

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-grantreporting-requirements-for-chronicdisease-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.'

ncoe									
national council on aging	Older Ad	dults Caregivers	Professionals	Advocates	٩	Search	Do	nate	
P R G	Prepare for Your Semi-Ani Reports Guidelines for Preparing Re	nual Administration fo	r Community Livi	ng Grant			Share (7) (2) (1) (2) (2) (2) (2) (2) (2) (2) (2		
	Cuidelines for I Grants Supported	- + Automatic Zoom O Preparing Performance Reports I by the U.S. Administration for	MB Approval No. 0985-0006 Expiration: 4/30/2021				S		

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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

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Falls Prevention Reporting Calendars: Due Dates ^{(*) 4} 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	EINAL REPORT - August 20, 2025	EINAL REPORT August 20, 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

ncc	on aging	Home	Programs	My Network	Workshops	Reporting ~	Resources	Support				Q		
Reports														
Reports All Fo 4 items	olders	3						Q, Se	arch all I	folders			₽	×
REPO	RTS Nar	me	Created 8	Ву	Created On	~	Last Modified By	1	Last Mod	dified Dat	0	~		
Rece	nt 🖿	CDSME Reports	angelica	herrera-venson	6/30/2023, 2:09 PM		angelica herrera-venson		6/30/20	23, 3:54 P	M			•
Creat	ted by Me	Dashboard Reports	angelica	herrera-venson	6/30/2023, 2:11 PM		angelica herrera-venson		6/30/20	23, 3:54 P	M		15	
Priva	te Reports	Facilitator Data	angelica	herrera-venson	8/9/2023, 9:38 AM		angelica herrera-venson	-	8/9/202	3, 9:38 AM	И			
FOLDI	ERS I	Falls Prevention Repo	rts angelica i	herrera-venson	6/30/2023, 2:10 PM		angelica herrera-venson	10	6/30/20	23, 3:55 P	M			
All Fo	Iders													
Creat	ted by Me	1	Login	to vour	HAPI Data	abase	account							

Semi-Annual Report: CDSME

Actional council on aging	Home Programs	My Network Work	shops Reporting 🗸	Resources	Support	Q.	¢ (
Reports							
Reports All Folders > 9 items	CDSME Reports				Q. Search all folders		遼 -
REPORTS	Name ↓	Description	~ 1	Folder	Created By	Created On	
Recent Created by Me Private Reports	Semi-annual Report CDSME	1. Set filter for 'Program T ACL CDSME Grant {Coho End Date' to 'greater or e & set 2nd 'Workshop End this Period's end date.	Farget Name' to 'Starts With= ort YEAR}. 2. First 'Workshop equal' to your Grant start date I Date' to 'less than or equal' to	angelica herrera-venson	10/26/2023, 10	:25 AM	
All Reports	Progress to ACL Target CDSME 2023	For 2023 Grantees Only	e e e	CDSME Reports	angelica herrera-venson	10/26/2023, 10	:34 AM
FOLDERS All Folders	Progress to ACL Target CDSME 2022	For 2022 Grantees Only		CDSME Reports	angelica herrera-venson	10/26/2023, 10	:38 AM
Created by Me	Progress to ACL Target (CDSME) 2021	DRAFT (!): 2021 Only		CDSME Reports	angelica herrera-venson	10/12/2023, 3:2	21 PM
Shared with Me	Progress to ACL Target (CDSME) 2020	DRAFT (!): 2020 Only		CDSME Reports	Meghan Thompson	10/5/2023, 1:52	2 PM
FAVORITES All Favorites	Participants & Completers by EBP CDSME	Filter by Cohort and/or b	by Workshop Start Date	CDSME Reports	angelica herrera-venson	8/9/2023, 9:18	AM •

