How To Create Your Appendix A Table from the HAPI Database for Your Semi-Annual Report

National Council on Aging

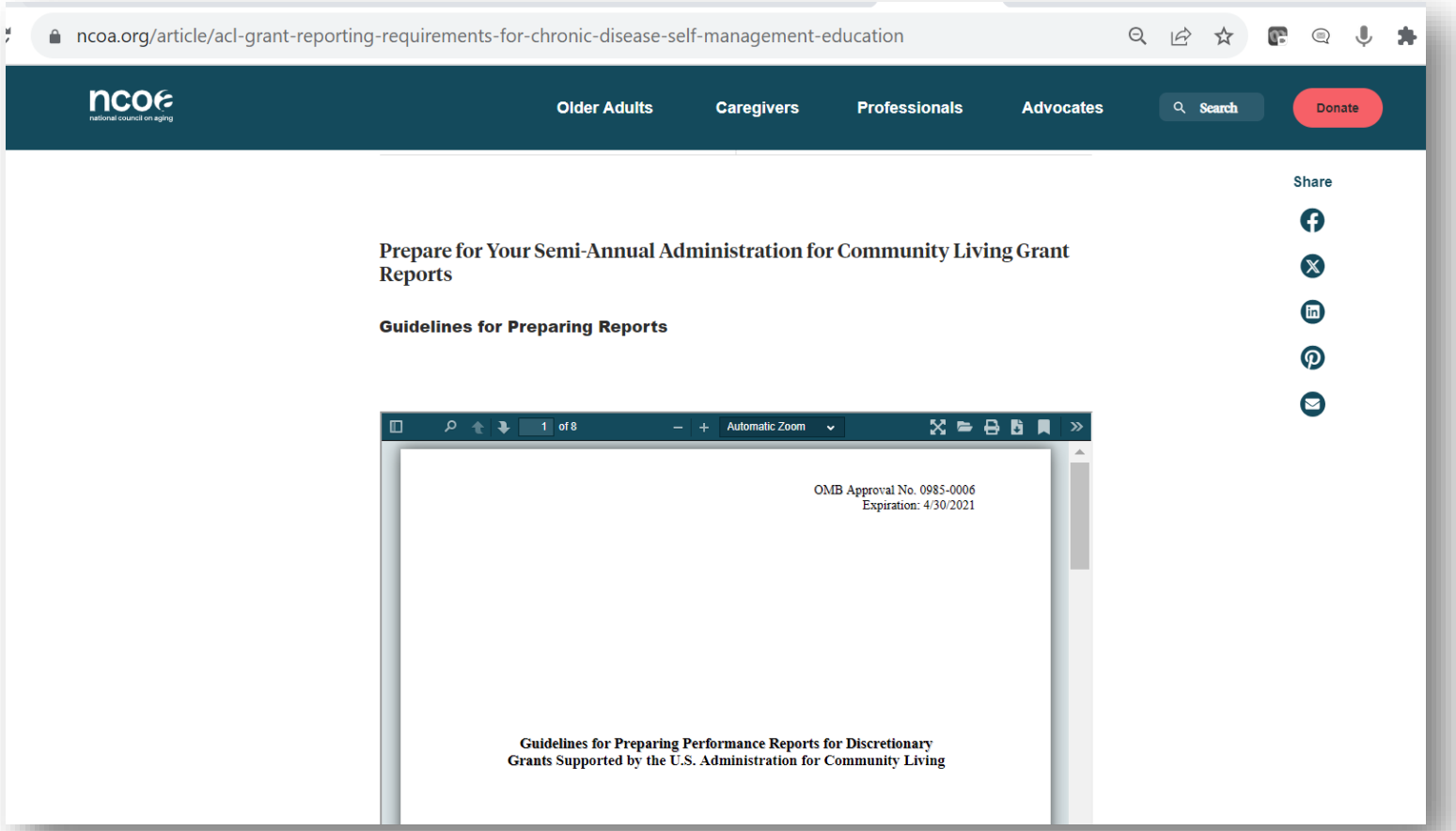
October 30, 2023

Guidelines for Preparing Performance Reports

All CDSME and Falls Prevention ACL grantees are required to submit a report to ACL on a semi-annual basis.

Detailed guidelines for this report can be found here:
https://www.ncoa.org/article/acl-grant-reporting-requirements-for-chronic-disease-self-management-education

You will need to generate and export a table from the Healthy Aging Program Integrated (HAPI) Database that you will include with your report to ACL, referred to as 'Appendix A.'



CDSME Reporting Calendars: Due Dates and Coverage Periods

The due dates and period covered vary depending on the Cohort Year.

Grantee Cohort	Reporting Calendar
2023-2027	Link to PDF
2022-2025	Link to PDF
2021-2024	Link to PDF
2020-2023	Link to PDF

Falls Prevention Reporting Calendars: Due Dates and Coverage Periods

The due dates and period covered vary depending on the Cohort Year.

