national council on aging

Preparing Semi-Annual Data Reports

For ACL CDSME Grantees

Administration for Community Living Chronic Disease Self-Management Education (CDSME) Grantees submit progress reports on a semi-annual schedule. Each semi-annual report requires inclusion of "Appendix A," a chart showing the participants and completers entered into the National CDSME Database. Follow the instructions below to create "Appendix A" from Power BI.

Note: If your organization has multiple CDSME grants from the Administration for Community Living, contact Kathleen Zuke (Kathleen.zuke@ncoa.org) for a data table allocated by grant year. This cannot be generated from Power BI.

To develop Appendix A, you will create and save two (2) PDFs from Power BI:

1. Log in to Power BI. (Each grantee has at least one user in Power BI. Contact binod.suwal@ncoa.org if you don't know how to log in.)

2. Select the "Overall Reach" tab.

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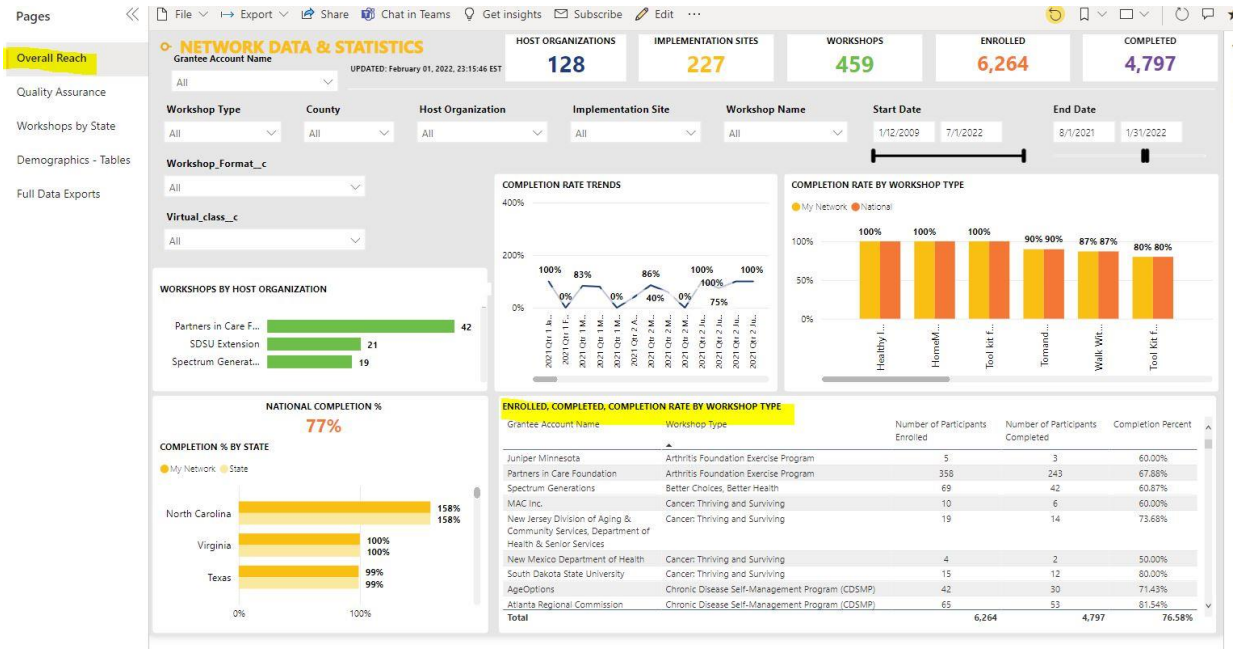
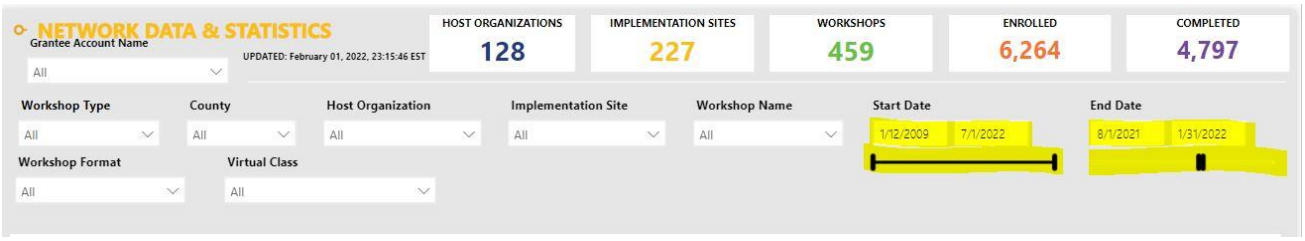
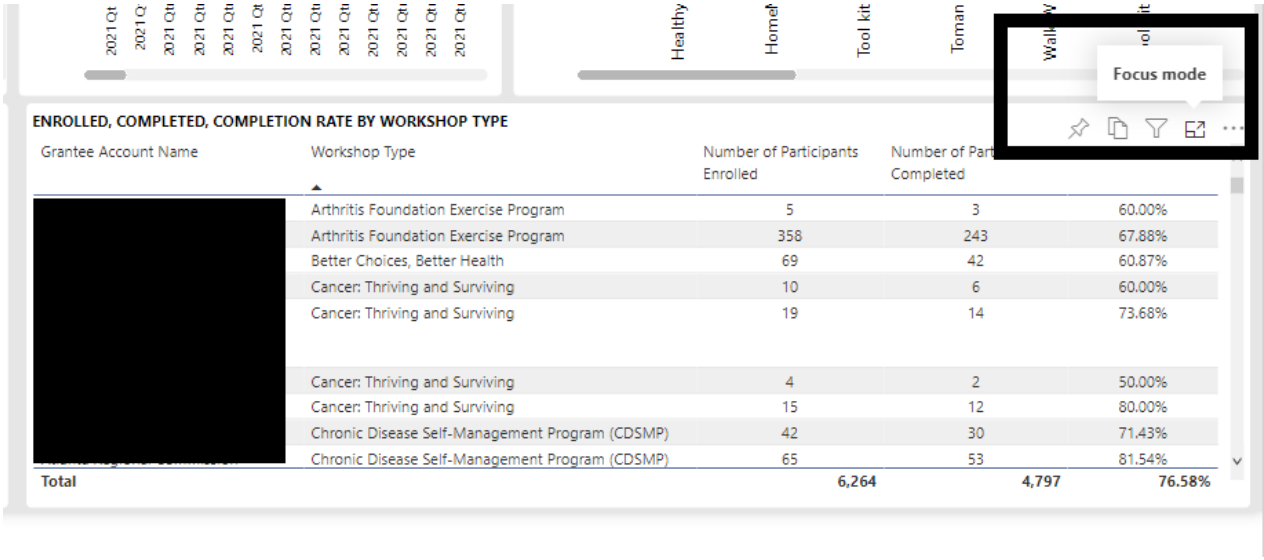


