

# Healthy Aging Programs Integrated Database (HAPID)

# **USER MANUAL**

Center for Healthy Aging National Council on Aging March 7, 2024



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# I. Getting Set Up in HAPID.

## A. Setting up a new Account in HAPID.

To request a new user to your grantee account in HAPID, please have an existing user in HAPID reach out to HAPIDhelp@ncoa.org or submit a support ticket in HAPID. It is best if a user with existing access reaches out.

EMAIL <u>HAPIDHelp@ncoa.org</u> to request an account with the following information.

- Full Name
- Email Address
- o Grantee Account Name associated with your ACL Grant
- Falls or CDSME
- User type: Super User or Data Entry (see table below to understand the difference)
- DO NOT send in any more submissions to the USER INTAKE FORM
  - $\circ$   $\;$  That form is only for NEW GRANTEES at the beginning of the grant period.

## **REMOVING USERS**

- If someone leaves the organization, you MUST notify us ASAP so that we can remove them.
- Reminder that we will DELETE any users who have never logged in or not logged in the past year in October (1 year post launch).
- We will be cleaning up and removing unused accounts once per year.
- Send Email to <u>HapidHelp@ncoa.org</u> to request that individuals to be removed with one sentence explanation.

To check who your current users are, visit the Profile section of your HAPID account with these next steps:

tional council on aging								
CHA Com	munity, Testing						Profile Settings	
Type Pho NCOA	ne Account Ov Integration	vner Bi ລູ້ຊີ້ 20 A U	Iling Address 500 Crystal Drive rlington, Virginia 2220; nited States	12			Account Inform Contact Suppo Experience Wo Log Out	nation rt rkspaces
DETAILS RE					î‡ • 0	Search this feed		
/ Information		View deta Re	ils & Related cords					
locount Name CHA Community, Test	ting	Phone				$\sim$	S.C.	
Healthy Aging	Programs Integrated	Database Infor	mation					
lost Organization		Grante	e					
Account CHA Comm	unity Testing							Follow
Type Phone NCOA	e Account Owner	Biling Ac 2600 cm Arlingto United S	sdress ystai Drive n, Virginia 22202 štates					Follow
CHA Comm CHA Comm NCOA Phone NCOA Phone	unity Testing Account Owner Integration Account Owner Integration	Billing Ac 2600 Cr Arlingto United S	kkress ystai Drive , Virginia 22202 Xates		ų	Q, Search this f	eed.	Follow T • C
CHA Comm CHA Comm Type Phone NCOA DETAILS REL Contacts (6+)	unity Testing e Account Owner Integration P ATED	Biling Ac 2600 Cr Arlington United S	sdress ystai Drive n, Vrogina 22202 itates		¶ ₽	Q. Search this f CHA Community Testing – U polated this record. wgust 16, 2023 at 700 AM	eed. •	Follow T C skoyee) V
Contact Name	unity Testing e Account Owner Integration ATED	Biling Ac 2600 cr Arlingto United S	tdress ystai Drive n, Virginia 22202 Xates			Q. Search this f CHA Community Testing — U splated this record. ugust 16, 2023 at 700 AM unit Name Community. Testing to CHA 4	eed	Follow ▼ • ℃ Joyne) •
CHA Comm CHA Comm Type Phon NCOA Phon DETAILS REL Contacts (6+) Contact Name CHA Admin Usar	unity Testing Account Owner Integration ATED	Billing Ac 2600 Cr Arling to United S Profile Nam Super User	tdress ystai Drive n, Virginia 22202 tates <b>e Email</b> (Grantee) CC	I cozox+admin@gmalL.	74 2 2	Q. Search this f CHA Community Testing — U updated this record. ugust 16, 2023 at 700 AM unt Name Community, Testing to CHA C	eed.	Follow ▼• C bloyee) ▼
	unity Testing Account Owner Integration ATED Title Facilitator	Biling Ac 2600 Cr Aringto United S Profile Nam Super User	tdress ystai Drive n, Virginia 22202 tates 0 Email (Grantee) CC	I coax+admin@gmalL. v		Q. Search this 1 CHA Community Testing — U updated this record. ugust 16, 2023 at 700 AM unt Name Community, Testing to CHA (C	eed.	Follow ▼• C bloyee) ▼
	unity Testing e Account Owner Integration P ATED Title Facilitator Facilitator	Biling Ac 2600 Cr Aringto United S Profile Nam Super User	tdress ystai Drive n, Virginia 22202 Xates B Email (Grantee) CC Harn	I coax+admin@gmaiLv		Q. Search this 1 CHA Community Testing → U updated this record. ugust 16, 2023 at 700 AM unt Name Community, Testing to CHA ( Comment Write a comment	eed.	Follow ▼• ℃ sloyee) •
	Account Owner Integration ATED	Biling Ac 2600 Cr Aringto United S Profile Nam Super User	tdress ystai Drive n, Virginia 22202 Xates 9 Email (Grantee) CC	I coaxx+admin@gmaiL		Q. Search this f CHA Community Testing — U updated this record. ugust 16, 2023 at 700 AM unit Name Community, Testing to CHA C Comment Write a comment	eed.	Follow ▼• ℃ Joyee) •
	unity Testing  Account Owner Integration  Title  Facilitator  Facilitator  Facilitator  Case Manager / Facilitator	Billing Ac 2600 Cr Action Cr United S Profile Name Super User ator	Kiress ystai Drive , Virginia 22202 States (Grantee) CChand	I cozox+admin@gmaiL ♥ ♥ ♥ ♥		Q. Search this f CHA Community Testing — U pdated this record. uugust 16, 2023 at 700 AM unit Name Community, Testing to CHA C Comment Write a comment Sara DEU — Angelica (Employ	eed	Follow T  C playee)  V
Account CHA Comm Type NCOA Phon Phon DETAILS REL Contacts (6+) Contact Name CHA Admin User test divya1 test divya1 test divya2 Susie Facilitator Facilitator 25 Facilitator 25	unity Testing Account Owner Integration Title Facilitator Facilitator Facilitator Facilitator Facilitator Facilitator Facilitator Facilitator Facilitator Facilitator	Billing Ac 2600 Cr Action Cr United S Profile Name Super User ator	Kiress ystai Drive n, Virginia 22202 States (Grantee) CC hand	I coaxx+admin@gmal v v v v		Q. Search this f CHA Community Testing — U updated this record. uugust 16, 2023 at 700 AM int Name Community, Testing to CHA C Comment Write a comment Sara DEU — Angelica (Employ tune 30, 2023 at 10.35 AM	eed	Follow ▼ · C · Aloyee) •

**See it!** Check out this brief video on how to get set up: How to Get Set Up and Log into HAPID (2 minutes)

### B. Super User vs Data Entry

Users in the new database are set up as either 'Super Users' or 'Data Entry Users.' The following table summarizes the actions and permissions allowed for each user type.

ACTION	SUPER USER	DATA ENTRY
View a listing of active Hosts Organizations and Implementation Sites associated with your Network, Account	YES	YES
View workshops created by you or your team	YES	YES
Create workshops	YES	YES
Edit workshop you or others created	YES	YES
Add/edit/delete participants to workshops created by you or others on your Account	YES	YES
Delete a workshop created by you	YES	YES
Delete a workshop created by someone else	YES	NO
Delete a participant^	Requires Admin Assistance	Requires Admin Assistance
Change the Evidence-based Program/workshop type (e.g., Matter of Balance, Walk With Ease) to another one on an existing workshop record.	May require Admin Assistance	May require Admin Assistance
Move a workshop from one Host Org or Implementation Site to another	YES	Requires Admin Assistance or Ask a Super User on your team to do
Move a workshop from one Program Target to another	YES	YES
Create Host organizations & Implementation Sites	YES	YES
Edit or Delete Host organizations & Implementation Sites	YES	NO
Create a Facilitator	YES	YES
Edit a Facilitator*	YES	YES
Delete a Facilitator*	NO	NO
Create a non-ACL Program Target	YES	NO
Create an ACL Program Target	NO	NO
View & Export Reports / Dashboards	YES	NO
Create surveys	Requires Admin Assistance	Requires Admin Assistance

<sup>^</sup> This will change by the end of Summer 2024, and Super Users will be able to delete participants. \*See Section V of this manual for additional information.

# II. Logging On

Each External Test User will receive a notice from Salesforce, prompting you to set up your account in HAPID.

## Log in at <a href="https://ncoa1.my.site.com/hapid/s/login/">https://ncoa1.my.site.com/hapid/s/login/</a>

### For a minority of users...

Some users may work for a Host organization that is associated with more than one Grantee Account and need to contribute and enter workshops for both of these Grantees. If this is the case for you, submit a support ticket, and NCOA staff will create and connect your user accounts (and Host organization) to all the respective Grantee accounts desired.

Upon login, users configured to enter data to more than one Grantee will be prompted to select the Grantee account they wish to associate a given workshop with.

1) If users want to create a workshop under a Grantee account, they can choose the first option (Yes) and select the Host Organization on the next screen.

2) If a user wants to create a workshop under a Host organization or a Host organization with a different Grantee account, they can choose the second option (No) and select the Grantee account in the next screen. Please raise a support ticket if you don't see the Grantee listed.

#### **Getting Stuck and Resetting Password**

- HAPID users receive a Welcome email which enables them to set up their login access
- Check SPAM folder. Emails will come from Salesforce / NCOA / HAPID
- All password resets need to be done by emailing <u>Hapidhelp@ncoa.org</u>
- <u>Tips to prevent getting caught in loop</u>:
  - Ensure you're only using the correct URL to log in to HAPID.
  - Remove other similar links to legacy databases (which also used Salesforce platform)
  - Fully log out and close out of browser.
  - Refresh page, reset cache.



The home page to HAPID will appear as shown below:

# III. Network and Programs

## A. My Network

From the Home Page, click on the 'My Network' menu item. From My Network, you'll see two tabs listing the organizations that make your network.

- Host Organizations
- Implementation Sites

inplement	entation Sites					
Ay Host Organizations						
Search this list						
Account Name	~   E	Billing City	$\sim$	Billing State/Province	Phone	~
AAA Region 5	4	lexandria		MD		
CHA Community Testing	4	Arlington		VA		
AAA Region 7	A	Arlington		VA		
AAA Region 1	[	Dulles		VA		

## 1. Sorting host organizations and implementation sites

A. To sort host organizations, go to My Network and it should display My Host Organizations by default. Please click on any of the headers to sort your host organizations.