Grantee Cohort	Reporting Calendar
2023-2027	Link to PDF
2022-2025	Link to PDF
2021-2024	Link to PDF
2020-2023	Link to PDF

Example: 2022 CDSME Grantees

2022-2025 CDSME GRANTEE REPORTING CALENDAR

(Grant Period: May 1, 2022 – April 30, 2025)

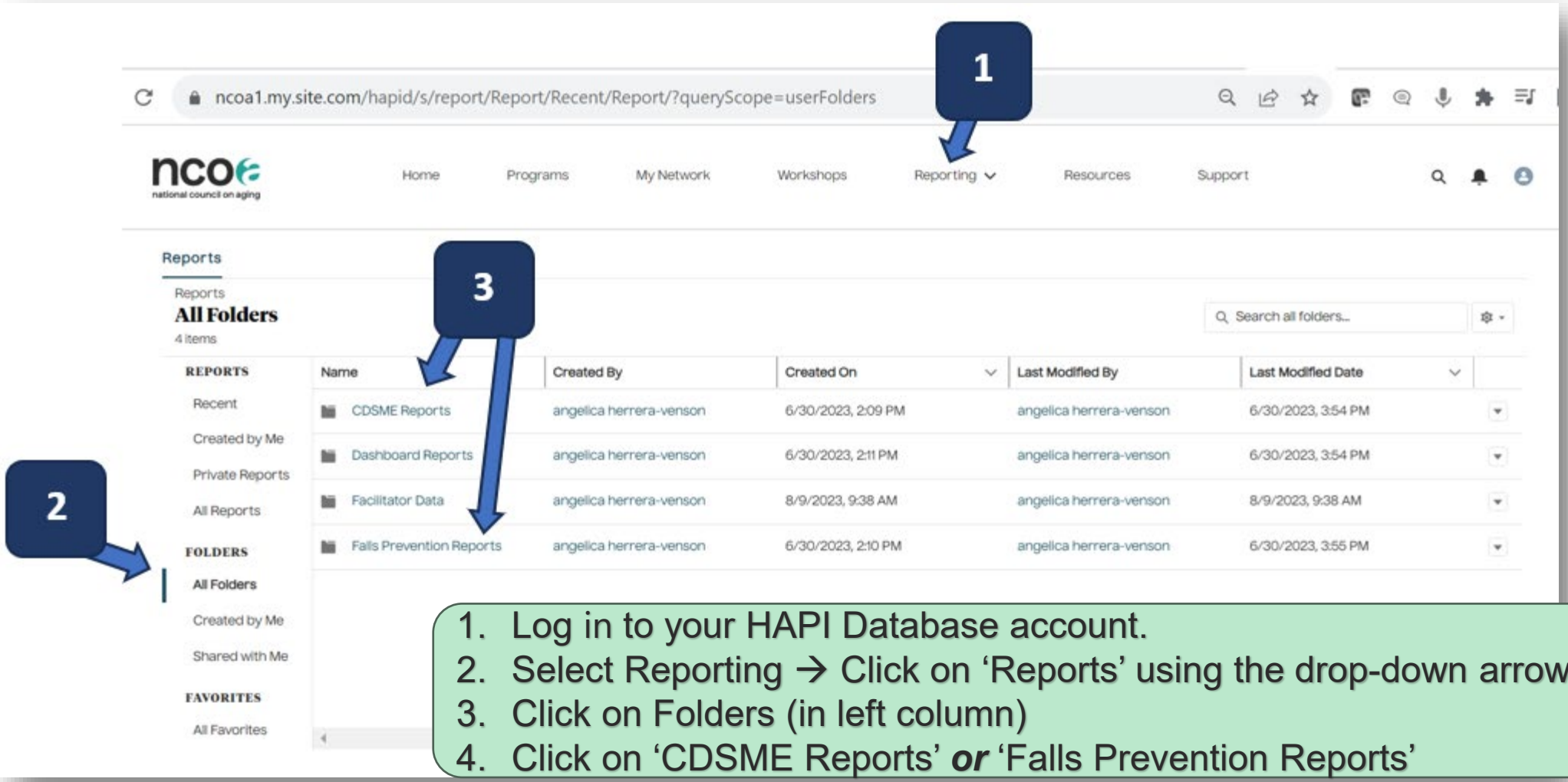
Year	Financial Reports[1]	Semi-Annual[2] and Final Program Reports[3]
2022	**Annual SF-425**	
		Semi- Annual Report- November 30, 2022 (For the Period May 1, 2022 – October 31, 2022)
2023		
	Annual SF-425- May 30, 2023 (For the Period May 1, 2022 – April 30, 2023)	Semi Annual Report- May 30, 2023 (For the Period November 1, 2022 – April 30, 2023)
		Semi- Annual Report- November 30, 2023 (For the Period May 1, 2023 – October 31, 2023)
2024		
	Annual SF-425- May 30, 2024 (For the Period May 1, 2023 – April 30, 2024)	Semi- Annual Report- May 30, 2024 (For the Period November 1, 2023 – April 30, 2024)
		Semi- Annual Report- November 30, 2024 (For the Period May 1, 2024 – October 31, 2024)
2025		
	FINAL REPORT - August 30, 2025	**FINAL REPORT-** August 30, 2025

CDSME Grantees awarded in 2022 had their first report due Nov 30, 2022.