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, Fo Semi-annual Repo Set filter for 'Program Target Nan	inding Source, w/wo Workshops rt CDSME ne' to 'Starts With= ACL CDSME Gra	ant (Cohort YEAR). Set 1	st Workshoj	o Start Date' to 'greater or equal'	to your semi-annual period start	late & 2nd 'Works!	hop Start D	ate" to "less than or equa	l' to report period's end da	ste.			Enable Field Editing
Total Workshop: Actual Participants 222	Total Workshop: Actual Completers 101	Total Participant Target 1,400	Total Compl 1,189	eter Target Total Actual Participants 2,252	Total Actual Completers Partic 1,508 852	pant Variance Cor 31	mpleter Variar 9	108					
Grantee: Account Name †	Program Target Name †			m of Workshop: Actual Participants	Sum of Workshop: Actual Complet	ers Sum of Particip	pant Target	Sum of Completer Target	Sum of Actual Participants	Sum of Actual Completers	fx Participant Variance	fx Completer Variance 💌	$f_{\rm H}$ Number of Workshops $[*]$
	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-Ma	ACL CDSME Grant 2021 Diabetes Self-Management Program (DSMP)				13	0	0	19	13	19	13	3
	ACL CDSME Grant 2021 Programa de Ma	anejo Personal de la Diabete	s .	45		18	0	0	74	39	74	39	7
	ACL CDSME Grant 2021 Walk With Ease ((in-person)		58		15	1,400	0	458	165	-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
otal				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 (1 st 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 <i>entire</i> 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 <i>entire</i> 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 <u>Support / Alternate programs</u> , 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 <u>Support Programs</u> , 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

Report: Program Targett. Fu Semi-annual Report et filter for 'Program Target Nam	inding Source, w/wo Workshops rt CDSME re' to 'Starts With= ACL CDSME Gra	int (Cohort YEAR). Set 1	st Workshop Start Da	te' to 'greater or equal' to	your semi-annual perio	od start date & 2	ind Workshop Start	Date' to 'less than or equa	to report period's end da	ite.			✓ Enable Field Editing	۹ ۹	Add Dhart
Total Workshop: Actual Participants 222	Total Workshop: Actual Completers 101	Total Participant Target 1,400	Total Completer Target 1,189	Total Actual Participants 2,252	Total Actual Completers 1,508	Participant Vari 852	ance Completer Va 319	lance							Filters Show Me
Grantee: Account Name † 💌	e: Account Name † 💌 Program Target Name †		Sum of Worl	shop: Actual Participants	Sum of Workshop: Actual	Completers Sur	n of Participant Targe	Sum of Completer Target	Sum of Actual Participants	Sum of Actual Completers	$f_{\rm K}$ Participant Variance $[\overline{ \cdot }]$	fix Completer Variance	fx Number of Workshops	-	All program targets
·	ACL CDSME Grant 2021 Ovidinic Disease	Self-Management Program	(CDSMP)	5		4		0 0	5	4	5		4	1	Created Date
	ACL CDSME Grave 2021 Collective SMRC			99		51	14	1.189	1.115	715	1.115	-47	4	12	Page Alling
	ACL CDSME Grant 2021 Diabetes Self-Ma	inagement Program (DSMP	5	15		13	00	0	19	13	19		1	3	Workshop: Workshop Start Date
2	ACL CDSME Grant 2021 Programa de Ma	nejo Personal de la Diabete		45		18	124	0	74	39	74	3	2	7	grave or equal may 1, and
	ACL CDSME Grant 2021 Walk With Ease I	in-person)		58		15	1.40	0 0	458	105	-932	10	6	12	Workshop: Workshop Start Date less or equal Oct 31, 2023
	ACL CDSME Grant 2021 Walk With Ease L	self-directed)		0		0		0 0	571	571	571	57	1	1	
	Subtotal			222		101	1,40	1,189	2.252	1.508	852	31		36	starts with ACL CDSME Grant
				222		101	1.43	1.129	2.252	1508	852	31		36	2021