My Host Organizations Ir	mplementation Site	s					
My Host Organization	15						
Search this list							
Account Name	~	Billing City		~	Billing State/Province †		V Phone
AAA Region 5		Alexandria			MD		
AAA Region 4		Arlington			VA		
AAA Region 7		Arlington			VA		
CHA Community Testing		Arlington			VA		
AAA Region 3		Centerville			VA		
Dago Sites							
Page Size: 5			« First < Previou	Showing	g1 of 2 Page(s) Next >	Last »	

B. To sort Implementation site, from the My Network page, click on the Implementation Sites tab. Please click on any of the headers to sort your implementation sites.

Ay Implementation (	Sites			
Search this list				
implementation Site Name	<ul> <li>✓ City</li> </ul>	✓ State	-	V Site Type
Aged Senior Center	Arington	VA		Senior center
Northeast Senior Center	Dulles	VA		Senior center
Southwest Senior Center	Dulles	VA		Senior center
Central Area Medical Center	Manassa	s VA		Health care organization
Eastside Clinic	Manassa	s VA		Health care organization
Southwest Senior Center Central Area Medical Center Eastside Clinic	Dulles Manassa Manassa	VA 5 VA 6 VA		Senior center Health care organiz Health care organiz

#### 2. Edit information of a Host Site, Implementation Site

A. To edit a host, please submit a support ticket or email hapidhelp@ncoa.org. To edit an implementation site, please click on the Implementation Site from My Network page and make any necessary edits before saving changes.

#### 3. Adding Host Organization.

A. To limit the amount of duplicate host organizations that exist in HAPID, you must search for a host organization before it allows you to create one. This happens during the create/edit workshop phase in HAPID.

- a. Creating a Host Organization for a new workshop:
  - 1. Click on Workshops at the top of the page and then click New.

My Oi	rganization's Workshops	• •						Now Print	table Vk	w
50- item	is • Sorted by Program Type • Filtered I	by All workshops - Updated 22 minutes ago				Q, 5	iearch this list		۵.	C
	Workshop Name	<ul> <li>Evidence-Based Program</li> </ul>	~	Program Type † 🗸	Workshop St V	Workshop En 🗸	Actual Pa V	Actual C v	/	
1	VA_MOB_NCOA_20220901	A Matter of Balance		Falls Prevention	9/1/2022	9/30/2022	6	4	¥	Â
2	AZ_CAP_Apac_20220901	CAPABLE		Falls Prevention	9/1/2022	9/27/2022	2	2	٣	
3	AZ_CAP_Ariz_20220901	CAPABLE		Falls Prevention	9/1/2022	10/5/2022	0	0	Ŧ	
4	AZ_CAP_Apac_20220901	CAPABLE		Falls Prevention	9/1/2022	9/28/2022	0	0	٣	1
5	AZ_BC_Apac_20220901	Bingocize		Falls Prevention	9/1/2022	9/2/2022	1	0	۳	1
6	AZ_SO_Alma_20220902	Stepping On		Falls Prevention	9/2/2022	9/3/2022	1	1	۳	
7	AZ_SO_Apac_20220902	Stepping On		Falls Prevention	9/2/2022	9/3/2022	2	1	٣	1
8	AZ_BC_Adel_20220901	Bingocize		Falls Prevention	9/1/2022	9/2/2022	0	0	۳	1
9	AZ_FallScp_Adel_20220901	FallScape		Falls Prevention	9/1/2022	10/6/2022	0	0	٣	
10	AZ_MOB_Adel_20220831	A Matter of Balance		Falls Prevention	8/31/2022	10/6/2022	0	0	¥	
	47 MOR Add 20220001	A Matter of Balance		Ealis Prevention	9/1/2022	0.05/2022	0	0		- 11

2. There will be a pop-up for a New Workshop. Under the list of host orgs currently in the system, you will see Host Organization next to a search bar.

AAA Region 15	VA	Dulles VA	
AAA Region 2	VA	Manassas	
AAA Region 3	VA	Centerville	
AAA Region 4	VA	Arlington	
Con't see your Host O	canization in the list abo	Displaying 1 of 2 Pages	B to find it. If it's still not listed
Don't see your Host O you will be prompted t	rganization in the list ab o create a new Host Org	Displaying 1 of 2 Pages	R to find it. If it's still not listed,

3. Please type in the name of the host organization you'd like to add. The pop-up will show Search Box and it will show a message as seen in the image below. Please click on the Create New button.

Account Name	Billing State/Province	Billing City	Billing Zip/Postal Code	Select
still not listed, you will	be prompted to create a new l	Host Organization.	Cre	ate New

4. Once you click on Create New, the pop-up will change to Create Host Organization. Please fill out all the required information to create the host. Once all information has been inputted, please click Save.

* Account Name		
*Street		
* City		
* State	Select an Option	•
-* Zip Code		
*Site Type	Select an Option	•
		Cancel

5. Once you save the information for the new host organization, you will see it on the New Workshop pop-up.

Hello Angelica TESTAc	ct, please follow the steps below to	set up a Workshop for C	HA Community Testing.	
Please choose the Hos	t Organization for this Workshop			
Account Name	Billing State/Province	Billing City	Billing Zip/Postal Code	Select
CHA new site	VA	Arlington		۲
AAA Region 1	VA	Dulles		
AAA Region 15	VA	Dulles	VA	
AAA Region 2	VA	Manassas		
AAA Region 3	VA	Centerville		
<	Di	splaying 1 of 2 Pages		>
Don't see your Host Or	canization in the list above? Enter	a key word in the snace h	elow and hit ENTER to find it. If it's st	ill not listed
vou will be prompted to	ganization in the list above? Enter a o create a new Host Organization.	a key word in the space b	elow and nit EN LER to find it. If it's st	ili not listea,

b. Editing a Host Organization for an existing workshop:

1. Find the workshop that you would like to change the Host Organization for. Click on Edit.

	Home	Programs	My Network	Workshops	Reporting 🥆	Resource	ns oppo	rt	۹	÷ 0
Workshop VA_AFEP_Aged_	20240201					E	lit Create Work	shop Participant	Refresh Totals	•
Vorkshop Start Date 2/1/2024	Workshop End Date 2/3/2024	A	vidence-Based Program Inthritis Foundation Exerci	ise Program	Actual Participants					
Evidence-Based Program Arthritis Foundation Exercis	e Program		Survey Template ACL CDSME 2023-26 S	TANDARD 6-session		📕 Worksh	op Participants	(0)		
Workshop Name VA_AFEP_Aged_20240201			Survey Template Name ACL CDSME 2023-26 ST	TANDARD 6-session		📮 Worksh	ons to Program	Targets (1)		
Grantee			Workshop Start Date 2/1/2024				opstorrogram	Tangets (1)		
Host Organization AAA Region 2			Workshop End Date 2/3/2024			TS-075136	ACL CDSME G	CHA Communi	Program	¥
Implementation Site Aged Senior Center			Workshop Language							View All
Program Type CDSME			Workshop Language Oth	ver		📕 Facilita	or (1)			
Session 0?			Number of sessions			Facilitator Na	First Name	Last Name	Email	
NCOA Import ID			Number of Sessions for a	a Completer		A-28470	test	last33		۳
			8							View All

2. A pop-up for Workshop Editing Mode will open and you will see the list of host organizations that you currently have as well as the Host Organization with search bar at the bottom of the list.

Account Name	Billing State/Province	Billing City	Billing Zip/Postal Code	Select
AAA Region 1	VA	Dulles		
AAA Region 15	VA	Dulles	VA	
AAA Region 2	VA	Manassas		
AAA Region 3	VA	Centerville		
AAA Region 4	VA	Arlington		
<	Di	splaying 1 of 2 Pages		>

3. Please follow the same process as you see above for creating a new host organization for a new workshop.

c. Deleting a Host Organization

1. To delete a Host Organization, please submit a support ticket or email <u>hapidhelp@ncoa.org</u> with the following information:

- i. Name of Host Organization
- ii. Account that it is affiliated to.
- iii. Confirmation that it is not connected to any workshop. If the host organization you would like to delete is connected to a workshop, you must first change the Host Organization for the workshop that is currently tied to the Host Organization that you would like to delete. If you would like help changing the host organization for the workshop, please let us know in the email or support ticket the name of the workshop and the Host Organization that it should be changed to. In order for us to delete your Host Organization, it cannot be tied to any workshop on the account.

## 4. Adding an Implementation Site.

A. To limit the amount of duplicate implementation sites that exist in HAPID, you have to search for the Implementation Site before it will allow you to create one. This happens during the create/edit workshop phase in HAPID.

a. Creating an Implementation Site for a new workshop:

coure	for aging				8.1.8					0.0	Ŭ
y Or	ganization's Workshop	•							Now Prin	tabie Vie	w.
+ tiern	s • Sorted by Program Type • Filtere	d by i	8 workshops • Updated a few seconds ago					G. Search this list		۰.0	C.
	Workshop Name	-	Evidence-Based Program	~	Program Type †	✓ Workshop St ✓	Workshop En	_ ~ Actual Pa., ~	Actual C_	-	
1	VA_MOB_NCOA_20220901		A Matter of Balance		Falls Prevention	9/1/2022	9/30/2022	6	4	*	ii.
2	AZ_CAP_Apinc_20220901		CAPABLE		Falls Prevention	9/1/2022	9/27/2022	2	2	*	1
3	AZ_CAP_A/U_20220901		CAPABLE		Falls Prevention	9/1/2022	10/6/2022	0	0		1
4	AZ_CAP_Apat_20220901		CAPABLE		Falls Prevention	9/1/2022	9/28/2022	0	0	*	
5	AZ_BC_Apec_20220901		Bingocize		Falls Prevention	9/1/2022	9/2/2022	1	0	*	
6	AZ_SO_Alma_20220902		Stepping On		Falls Prevention	9/2/2022	9/3/2022	3	1		1
$\tau$	AZ_SO_Apac_20220902		Stepping On		Falls Prevention	9/2/2022	9/3/2022	2	1		1
8	AZ_BC_Adek_20220901		Bingocize		Falls Prevention	9/1/2022	9/2/2022	0	0		
9	AZ_FalScp_Adel_20220901		FallScape		Falls Prevention	9/1/2022	10/6/2022	0	0	*	1
10	AZ.MOB.Adel.20220831		A Matter of Balance		Falls Prevention	8/31/2022	10/6/2022	0	0		
н.	AZ_MOB_Adel_20220901		A Matter of Balance		Falls Prevention	9/1/2022	9/16/2022	0	0		

1. Click on Workshops at the top of the page and then click New.

2. There will be a pop-up for a New Workshop. Under the section for host organization, you will see the implementation sites. It will not show you any Implementation Site until you select a Host Organization.

in plottion dation of the real to	Street	City	State	Select
AAAA site	12345 south	chicago	IL	
Aged Senior Center	251th Crystal City	Arlington	VA	
Central Area Medical Center	73 Lake St.	Manassas	VA	
East County YMCA	28 Ocean Dr	Arlington	VA	
Eastside Clinic	84 Water St.	Manassas	VA	
<	D	Displaying 1 of 4 Pages		>
Don't see your Implementatio you will be prompted to creat	n Site in the list above? Ent e a new Implementation Si	ter a key word in the space te.	below and hit ENTER to find	i it. If it's still not listed,

3. Please type in the name of the Implementation Site you'd like to add. The pop-up will show Search Box and it will show a message as seen in the image below. Please click on the Create New button.

