



# Healthy Aging Programs Integrated – Database (HAPI-D)

## USER MANUAL

**Angelica P. Herrera-Venson, DrPH**

Data Management and Evaluation  
Center for Healthy Aging

October 10, 2023

I.	Getting Set Up in HAPI-D.....	1
	<b>A. Setting up a new Account in HAPI-D.....</b>	<b>1</b>
	<b>B. Super User vs Data Entry .....</b>	<b>1</b>
II.	Logging On.....	2
III.	Network and Programs.....	3
	<b>A. My Network.....</b>	<b>3</b>
	<b>B. Programs.....</b>	<b>4</b>
	<b>I. Program Targets.....</b>	<b>6</b>
	<b>II. Survey Templates.....</b>	<b>10</b>
IV.	Creating a Workshop.....	12
	<b>A. Selecting or Adding a Host Organization.....</b>	<b>12</b>
	<b>B. Selecting or Adding an Implementation Site .....</b>	<b>13</b>
	<b>C. Selecting Your Evidence-based Program &amp; Completing Workshop Form .....</b>	<b>14</b>
V.	Creating a Facilitator.....	16
VI.	Adding Participants to Workshops .....	19
VII.	Reporting and Dashboards .....	21
	<b>A. Reports .....</b>	<b>21</b>
	<b>B. Dashboards.....</b>	<b>22</b>
VIII.	Resources.....	24
IX.	Submitting a Support Ticket .....	25

# I. Getting Set Up in HAPI-D

## A. Setting up a new Account in HAPI-D.

EMAIL [HAPIDHelp@ncoa.org](mailto:HAPIDHelp@ncoa.org) to request an account with the following information.

- Full Name
- Email Address
- Grantee Account Name associated with your ACL Grant
- User type: Super User or Data Entry (*see table below to understand the difference*)

**See it!** Check out this brief video on how to get set up:  
[How to Get Set Up and Log into HAPI-D \(2 minutes\)](#)

## 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
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	YES	NO
Create a non-ACL Program Target	YES	NO
Create an ACL Program Target	NO	NO
View & Export Reports / Dashboards	YES	NO
Create surveys	Will enable in 2024. Until then, contact Admin for help customizing surveys.	NO