- 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

tal Workshop: Actual Participants 22	Total Workshop: Actual Completers 101	Total Participant Target 1,400	Total Completer Targ 1,189	pet Total Actual Participants 2,252	Total Actual Completers 1,508	Participant Varia 852	nos Completer Varia 319	nce						Filters	
Grantee: Account Name † (*) Pro	* Program Target Name 1		🐨 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 fr Participant Variance 😨 fs Completer V		fs Completer Variance 💽 fs Num	ber of Workshops 💌	Show Me All program target								
	ACL CDSME Grant 2021 Chronic Disease	Self-Management Program	(CDSMP)	5		4	0	0	5	4	5	4	1	Created Date	
	ACL CDSME Grant 2021 Collective SMRC			99		51	0	1.189	1.115	715	1.115	-474	12	All Time	
	ACL CDSME Grant 2021 Diabetes Self-Management Program (DSMP)		8	15		13	0	0	19	13	19	12	5	Workshop: Worksho	Start Date
	ACL CDSME Grant 2021 Programa de Ma	nejo Personal de la Diabete		45		18	0	0	74	39	74	Filter by Program Target 1	Name	greater or equal in	9 1, 2023
	ACL COSME Grant 2021 Walk With Ease (nt 2021 Walk With Ease On-person)		58		15	1.400	0	468	166	-932			Workshop: Workshop less or equal Oct 3	Start Date 2023
	ACL CDSME Grant 2021 Walk With Ease (self-directed)		0		0	0	0	571	571	571	Operator			
	Subtotal			222		101	1,400	1.189	2.252	1,508	852	auro mon		starts with ACL CDS	e ME Grant
				222		101	1,400	1,189	2.252	1,508	023		Use relative value	.2021	

- 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

	Home	Programs	My Network	Workshops	Reporting \checkmark	Resources	Support	Q	•	0
eports										
Reports All Folders > 1 6 items	Falls Prevention R	eports					Q Search all folders		\$	•]
REPORTS	Name ↓		Description		~	Folder	Created By	Created On		
Recent Created by Me Private Reports	Semi-annual Report Falls		1. Set filter for ACL Falls Prev "Workshop En start date & s or equal' to th	'Program Target Nami vention Grant{Cohort \ d Date' to 'greater or e et 2nd 'Workshop End is Period's end date.	angelica herrera-venson	10/26/2023,	10:29 A	M		
All Reports	Progress to ACL Target (F	Falls)	Filter by Coho	ort		Falls Prevention Reports	Meghan Thompson	7/27/2023, 4	:14 PM	
FOLDERS All Folders	Participant Export File - F	alls	Standard Par Program Surv	ticipant Information Fo vey fields (Falls Preven	rm and Post tion programs)	Falls Prevention Reports	Divya Tangirala	2/10/2023, 1	2:29 PN	Л
Created by Me	Network - Falls and/or CE	SME v2	Implementation	on Sites by Host Organ	ization	Falls Prevention Reports	angelica herrera-venson	8/11/2023, 4	22 PM	
Shared with Me	Falls Workshop Level EXP	ORT	Export table of Prevention pr	of unduplicated worksh ograms)	nop records (Falls	Falls Prevention Reports	Meghan Thompson	5/4/2023, 1:5	2 PM	
All Favorites	4									•

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, Semi-annual Rep Set filter for 'Program Target Na	Funding Source, w/wo Workshops ort FALLS ame' to 'Starts With= ACL Falls Prevent	ion Grant {Cohort YE/	AR]. Set 1st 'Worksho	op Start Date' to 'greater	or equal' 1	to your semi-annual perio	ed start date & 2nd 'Worksh	able Field Editing Q, nop Start Date' to 'less	Add Cha	t T	C,	Edit	٠
Total Workshop: Actual Participant 331	s Total Workshop: Actual Completers 102	Total Participant Target 5,883	Total Actual Participa 8,211	ants Participant Variance 2,328	Number 22	of Workshops							
Grantee: Account Name 1	Program Target Name †	Sum of Workshop:	Actual Participants	Sum of Workshop: Actual C	ompleters	Sum of Participant Target	Sum of Actual Participants	$f_{\rm X}$ Participant Variance	💌 f 🛛 Number	of Workshop			
	CL Falls Prevention Grant 2021 MOB		40	40		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	Dn	7		7	233	437		204		1		
	ACL Falls Prevention Grant 2021 Tai Ji Quar	6	91		0	2,563	2,205	7.	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.