	- Scaren Dox		
mplementation Site Name Street	City	State	Select
Don't see your Implementation Site in the list t's still not listed, you will be prompted to cre	above? Enter a key word ate a new Implementatio	in the space below and hit n Site.	ENTER to find it. If
			Create New

4. Once you click on Create New, the pop-up will change to Create Implementation Site. Please fill out all the required information to create the implementation site. Once all information has been inputted, please click Save.

tion loss estation City Name			Î
* Implementation Site Name			- 1
* Site Type	None	•	
*Street			
* City			
* State	None	•	
* Zipcode			
		Cancel	

5. Once you save the information for the new host organization, you will see it on the New Workshop pop-up.

Implementation Site Name	Street	City	State	Select
CHA implementation test si	18th crystal street	Arlington	VA	۲
AAAA site	12345 south	chicago	IL.	
Aged Senior Center	251th Crystal City	Arlington	VA	
Central Area Medical Center	73 Lake St.	Manassas	VA	
East County YMCA	28 Ocean Dr	Arlington	VA	
<	Disp	playing 1 of 5 Pages		>
Don't see your Implementatio	n Site in the list above? Enter e a new Implementation Site.	a key word in the space bel	ow and hit ENTER to fin	d it. If it's still not listed,

b. Editing an Implementation Site for an existing workshop:

**1.** Find the workshop that you would like to change the Implementation Site for and click on Edit.

ICO(F Ho	me Programs	My Network	Workshops	Reporting $\checkmark$	Resources	Support	۹ 🜲
Workshop VA_MOB_NCOA_202209	901				Edit	Create Workshop Participant	Refresh Totals
Workshop Start Date Worksh 9/1/2022 9/30/2	top End Date Evide	nce-Based Program atter of Balance	Actual Participants 6				
DETAILS RELATED		Survey Template			Chatter isn't e	mabled or the user doesn't hav	e Chatter access.
A Matter of Balance Workshop Name		ACL Falls 2021-23 CAPABL Survey Template Name	Ę				
VA_MOB_NCOA_20220901		ACL Falls 2021-23 CAPABLI					
Grantee CHA Community Testing		Norkshop Start Date 3/1/2022					
Host Organization AAA Region 5		Norkshop End Date 3/30/2022					
Implementation Site NCOA Senior Center		Norkshop Language					

**2.** A pop-up for Workshop Editing Mode will open and you will see the list of Implementation Sites that you currently have under the Host Organization section with search bar at the bottom of the list. Because you are editing a workshop, the Host Organization has already been selected which is why you can scroll down and see the list of Implementation Sites.

inplomentation one fame	Street	City	State	Select
NCOA Senior Center	251 18th Street	Arlington	VA	۲
AAAA site	12345 south	chicago	IL	
Aged Senior Center	251th Crystal City	Arlington	VA	
Central Area Medical Center	73 Lake St.	Manassas	VA	
CHA implementation test si	18th crystal street	Arlington	VA	
<	Displ	aying 1 of 5 Pages		>
Don't see your Implementatio you will be prompted to create	n Site in the list above? Enter a a new Implementation Site.	a key word in the space below a	and hit ENTER to find it. If it's sti	ll not listed,

**3.** Please follow the same process as you see above for creating a new Implementation Site for a new workshop.

- c. Editing an implementation site:
  - 1. To edit an Implementation Site, please go to my network tab and click on the implementation sites tab.
  - 2. Please click on the Implementation Site that you would like to edit.

home Home	Programs	My Network	Workshops	Reporting N	<ul> <li>Resources</li> </ul>	Support	Q	Ļ	8
Timplementation Site CHA implementation	tion test site						Edit	Delet	e
ity State rlington Virginia	Site Type Health care organiz	zation	# Workshops at Implementa	ition Site					
Implementation Site Name CHA implementation test site					Timplementation Si	te Directories (	1)		
Site Type					Implementation Site Direct	Host Organizatio	on Name		
Health care organization					ISD-035638	AAA Region 3			▼
<ul> <li>Site Location</li> </ul>								Viev	w All
Street 18th crystal street					_				
City Arlington					Workshops (0)			Nev	N
State									

3. A pop-up will appear allowing you to edit information on the Implementation Site. Once you're done with edits, please Save.

4. You may also create a new Implementation Site by clicking on Save and New from this step.

ICOC Home	Edit CHA impl	ementation test site	-	Q 🐥 🖪
Tity State Arlington Virginia	Implementation Site Name     CHA implementation test site     Site Type     Health care organization     T		Ē	lit Delete
Implementation Site Name CHA implementation test site	Site Location Street 18th crystal street		ories (1)	
Site Type Health care organization	City Arlington		ganization Na gion 3	me
<ul> <li>Site Location</li> <li>Street</li> </ul>	State Virginia			View All
City Arlington	7inonde	Cancel Save & New	Save	New
State Virginia	/			

d. Deleting an Implementation Site:

1. To delete an Implementation Site, please go to my network and click on the Implementation Sites tab.

2. Please select the Implementation Site that you would like to delete.

national council on aging Home Progra	ams My Network	Workshops Reporti	ng 🗸 Resources	Support	ଦ 🌲 😆
ly Host Organizations	on Sites				
My Implementation Sites					
Search this list					
Implementation Site Name $$	City	<ul> <li>✓ State</li> </ul>	~	Site Type	~
Aged Senior Center	Arlington	VA		Senior center	
Northeast Senior Center	Dulles	VA		Senior center	
Southwest Senior Center	Dulles	VA		Senior center	
Central Area Medical Center	Manassas	VA		Health care organization	
Eastside Clinic	Manassas	VA		Health care organization	
Page Size: 5	≪ First < Previous	Showing1 of 4 Page(s)	Next > Last >>		Total Records: 20

3. Please make sure that your Implementation Site is not tied to any workshop. If your Implementation Site is tied to a workshop, you will not be able to delete the implementation site.

ICOC Hon	ne Programs	i My Ne	etwork	Workshops	Reporting N	<ul> <li>Resources</li> </ul>	Support	Q	<b>₽</b> (3)
Implementation Sit CHA impleme	e ntation test site							Edit	Delete
ity State rlington Virgir	Site Type ia Health ca	re organization	# Wo	rkshops at implementat	ion Site				
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Site Type Health care organization						Implementation Site Direct	Host Organizati	on Name	
<ul> <li>Site Location</li> </ul>						ISD-035638	AAA Region 3		View All
18th crystal street City Arlington						Workshops (0)			New
State Virginia									
Zipcode									

4. Click on delete at the top right of the page to delete the implementation site. Confirm you'd like to delete the site.

Kel council on aging	ie Progra	ams My Network	Workshops	Reporting 🗸	Resources	Support	۹	<b>≜</b> ⊖
Implementation Site CHA implemen	tation test site	•					Edit	Delete
				The Control of Control	*			
y State rystal City Virgli	nia Co.	De	elete Implement	ation Site				
nplementation Site Name 34A implementation test s	ite	Are you su	re you want to delete thi	s Implementation Site?		Site Directories	(0)	
				Cano	el Delete			
ite Type Sounty Health Departmen	t -	<u>/</u>		T	Workshops (0)			New
Site Location								
treet								
Bth street								
ity Srystal City								
itate /irginia								

**See it!** Check out this brief video on searching your Host Organizations and Implementation Sites list.

How to View and Search Within Your Network (4 minutes)

# See it!

Check out our video tutorials to learn more about creating Host Organizations or Implementation Sites.

How to Create a Host Organization or Implementation Site (10 minutes)

# B. Programs

The 'Programs' page includes two tabs.

1 = **My Program Targets**, a listing of your program targets. For active ACL grantees (currently, 2019 to 2023), these 'Program targets' are the total number of participants or completers you committed to reaching in your ACL grant proposal.

NCOA staff have keyed in these targets for active grantees.

Review the targets shown for your active Cohort period when first logging on. If you have been using either legacy database (National CDSME or Falls Prevention) for many years outside your busy funding period, you may also see prior targets and workshops assigned to other sources.

2 = **Healthy Aging Programs**, where you can view Falls, CDSME, or both types of available programs in the database, showing a link to additional program information, the total # of sessions, and the number of sessions that need to be completed for a participant to be counted as a completer.

My Pro	ogram Targets Healthy Aging	Progr	ams									
All 🔻										New	Printable V	/iew
7 items •	Sorted by Program Target Name • Filtere	ed by All	program targets • Updated a few seconds a	go				Q. Sear	ch this list		\$ *	C,
	Program Target Name 1	~	Funding Source Name	~	Grantee	✓ Actual Parti ∨	Actual	Com ∨	Last Mod	dified Date	~	
1	ACL CDSME ALED test		ACL CDSME Grant 2011		HAPIDTestAcct	0	0		9/28/202	22 10:03 AM		•
2	ACL CDSME Grant 2022 DSMP		ACL CDSME Grant 2022		HAPIDTestAcct	0	0		9/28/202	22 10:03 AM		Ŧ
3	ACL CDSME Grant 2022 WWE		ACL CDSME Grant 2022		HAPIDTestAcct	3	1		10/18/20	22 9:00 AM		¥

Under either tab - My Program Targets or Healthy Aging Programs - you can filter List Views by program type (CDSME, Falls, or Recently viewed).

