



Healthy Aging Programs Integrated Database (HAPID)

USER MANUAL

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

I.	Getting Set Up in HAPID.	1
A.	Setting up a new Account in HAPID.	1
B.	Super User vs Data Entry	3
II.	Logging On	4
III.	Network and Programs	6
A.	My Network	6
B.	Programs	18
I.	Program Targets	19
II.	Survey Templates	23
IV.	Creating a Workshop	25
A.	Selecting or Adding a Host Organization	25
B.	Selecting or Adding an Implementation Site	25
C.	Selecting Your Evidence-based Program & Completing Workshop Form	25
D.	Change to Workshop ID Formats from Legacy Databases	27
V.	Creating a Facilitator	28
	Editing and Deleting Facilitators	29
VI.	Adding Participants to Workshops	34
VII.	Reporting and Dashboards	38
A.	Accessing Reports	39
B.	Listing of Available Reports	40
C.	Applying Filters and Customizing Reports	41
D.	Dashboards	42
VIII.	Semi-annual Reports.....	43
IX.	Resources	43
X.	Submitting a Support Ticket.....	46

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.

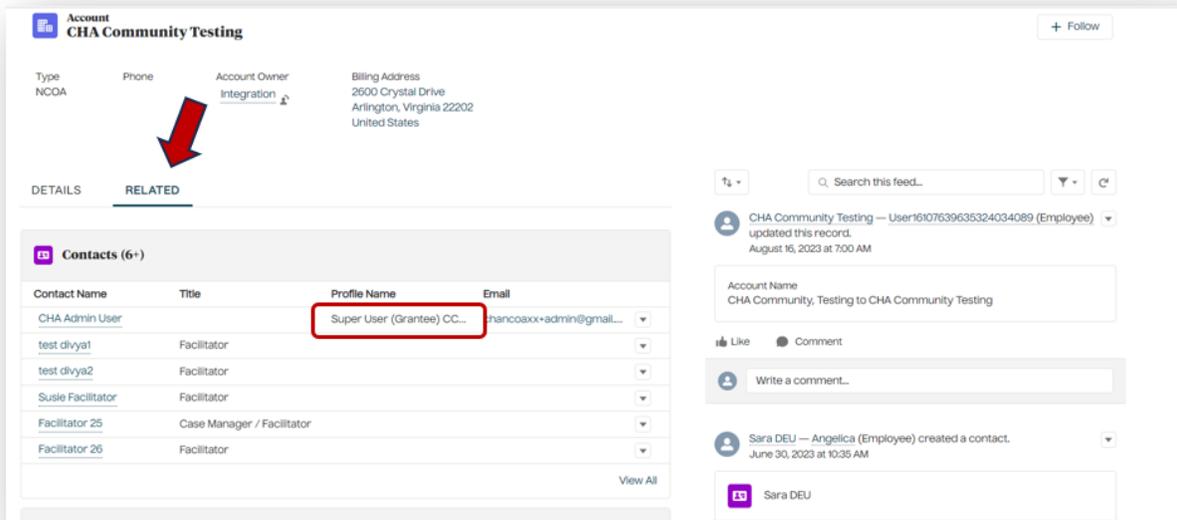
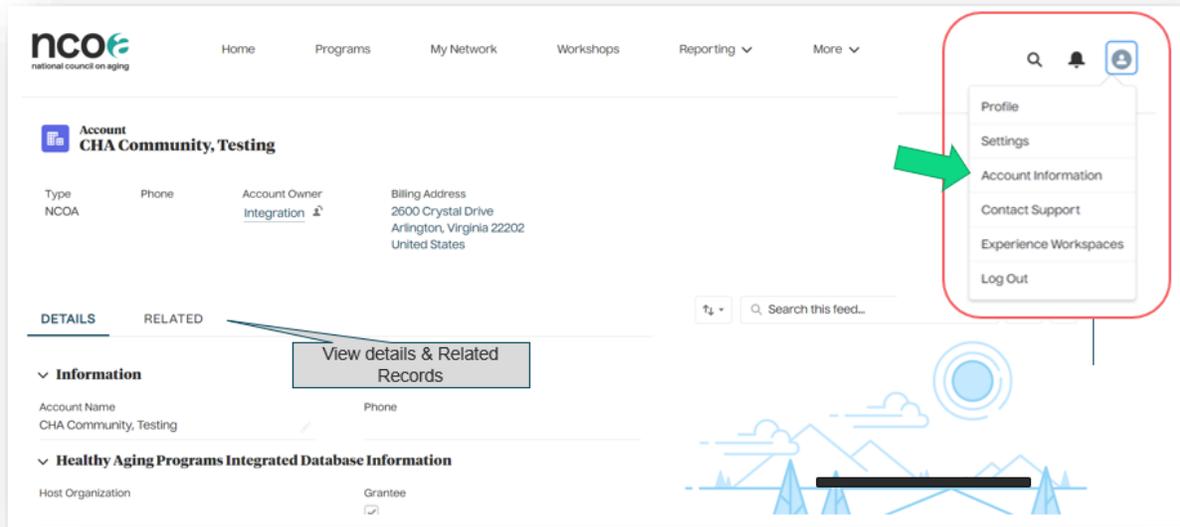
EMAIL HAPIDHelp@ncoa.org to request an account with the following information.

- Full Name
- Email Address
- 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](#)
 - **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 HapidHelp@ncoa.org 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:



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

[^] 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 <https://ncoa1.my.site.com/hapid/s/login/>

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.

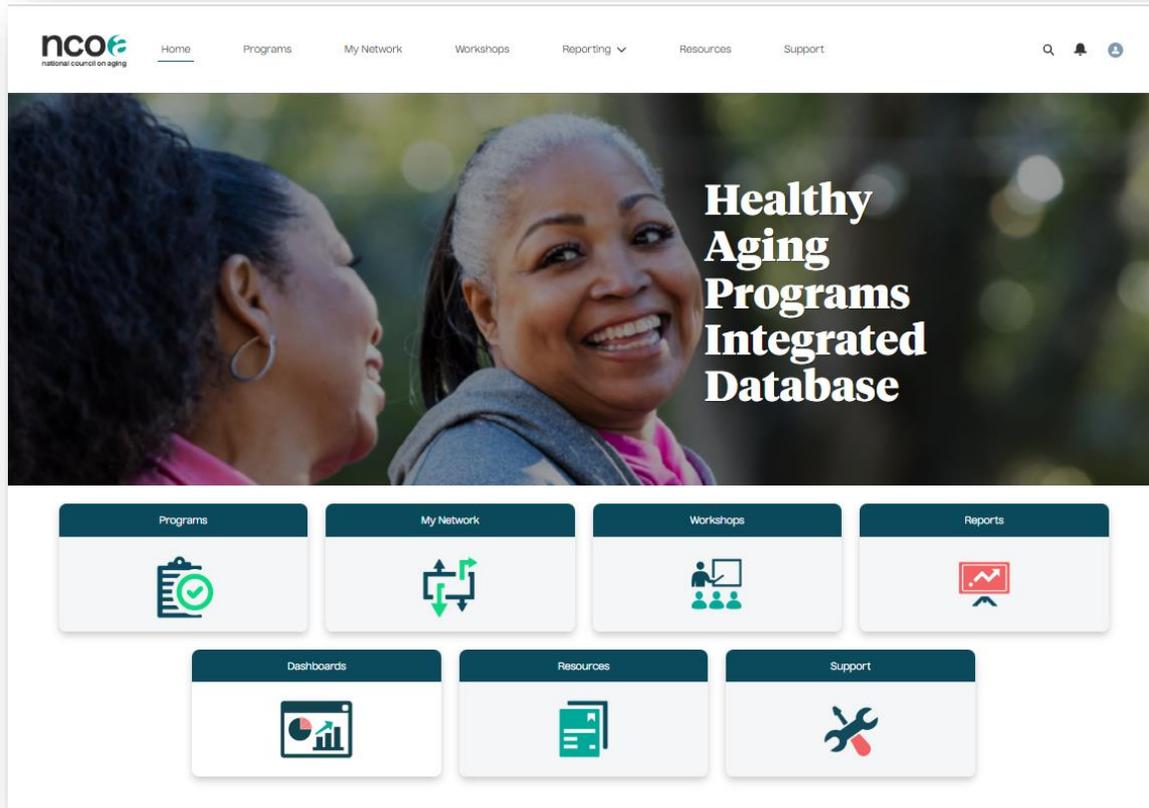
Upon login, users configured to enter data to more than one Grantee will be prompted to select the Grantee account they wish to associate a given workshop with.

- 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 Hapidhelp@ncoa.org
- Tips to prevent getting caught in loop:
 - 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:

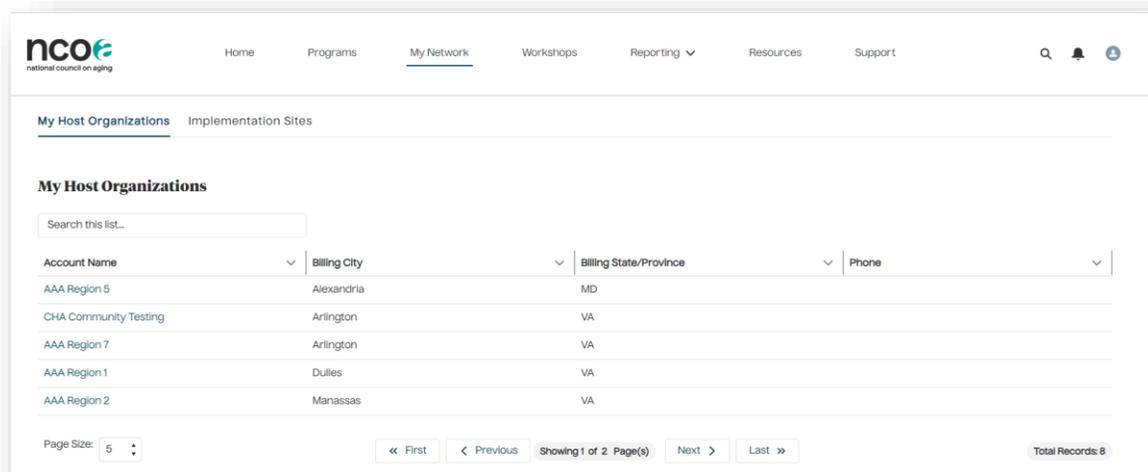


III. Network and Programs

A. My Network

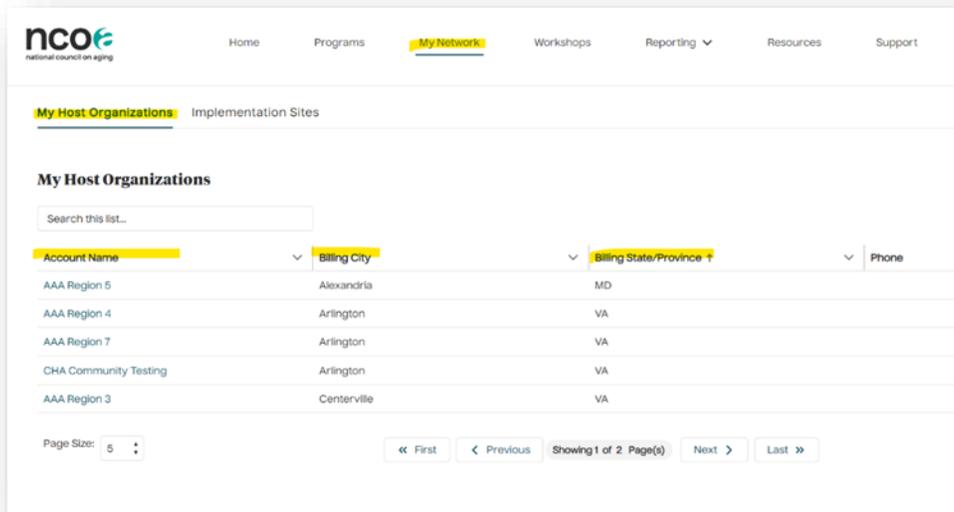
From the Home Page, click on the 'My Network' menu item. From My Network, you'll see two tabs listing the organizations that make your network.