In 2023, Cohort 2022 grantees have 2 reports due. The report due on Nov 30, 2023 will cover the period between 5/1/23 and 10/31/23.

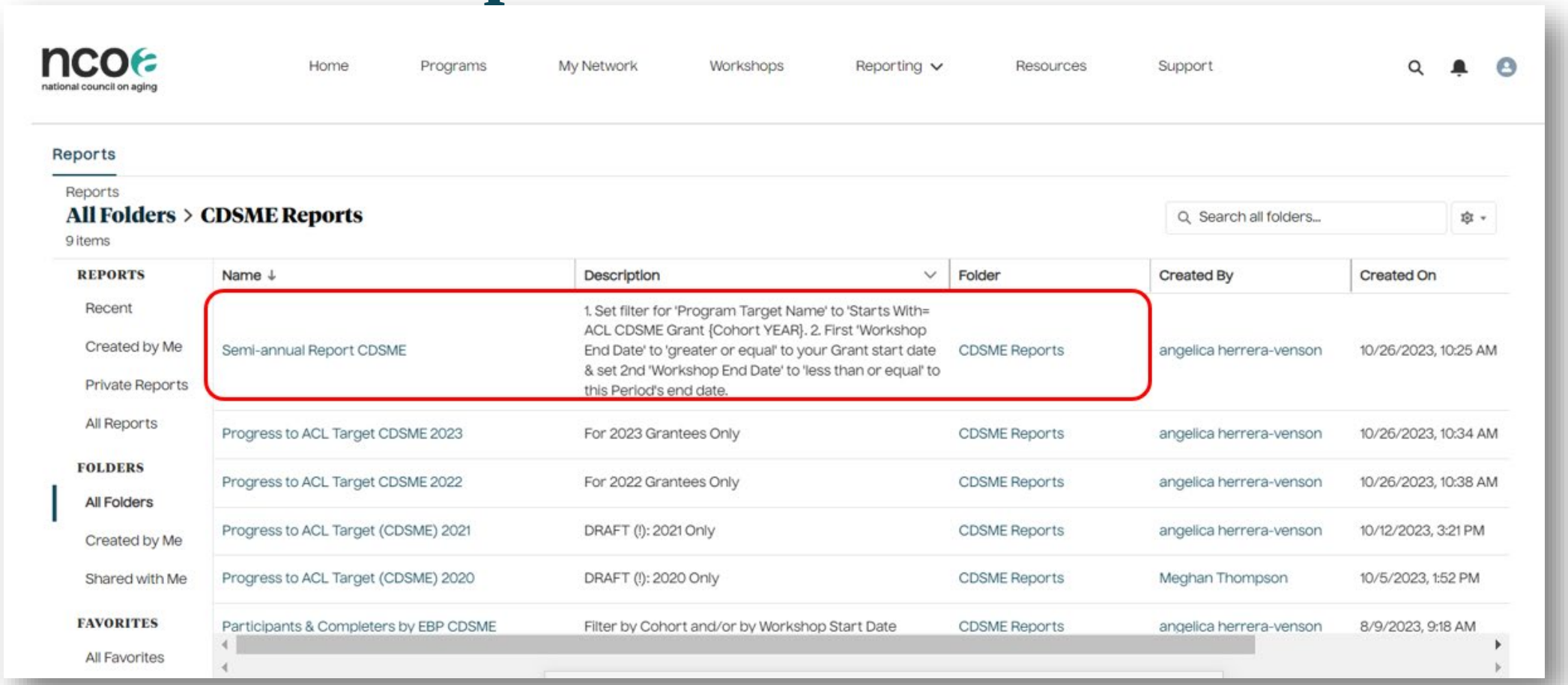
You will use this period (5/1/23 and 10/31/23) in the report in the HAPI Database to create and export your report.

Steps to Find Semi-Annual Report in HAPI Database



1. Log in to your HAPI Database account.
2. Select Reporting → Click on 'Reports' using the drop-down arrow
3. Click on Folders (in left column)
4. Click on 'CDSME Reports' ***or*** 'Falls Prevention Reports'

Semi-Annual Report: CDSME



From the respective folder, select your report:

- Reporting → Reports → All Folders → CDSME Reports (folder) → Semi-Annual Report (CDSME) (report)

Semi-Annual Report: CDSME

Report: Program Targets, Funding Source, w/wo Workshops

Semi-annual Report CDSME

Set filter for 'Program Target Name' to 'Starts With= ACL CDSME Grant (Cohort YEAR). Set 1st 'Workshop Start Date' to 'greater or equal' to your semi-annual period start date & 2nd 'Workshop Start Date' to 'less than or equal' to report period's end date.