ICO (>	Home	Programs	My Network	Workshops	Reports	Resources	Support			۹	0
Program Targets	Healthy Aging Pro	ograms									
lls Prevention P	rograms 🔻										
LIST VIEWS				rogram • Updated 3 min	utes ago		୍ୟୁ	rch this list	-	tôt	• C
CDSME Programs							~	Nu ~	Co ~	Vari ∨	
<ul> <li>Falls Prevention Pr</li> </ul>	ograms			widence-based-progra	am-a-matter-of-bala	ince		8	5		
Recently Viewed				vidence-based-progra	am-bingocize			20	16		•
3 CAPABLE		CAP	https://ncoa.org/article/	/evidence-based-progra	am-capable			10	8		T
4 EnhanceFitnes	s	EF	https://ncoa.org/article.	/evidence-based-progra	am-enhancefitness				22	~	•
5 FallScape		FallScp	https://ncoa.org/article.	/evidence-based-progra	am-fallscape			5	5		•
6 FallsTalk		FT	https://ncoa.org/article/	/evidence-based-progra	im-fallstalk			5	1		•
7 Fit & Strong!		F&S	https://ncoa.org/article/	/evidence-based-progra	am-fit-strong			24	18		•
8 Healthy Steps	or Older Adults	HSOA	https://ncoa.org/article/	/evidence-based-progra	am-healthy-steps-fo	r-older-adults		2	2		•
9 Healthy Steps i	n Motion	HSIM	https://ncoa.org/article/	/evidence-based-progra	m-healthy-steps-in	-motion		8	5		•

**See it!** Check out this brief video on how to find information about Falls or CDSME evidence-based programs being entered into HAPID: How to Find Falls and CDSME EBP Information (5 minutes)

I. Program Targets

The data model in HAPID requires users to connect workshops to specific **Program Targets**. This will enable more accurate reports that reflect account holders' progress toward their ACL Grant targets or other goals. This is true regardless of whether you are an active ACL grantee, a former or inactive ACL or CDC grantee, or simply uploading your workshops and don't have a current target.

Program Targets typically consist of:

- 1) Funding Source (ex. ACL or non-ACL)
- 2) Cohort Year (first year of the grant period)
- 3) Record type (Collective or Program specific) defined below
- 4) The name of the evidence-based program (if 'Program specific')
- 5) The target # of Participants and / or Completers, as appropriate for the program
- 6) Survey template (see Section II)

NCOA has entered your ACL targets on your behalf. When logging in, please verify that you see all the correct program targets. Focus on your current or active grant. If you have a long history of workshops in NCOA's databases, older Program targets (particularly those prior to 2020) will be less reliable.

Perhaps you are tracking your workshop activity toward other funding sources, such as a local initiative or a grant from another funder (e.g., CDC, American Heart Association). HAPID allows you the flexibility to count any single workshop toward multiple targets according to your various projects and funding sources, Cohort, or time frame and link them to the correct survey templates.

## ACL Program Targets have two RECORD types: Collective and Program-specific.

**Collective:** A Collective program target is not Program-specific. You will select this type if you have a target that can be met using any combination of programs (one or more programs).

- For instance, a goal of 1,000 total participants for a Collective Program Target can be reached by combining participants in CPSMP workshops, DSMP workshops, and Walk With Ease workshops.
- This is also used when more than one type of Walk With Ease program can be used to meet the grant target.
- It is also used when more than one language version can be used to meet the grantee's target.

# You may recognize Collective targets because they will end with the word 'Collective' or simply list multiple program types alongside it, such as:

- ACL CDSME Grant 2023 Collective
- ACL CDSME Grant 2022 CPSMP & DSMP
- o ACL CDSME Grant 2021 All WWE Types
- ACL Falls Prevention 2022 MOB & Bingocize
- ACL CDSME Grant 2022 DSMP (Eng & Span)

**Program-specific:** A Program-specific target means that the target number of participants must be met only by workshops of the specified program type.

- For instance, a goal of 700 participants in a Matter of Balance Program Target can only be met with participants in Matter of Balance workshops.
- You would need to set a Program specific target for each workshop type. (ex. 300 participants in Walk With Ease (in-person), 750 in DSMP, and 400 from Fit & Strong).

You will recognize Program specific targets because they typically end with a single program acronym.

- ACL Falls Prevention Grant 2023 MOB
- ACL CDSME Grant 2022 SBIRT
- o ACL CDSME Grant 2021 WWE (self-directed)
- o ACL Falls Prevention 2022 SAIL

# See it!

Check out this video to understand how Program Targets are organized in HAPID. How to Connect Workshops to Program Targets (10 minutes) The following provides further examples of how your Program Targets may appear. When creating a workshop, you'll be prompted to select all the Program Targets to which you wish your workshop to be credited (ACL and non-ACL).

# **ACL TARGETS**

**Example 1:** If ACL funded you for the 2021 cohort and indicated you plan to reach 500 completers for DSMP and 700 for HomeMeds, NCOA would have set up two separate Program-specific targets using the following naming convention.



**Example 2:** If you have several SMRC, 6-session standard programs you're tracking toward your 2022 ACL grant, such as CPSMP and Tomando Control de Su Salud, DSMP, etc., NCOA would create a Collective target, but can use the term 'Standard' in the Program Target name to indicate that all SMRC, 6-session standard programs can apply to this Program Target.



# **NON-ACL TARGETS**

**Example 3:** If you are a former Falls grantee, delivering Bingocize and MOB, and are participating in your State's Falls Initiative for 2023, and hope to reach 1,000 participants total from either program, you could ask NCOA staff to help you create a Collective Program Target, and could label your target in the manner shown below. You can wish to add the total target to the label; however, it is already added to the Program Target record, so it is unnecessary here. The labels simply help your users quickly find the Program targets.



**Example 4:** You can connect your workshops to an 'Evergreen' target in cases without a Funding source.



# **Evergreen?**

EVERGREEN will appear in your Program Target name when you have workshops that are not bound by a specific time period, program, funding source, or goal. This designation helps collect data for workshops that are not otherwise obligated to any funding source into a "bucket" that allows you to report on their data.

# II. Survey Templates

NCOA staff have already created survey templates and have connected default surveys to each CDSME and Falls prevention program type (e.g., Diabetes Self-Management Program, Matter of Balance).

However, it's essential to understand the steps to verify the survey template assigned to each workshop before you begin adding participants.

The following are the survey templates that NCOA has created to date.

#### **Falls Prevention**

	Survey Template Name 🦊 🔍	Details	$\sim$
1	ACL Falls 2021-23 Total Attendance (Biceps Curl)	This Survey Template is for CUSTOMIZED 2021-2023 OMB forms for Marymount University to use with SAIL workshops that collect Biceps Curls along with standard optional Fitness Tests	1
2	ACL Falls 2021-23 Total Attendance	This Survey Template is for STANDARD 2021-2023 OMB forms for use with programs that use Total Attendance field for attendance. [End Date to be added when transition to new version	
3	ACL Falls 2021-23 Total Attend with Home Practice	This Survey Template is for STANDARD 2021-2023 OMB forms for use with programs that use Total Attendance field for attendance and that track Home Practice Hours. [End Date to be a	
4	ACL Falls 2021-23 STEADI Total Attendance	This Survey Template is for CUSTOM 2021-2023 OMB forms for use with programs that use Total Attendance, and includes the STEADI tool, Chair Stand, TUG and Biceps Curl. Custom for	
5	ACL Falls 2021-23 STEADI Collective	This Survey Template is for CUSTOM 2021-2023 OMB forms for use with programs that use either 8 session checkboxes, total attendance, or CAPABLE encounters for attendance, and incl	
6	ACL Falls 2021-23 STEADI CAPABLE	This Survey Template is for CUSTOM 2021-2023 OMB forms for use with CAPABLE program (which uses unique attendance format), and includes the STEADI tool, Chair Stand, and TUG. C	
7	ACL Falls 2021-23 STEADI 8-session	This Survey Template is for CUSTOM 2021-2023 OMB forms for use with programs that use 8 session checkboxes for attendance, and includes the STEADI tool, Chair Stand, and TUG. Cust	
8	ACL Falls 2021-23 STEADI 5-session	This Survey Template is for CUSTOM 2021-2023 OMB forms for use with programs that use 5 session checkboxes for attendance, and includes the STEADI tool. Custom for [] grantee. [En	
9	ACL Falls 2021-23 CAPABLE	This Survey Template is for STANDARD 2021-2023 OMB forms for use with CAPABLE programs (which uses RN, OT, and Handworker visits for attendance). [End Date to be added when tr	
10	ACL Falls 2021-23 8-session	This Survey Template is for STANDARD 2021-2023 OMB forms for use with programs that use 8 session checkboxes for attendance. [End Date to be added when transition to new version	
11	ACL Falls 2021-23 7-session	This Survey Template is for STANDARD 2021-2023 OMB forms for use with programs that use 7 session checkboxes for attendance. [End Date to be added when transition to new version	
12	ACL Falls 2021-23 5-session	This Survey Template is for STANDARD 2021-2023 OMB forms for use with programs that use 5 session checkboxes for attendance. [End Date to be added when transition to new version	
13	ACL Falls 2021-23 2-session	This Survey Template is for STANDARD 2021-2023 OMB forms for use with programs that use 2 session checkboxes for attendance. [End Date to be added when transition to new version	
14	ACL Falls 2014-2021	This Survey Template is for historic 2014-2018 AND 2018-2021 OMB forms for any attendance format. This is intended for use to display previous (version 1 or 2) survey data created in le	

#### CDSME

	Survey Template Name 4	/ Details	$\sim$
1	ACL CDSME Hx 2010-18	ACL CDSME Participant Survey template for migration of historical workshops, 2010 to 2018.	
2	ACL CDSME 2023-26 STANDARD 6-session TAMU	ACL CDSME Participant Survey OMB Control No. 0985-0036 Exp. Date 01/31/2026. This is for programs with 6 sessions, including most SMRC programs. Simply, 2 additional pre and post	
3	ACL CDSME 2023-26 STANDARD 6-session	ACL CDSME Participant Survey for use in 2023 to 2026. OMB Control No. 0985-0036. Exp. Date 01/31/2026	
4	ACL CDSME 2023-26 ALTERNATE TAMU	ACL CDSME Participant Survey OMB Control No. 0985-0036 Exp. Date 01/31/2026. This is for programs with variable sessions, in which users must enter the total # of Encounters, and ind	
5	ACL CDSME 2023-26 ALTERNATE	ACL CDSME Participant Survey OMB Control No. 0985-0036 Exp. Date 01/31/2026. This is for programs with variable sessions, in which users must enter the total # of Encounters, and ind	
6	ACL CDSME 2019-22 STANDARD 6-session	ACL CDSME Participant Survey OMB Control No 0985-0036 Exp. Date 11/22/2022.	
7	ACL CDSME 2019-22 ALTERNATE WWE	ACL CDSME Participant Survey OMB Control No 0985-0036 Exp. Date 11/22/2022. This is for programs with variable sessions, in which users must enter the total # of Encounters, and ind	
8	ACL CDSME 2019-22 ALTERNATE	ACL CDSME Participant Survey OMB Control No 0985-0036 Exp. Date 11/22/2022. This is for programs with variable sessions, in which users must enter the total # of Encounters, and ind	•

There may be periods in which a Grantee /organization will have a mixed batch of workshop surveys to enter, especially when Grantees transition from older to newer forms.