- Host Organizations
- Implementation Sites

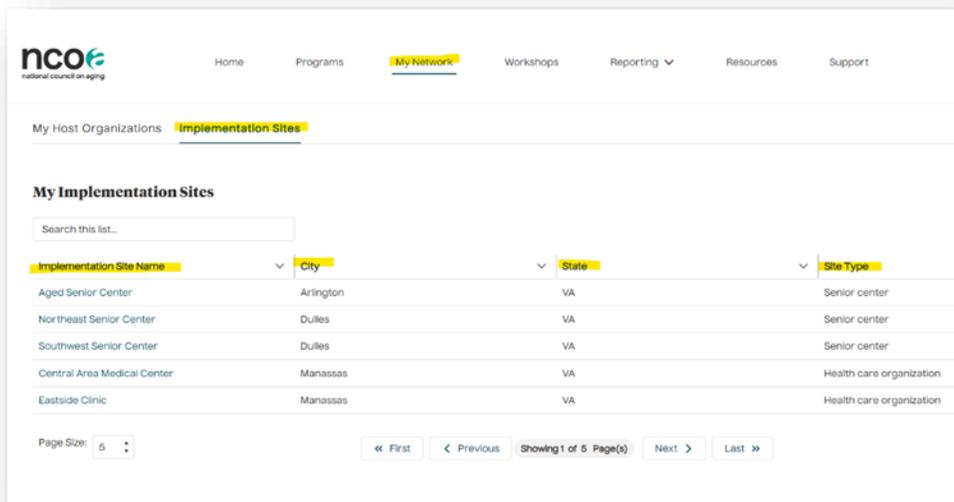


1. Sorting host organizations and implementation sites

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.



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.



2. Edit information of a Host Site, Implementation Site

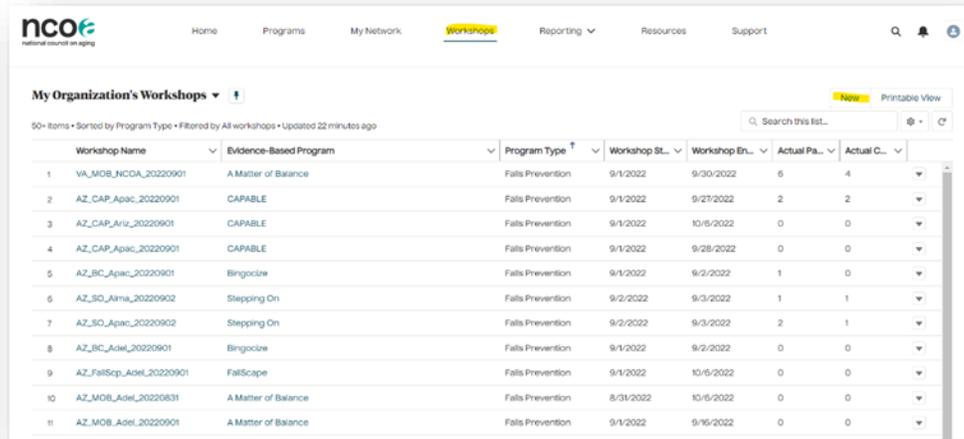
A. To edit a host, please submit a support ticket or email hapidhelp@ncoa.org. To edit an implementation site, please click on the Implementation Site from My Network page and make any necessary edits before saving changes.

3. Adding Host Organization.

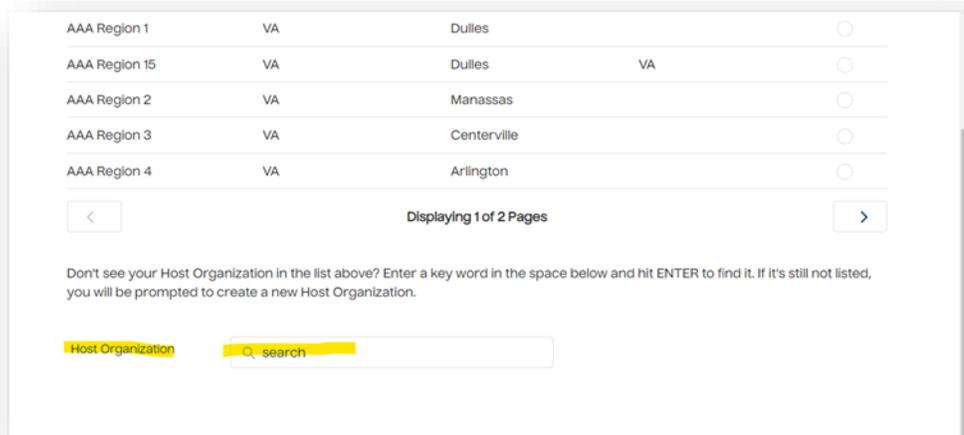
A. To limit the amount of duplicate host organizations that exist in HAPID, you must search for a host organization before it allows you to create one. This happens during the create/edit workshop phase in HAPID.

a. Creating a Host Organization for a new workshop:

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



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.



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.

Search Box

Account Name	Billing State/Province	Billing City	Billing Zip/Postal Code	Select
--------------	------------------------	--------------	-------------------------	--------

Don't see your Host Organization in the list above? Enter a key word in the space below and hit ENTER to find it. If it's still not listed, you will be prompted to create a new Host Organization.

Create 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.

Create Host Organization

* Account Name

* Street

* City

* State

* Zip Code

* Site Type

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

New Workshop

Hello Angelica TESTAcct, please follow the steps below to set up a Workshop for CHA Community Testing.

Please choose the Host Organization for this Workshop

Account Name	Billing State/Province	Billing City	Billing Zip/Postal Code	Select
CHA new site	VA	Arlington		<input checked="" type="radio"/>
AAA Region 1	VA	Dulles		<input type="radio"/>
AAA Region 15	VA	Dulles	VA	<input type="radio"/>
AAA Region 2	VA	Manassas		<input type="radio"/>
AAA Region 3	VA	Centerville		<input type="radio"/>

Displaying 1 of 2 Pages

Don't see your Host Organization in the list above? Enter a key word in the space below and hit ENTER to find it. If it's still not listed, you will be prompted to create a new Host Organization.

Host Organization

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.

The screenshot shows the NCOA (National Council on Aging) system interface. The top navigation bar includes Home, Programs, My Network, Workshops, Reporting, Resources, and Support. A red arrow points to the 'Edit' button in the top right corner of the workshop details page.

Workshop VA_AFEP_Aged_20240201

Workshop Start Date: 2/1/2024 | Workshop End Date: 2/3/2024 | Evidence-Based Program: Arthritis Foundation Exercise Program | Actual Participants: 0

Workshop Details:

- Evidence-Based Program: Arthritis Foundation Exercise Program
- Workshop Name: VA_AFEP_Aged_20240201
- Grantee: CHA Community Testing
- Host Organization: AAA Region 2
- Implementation Site: Aged Senior Center
- Program Type: CDSME
- Session 07: No
- NCOA Import ID: [Blank]

Survey Template:

- ACL CDSME 2023-26 STANDARD 6-session
- Survey Template Name: ACL CDSME 2023-26 STANDARD 6-session
- Workshop Start Date: 2/1/2024
- Workshop End Date: 2/3/2024
- Workshop Language: [Blank]
- Workshop Language Other: [Blank]
- Number of sessions: 12
- Number of Sessions for a Completer: 8

Workshop Participants (0)

Workshops to Program Targets (1)

Workshops L...	Funding Source	Grantee	Program
TS-07506	ACL CDSME G...	CHA CommunL...	[Dropdown]

Facilitator (1)

Facilitator Na...	First Name	Last Name	Email
A-28470	test	last33	[Dropdown]

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.

Workshop Editing Mode

Hello Angelica TESTAcct, please follow the steps below to set up a Workshop for CHA Community Testing.

Please choose the Host Organization for this Workshop

Account Name	Billing State/Province	Billing City	Billing Zip/Postal Code	Select
AAA Region 1	VA	Dulles		<input type="radio"/>
AAA Region 15	VA	Dulles	VA	<input type="radio"/>
AAA Region 2	VA	Manassas		<input type="radio"/>
AAA Region 3	VA	Centerville		<input type="radio"/>
AAA Region 4	VA	Arlington		<input type="radio"/>

< Displaying 1 of 2 Pages >

Don't see your Host Organization in the list above? Enter a key word in the space below and hit ENTER to find it. If it's still not listed, you will be prompted to create a new Host Organization.

Host Organization search

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 hapidhelp@ncoa.org 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.