Enable Field Editing

Total Workshop: Actual Participants	Total Workshop: Actual Completers	Total Participant Target	Total Completer Target	Total Actual Participants	Total Actual Completers	Participant Variance	Completer Variance
222	101	1,400	1,189	2,252	1,508	852	319

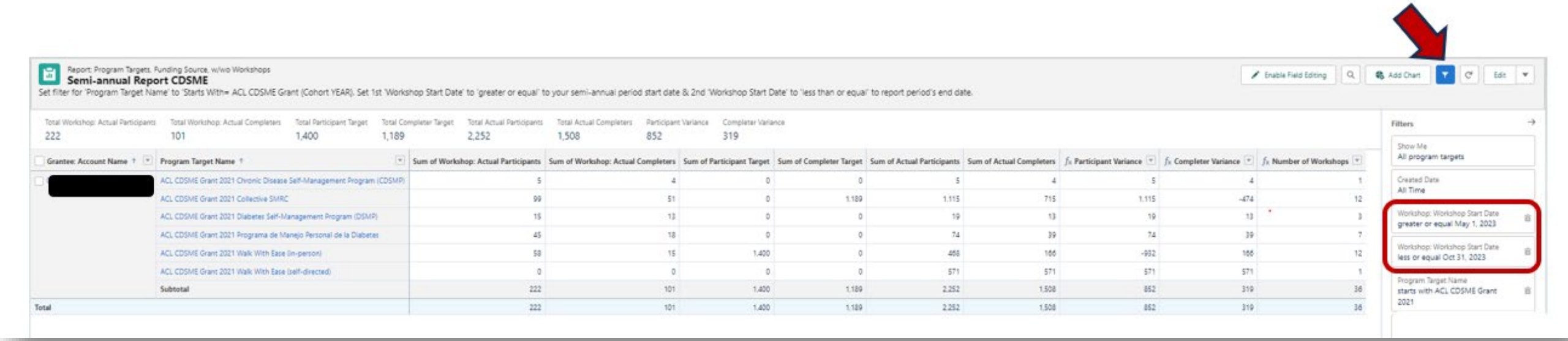
Grantee: Account Name	Program Target Name	Sum of Workshop: Actual Participants	Sum of Workshop: Actual Completers	Sum of Participant Target	Sum of Completer Target	Sum of Actual Participants	Sum of Actual Completers	Participant Variance	Completer Variance	Number of Workshops
[redacted]	ACL CDSME Grant 2021 Chronic Disease Self-Management Program (CDSMP)	5	4	0	0	5	4	5	4	1
	ACL CDSME Grant 2021 Collective SMRC	99	51	0	1,189	1,115	715	1,115	-474	12
	ACL CDSME Grant 2021 Diabetes Self-Management Program (DSMP)	15	13	0	0	19	13	19	13	3
	ACL CDSME Grant 2021 Programa de Manejo Personal de la Diabetes	45	18	0	0	74	39	74	39	7
	ACL CDSME Grant 2021 Walk With Ease (in-person)	58	15	1,400	0	468	166	-932	166	12
	ACL CDSME Grant 2021 Walk With Ease (self-directed)	0	0	0	0	571	571	571	571	1
	Subtotal	222	101	1,400	1,189	2,252	1,508	852	319	36
Total		222	101	1,400	1,189	2,252	1,508	852	319	36

- Your Semi-Annual report will display your total number of participants, completers, and workshops, against your Program Targets for that 6-month period.
- The variance will display the gap between your cumulative total and your Grant's goal for your entire Grant period.
- Definition of table column headers on next slide.