**CDSME Forms:** For CSME grantees transitioning to the recently updated OMB-approved forms, they can select either the OLD forms (that expired 11/2022) OR the new forms (that expire 01/2026) for each workshop in the database. It's essential to select the proper survey to make data entry easier when creating a new survey and/or to verify the pre-assigned survey template when adding participants to an existing workshop. To learn more about the recent transition, timeline, and implications of the NEW CDSME forms, click <u>here</u>.

**Fall Prevention Forms:** Be aware that ACL initiated the review process to update the Falls prevention forms in October 2023. Grantees and partners had an opportunity to comment on potential updates to the forms in the Federal Register. New forms are expected to go into effect in June of 2024. As soon as these forms are approved in May/June, the HAPID team will initiate creating the new fields and mapping relevant fields. New forms will be created and are expected to be available around Sep/Oct 2024. From then, grantees/database users will be able to select old or new forms for at least 4 months as community partners transition to the new forms.

**Customizing Surveys:** The new database allows users to clone and modify surveys to suit their needs. Please submit a Support Ticket if you wish to have questions added.

# See it! Check out our video tutorials to learn more about Survey Templates.

- How to Select a Survey Template (3 minutes)
- How to Verify Survey Templates on Falls Prevention Workshops (11 minutes)
- <u>Selecting the Right CDSME Survey Templates on Workshops Before Adding</u> <u>Participants (10 minutes)</u>

# IV. Creating a Workshop

Create a workshop by going to the Workshop tab and selecting 'New.'

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Ay W	orkshops 👻 🕴								New P	Printable View
6 item	s • Sorted by Program Type • Filtered b	y My workshops • Updated a few seconds	ago				Q	Search this list		\$ • C'
	Workshop Name	V Evidence-Based Program	~	Program Type †	✓ Workshop Start D ✓	Workshop E., 🗸	Actual P v	Actual C v		
1	VA_MOB_East_20220901	A Matter of Balance		Falls Prevention	9/1/2022	9/30/2022	4	3		
2	AZ_CAP_Apac_20220901	CAPABLE		Falls Prevention	9/1/2022	9/27/2022	0	0		
	AZ_CAP_Ariz_20220901	CAPABLE		Falls Prevention	9/1/2022	10/6/2022	0	0	•	
3		CAPABLE		Falls Prevention	9/1/2022	9/28/2022	0	0		
3	AZ_CAP_Apac_20220901									

# A. Selecting or Adding a Host Organization

Please see above (Network and Programs Section) for instructions on adding a host site.

# B. Selecting or Adding an Implementation Site

Please see above (Network and Programs Section) for instructions on adding an implementation site.

## C. Selecting Your Evidence-based Program & Completing Workshop Form

After selecting your Host Organization and Implementation Site, you'll be prompted to choose your CDSME or Falls program type from a drop-down menu on the next page.

Then, you'll scroll through the various pages to find and select your evidence-based program. Select your program and scroll down the workshop modal to complete the remaining fields.

For CDSME Self-Management Resource Center (SMRC) programs and their Toolkits, we have added helper language that pops up when you select those programs to help you determine whether to enter participants into a Standard 6-session workshop or as Toolkits based on how you respond to different questions about their format and delivery approach. We understand that toolkits may be used in many ways in the field, and this impacts how they are entered in the database to ensure you're given credit for participants and/or completers. You may wish to reference this <u>page</u> or view one of the <u>video tutorials</u>, for additional guidance.

On this workshop entry form, complete as much information as is available.

Other fields on workshop modal:

- The WORKSHOP START and END DATES are required fields for most, but not all, workshop types.
- Select the Program Delivery approach. This is currently required for CDSME and is optional for Falls Prevention grantees.
  - Once Falls Prevention forms are released in June 2024, this field will become required for Falls Prevention grantees as well.
- Enter program fees, workshop language, where applicable.
- Add NOTES that will be visible to you and other team members about the workshop.

On the next page in the workshop modal, you'll be asked to select your 1) Program Target and 2) Survey Template. Refer to the above (Networks and Programs Section) for more information on program targets and selecting the corresponding Survey Template for each workshop.

You won't be able to SAVE and entirely create your workshop until you've added these items above and selected a Facilitator. If there is no facilitator for the workshop, please list the coordinator for the workshop.

To view and sort your workshops, please go to the Workshops tab in HAPID. You will see three list views to choose from when you click on the dropdown menu.

- i. **My organization's workshops** show all workshops that is from your organization.
- ii. My workshops show all workshops you've created in the HAPID environment.
- iii. **Recently viewed** show all workshops you've recently viewed.

<b>nc</b> ational co	Home Pro	grams My Network	Workshops	Reportin	ig 🗸	Resources	Support		Q .	L
LIST V	ganization's Workshops 🔻	Ŧ	o				Q Search this list	New	Printab	le View
<ul> <li>✓ M</li> <li>M</li> </ul>	y Organization's Workshops (Pinned I y Workshops	ist)	~	Program T V	Worksh ∨ 9/1/2022	Works ~	Actual Participant	ts v A	Actual Con	npleters
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3	AZ_MOB_Adel_20220901 AZ_MOB_Adel_20220902	A Matter of Balance		Falls Prevention	9/1/2022 9/2/2022	9/16/2022 9/10/2022	0	(	)	
5	IL_MOB_AAAA_20231001	A Matter of Balance		Falls Prevention	10/1/2023	10/2/2023				
6 7	VANCOA_ALED_052220 VA_ALED_NCOA_20190701	Active Living Every Day Active Living Every Day		CDSME	5/22/2020	6/24/2020 7/31/2019	1	1	ō	
8	VANCOA_ALED_043018	Active Living Every Day		CDSME	4/30/2018	6/6/2018	1	1		
9	AZ_ALED_Adel_20220902	Active Living Every Day		CDSME	9/2/2022	10/8/2022	0	C	)	

Once you've chosen a list view, click on any of the tabs to sort the workshops according to your preference.

# D. Change to Workshop ID Formats from Legacy Databases

Workshop ID formats in HAPID take on a different form than what you may have been accustomed in the legacy databases.

Typically consists of 2 letters of State, 4 letters of Site Name, EBP acronym, and Workshop Start Date.

Created In	Format in Source Legacy Database	Format in HAPID, After Migration
CDSME legacy	MDPRIN_100323	MDPrin_CPSMP_100323
Falls legacy	OASI_TJQ_9/21/2022	OASI_TJQ_9/21/2022
HAPID	VA_DSMP_Cent_20240129	

**Exception:** If you edit a workshop originally entered in CDSME/Falls legacy database, the workshop ID #'s will update to HAPID format.

See it! Check out these brief videos on how to create and edit various types of workshops:

- How to Create a Workshop (14 minutes) uses CDSME workshop as example.
- How to Create a Falls Prevention Workshop (16 minutes)
- How to Connect Workshops to Program Targets (10 minutes)
- How to Edit a Workshop (5 minutes)
- How to Find Your Workshops (22 minutes)
- How to Enter Walk With Ease Programs (14 minutes)
- How to Collect SMRC Toolkit Data and Enter into HAPID (15 minutes)

# V. Creating a Facilitator

When adding a workshop, you'll come to a window where you can add as many Facilitators as are associated with the workshop. We will refer to this as your 'Facilitator Directory'.

You can ONLY add Facilitators through the workshop modal / pop-up at the point of creating a workshop.

You're asked to first make an attempt to search for a Facilitator in this directory to prevent duplicates from being created. Once the system shows no such person exists, you'll be prompted to create a New Facilitator.

If the search doesn't turn up the Facilitator you were looking for, you'll be prompted to Create a New Facilitator. Hit **'Create New'** to create and add the New Facilitator.

If you already have a list of Facilitators in your 'directory,' you can search among them.

	Search Box	
Full Name	Email	Select
Cannot see the Facilitator	n this list?	Create New

# **Editing and Deleting Facilitators**

You also have the option to update information you've previously entered on this Facilitator.

Once you've created a record for the Facilitator, they should now appear in the directory for you to select. All Facilitators in your account will appear in your directory. Account holders can only see Facilitators from their own account, and cannot see Facilitators in others' Grantee accounts, even if they are in the same region. If you'd like to identify other potential Facilitators in your region, contact NCOA to facilitate introductions to other organizations in your region.

## Temporary Limitation to Facilitator options listed for CDSME Users:

- CDSME users with accounts in only CDSME will NOT see any Facilitators here until you add/create them yourselves.
- Only users whose Grantee/organization had an account in the Falls database will see those Falls-related Facilitators listed here.
- CDSME users will need to add Facilitators to all their workshops, as will users entering Falls programs with *new* Facilitators. However, this is just one time. Once Facilitators are entered, they will be available for selection in future workshops for you and others in your Account.
- Why the limitation? Facilitator information was captured as actual records in the legacy Falls Database, whereas in CDSME, Facilitators were documented in text fields for each workshop in the legacy CDSME Database. Hence, Facilitators from Falls were migrated as profiles/records, but the same cannot be done for CDSME Facilitators.

You <u>can</u> EDIT/UPDATE specific Facilitator information, such as their Age, Race/Ethnicity, and Employment Type.

You <u>cannot</u> DELETE Facilitator records.

You <u>cannot</u> EDIT the Facilitator's *Name* or *Email address*. To DELETE a Facilitator or edit their name or Email, you can submit a ticket / request to <u>HapidHelp@ncoa.org</u>.

30:					×	۹ 🖡	e
		New Workshop					
Organization's Wor	Please choose the Facilitator fo	or this Workshop			Nev	Printable Vie	ew
ems • Sorted by Program Typ					t	\$*	C
Workshop Name	Full Name	Email	Select	Update	Complete	ers 🗸	
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AZ_CAP_Apac_20220	test1						
AZ_CAP_Ariz_202209	Facilitator 25			Update			
AZ_CAP_Apac_20220	Facilitator 26		~	Update			
AZ_SO_Alma_202209	Facilitator 27						
AZ_SO_Apac_202209		Displaying 2 of 10 Pages					
AZ_BC_Adel_2022090		biopioy nig a or to togoo					
AZ_FallScp_Adel_202	Cannot see the Facilitator in th	is list?				•	
AZ_MOB_Adel_20220							
AZ_MOB_Adel_20220	Q	search					
AZ_CAP_Apac_20220	Previous Save Wor	rkshop				•	
AZ_MOB_Adel_20220					-		
AZ_CAP_ASPC_20220902	CAPABLE	Falls Prevention 9/2/2022	9/9/2022	0	0		

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ms•	Sorted by Program Typ	Please choose the Facilitat	Age							t		1\$t ~
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	VA_MOB_NCOA_2022	test test2	Ethnicity	Rolog			_					•
	AZ_CAP_Apac_20220	test1	Lutiony	36160			•					•
	AZ_CAP_Ariz_202209	Facilitator 25	Your Race Available			Selected						T
	AZ_CAP_Apac_20220	Facilitator 26	American Indian or Ala	3S	۲		*		Update			•
	AZ_SO_Alma_202209	Facilitator 27	Asian				_					•
	AZ_SO_Apac_202209	<	Black or African Ameri	ican			Ť		>			T
	AZ_BC_Adel_2022090	-	Native Hawaiian or oth	er								T
	AZ_FallScp_Adel_202	Cannot see the Facilitator	White									T
	AZ_MOB_Adel_20220		Other									T
	AZ_MOB_Adel_20220		Some Other Race									T
	AZ_CAP_Apac_20220	Previous Save										•
	AZ_MOB_Adel_20220					Cancel	Save					T

# To edit Facilitators in workshops that have already been created, follow these steps:

1 – Find the workshop by the Workshop Name/ID.