3. **For the current reporting period**:
    a. Broaden the “start date” to include all years.
    b. Set the “end date” to the *current 6-month reporting period*. (Example: August 1-January 31).

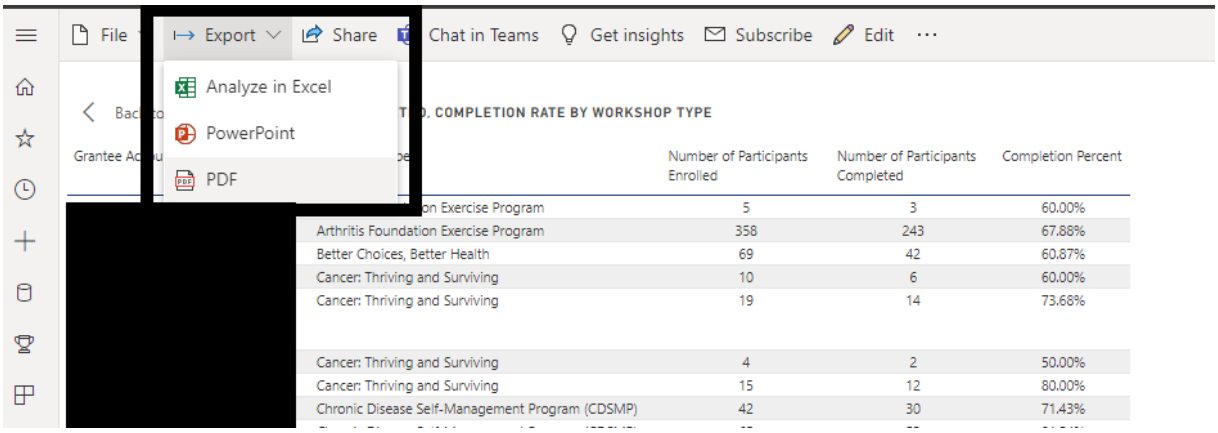


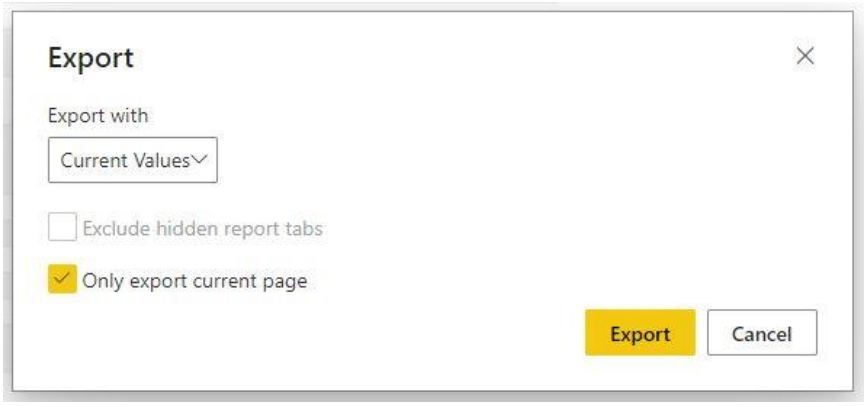
    c. Ensure all filters are selected correctly, including programs, county, host organizations, implementation site, etc.

d. Hover over the right corner of the table titled, “Enrolled, Completed, Completion Rate by Workshop Type” and click the box/arrow calls “Focus.”



e. Click “export” at the top of the screen, select “PDF”, select “only current page.”





f. Save the file and include in your report as Appendix A.

g. Repeat these steps for the cumulative grant period.

4. **<u>For the cumulative grant period</u>**:
    a. Broaden the “start date” to include all years.
    b. Set the “end date” to the *full grant period to date.*
    c. Ensure all filters are selected correctly, including programs, county, host organizations, implementation site, etc.
    d. Hover over the right corner of the table titled, “Enrolled, Completed, Completion Rate by Workshop Type” and click the box/arrow calls “Focus”
    e. Click “export” at the top of the screen, select “PDF”, select “only current page.”
    f. Save the file and include in your report as Appendix A.