Definitions: CDSME

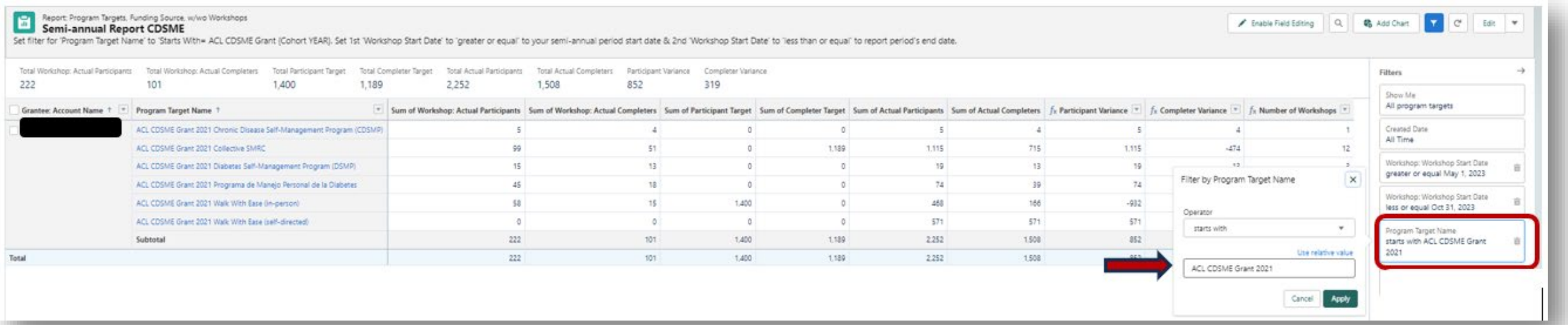
Column Headers	Definitions
Grantee Account Name	Your Account, as known in the HAPI Database
Program Target Name	The name of your program target, combining a specific evidence-based program (or collection of programs), the ACL funding source (CDSME or Falls), and the Cohort Year (1st year of your funding)
Sum of Workshops: Actual Participants	Actual Participants reached this 6-month Period
Sum of Workshops: Actual Completers	Actual Completers this 6-month Period
Sum of Participant Target	Your participant goal/target for the *entire* grant period (3 to 4 years, depending on your Cohort) for that given Program Target
Sum of Completer Target	Your completer goal/target for the *entire* grant period (3 to 4 years, depending on your Cohort) for that given Program Target
Sum of Actual Participants	Cumulative Actual Participants, from beginning of your grant start date to the end of the current 6-month period
Sum of Actual Completers	Cumulative Actual Completers, from beginning of your grant start date to the end of the current 6-month period
Participant Variance	Shows the difference between your Cumulative Actual Participants and your Participant Target (these are applicable to your Support / Alternate programs, e.g. WWE, HomeMeds, AFEP) from the beginning of your grant to the end of the current 6-month period
Completer Variance	Shows the difference between your Cumulative Actual Completers and your Completer Target (these are applicable to most SMRC (e.g. CDSMP, DSMP, etc) and some Support Programs, e.g. WRAP, HCHC, EW, etc). from the beginning of your grant to the end of the current 6-month period
Number of Workshops	Number of workshops in this 6-month reporting period.

Apply Filters: CDSME



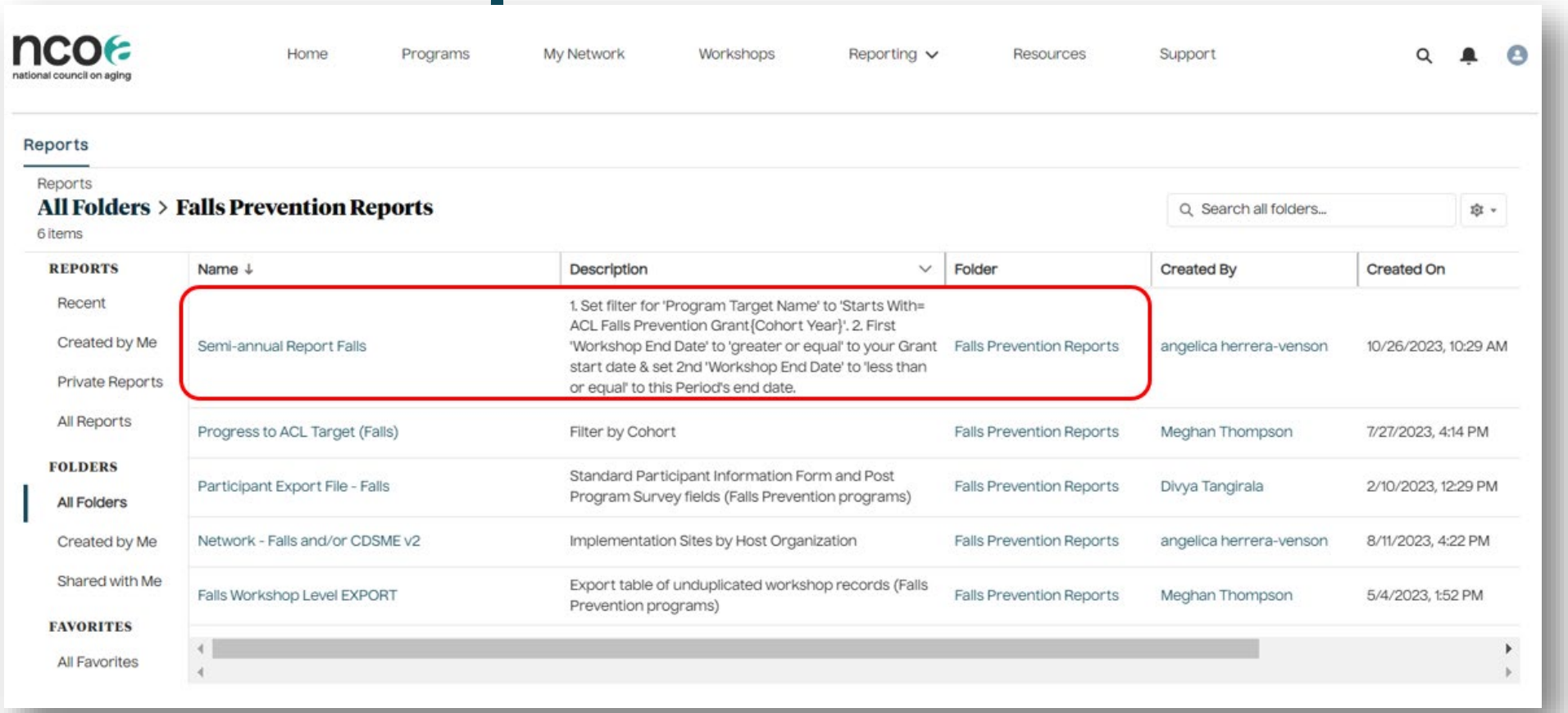
1. Click on the Funnel icon (red arrow) to display the filters.
2. Click on the first **Workshop Start Date** filter and enter the start date of the 6-month REPORTING period for 'greater or equal'. *Click Apply.*
3. Click on the second **Workshop Start Date** filter and enter the end of the 6-month REPORTING period after 'less or equal'. For reports due Nov 2023, a 2022 & 2023 Grantee would enter 10/31/2023 here. *Click Apply.*
4. Even though you're focusing on the current 6-months, the 'Sum of Actual Participants' and 'Sum of Actual Completers' will automatically include all your participants & completers from the beginning of your Grant Cohort start date.