2 – On the workshop's record page, under the Facilitator section, click on the drop-down button.

3 – Click on 'EDIT.'

4 – Edit certain fields, such as Age, Race/Ethnicity, & Employment Type. Currently, you cannot edit the Facilitators name or email or DELETE a Facilitator. To do so, email <u>HapidHelp@ncoa.org</u> with your request.

Workshop AZ_MOB_Adel_	20220902			Ed	it Create Work	kshop Participant	Refresh Totals	•			
Workshop Start Date 9/2/2022	Workshop End Date 9/10/2022	Evidence-Based Program A Matter of Balance	Actual Participants 0								
Evidence-Based Program A Matter of Balance		Survey Template ACL Falls 2021-23 8-session	Survey Template ACL Falls 2021-23 8-session			<b>Workshop Participants (1)</b>					
Workshop Name		Survey Template Name		Workshop Pa	Completer or	Session Count	Admin Assigne				
AZ_MOB_Adel_20220902		ACL Falls 2021-23 8-session		test Q	Enrolled	0		Y			
HAPIDTestAcct		9/2/2022					,	view All			
Host Organization		Workshop End Date									
Arizona Living Well Institu	te	9/10/2022	9/10/2022 Workshop Language		ops to Program	Targets (1)					
Implementation Site		Workshop Language									
Adelante Health Care Cen	iter			Workshops t	Funding Source	Grantee	Program				
Program Type Falls Prevention		Workshop Language Other		TS-061934	Centers for Dis	HAPIDTestAcct		T			
Session 0? No		Number of sessions					,	view All			
NCOA Import ID		Number of Sessions for a Com 3	pleter	📕 Facilitat	or (1)						
Fee		Bingocize Unit		Facilitator Na	First Name	Last Name	Email				
Notes		Bingocize Mobile App		A-22963	Tuesday	Test	test@email.con				
Program Delivery		Was this a Wisdom Warriors pro	ogram					View All			

	Facilitate	or (1)			
	Facilitator Na	First Name	Last Name	Email	
	A-22963	Tuesday	Test	test@ema	Edit
m					View Al Edit
VID-19					

Workshop Start Date			
	Edit Facilitator		
First Name	Ernan	J	
Tuesday	test@email.com		
Last Name	Phone		
Test			
Age 1	Mobile		
What is your race? Check all that apply 0	State		
Available Chosen			
American Indi 🔺 🕨			
Asian			
Black or Africa			
Native Hawaiia			
Some other race (please specify)			
Nope			
	•		
Ethnicity 0			
		Cancel Save & New	Save
		Gansor Gave a New	Gave

#### What if the workshop doesn't require a Facilitator?

NCOA is aware that several workshop types do not require a Facilitator.

The following EBPs are now allowed to create and save a workshop without assigning a Facilitator.

- 1. Better Choices Better Health
- 2. Eat Less Move More
- 3. Otago
- 4. Stay Active and Independent for Life
- 5. Tool kit for Active living with Chronic Conditions
- 6. Tool Kit for Active Living with Chronic Pain
- 7. Tool Kit for Active Living with Diabetes
- 8. Walk With Ease (self-directed)

See it! Check out these brief videos on how to add and edit Facilitator information from the Workshops page, and where to find your Facilitator information in the Reports. <u>The Many Places to Find Your Facilitator Data in HAPID (8 minutes)</u> <u>How to Add Facilitators to Workshop & Edit Them (7 minutes)</u> <u>How to Skip Facilitators If My Program Doesn't Use Them (3 minutes)</u>

# VI. Adding Participants to Workshops

1. To create a workshop participant, please go to the workshop that you'd like to add participants and click on Create Workshop Participant.

2. Before creating a workshop participant, please ensure you have selected the correct survey template for the workshop. Although NCOA has already connected the proper survey templates to each evidence-base program type, it's a good idea to double check.

Hational council on aging	lome	Programs	My Network	Workshops	Reporting $\checkmark$	Resources	Support
Workshop VA_MOB_NC	OA_202	220901				Edit Create Works	shop Participant
Workshop Start Date 9/1/2022	W 9/	forkshop End Date /30/2022	Evidence-Based A Matter of Bal	Program ance	Actual Participants 6		
DETAILS RELA	ATED					Chatter isn't enabled o	or the user doesn't ha
Evidence-Based Program A Matter of Balance			Survey Template ACL Falls 2021-23 C	APABLE			
Workshop Name VA_MOB_NCOA_202209	01		Survey Template Na ACL Falls 2021-23 C	ne APABLE			
Grantee CHA Community Testing	9		Workshop Start Date 9/1/2022				
Host Organization AAA Region 5			Workshop End Date 9/30/2022				
Implementation Site NCOA Senior Center			Workshop Language				

3. A pop-up will open allowing you to create workshop participant. It will also show you the workshop this is for as well as the survey template being used.

		Create Workshop Participant		
p DB_NCC	Workshop - VA_MOB_NCOA_2022	201-		Refresh
	Survey Template - ACL Falls 2021-	3 CAPABLE		
Date	✓ Participant Information			
RELAT	Participant Name/ID			have Chatte
rogram	Health Care Referral	None	¥	
20220901	Age			
Testing	Live Alone	None	¥	
	9/30/20	2		

4. You can input data for the pre-survey and post-survey together once the workshop concludes or input data for the pre-survey after the workshop begins and then the post-survey once the workshop concludes.

Enter Participants one after another, selecting 'Save and New.'

## **IMPORTANT:**

If you plan to pull reports on the same day after you enter Participants, be sure to click on 'REFRESH TOTALS' on the top right hand of the Workshop record. This will ensure that the total # of Participants populates in summary reports.

council on aging	Home	Programs	My Network	Workshops	Reporting 🗸	Resource	ss Suppo	rt	Ý	7
Workshop VANort_DSMP	_081917					Ec	dit Create Work	kshop Participant	Refresh Totals	•
Vorkshop Start Date I/19/2017	Workshop End Date 10/25/2023	Evidence Diabetes	-Based Program s Self-Management F	Program (DSMP)	Actual Participan 12	ts				
Evidence-Based Program Diabetes Self-Manageme	nt Program (DSMP)	Surv	ey Template CDSME Hx 2010-18			📊 Worksh	op Participants	(6+)		
Workshop Name VANort_DSMP_081917		Surv	ey Template Name CDSME Hx 2010-18			Workshop Pa	Completer or	Session Count	Admin Assigne	
Grantee CHA Community Testing		Work 8/19/	shop Start Date /2017			a113i000002i	Completer	6		*
Host Organization		Work	shop End Date			a113i000002i	Completer	4		¥
Implementation Site		Work	shop Language			att3i000002i	Completer	5		•

 To input post-test data for participants at a later date, you can come back and search for your desired Workshop ID/Name. Then click on the Workshop Participants list. You can click on the title to open up the full list or select the participant by the Workshop Participant ID if you see it on the short list.
 Once you find the participant for which you would like to input data, you

can EDIT from there.

CO(F ouncil on aging	Home Progn	ams My Network Workshops	Reporting 🗸	Resources	s Suppo	et.		Q 🌲	0
Workshop VANort_CDSMP_04	41817			Edi	t Create Work	kshop Participant	Refresh	Totals	•
orkshop Start Date /18/2017	Workshop End Date 5/23/2017	Evidence-Based Program Chronic Disease Self-Management Program (CDSMP)	Actual Particip 16	ants					
Vidence-Based Program Chronic Disease Self-Managen	nent Program (CDSMP)	Survey Template ACL CDSME Hx 2010-18	8	Worksho	p Participants	(6+)			
Vorkshop Name		Survey Template Name	Work	shop Pa	Completer or	Session Count	Admin As	isigne	
Grantee		Workshop Start Date	att3k	000002i	Completer	5			
CHA Community Testing		4/18/2017	a113i	000002j	Participant	3		Edit	
lost Organization		Workshop End Date	at13	000002)	Completer	4			-
molementation Site		Workshop Language	att3)	00002j	Completer	5		12	<u>e</u>
Vortheast Senior Center		English	att3)	000002	Completer	5			. 13
rogram Type		Workshop Language Other	at13i	00002]	Completer	5		200	
Session 0?		Number of sessions						View	All
NCOA Import ID a19f2000002KJDSAA4		Numiber of Sessions for a Completer 4		Worksho	ps to Program	Targets (1)			
Fee		Bingocize Unit	Work	shops t	Funding Source	Grantee	Program		
			TS-C	45114	ACL CDSME G.	CHA Communi.	Chronic I	Disea	

7. The page with participant information will pop up and you will be able to edit any fields. Please save any changes made by clicking save at the bottom of the form.

# **IMPORTANT**:

Do NOT enter any Protected Health Information (PHI) or Personally Identifiable Information (PII) data in the **Participant ID field** that could identify a participant in any way. NO Names, Social Security #'s, Dates of Birth, Addresses, Medicare or Medicaid #'s, or Medical Record #'s should be entered here or anywhere else in HAPID.

	• •	
Workshop - WA_MOB_Tues_20231126		
Survey Template - ACL Falls 2021-23	3-session	
✓ Participant Information		
Participant ID		
Health Care Referral	None	•
Age		

rging			Х Q
	Workshop - VA_MOB_NCOA_20220901		
VA_MOB_NCOA_ p Participan	Survey Template - ACL Falls 2021-23 CAPABLE		
ited a minute ago	✓ Participant Information		尊,
shop Participant	Participant Name/D		signed Complet.
000002lGos	Par ucipant Name/D		
000002lGot	Health Care Referral		
000002lGox			
000002lGp2	Age		
pleterTest	Live Alone	•	
Compl Test			
	Gender	<b>•</b>	*

8. To delete duplicate participants, please submit a support ticket or email hapidhelp@ncoa.org. Please include the following information:

a) Workshop Name/ID (ex. VANort\_CDSMP\_041817)

- b) EBP name (e.g., MOB, CPSMP, etc).
- c) Workshop Start Date
- d) Duplicate Participant ID #

9. For the first three pieces of information in this list, please look at the previous point. For the duplicate participant ID, you would need to go to the workshop participant list of the workshop with the duplicate participant. Then, you will need to copy the information under the highlighted column. The highlighted entry under the Workshop Participant is an example of what you would need to include to let us know which entry to delete.