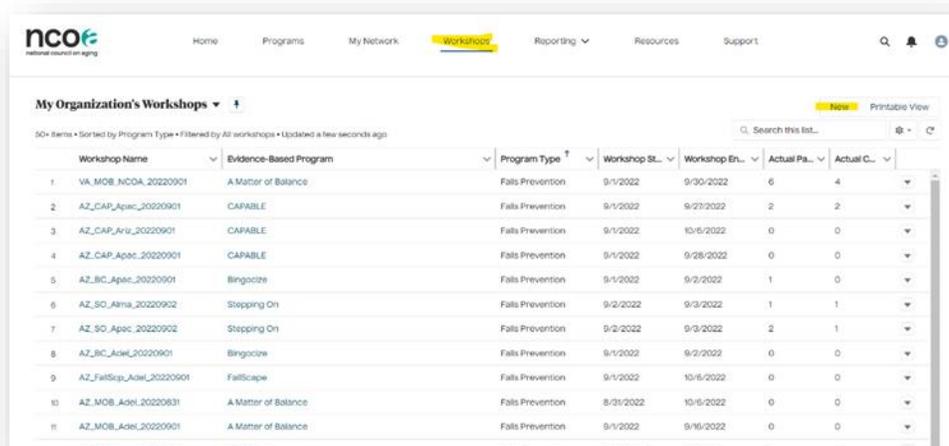
If the host organization you would like to delete is connected to a workshop, you must first change the Host Organization for the workshop that is currently tied to the Host Organization that you would like to delete. If you would like help changing the host organization for the workshop, please let 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.

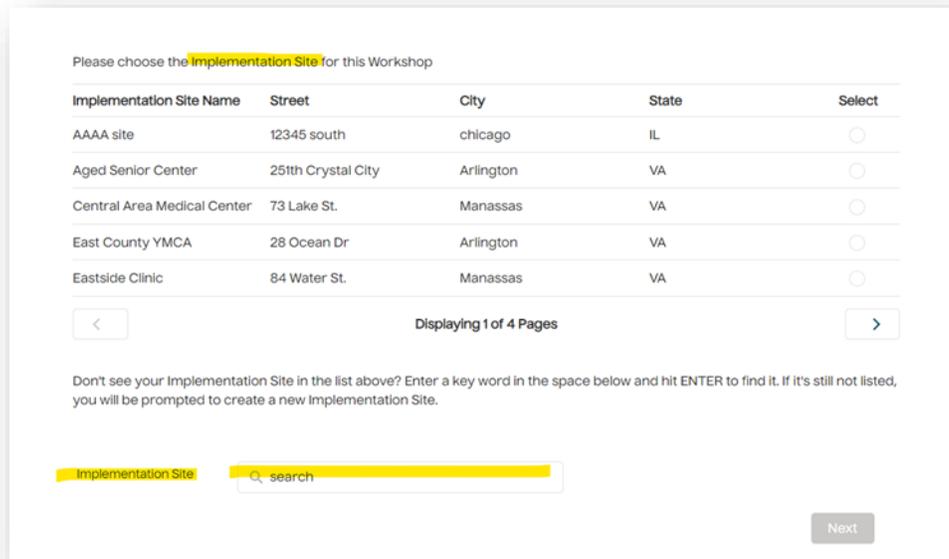
A. To limit the amount of duplicate implementation sites that exist in HAPID, you have to search for the Implementation Site before it will allow you to create one. This happens during the create/edit workshop phase in HAPID.

- a. Creating an Implementation Site for a new workshop:

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.**



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.

Search Box

Implementation Site Name	Street	City	State	Select
<p>Don't see your Implementation Site in the list above? Enter a key word in the space below and hit ENTER to find it. If it's still not listed, you will be prompted to create a new Implementation Site.</p> <p style="text-align: right;">Create New</p>				

- 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.

Create Implementation Site

* Implementation Site Name

* Site Type

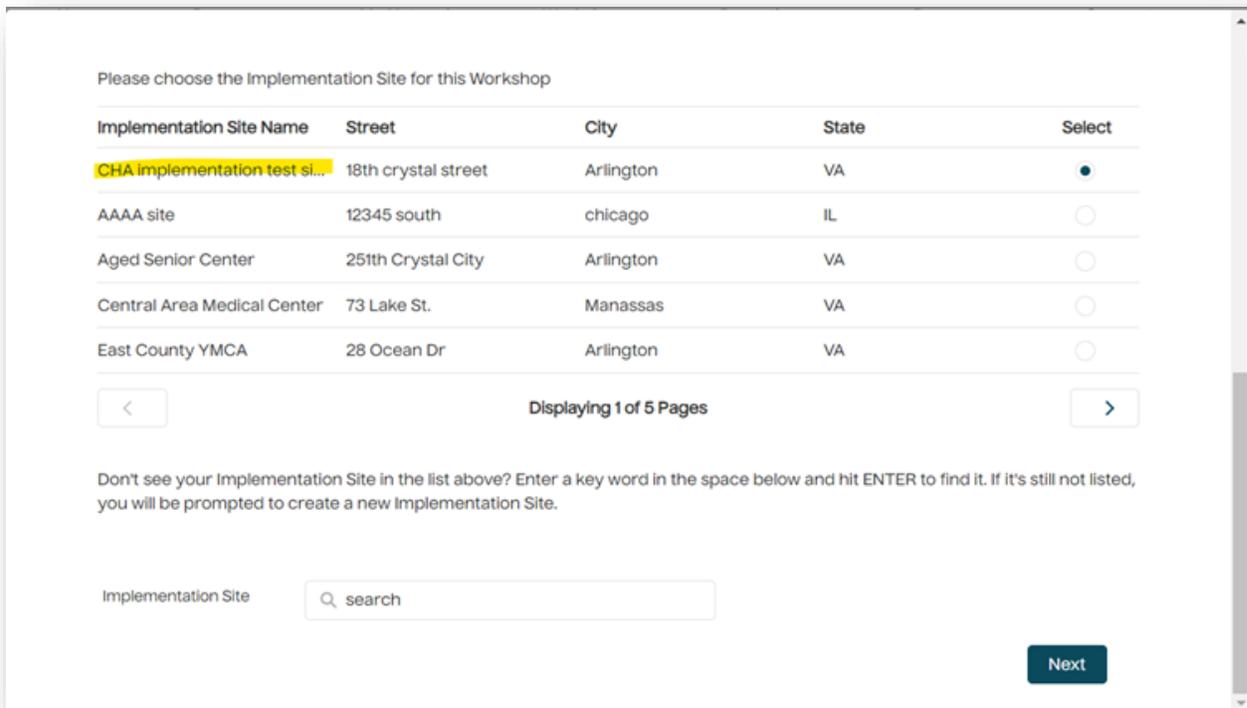
* Street

* City

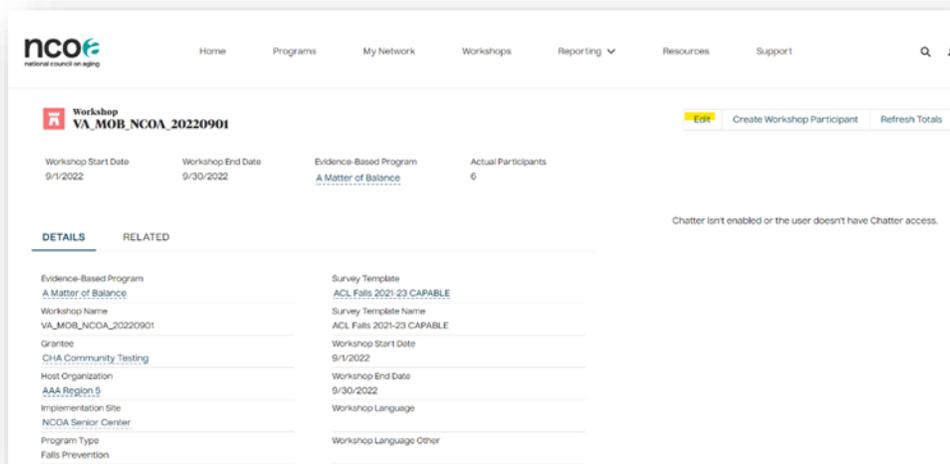
* State

* Zipcode

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



- 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.



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.

Please choose the **Implementation Site** for this Workshop

Implementation Site Name	Street	City	State	Select
NCOA Senior Center	251 18th Street	Arlington	VA	<input checked="" type="radio"/>
AAAA site	12345 south	chicago	IL	<input type="radio"/>
Aged Senior Center	251th Crystal City	Arlington	VA	<input type="radio"/>
Central Area Medical Center	73 Lake St.	Manassas	VA	<input type="radio"/>
CHA implementation test si...	18th crystal street	Arlington	VA	<input type="radio"/>

Displaying 1 of 5 Pages

Don't see your Implementation Site in the list above? Enter a key word in the space below and hit ENTER to find it. If it's still not listed, you will be prompted to create a new Implementation Site.

Implementation Site

Next

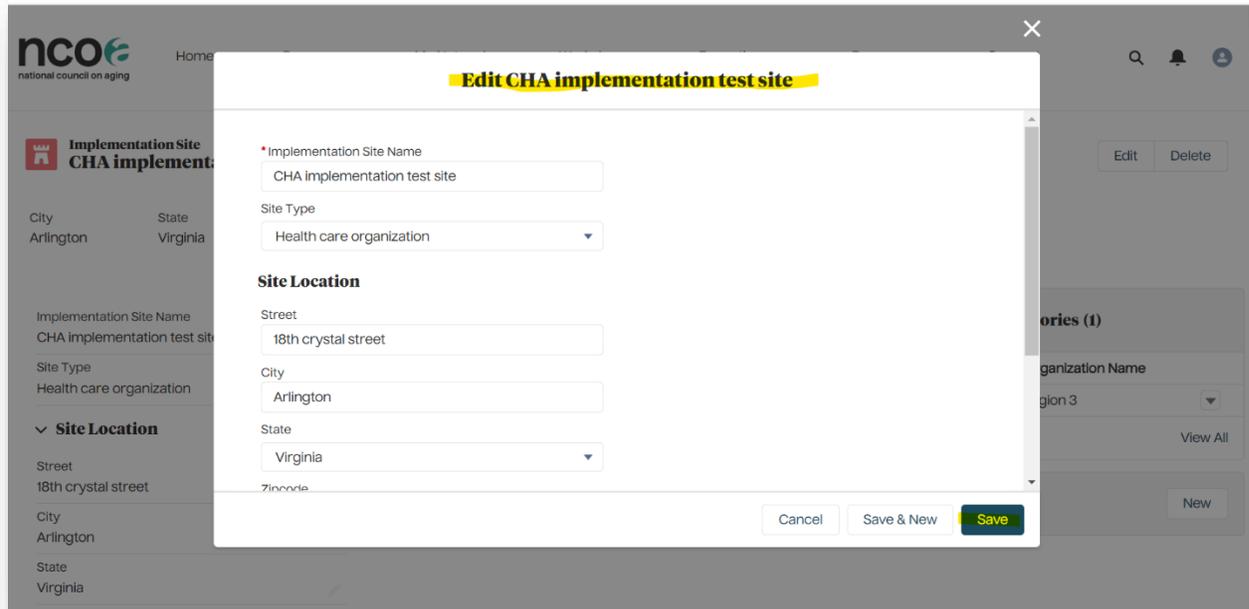
3. Please follow the same process as you see above for creating a new Implementation Site for a new workshop.