## II. Logging On

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

Log in at <https://ncoa1.my.site.com/hapid/s/login/>

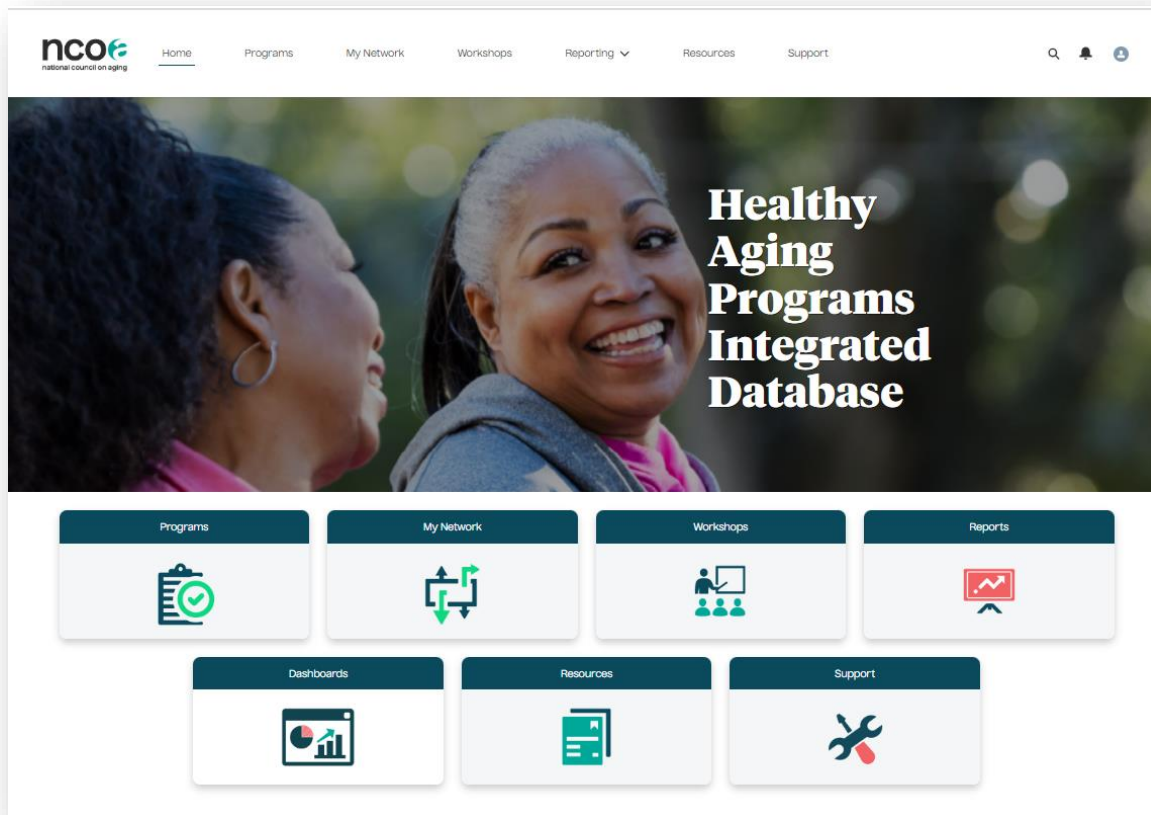
*For a minority of users...*

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.

The home page to HAPID will appear as shown below:

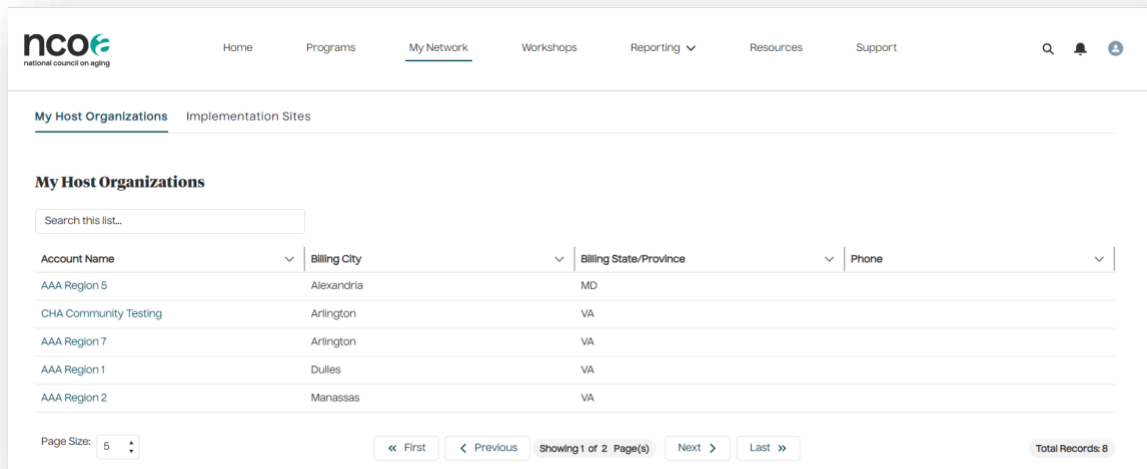


### III. Network and Programs

#### 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



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

[How to View and Search Within Your Network \(4 minutes\)](#)

## 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. Suppose you have been using either legacy database (National CDSME or Falls Prevention) for many years outside your busy funding period. In that case, 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.

1 Home 2 Programs

My Program Targets Healthy Aging Programs

All ▾

7 Items • Sorted by Program Target Name • Filtered by All program targets • Updated a few seconds ago

Search this list...

	Program Target Name ↑	Funding Source Name	Grantee	Actual PartL...	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

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

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

My Program Targets Healthy Aging Programs

Falls Prevention Programs ▾

LIST VIEWS

- CDSME Programs
- ✓ Falls Prevention Programs
- Recently Viewed

Search this list...

	Program Target Name	Funding Source Name	Grantee	Actual PartL...	Actual Com...	Last Modified Date
3	CAPABLE	CAP	https://ncoa.org/article/evidence-based-program-capable	10	8	
4	EnhanceFitness	EF	https://ncoa.org/article/evidence-based-program-enhancefitness		22	
5	FallScap	FallScp	https://ncoa.org/article/evidence-based-program-fallscap	5	5	
6	FallsTalk	FT	https://ncoa.org/article/evidence-based-program-fallstalk	5	1	
7	Fit & Strong!	F&S	https://ncoa.org/article/evidence-based-program-fit-strong	24	18	
8	Healthy Steps for Older Adults	HSOA	https://ncoa.org/article/evidence-based-program-healthy-steps-for-older-adults	2	2	
9	Healthy Steps in Motion	HSIM	https://ncoa.org/article/evidence-based-program-healthy-steps-in-motion	8	5	