	Workshop Participant: Workshop P	Completer or Participant	~	Session Count	~	Admin Assigned Attenda		
1	a113i000002/Gos	Completer		5				¥
2	a113i0000021Got	Completer		8				Ŧ
3	a113i000002lGox	Participant		4				¥
4	a113i000002lGp2	Completer		0			<b>v</b>	•
5	Test	Enrolled		0				•
6	CompleterTest	Completer		5				¥
7	NonCompl Test	Participant		4				T

**See it!** Check out these tutorials on how to add participants to workshops. How to Add Participants to Workshops for CDSME Support Programs (18 minutes) How to Add Participants to Workshops for a STANDARD 6-Session CDSME Program (11 minutes)

# VII. Reporting and Dashboards

NCOA has several critical reports and dashboards available to HAPID users, using essential reporting tools as part of the Salesforce platform on which HAPID is built.

# A. Accessing Reports

- **1.** To access Reports, go to Home  $\rightarrow$  Reporting  $\rightarrow$  Reports
- 2. Next, Click on **All Folders**. [IMPORTANT: It is best to find the report you need by first going to the <u>subfolder</u> first. If you go straight into the Reports listing, you're going to encounter hundreds of reports, including all of those the feeds the dashboards and too much to weed through.]
- 3. Notice that you will find 5 key folders:
  - a. CDSME Reports exclusive to CDSME grantees; reports mirror those of Falls grantees
  - b. **Dashboard Reports avoid using;** mainly used to organize hundreds of small reports that feed the Dashboards.
  - c. Facilitator Data has reports common to CDSME & Falls, can be used by either
  - d. **Falls Prevention Reports** exclusive to Falls Prevention grantees; reports mirror those of CDSME grantees
  - e. **Network Data** has reports common to CDSME & Falls that include info on Hosts and Sites

national council on aging	Home	Programs	My Network	Workshops	Reporting $\checkmark$	Resources	Suppo	ort	۵	÷	
Reports											
Reports All Folders 5 items							Q	Search all folders		\$	•
REPORTS	Name		Created By		Created On	~	Last Modified B	у	Last Modified	Date	
Recent	CDSME Reports		angelica herrera-vensor	ı	6/30/2023, 2:09 PM		angelica herrer	a-venson	6/30/2023, 3:	54 PM	
Created by Me	Dashboard Reports		angelica herrera-vensor	ı	6/30/2023, 2:11 PM		angelica herrer	a-venson	6/30/2023, 3:	54 PM	
AltReports	Facilitator Data		angelica herrera-vensor	ı	8/9/2023, 9:38 AM		angelica herrer	a-venson	8/9/2023, 9:38	3 AM	
Folders	Falls Prevention Repor	ts	angelica herrera-vensor	ı	6/30/2023, 2:10 PM		angelica herrer	a-venson	6/30/2023, 3:	55 PM	
All Folders	Network Data		angelica herrera-vensor	ı	3/4/2024, 8:57 PM		angelica herrer	a-venson	3/4/2024, 8:57	PM	
Created by Me Shared with Me											

- 4. Once you've selected your desired Folder Name, you can find your desired Report in a few ways.
- 5. To find a report you're looking for, Filter the first column by Report name or search by report name in the search field.

ional council on aging	Home Program	ns My Network	Workshops	Reporting 🗸	Resources	Support		Q 🖡
Reports								
Reports Recent 25 items						Q, Search	recent reports	\$
REPORTS	Report Name 1	Description $\checkmark$	Folder	Created By		Created On	<ul> <li>✓ Subscribed</li> </ul>	
Recent	Avg No. of Participants by EBP CDSME		CDSME Reports	angelica he	rrera-venson	11/15/2023, 11:47 AM		
Created by Me Private Reports	CDSME Participant Level EXPORT	CDSME Participant Pre and Post Survey fields	CDSME Reports	angelica he	rrera-venson	11/14/2022, 6:39 PM		
All Reports	CDSME Program Target Clean Up		CDSME Reports	angelica he	rrera-venson	2/2/2024, 8:28 AM		
FOLDERS All Folders Created by Me Shared with Me	CDSME Wkshp, Partic & Compi by Hos	Workshops, Participants & Completers by Host Organization, Cohort, and Evidence-Based Program. 'Record Count' column is count of Workshops	CDSME Reports	Meghan Th	ompson	11/6/2023, 5:35 PM		
FAVORITES	CDSME Workshop Level EXPORT	Export table of undupli- cated workshop records	CDSME Reports	Meghan Th	ompson	6/21/2023, 7:26 PM		
All Favorites	•							

## B. Listing of Available Reports

The following provides and overview and listing of the reports you can expect to find in HAPID. This list is not exhaustive, and we will continue to upload reports that you may find useful. Don't hesitate to send requests to <u>hapidhelp@ncoa.org</u>.

#### Raw Data Exports

- **CDSME & Falls Workshop Level EXPORT:** Download a spreadsheet containing *all* workshop record fields, for all workshops or for a subset (filtered by workshop date or ACL Cohort). Table includes one row per workshop.
- CDSME & Falls Participant Level EXPORT: Download a spreadsheet containing all participant record fields or a subset (filtered by workshop date or ACL Cohort.) Includes demographics, pre- and post-survey, and attendance data. Table includes one row per participant. Can be linked to Workshop Level Export on Workshop: ID field.

## **ACL Grant Reporting & Progress Monitoring**

- Semi-annual Report CDSME or Falls: This report provides the quantitative data required for ACL grant reporting. You must set appropriate filters according to the semi-annual period you need and your ACL Cohort.
- **Progress to ACL Target (CDSME or Falls) [Cohort Year]:** There are pre-built Progress reports for all of the currently-active cohort years. Use the one(s) that apply to your grant award(s). These reports show participants & completers against grantee Program Targets, with % of Goals Met.

#### Implementation Network Information and QA Monitoring:

• Facilitator Directory: List of unique Facilitators with their Email and Phone, and total # of workshops delivered.

- Facilitator Activity History: List of Facilitators with details for workshop each has delivered. Can be filtered by record created date, Program Type, Evidence-Based Program, and workshop dates.
- Network Hosts & Sites: List of your Host Organizations and Implementation Sites, along with their unique system ID's. Useful to identify duplicates. Includes total number of workshops under each site and host. Filterable by various system activity dates (host or site record creation or modification dates).
- **Program Target Clean Up:** A list of workshops with the Program Target that each is linked to. Provides a way to browse workshops and ensure that each is associated with the expected Program Target(s).

# C. Applying Filters and Customizing Reports

While you can apply some basic filters on individual reports, any changes you make during a session will be removed and the report will reset to the default version. In short, you cannot 'break' any of these reports, so you should feel free to explore the reports and customize them to suit your needs. This is done so that all users across the database are not affected by any changes you may make during your session.

# Selecting the Right Date Filters

- *Generally,* reports in HAPID will refer to a workshop's **Start Date** to determine whether to include a workshop in any given report period.
- This differs from some reports in the two legacy databases, and we are in the process of harmonizing these within HAPID.
- For filtering, you will generally want to use the workshop **Start Date** rather than "**Date Created**" or "**Date Modified**" fields (even if these are available for filtering).
  - These dates won't necessarily be reliable for migrated data
  - But they *can* be useful for data quality monitoring purposes!

Do check out the video tutorials below to help you get comfortable with manipulating the reports and applying filters.

The March 7, 2024 webinar that will be posted <u>here</u>, also covered this in detail.

**See it!** Check out these tutorials on how to find, use, and filter the most common Reports. How Reports are Organized in HAPID (6 minutes)

How to Find and Use Participant Level Reports for CDSME and Falls (6 minutes) How to Find and Use Workshop Level Reports for CDSME or Falls (10 minutes) How to Find and Use Reports on Host Organizations and Implementation Sites (9 minutes) How to Customize a Report - Example with Workshop Level Export (13 minutes)

# D. Dashboards

HAPID uses native Salesforce dashboards to display your program data in charts, graphics, and other visuals.

There are currently 10 dashboards, and we are growing this in the coming year. Each dashboard currently permits 12 'tiles' on each page, and 5 filters.

We are working with grantees' feedback to further refine dashboards. These are also being updated to reflect new CDSME fields. They will be updated to incorporate upcoming new Falls prevention fields after June 2024.

- 1. To access the Dashboards, go to Home --> Reporting --> Dashboards.
- 2. Click on 'All Dashboards' to view the listing of the 10 current dashboards.
- 3. Most Dashboards can be filtered by:
  - Specific time frames based on Workshops Start Date (e.g. this year, last year, last 5 years, cohort periods).
  - Cohort Year
  - Program (e.g. Matter of Balance, CDSMP, etc)

nati	ional council on aging						
	Dashboards All Dashboards 10 items					Q. Search all dashboards	\$*
	DASHBOARDS	Dashboard Name	Description ~	Folder	Created By	Created On	✓ Subscribe
	Recent	CDSME General Demographics	Race, Ethnicity, Gender, Age, Provider Referral, etc. for CDSME participants	HAPID Dashboards	angelica herrera-ven	son 1/20/2023, 8:11 AM	
	Private Dashboards	Falls General Demographics	Race, Ethnicity, Gender, Age, Provider Referral, etc. for Falls participants	HAPID Dashboards	angelica herrera-ven	son 8/15/2023, 12:42 PM	
	All Dashboards	Falls Outcomes pg 1	Outcome measures for Falls Programs (pg 1)	HAPID Dashboards	Meghan Thompson	11/16/2022, 10:25 PM	
	All Folders	Falls Outcomes pg 2	Outcome measures for Falls Programs (pg 2)	HAPID Dashboards	Divya Tangirala	2/28/2023, 1:14 PM	
	Created by Me	Falls Outcomes pg 3	Outcome measures for Falls Programs (pg 3)	HAPID Dashboards	Divya Tangirala	2/28/2023, 1:14 PM	
	FAVORITES	Falls Outcomes pg 4	Outcome measures for Falls Programs (pg 4)	HAPID Dashboards	Divya Tangirala	2/28/2023, 1:14 PM	
	All Favorites	4					► ►

# **See it!** Check out these tutorials on how to find and use Dashboards.

How to Find, Navigate, and Use Dashboards - General (7 minutes) How to Use and Navigate Falls Prevention Dashboards (5 minutes) How to Use CDSME Dashboards Including Optional Fields (15 minutes)

# **VIII. Semi-annual Reports**

For detailed guidance, please visit the following pages for your grant category (Falls vs CDSME). These include instructions for pulling your data from HAPID. Instructions are in the process of being revised by May 1, 2024, ahead of your next deadline.