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.

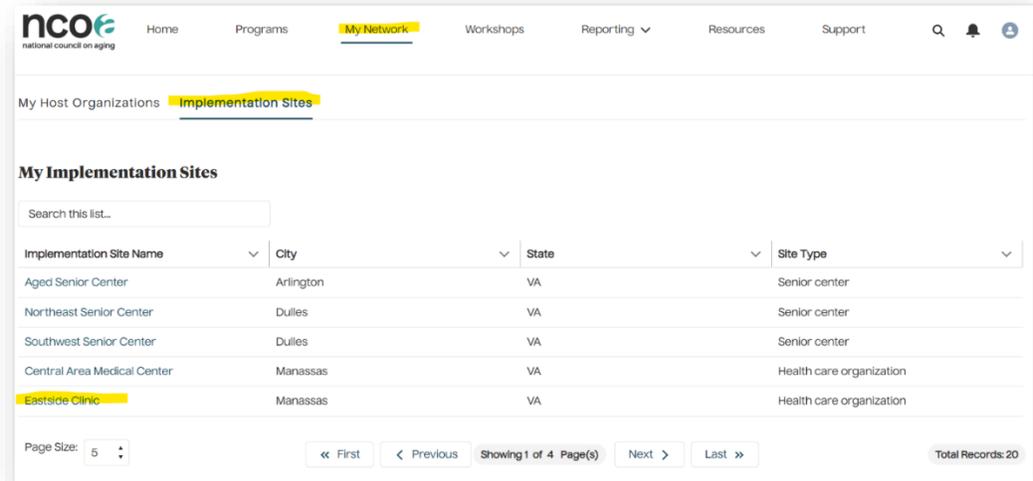
The screenshot shows the NCOA website interface. The navigation bar includes 'Home', 'Programs', 'My Network' (highlighted), 'Workshops', 'Reporting', 'Resources', and 'Support'. The main content area displays the details for an 'Implementation Site' named 'CHA implementation test site'. The site is located in Arlington, Virginia, and is a 'Health care organization'. The site type is 'Health care organization'. The site location is '18th crystal street', Arlington, Virginia. The site has 0 workshops. The site is part of the 'Implementation Site Directories (1)' and is associated with the 'Host Organization Name' 'AAA Region 3'. There are 'Edit' and 'Delete' buttons for the site. The 'Workshops (0)' section has a 'New' button.

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.

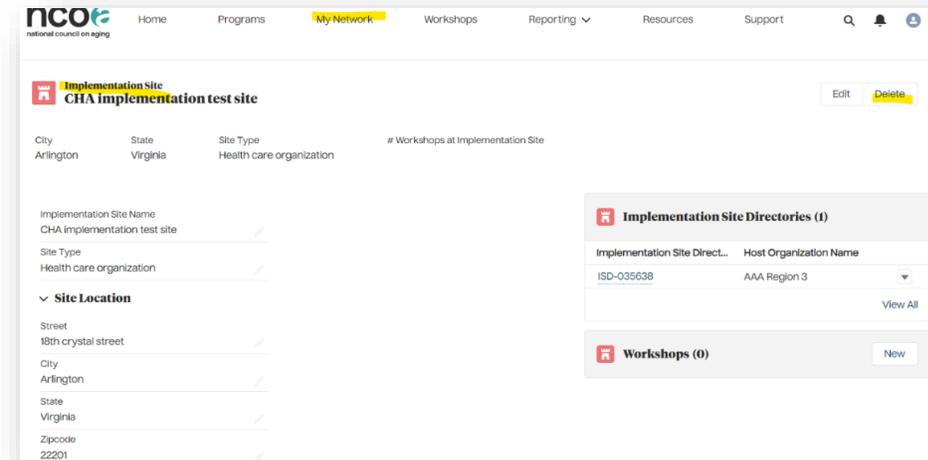


d. Deleting an Implementation Site:

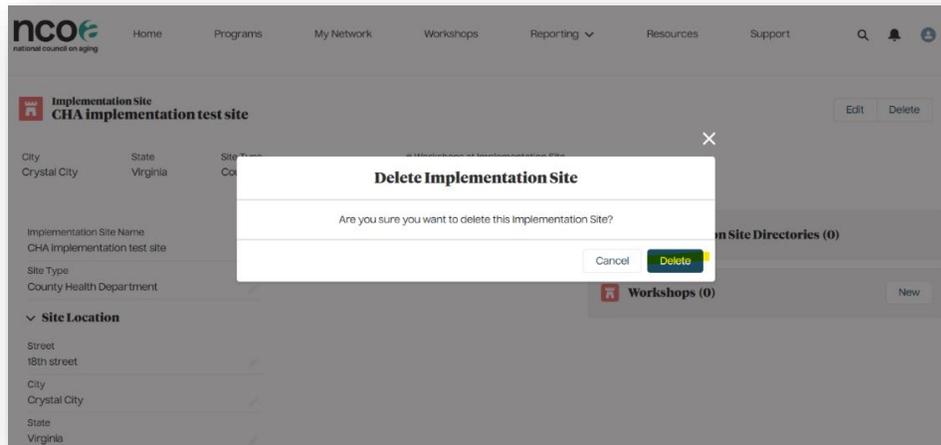
1. To delete an Implementation Site, please go to my network and click on the Implementation Sites tab.
2. Please select the Implementation Site that you would like to delete.



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.



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



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

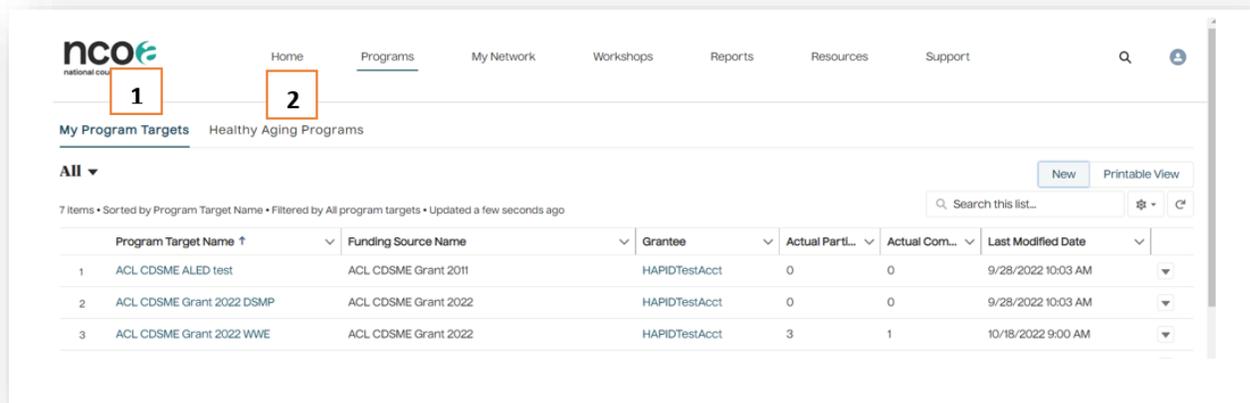
The 'Programs' page includes two tabs.

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.

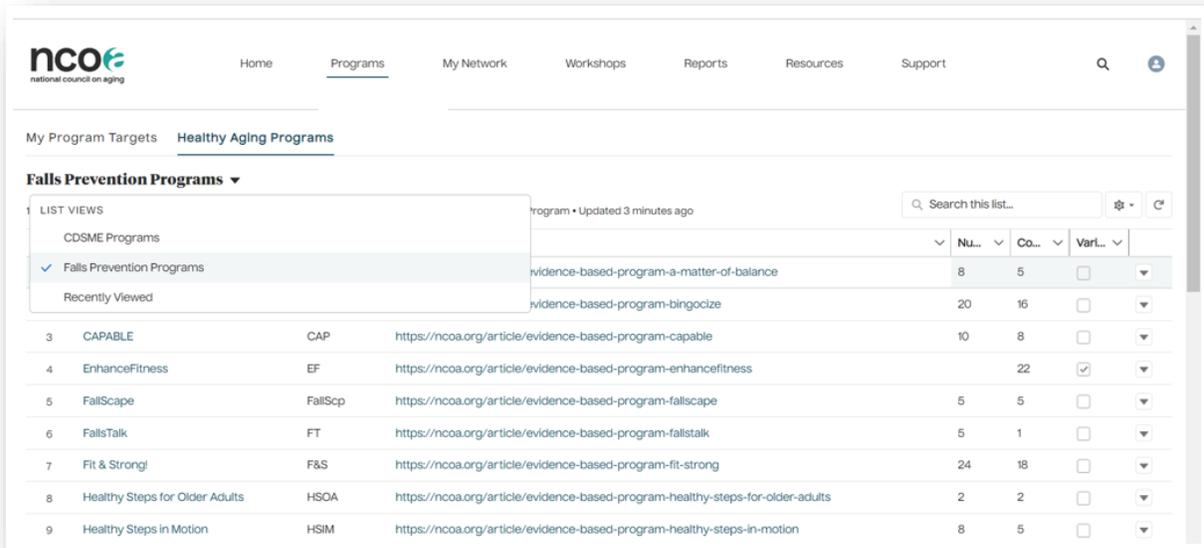
Review the targets shown for your active Cohort period when first logging on. If you have been using either legacy database (National CDSME or Falls Prevention) for many years outside your busy funding period, you may also see prior targets and workshops assigned to other sources.

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.



	Program Target Name ↑	Funding Source Name	Grantee	Actual Part...	Actual Com...	Last Modified Date
1	ACL CDSME ALED test	ACL CDSME Grant 2011	HAPIDTestAcct	0	0	9/28/2022 10:03 AM
2	ACL CDSME Grant 2022 DSMP	ACL CDSME Grant 2022	HAPIDTestAcct	0	0	9/28/2022 10:03 AM
3	ACL CDSME Grant 2022 WWE	ACL CDSME Grant 2022	HAPIDTestAcct	3	1	10/18/2022 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).



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
- 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
- ACL CDSME Grant 2021 WWE (self-directed)
- ACL Falls Prevention 2022 SAIL

See it!

