all* of the following outdoor public places: outdoor restaurant dining areas, outdoor bar patios, outdoor public events and venues (e.g. farmers' markets, fairs, concerts, flea markets, sports arenas, swap meets, shopping centers, special/specified events), outdoor recreational areas (e.g. parks, playgrounds, trails, bike/pedestrian paths, sports fields, beaches), public easements/rights of way (sidewalks, plazas, downtown/ business districts, service lines), and/or outdoor places of employment.
    - To generate a list, go to the PETS CX Reports page under the Reports tab, and select List of smokefree outdoor public places policies.

3.2.1: Tobacco Retail Licensing

- o List of Local Tobacco Retail License Policies:
    - In the drop-down menu under Policy Type Search, click Tobacco Retail Sales.
    - Go to **Question 1** and select answer option *Yes*.
    - Click *Search* to generate a list of jurisdictions whose policies meet these criteria.

3.2.2: Tobacco Retailer Density/Zoning

- o List of Local Tobacco Retail Licensing or Other Policies Restricting Retailer Density or Retailers Near Schools:
    - There is a report feature that will generate a list of jurisdictions with a policy restricting tobacco retailer density and/or tobacco retailers near schools.
    - To generate a list, go to the PETS CX Reports page under the Reports tab, and select List of Jurisdictions with Policies Restricting Retailer Density or Retailers Near Schools.

3.2.4: Tobacco Industry Sampling/Coupons/Discounts/Gifts

- o List of Policies Prohibiting Free Samples of Tobacco
    - In the drop-down menu under Policy Type Search, click Tobacco Retail Sales.
    - Go to **Question 22:** select answer option *Yes*.
    - Click *Search* to generate a list of jurisdictions whose policies meet these criteria.

3.2.7: Tobacco-Free Pharmacies and Health Care Providers

- o List of Tobacco Retail Licensing or Other Policies Including a Provision Restricting Pharmacy Tobacco Sales
    - In the drop-down menu under Policy Type Search, click Tobacco Retail Sales.
    - Go to **Question 38:** select answer option *Yes*.
    - Click *Search* to generate a list of jurisdictions whose policies meet these criteria.

3.2.9: Menthol and Other Flavored Tobacco Products

- o List of Tobacco Retail License or Other Policies with a Provision Restricting the Sale of Flavored Tobacco Products and/or Menthol Cigarettes
  - There is a report feature that will generate a list of jurisdictions with a policy that *restricts or prohibits* the sale of menthol and/or other flavored tobacco products.
  - To generate a list, go to the PETS CX Reports page under the Reports tab, and select List of Tobacco Retail License or Other Policies with a Provision Restricting the Sale of Flavored Tobacco Products and/or Menthol Cigarettes

3.2.17: No Sale of Tobacco Products

- o List of Local Jurisdictions With a Policy Prohibiting the Sale and Distribution of Any Tobacco Products (Including ESD)
  - There is a report feature that will generate a list of jurisdictions with a policy prohibiting the sale of all flavors of all tobacco products in all locations, including ESDs.
  - To generate a list, go to the PETS CX Reports page under the Reports tab, and select List of Local Jurisdictions with a Policy Prohibiting the Sale and Distribution of Any Tobacco Products (Including ESD)

Please contact ANR Foundation at PETS-TA@no-smoke.org with any questions about these instructions or the new PETS website.