#### CDSME:

https://www.ncoa.org/article/acl-grant-reporting-requirements-for-chronic-disease-selfmanagement-education

### Falls Prevention:

https://www.ncoa.org/article/acl-grant-reporting-requirements-for-falls-prevention

# **IX.** Resources

The Resources tab provides a convenient place where users can easily access all guidance documents related to data collection and the database, including tip sheets and webinars. For a listing of VIDEO TUTORIALS, visit this page.

For your convenience, we have compiled the most useful sites associated with HAPID just below this image.

ICO C	Home	Programs	My Network	Workshops	Reporting $\checkmark$	Resources	Support	۹	<b>₽</b>	
• Home page: https://w	rww.ncoa.org/profession	hals/health/center-for-h	ealthy-aging/healthy-ag	ing-programs-integrated	-database-resources-and-	updates				
<ul> <li>About HAPI-D: https://</li> <li>FAQs: https://ncoa.org</li> </ul>	//www.ncoa.org/article/ g/article/frequently-ask	about-the-healthy-agin ad-questions-healthy-ag	g-programs-integrated-d ging-programs-integrated	latabase-hapi-d d-database						
Requesting an Account or Ad	ding New Users									
For new 2023 grantees, please	e complete this form to a	add a new account or n	ew users.		6					
If you have an existing accoun that your TA Liaisons or data r	it in the National CDSME management have had v	Database or Falls Prev with your teams. If anyt	ention Database, you do hing has changed, you co	NOT need to submit this an contact Angelica Herr	: form. We are migrating y era-Venson (angelica.herr	our data, account, and era-venson@ncoa.org).	honoring your request on cho	anges to users based on o	discussions	
<ul> <li>HAPI-D User Manual h</li> </ul>	https://www.ncoa.org/a	rticle/about-the-health	-aging-programs-integra	ated-database-hapi-d						
HAPI-D User Manual h     Find short how-to vide	https://www.ncoa.org/a eo tutorials https://www	rticle/about-the-health ncoa.org/article/abou	y-aging-programs-integra t-the-healthy-aging-prog	ated-database-hapi-d grams-integrated-databa	se-hapi-d					
HAPI-D User Manual h     Find short how-to vide Finding Help with Database N	https://www.ncoa.org/a eo tutorials https://www Management Issues	rticle/about-the-health ncoa.org/article/abou	y-aging-programs-integra t-the-healthy-aging-prog	ated-database-hapi-d grams-integrated-databa	se-hapi-d					
HAPI-D User Manual I     Find short how-to vide Finding Help with Database N For users with an existing	https://www.ncoa.org/a eo tutorials https://www Management Issues account in HAPI-D, follo	rticle/about-the-health ncoa.org/article/abou w these step by step ins	y-aging-programs-integra t-the-healthy-aging-prog tructions for submitting o	ated-database-hapi-d grams-integrated-databa a ticket and tracking you	se-hapi-d r case: https://ncoa.org/a	rticle/need-help-with-t	he-healthy-aging-programs-ir	ntegrated-database-subm	nit-a-	
<ul> <li>HAPI-D User Manual I</li> <li>Find short how-to vide</li> <li>Find short how-to vide</li> <li>Finding Help with Database N For users with an existing request</li> </ul>	https://www.ncoa.org/a eo tutorials https://www Management Issues account in HAPI-D, follo	rticle/about-the-health .nccoa.org/article/abou w these step by step ins	y aging-programs-integra t-the-healthy-aging-prog tructions for submitting of	ated-database-hapi-d grams-integrated-databa a ticket and tracking you	se-hapi-d r case: https://ncoa.org/a	ticle/need-help-with-t	he-healthy-aging-programs-ir	ntegrated-database-subn	nit-a-	
HAPI-D User Manual F HAPI-D User Manual F Find short how-to vide Finding Help with Database N For users with an existing request For users not in HAPI-D ne	https://www.ncoa.org/a eo tutorials https://www Management Issues account in HAPI-D, follow weding assistance, contac	rticle/about-the-health .nccoa.org/article/abou w these step by step ins :t Angelica Herrera-Ven	-aging-programs-integra t-the-healthy-aging-prog tructions for submitting of son (angelica.herrera-ve	ated-database-hapi-d grams-integrated-databa a ticket and tracking you mson@ncoa.org) with ar	se-hapi-d r case: https://ncoa.org/a w questions.	ticle/need-help-with-t	he-healthy-aging-programs-in	ntegrated-database-subn	nit-a-	
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#### **HAPI-Database**

- Home page: <u>https://www.ncoa.org/professionals/health/center-for-healthy-aging/healthy-aging-programs-integrated-database-resources-and-updates</u>
- About HAPI-D: <u>https://www.ncoa.org/article/about-the-healthy-aging-programs-integrated-database-hapi-d</u>
- FAQs: <u>https://ncoa.org/article/frequently-asked-questions-healthy-aging-programs-integrated-database</u>

#### How to Use the Database

For a growing library of step-by-step video tutorials, the latest User Manual, and kick-off webinars of the database visit: <u>https://www.ncoa.org/article/how-to-use-the-healthy-aging-programs-integrated-database-hapi-d</u>

You will need to set up an account in NCOA Connect to access the videos.

#### Finding Help with Database Management Issues

- For users with an existing account in HAPI-D, follow these step by step instructions for submitting a ticket and tracking your case: <u>https://ncoa.org/article/need-help-with-the-healthy-aging-programs-integrated-database-submit-a-request</u>
- For users not in HAPI-D needing assistance, contact HapidHelp (<u>hapidhelp@ncoa.org</u>) with any questions.

#### **Data Collection Tools**

- CDSME (OMB Forms with Expiration **1/31/2026**). Download the forms in English and multiple languages. <u>https://ncoa.org/article/data-collection-tools-for-chronic-disease-self-management-education</u>
- Falls Prevention Forms. Download the forms in English and multiple languages. <u>https://ncoa.org/article/data-collection-tools-for-falls-prevention-programs</u> (NEW FORMS expected June 2024).

#### **Data Importing and API**

*Importing data using CDSME or Falls Prevention Data templates into legacy databases via Movelt was suspended on Dec 31, 2023.* Learn more about the transition in 2024 and new options for setting up an API to allow the transmission of your data to HAPID.

• Guidance for bulk uploads to HAPID

#### **Research from CDSME & Falls Database**

Find data highlights, trends and demographic information about evidence-based programs that have been analyzed by NCOA staff and research partners over the years. You can find data reports, a listing of peer-reviewed articles, PowerPoints from professional conferences and more at this page:

• <u>https://ncoa.org/article/research-on-evidence-based-programs</u>

#### Privacy & Security

Find tips for safeguarding your participant data every step of the way, and learn how NCOA protects EBP data in HAPI-D:

Privacy and security

### **Quality Assurance**

*Check out these pages to learn about best practices, get accurate and complete data, and coordinate data collection with partners.* 

- 1. <u>Tip Sheet: Collecting Participant and Partner Data for ACL Chronic Disease Self-Management and Falls</u> <u>Prevention Evidence-Based Programs</u>
- 2. Dos and Donts for modifying forms
- 3. Maximizing complete data

### **Optional Items**

The CDSME and Falls Prevention Resource Centers have allowed grantees to submit additional data on their evidence-based programs and participants. These fields are visible in HAPI-D. Learn more about existing 'Optional' fields <u>here</u>.

### **Tracking Completers**

- o CDSME Participants vs. Completers: How are they tracked: <u>https://ncoa.org/article/cdsme-participants-vs-completers-how-are-they-tracked</u>
- Falls Prevention Program Participants vs Completers: how are they tracked: <u>https://ncoa.org/article/falls-prevention-program-participants-vs-completers-how-are-they-tracked</u>

#### **Program Specific Data Entry Guidance**

- Guidance on CDSME Toolkits (how to enter data and what counts depending on the format): <u>https://ncoa.org/article/data-collection-guidance-tool-kit-active-living-chronic-conditions</u>
- Instructions for wCDSMP data entry: <u>https://ncoa.org/article/instructions-entering-data-for-workplace-cdsmp-into-the-national-cdsme-database</u>
- Instructions for WWE data entry (includes definitions for different formats): <a href="https://www.ncoa.org/article/data-entry-instructions-walk-with-ease">https://www.ncoa.org/article/data-entry-instructions-walk-with-ease</a>

# X. Submitting a Support Ticket

A. To get to the support page, please click on More on the home page and then click Support in the submenu.



- B. Under the **Support** menu, you can submit your request for help to resolve any database-related issue.
  - a. Identify the Case Type to help describe the nature of the problem.
  - b. Select the related program category (Falls, CDSME, or N/A).
  - c. Enter a subject and attach a file or document.

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Contact Support My	Cases								
			Contact ( Tell us	Customer Suppo	ort				
<ul> <li>Contact Name</li> </ul>									
🖪 Sarah Jones - Supe	r User								×
<ul> <li>Case type</li> </ul>									
None								*	
Program Type									
Available				Chosen					
CDSME				•					
Falls									
N/A				4					
<ul> <li>Subject</li> </ul>									

C. Once you submit a ticket, you will see a confirmation page with the case number. If you want to follow up on the support ticket or send additional information, please email hapidhelp@ncoa.org with the case number.

Contact Support	My Cases								
Your case was created.									
Thank you for your Support Ticket. Someone will contact you shortly									
<b>Case summary</b>									
Subject:	Test issue for pro tips page								
Description:	testing								
Case Number:	00001109								

D. To see all the support tickets you have as well as the status of the cases, please click on the My Cases tab on the support page.

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1	00001042	Sa	irah Jones - Super Us	er	Not sure how to en	nter ToolKit		Closed			¥
2	00001043	Sa	rah Jones - Super Us	er	Error when enterin	ng WWE program		Closed			Ŧ
3	00001109	Sa	rah Jones - Super Us	er	Test issue for pro t	ips page		New			¥

See it! Check out these tutorials on how to request help with the database. How to Request Database Assistance (6 minutes)

For questions about this User Manual or help with HAPID, email <u>HapidHelp@ncoa.org</u>.

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