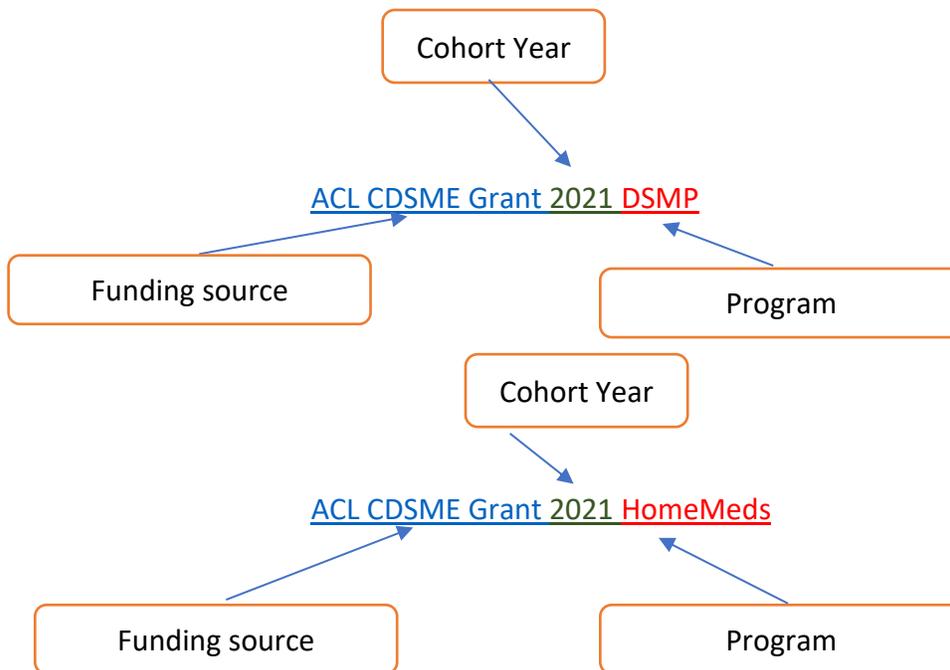
Check out this video to understand how Program Targets are organized in HAPID.

[How to Connect Workshops to Program Targets \(10 minutes\)](#)

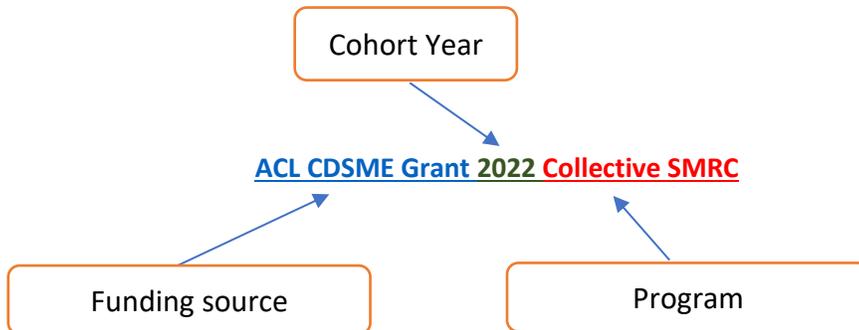
The following provides further examples of how your Program Targets may appear. When creating a workshop, you'll be prompted to select all the Program Targets to which you wish your workshop to be credited (ACL and non-ACL).

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.

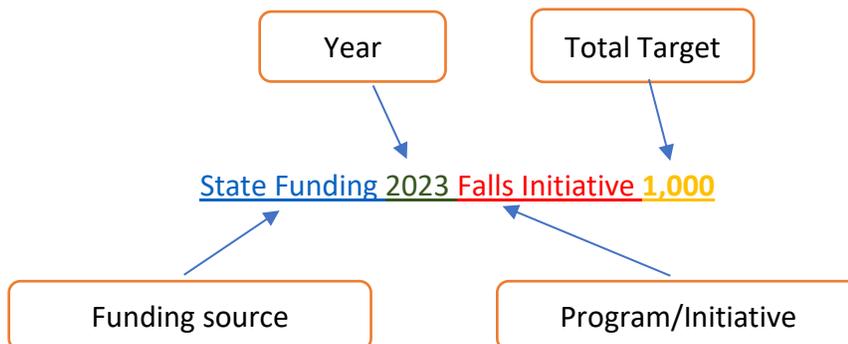


Example 2: If you have several SMRC, 6-session standard programs you're tracking toward your 2022 ACL grant, such as CPSMP and Tomando Control de Su Salud, DSMP, etc., NCOA would create a Collective target, but can use the term 'Standard' in the Program Target name to indicate that all SMRC, 6-session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

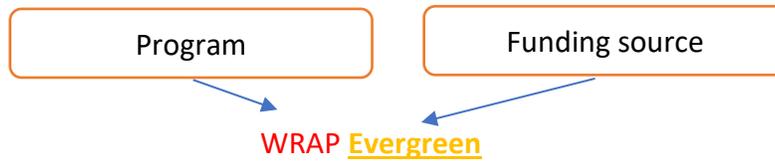


NON-ACL TARGETS

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

<input type="checkbox"/> Survey Template Name ↓	Details
1 <input type="checkbox"/> 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 ...
2 <input type="checkbox"/> 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 <input type="checkbox"/> 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 <input type="checkbox"/> 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 <input type="checkbox"/> 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 <input type="checkbox"/> 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 <input type="checkbox"/> 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 <input type="checkbox"/> 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 <input type="checkbox"/> 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 <input type="checkbox"/> 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 <input type="checkbox"/> 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 <input type="checkbox"/> 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 <input type="checkbox"/> 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 <input type="checkbox"/> 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

<input type="checkbox"/> Survey Template Name ↓	Details
1 <input type="checkbox"/> ACL CDSME Hx 2010-18	ACL CDSME Participant Survey template for migration of historical workshops, 2010 to 2018.
2 <input type="checkbox"/> 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 <input type="checkbox"/> 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 <input type="checkbox"/> 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 <input type="checkbox"/> 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 <input type="checkbox"/> ACL CDSME 2019-22 STANDARD 6-session	ACL CDSME Participant Survey OMB Control No 0985-0036 Exp. Date 11/22/2022.
7 <input type="checkbox"/> 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 <input type="checkbox"/> 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 [here](#).

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.

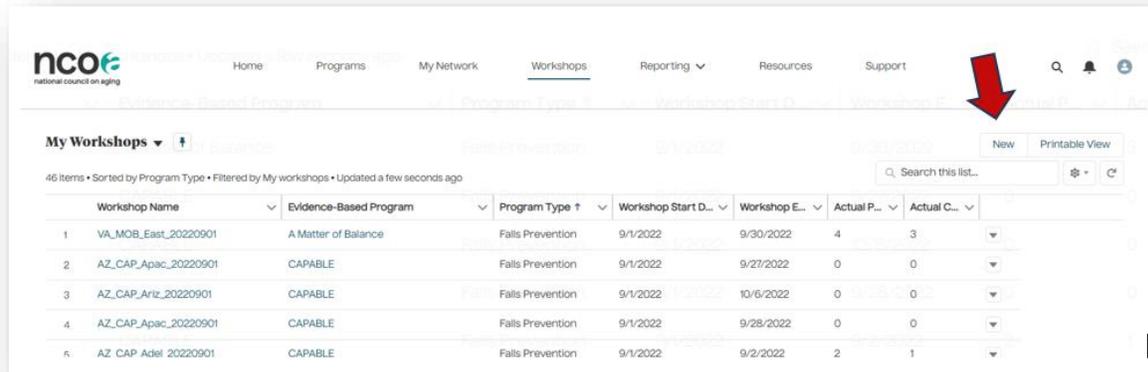
Customizing Surveys: The new database allows users to clone and modify surveys to suit their needs. Please submit a Support Ticket if you wish to have questions added.

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 \(11 minutes\)](#)
- [Selecting the Right CDSME Survey Templates on Workshops Before Adding Participants \(10 minutes\)](#)

IV. Creating a Workshop

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



The screenshot shows the 'My Workshops' page in the NCOA system. The page has a navigation bar with 'Home', 'Programs', 'My Network', 'Workshops', 'Reporting', 'Resources', and 'Support'. Below the navigation bar, there are tabs for 'Evidence-Based Programs', 'Program Type', 'Workshop Start Date', and 'Workshop End Date'. The main content area displays a table of workshops with columns for 'Workshop Name', 'Evidence-Based Program', 'Program Type', 'Workshop Start Date', 'Workshop End Date', 'Actual P...', and 'Actual C...'. A red arrow points to the 'New' button in the top right corner of the table area.

Workshop Name	Evidence-Based Program	Program Type	Workshop Start Date	Workshop End Date	Actual P...	Actual C...
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
3 AZ_CAP_Ariz_20220901	CAPABLE	Falls Prevention	9/1/2022	10/6/2022	0	0
4 AZ_CAP_Apac_20220901	CAPABLE	Falls Prevention	9/1/2022	9/28/2022	0	0
5 AZ_CAP_Adel_20220901	CAPABLE	Falls Prevention	9/1/2022	9/2/2022	2	1

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 [page](#) or view one of the [video tutorials](#), for additional guidance.

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

Other fields on workshop modal:

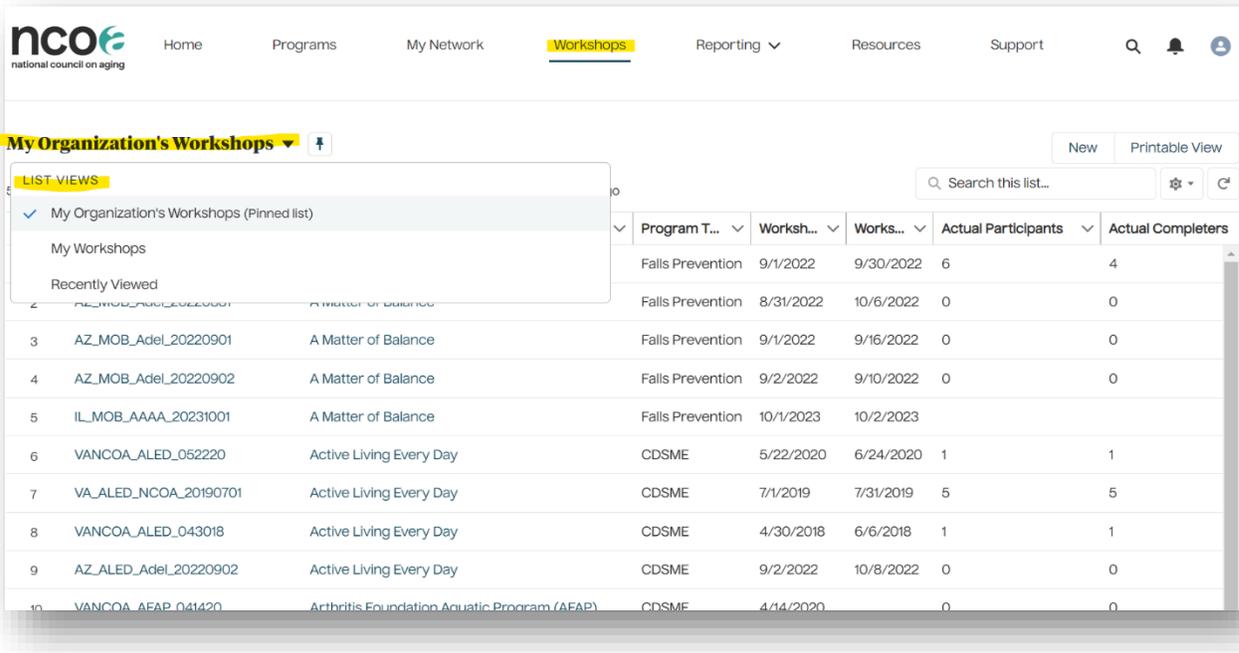
- The WORKSHOP START and END DATES are required fields for most, but not all, workshop types.
- Select the Program Delivery approach. This is currently required for CDSME and is optional for Falls Prevention grantees.
 - Once Falls Prevention forms are released in June 2024, this field will become required 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.