Apply Filters: CDSME



1. Click on the **Program Target Name** filter and enter 'ACL CDSME Grant YYYY', replacing the YYYY with your Cohort year. A 2021 Grantee would enter 'ACL CDSME Grant 2021'. Use this exact capitalization and phrase. Be sure the Operator is set to 'starts with.'
2. Then click 'Apply.'
3. The report will automatically update.

Semi-Annual Report: Falls Prevention



From the respective folder, select your report:

- Reporting → Reports → All Folders → Falls Prevention Reports (folder) → Semi-Annual Report (Falls Prevention) (report)

Semi-Annual Report: Falls Prevention

Report: Program Targets, Funding Source, w/wo Workshops

Semi-annual Report FALLS

Enable Field Editing | Add Chart | Edit

Set filter for 'Program Target Name' to 'Starts With= ACL Falls Prevention Grant {Cohort YEAR}. Set 1st 'Workshop Start Date' to 'greater or equal' to your semi-annual period start date & 2nd 'Workshop Start Date' to 'less or equal' to period end date.

Total Workshop: Actual Participants	Total Workshop: Actual Completers	Total Participant Target	Total Actual Participants	Participant Variance	Number of Workshops
331	102	5,883	8,211	2,328	22

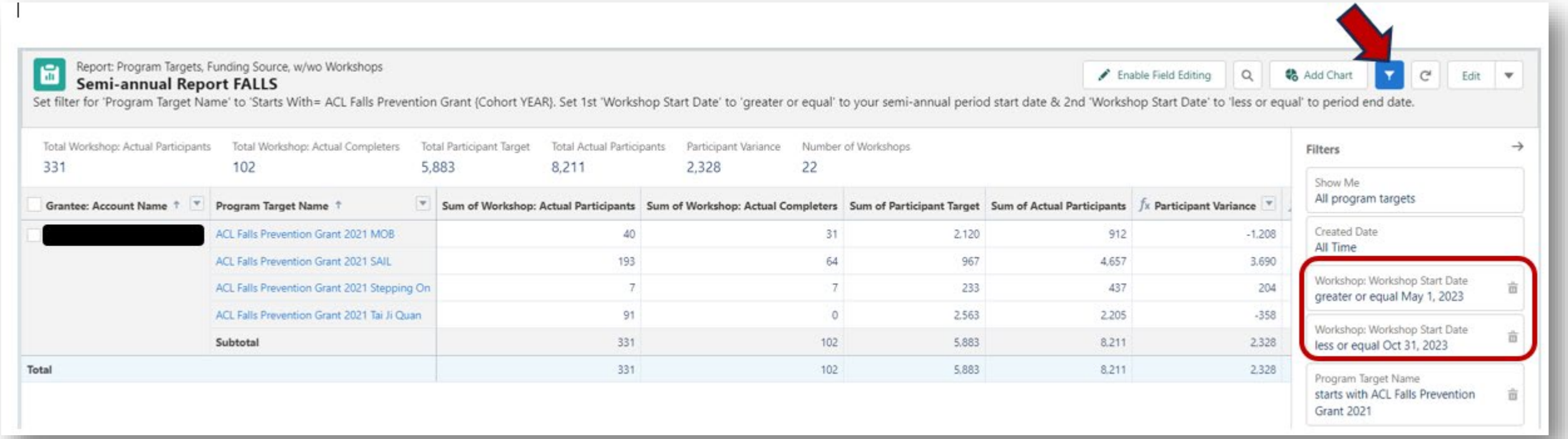
Grantee: Account Name	Program Target Name	Sum of Workshop: Actual Participants	Sum of Workshop: Actual Completers	Sum of Participant Target	Sum of Actual Participants	Participant Variance	Number of Workshops
[redacted]	ACL Falls Prevention Grant 2021 MOB	40	31	2,120	912	-1,208	4
	ACL Falls Prevention Grant 2021 SAIL	193	64	967	4,657	3,690	12
	ACL Falls Prevention Grant 2021 Stepping On	7	7	233	437	204	1
	ACL Falls Prevention Grant 2021 Tai Ji Quan	91	0	2,563	2,205	-358	5
	Subtotal	331	102	5,883	8,211	2,328	22
Total		331	102	5,883	8,211	2,328	22