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Definitions: Falls Prevention

Column Headers	Definitions
Grantee Account Name	Your Account, as known in the HAPI Database
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Sum of Completer Target	Your completer goal/target for the <i>entire</i> 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

Report: Program Targets, Funding Source, w/wo Workshops Semi-annual Report FALLS

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 331	Total Workshop: Actual Completers To 102 5	tal Participant Target Total Actual Partici 883 8 211	pants Participant Variance Number 2 328 22	of Workshops			Filters	->	
Grantee: Account Name †	Program Target Name †	Sum of Workshop: Actual Participants	Sum of Workshop: Actual Completers	Sum of Participant Target	Sum of Actual Participants	fx Participant Variance	Show Me All program targets		
	ACL Falls Prevention Grant 2021 MOB	40	31	2.120	912	-1.208	Created Date		
	ACL Falls Prevention Grant 2021 SAIL	193	64	967	4,657	3.690	All time	_	
	ACL Falls Prevention Grant 2021 Stepping On	7.	27	233	437	204	Workshop: Workshop Start Date greater or equal May 1, 2023	亩	
	ACL Falls Prevention Grant 2021 Tai Ji Quan	91	0	2.563	2.205	-358			
	Subtotal	331	102	5.883	8.211	2,328	Workshop: Workshop Start Date less or equal Oct 31, 2023	亩	
Total		331	102	5,883	8,211	2,328	Program Target Name		
							starts with ACL Falls Prevention Grant 2021		

- 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.

Add Chart

Q

Enable Field Editing

Apply Filters: Falls Prevention

Report: Program Targets, F Semi-annual Repo Set filter for 'Program Target Nar	unding Source, w/wo Workshops ort FALLS me' to 'Starts With= ACL Falls Preventio	n Grant {Cohort YEAR}. Set 1st 'Works	hop Start Date' to 'greater or equal' t	o your semi-annual perio	d start date & 2nd "Works	able Field Editing Q	Add Chart C ⁴ Edit v qual' to period end date.	
Total Workshop: Actual Participants	Total Workshop: Actual Completers To	otal Participant Target Total Actual Partici	pants Participant Variance Number	of Workshops			Filters \rightarrow	
Grantee: Account Name †	Program Target Name †	Sum of Workshop: Actual Participants	Sum of Workshop: Actual Completers	Sum of Participant Target	Sum of Actual Participants	fx Participant Variance	Show Me All program targets	
	ACL Falls Prevention Grant 2021 MOB	40	31	2.120	912	-1.208	Created Date	
	ACL Falls Prevention Grant 2021 SAIL	193	64	967	4.657	3,690	All Time	
	ACL Falls Prevention Grant 2021 Stepping On	7	7	233	Filter by Program Target Name		Workshop: Workshop Start Date greater or equal May 1, 2023	
	ACL Falls Prevention Grant 2021 Tai Ji Quan	91	0	2,563				
	Subtotal	331	102	5,883	Operator		less or equal Oct 31, 2023	
Total		331	102	5,883	starts with	. •	Program Target Name	
					Use relative value		starts with ACL Falls Prevention a Grant 2021	
				ACL Falls Prevention Grant 2021				
						Cancel Apply		

- 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.
- 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 <u>exported table, but not</u> <u>modify the #'s in it.</u> 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 semiannual 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