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

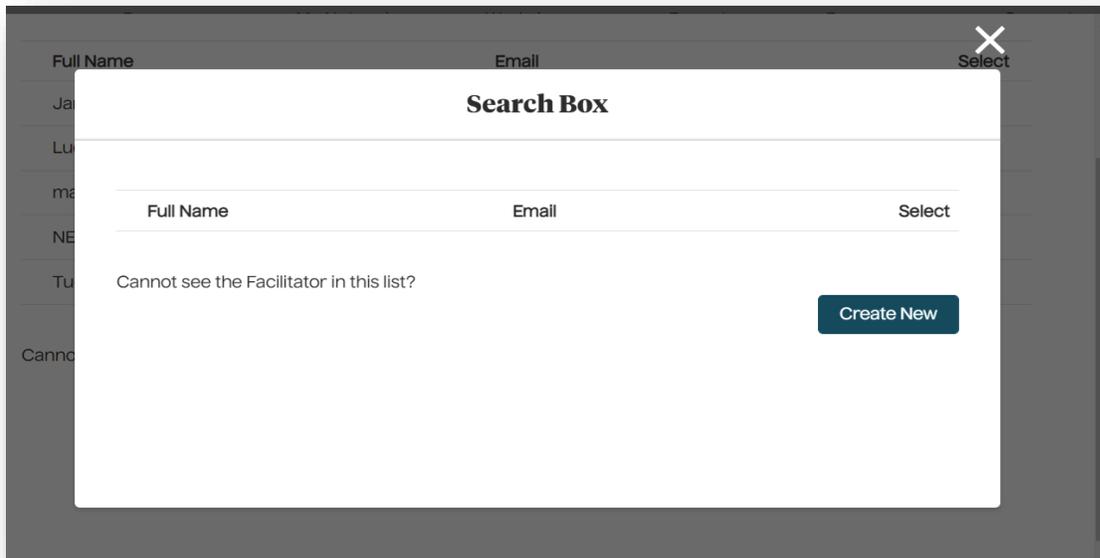
When adding a workshop, you'll come to a window where you can add as many Facilitators as are associated with the workshop. We will refer to this as your 'Facilitator Directory'.

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.



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:

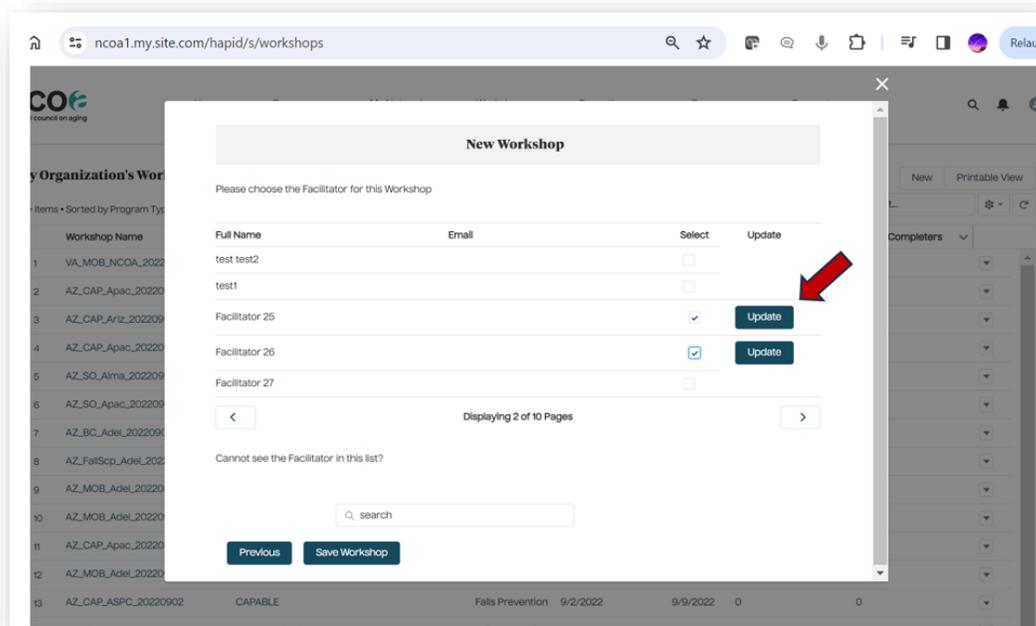
- CDSME users with accounts in only CDSME will NOT see any Facilitators here until you add/create them yourselves.
- Only users whose Grantee/organization had an account in the Falls database will see those Falls-related Facilitators listed here.
- CDSME users will need to add Facilitators to all their 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.

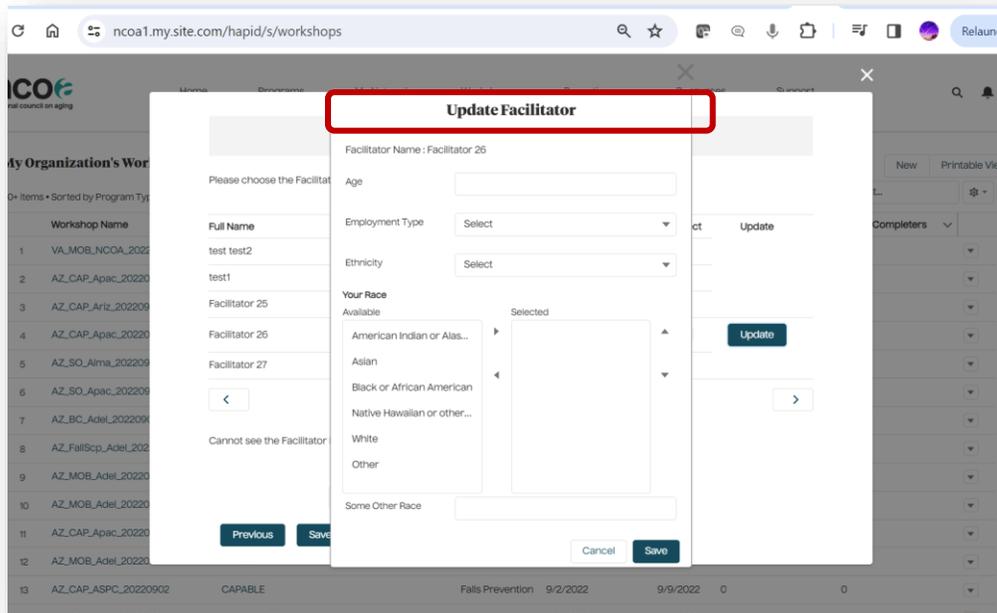
Why the limitation? Facilitator information was captured as actual records in the legacy Falls Database, whereas in CDSME, Facilitators were documented in text fields for each workshop in the legacy CDSME Database. Hence, Facilitators from Falls were migrated as profiles/records, but the same cannot be done for CDSME Facilitators.

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

You cannot DELETE Facilitator records.

You cannot 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 HapidHelp@ncoa.org.





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 HapidHelp@ncoa.org with your request.

ncoa1.my.site.com/hapid/s/epd-workshop/a133i000001kBTCAA2/azmobadel20220902

Workshop
AZ_MOB_Adel_20220902

Edit Create Workshop 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
Workshop Name: AZ_MOB_Adel_20220902
Survey Template Name: ACL Falls 2021-23 8-session
Grantee: HAPIDTestAcct
Workshop Start Date: 9/2/2022
Host Organization: Arizona Living Well Institute
Workshop End Date: 9/10/2022
Implementation Site: Adelante Health Care Center
Workshop Language:
Program Type: Falls Prevention
Session 07: No
Workshop Language Other:
NCOA Import ID:
Number of sessions:
Number of Sessions for a Completer: 3
Fee:
Bingocize Unit:
Notes:
Bingocize Mobile App:
Program Delivery:
Was this a Wisdom Warriors program:

Workshop Participants (1)

Workshop Pa...	Completer or ...	Session Count	Admin Assigne...
test Q	Enrolled	0	<input type="checkbox"/>

View All

Workshops to Program Targets (1)

Workshops L...	Funding Source	Grantee	Program
TS-061934	Centers for Dis...	HAPIDTestAcct	

View All

Facilitator (1)

Facilitator Na...	First Name	Last Name	Email
A-22963	Tuesday	Test	test@email.co

View All

View All

Facilitator (1)

Facilitator Na...	First Name	Last Name	Email	
A-22963	Tuesday	Test	test@ema	 View All Edit

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.