- Your Semi-Annual report will display your total number of participants, completers, and workshops, against your Program Targets for that 6-month period.
- The variance will display the gap between your cumulative total and your Grant's goal for your entire Grant period.
- Definition of table column headers on next slide.

Definitions: Falls Prevention

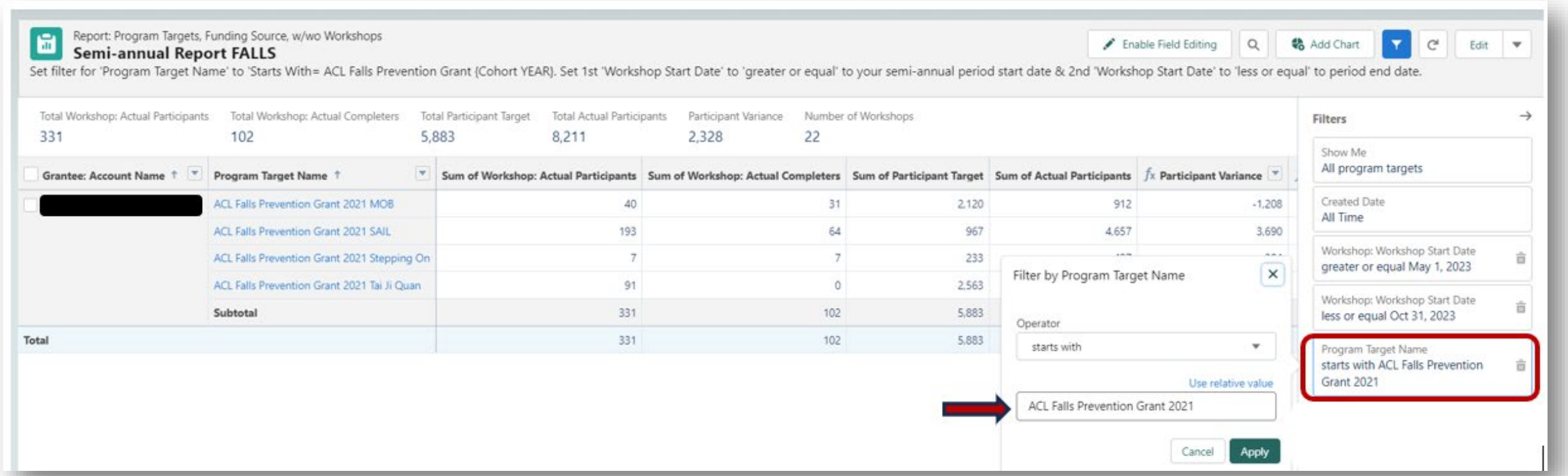
Column Headers	Definitions
Grantee Account Name	Your Account, as known in the HAPI Database
Program Target Name	The name of your program target, combining a specific evidence-based program (or collection of programs), the ACL funding source (CDSME or Falls), and the Cohort Year (1st year of your funding)
Sum of Workshops: Actual Participants	Actual Participants reached this 6-month Period
Sum of Participant Target	Your participant goal/target for the *entire* grant period (3 to 4 years, depending on your Cohort) for that given Program Target
Sum of Completer Target	Your completer goal/target for the *entire* grant period (3 to 4 years, depending on your Cohort) for that given Program Target
Sum of Actual Participants	Cumulative Actual Participants, from beginning of your grant start date to the end of the current 6-month period
Participant Variance	Shows the difference between your Cumulative Actual Participants and your Participant Target from the beginning of your grant to the end of the current 6-month period
Number of Workshops	Number of workshops in this 6-month reporting period.

Apply Filters: Falls



1. Click on the Funnel icon (red arrow) to display the filters.
2. Click on the first **Workshop Start Date** filter and enter the start date of the 6-month REPORTING period for 'greater or equal'. *Click Apply.*
3. Click on the second **Workshop Start Date** filter and enter the end of the 6-month REPORTING period after 'less or equal'. For reports due Nov 2023, a 2022 & 2023 Grantee would enter 10/31/2023 here. *Click Apply.*
4. Even though you're focusing on the current 6-months, the 'Sum of Actual Participants' will automatically include all of your participants from the beginning of your Grant Cohort start date.