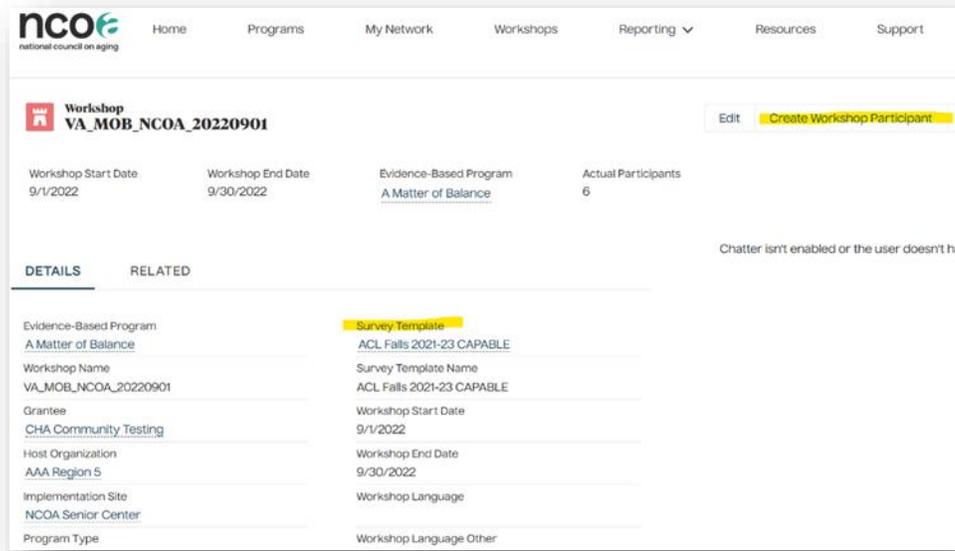
[The Many Places to Find Your Facilitator Data in HAPID \(8 minutes\)](#)

[How to Add Facilitators to Workshop & Edit Them \(7 minutes\)](#)

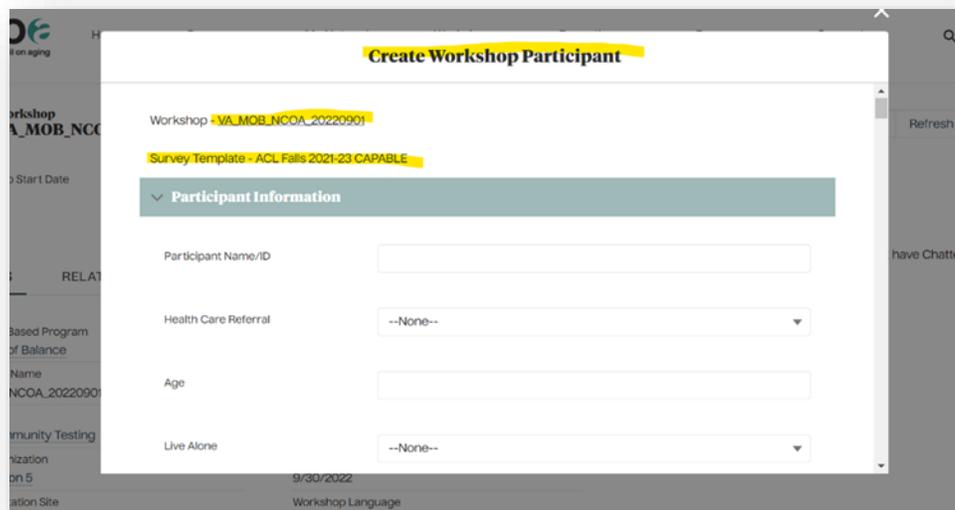
[How to Skip Facilitators If My Program Doesn't Use Them \(3 minutes\)](#)

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.



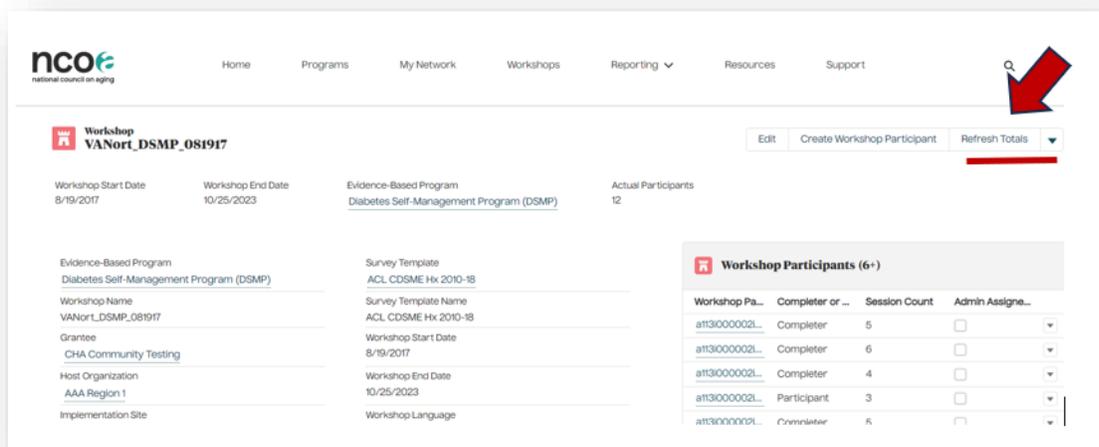
3. A pop-up will open allowing you to create workshop participant. It will also show you the workshop this is for as well as the survey template being used.



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.



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.

6. Once you find the participant for which you would like to input data, you can EDIT from there.

[Home](#)
[Programs](#)
[My Network](#)
[Workshops](#)
[Reporting](#)
[Resources](#)
[Support](#)

Workshop
VANort_CDSMP_041817

[Edit](#)
[Create Workshop Participant](#)
[Refresh Totals](#)

Workshop Start Date: 4/18/2017
 Workshop End Date: 5/23/2017
 Evidence-Based Program: Chronic Disease Self-Management Program (CDSMP)
 Actual Participants: 16

Evidence-Based Program Chronic Disease Self-Management Program (CDSMP)	Survey Template ACL CDSME Hx 2010-18
Workshop Name VANort_CDSMP_041817	Survey Template Name ACL CDSME Hx 2010-18
Grantee CHA Community Testing	Workshop Start Date 4/18/2017
Host Organization AAA Region 1	Workshop End Date 5/23/2017
Implementation Site Northeast Senior Center	Workshop Language English
Program Type CDSME	Workshop Language Other (empty)
Session 0? No	Number of sessions (empty)
NCOA Import ID a19f200002KJDSAA4	Number of Sessions for a Completer 4
Fee (empty)	Bingocize Unit (empty)

Workshop Participants (6)

Workshop Pa...	Completer or ...	Session Count	Admin Assigne...
a1131000002...	Completer	5	<input type="checkbox"/>
a1131000002...	Participant	3	<input type="checkbox"/>
a1131000002...	Completer	4	<input type="checkbox"/>
a1131000002...	Completer	5	<input type="checkbox"/>
a1131000002...	Completer	5	<input type="checkbox"/>
a1131000002...	Completer	5	<input type="checkbox"/>

[View All](#)

Workshops to Program Targets (1)

Workshops t...	Funding Source	Grantee	Program
TS-045114	ACL CDSME G...	CHA Communi...	Chronic 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.

Create Workshop Participant

Workshop - [WA_MOB_Tues_20231126](#)

Survey Template - ACL Falls 2021-23 8-session

▼ **Participant Information**

Participant ID

Health Care Referral --None-- ▼

Age

Create Workshop Participant

Workshop - [VA_MOB_NCOA_20220901](#)

Survey Template - ACL Falls 2021-23 CAPABLE

▼ **Participant Information**

Participant Name/ID

Health Care Referral

Age

Live Alone

Gender

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...	Admin Assigned Complet...
1	a1131000002Gos	Completer	5	<input type="checkbox"/>	<input type="checkbox"/>
2	a1131000002Goi	Completer	8	<input type="checkbox"/>	<input type="checkbox"/>
3	a1131000002Gox	Participant	4	<input type="checkbox"/>	<input type="checkbox"/>
4	a1131000002Gp2	Completer	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>
5	Test	Enrolled	0	<input type="checkbox"/>	<input type="checkbox"/>
6	CompleterTest	Completer	5	<input type="checkbox"/>	<input type="checkbox"/>
7	NonCompl Test	Participant	4	<input type="checkbox"/>	<input type="checkbox"/>

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

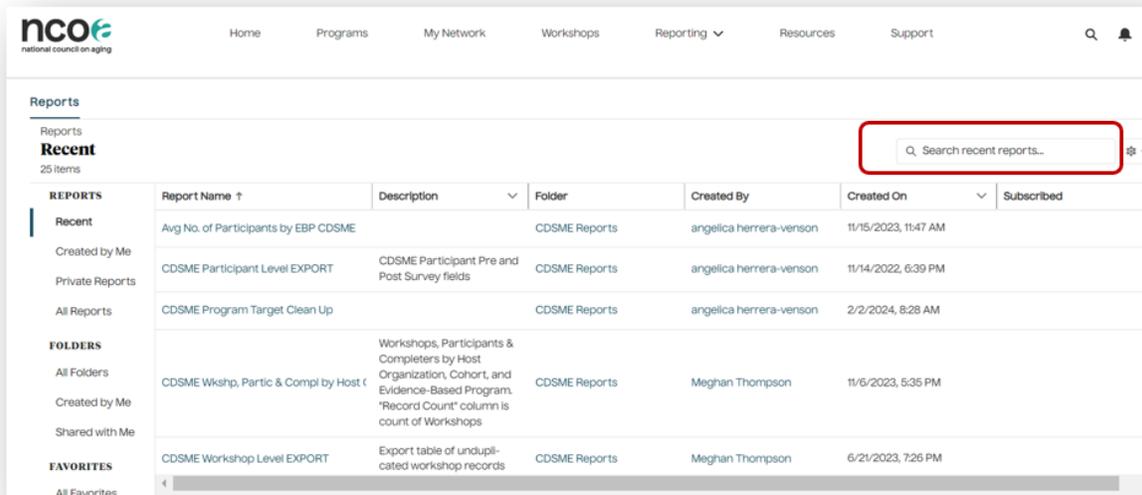
1. To access Reports, go to **Home → Reporting → Reports**
2. Next, Click on **All Folders**. [**IMPORTANT**: *It is best to find the report you need by first going to the subfolder first. If you go straight into the Reports listing, you're going to encounter hundreds of reports, including all of those 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

The screenshot shows the NCOE Reports page. The top navigation bar includes Home, Programs, My Network, Workshops, Reporting, Resources, and Support. The main content area is titled 'Reports' and shows a list of folders under 'All Folders'. A table lists the following folders:

REPORTS	Name	Created By	Created On	Last Modified By	Last Modified Date
Recent	CDSME Reports	angelica herrera-venson	6/30/2023, 2:09 PM	angelica herrera-venson	6/30/2023, 3:54 PM
Created by Me	Dashboard Reports	angelica herrera-venson	6/30/2023, 2:11 PM	angelica herrera-venson	6/30/2023, 3:54 PM
Private Reports	Facilitator Data	angelica herrera-venson	8/9/2023, 9:38 AM	angelica herrera-venson	8/9/2023, 9:38 AM
All Reports	Falls Prevention Reports	angelica herrera-venson	6/30/2023, 2:10 PM	angelica herrera-venson	6/30/2023, 3:55 PM
FOLDERS	Network Data	angelica herrera-venson	3/4/2024, 8:57 PM	angelica herrera-venson	3/4/2024, 8:57 PM
All Folders					
Created by Me					
Shared with Me					

A blue arrow points to the 'All Folders' link in the left sidebar.

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.



B. Listing of Available Reports

The following provides an 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 hapidhelp@ncoa.org.

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 [here](#), 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 \(13 minutes\)](#)

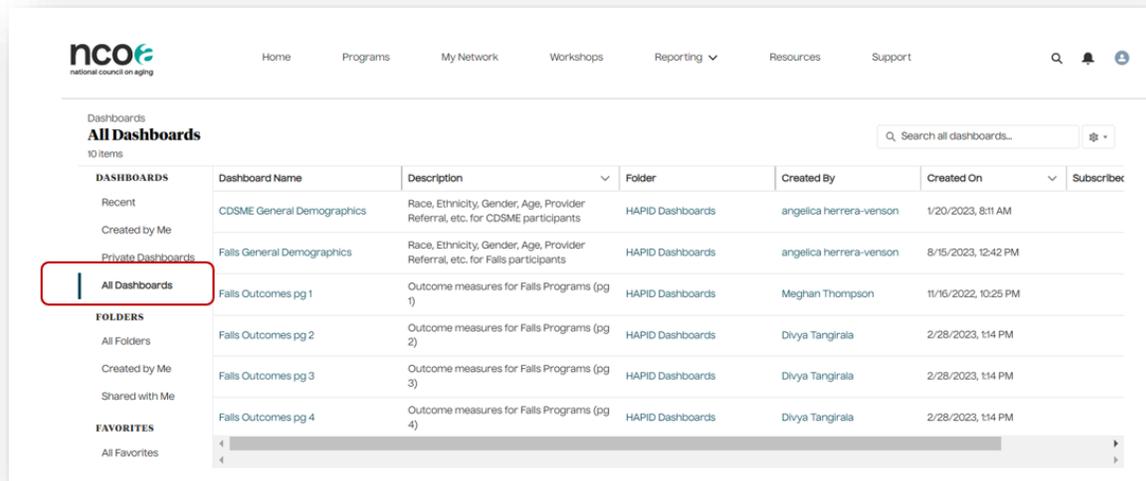
D. Dashboards

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)



The screenshot shows the HAPID Dashboards interface. At the top, there is a navigation bar with the ncofe logo and menu items: Home, Programs, My Network, Workshops, Reporting, Resources, and Support. Below the navigation bar, the 'Dashboards' section is titled 'All Dashboards' and shows 10 items. A search bar is present with the text 'Search all dashboards...'. The main content is a table with the following columns: Dashboard Name, Description, Folder, Created By, Created On, and a Subscribe button. The table lists several dashboards, including 'CDSME General Demographics', 'Falls General Demographics', and 'Falls Outcomes pg 1' through 'pg 4'. The 'All Dashboards' link in the left sidebar is highlighted with a red box.

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-venson	1/20/2023, 8:11 AM	
Created by Me	Falls General Demographics	Race, Ethnicity, Gender, Age, Provider Referral, etc. for Falls participants	HAPID Dashboards	angelica herrera-venson	8/15/2023, 12:42 PM	
Private Dashboards	Falls Outcomes pg 1	Outcome measures for Falls Programs (pg 1)	HAPID Dashboards	Meghan Thompson	11/16/2022, 10:25 PM	
FOLDERS	Falls Outcomes pg 2	Outcome measures for Falls Programs (pg 2)	HAPID Dashboards	Divya Tangirala	2/28/2023, 1:14 PM	
All Folders	Falls Outcomes pg 3	Outcome measures for Falls Programs (pg 3)	HAPID Dashboards	Divya Tangirala	2/28/2023, 1:14 PM	
Created by Me	Falls Outcomes pg 4	Outcome measures for Falls Programs (pg 4)	HAPID Dashboards	Divya Tangirala	2/28/2023, 1:14 PM	
Shared with Me						
FAVORITES						
All Favorites						

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-self-management-education>

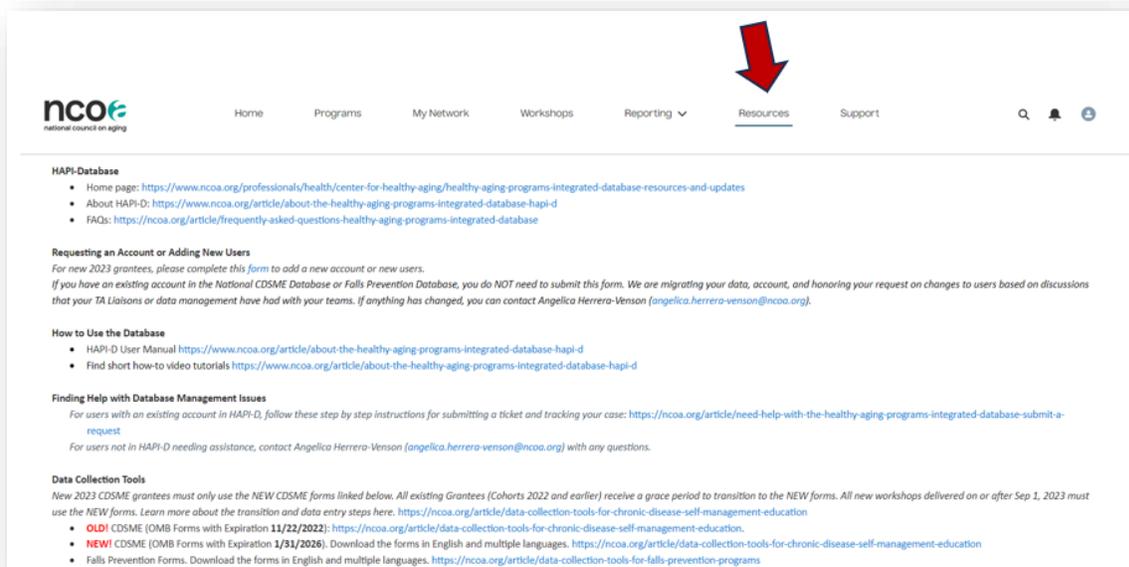
Falls Prevention:

<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.



The screenshot shows the NCOA website's navigation menu with the 'Resources' tab highlighted by a red arrow. Below the navigation bar, the 'Resources' page content is displayed, featuring several sections with links to various resources:

- HAPI-Database**
 - Home page: <https://www.ncoa.org/professionals/health/center-for-healthy-aging/healthy-aging-programs-integrated-database-resources-and-updates>
 - About HAPI-D: <https://www.ncoa.org/article/about-the-healthy-aging-programs-integrated-database-hapi-d>
 - FAQs: <https://ncoa.org/article/frequently-asked-questions-healthy-aging-programs-integrated-database>
- Requesting an Account or Adding New Users**

For new 2023 grantees, please complete this form to add a new account or new users. [https://www.ncoa.org/article/requesting-an-account-or-adding-new-users](#)

If you have an existing account in the National CDSME Database or Falls Prevention Database, you do NOT need to submit this form. We are migrating your data, account, and honoring your request on changes to users based on discussions that your TA Liaisons or data management have had with your teams. If anything has changed, you can contact Angelica Herrera-Venson (angelica.herrera-venson@ncoa.org).
- How to Use the Database**
 - HAPI-D User Manual <https://www.ncoa.org/article/about-the-healthy-aging-programs-integrated-database-hapi-d>
 - Find short how-to video tutorials <https://www.ncoa.org/article/about-the-healthy-aging-programs-integrated-database-hapi-d>
- 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: <https://ncoa.org/article/need-help-with-the-healthy-aging-programs-integrated-database-submit-a-request>

For users not in HAPI-D needing assistance, contact Angelica Herrera-Venson (angelica.herrera-venson@ncoa.org) with any questions.
- Data Collection Tools**

New 2023 CDSME grantees must only use the NEW CDSME forms linked below. All existing Grantees (Cohorts 2022 and earlier) receive a grace period to transition to the NEW forms. All new workshops delivered on or after Sep 1, 2023 must use the NEW forms. Learn more about the transition and data entry steps here: <https://ncoa.org/article/data-collection-tools-for-chronic-disease-self-management-education>

 - OLD!** CDSME (OMB Forms with Expiration **11/22/2022**): <https://ncoa.org/article/data-collection-tools-for-chronic-disease-self-management-education>.
 - NEW!** CDSME (OMB Forms with Expiration **11/31/2026**). Download the forms in English and multiple languages. <https://ncoa.org/article/data-collection-tools-for-chronic-disease-self-management-education>
 - Falls Prevention Forms. Download the forms in English and multiple languages. <https://ncoa.org/article/data-collection-tools-for-falls-prevention-programs>

HAPI-Database

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

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: <https://www.ncoa.org/article/how-to-use-the-healthy-aging-programs-integrated-database-hapi-d>

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: <https://ncoa.org/article/need-help-with-the-healthy-aging-programs-integrated-database-submit-a-request>

For users not in HAPI-D needing assistance, contact HapidHelp (hapidhelp@ncoa.org) with any questions.

Data Collection Tools

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

Data Importing and API

Importing data using CDSME or Falls Prevention Data templates into legacy databases via MoveIt 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:

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

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. • [Tip Sheet: Collecting Participant and Partner Data for ACL Chronic Disease Self-Management and Falls Prevention Evidence-Based Programs](#)
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 [here](#).

Tracking Completers

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

Program Specific Data Entry Guidance

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

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.

Contact Customer Support
Tell us how we can help.

* Contact Name
Sarah Jones - Super User

* Case type
--None--

* Program Type

Available	Chosen
CDSME	
Falls	
N/A	

* Subject

* Description

- 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.

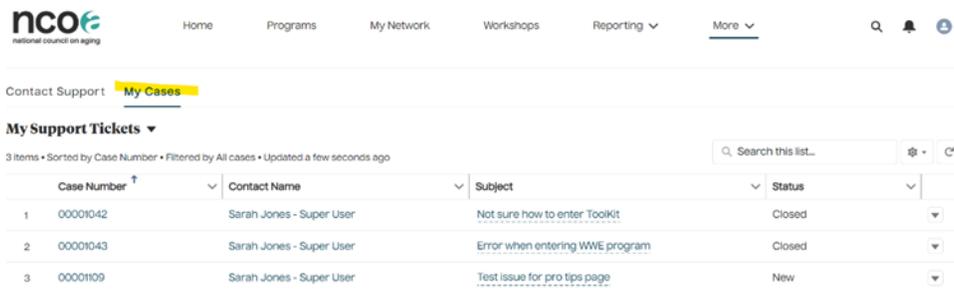
Your case was created.

Thank you for your Support Ticket. Someone will contact you shortly

Case summary

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.



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 HapidHelp@ncoa.org.