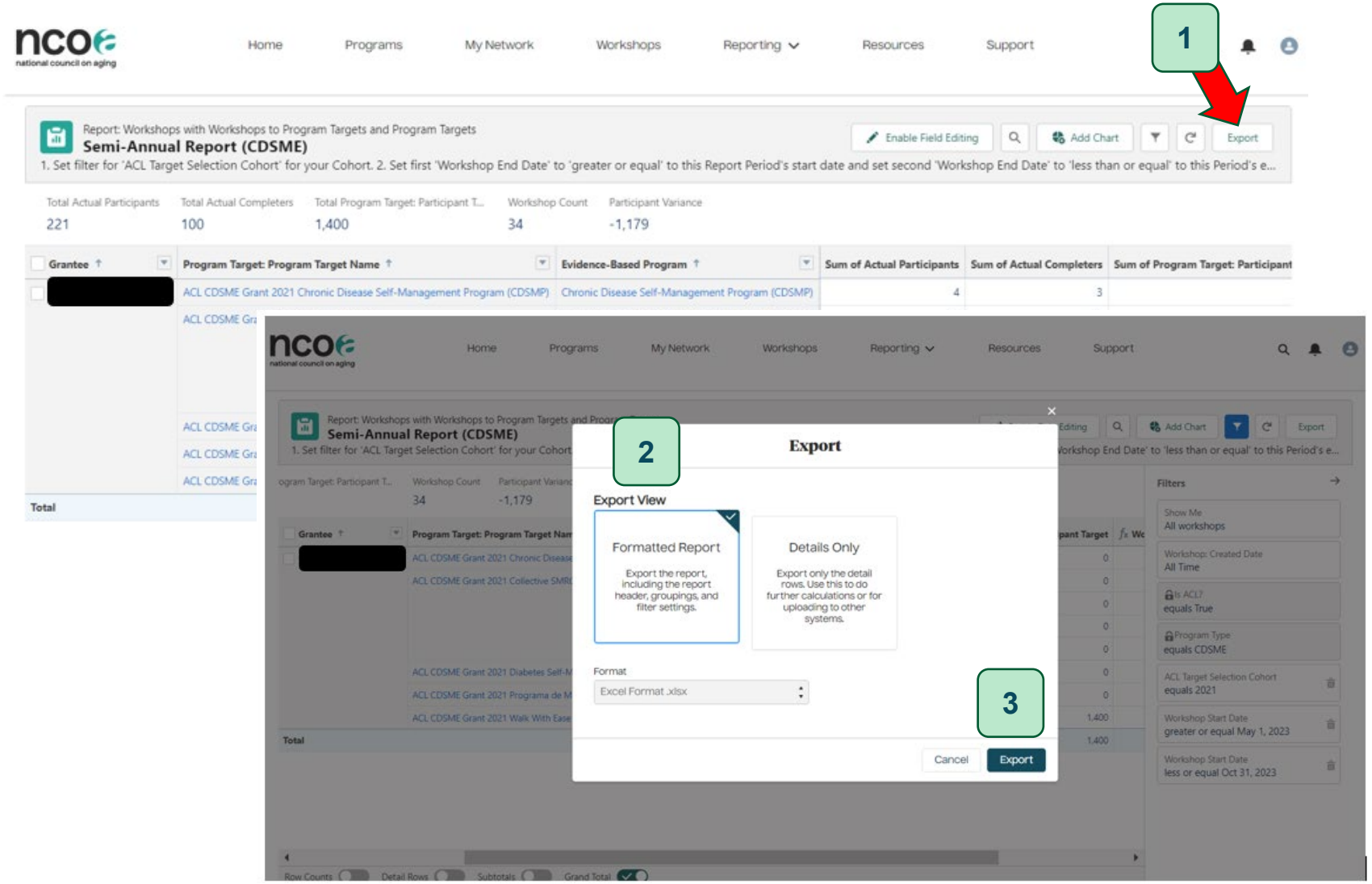
Apply Filters: Falls Prevention



1. Click on the **Program Target Name** filter and enter 'ACL Falls Prevention Grant YYYY', replacing the YYYY with your Cohort year. A 2021 Grantee would enter 'ACL Falls Prevention Grant 2021'. Use this exact capitalization and phrase. Be sure the Operator is set to 'starts with.'
2. Then click 'Apply.'
3. The report will automatically update.

Export Your Report

1. Export from either CDSME or Falls Prevention reports.
2. Click on the **Export** button on the top right.
3. On the Export dialogue box, click on 'Formatted Report.'
4. Next, click the Export button to export the file in Excel Format, .xlsx.
5. **You can format the exported table, but not modify the #'s in it.** *If these #'s differ from your progress, simply describe the reason for the discrepancy in your narrative.*
6. Include the file as your Appendix A in your semi-annual report.



For further assistance with your Semi-Annual Reports or Appendices, contact:

Angelica Herrera-Venson

Angelica.Herrera-Venson@ncoa.org

Or

Binod Suwal

Binod.Suwal@ncoa.org