## 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 III.A.2](#))

**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 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.



**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!**

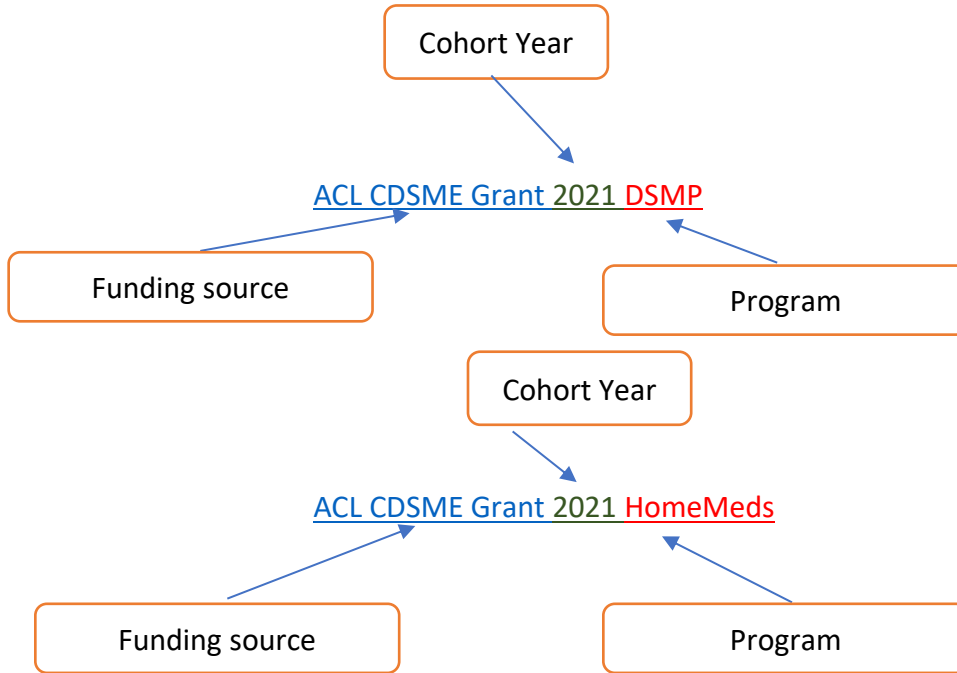
**Check out this video to understand how Program Targets are organized in HAPID.**

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

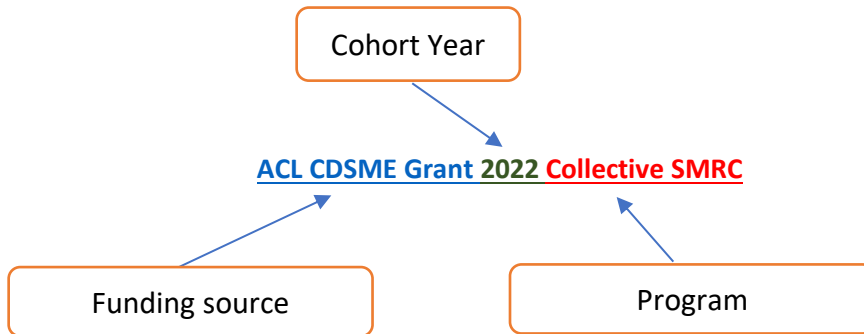
The following provides further examples of how your Program Targets may appear. When creating a workshop, you'll be prompted to select all the Program Targets to which you wish your workshop to be credited (ACL and non-ACL).

## 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.

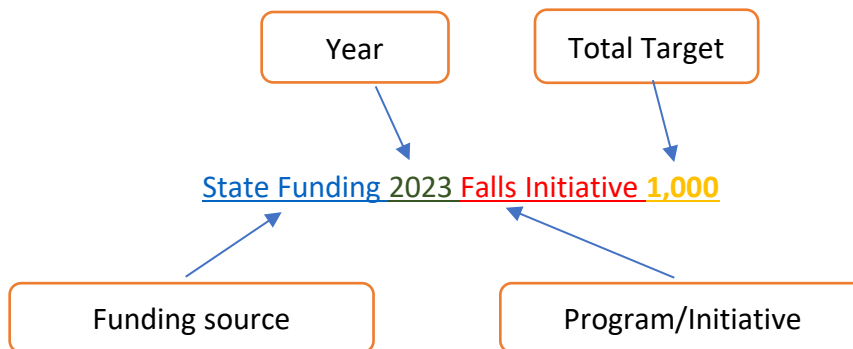


**Example 2:** If you have several SMRC, 6-session standard programs you're tracking toward your 2022 ACL grant, such as CPSMP and Tomando Control de Su Salud, DSMP, etc., NCOA would create a Collective target, but can use the term 'Standard' in the Program Target name to indicate that all SMRC, 6-session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

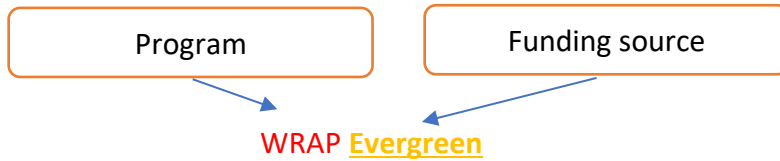


### NON-ACL TARGETS

**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.

	Survey Template Name	Template Name	Progr...	Start Date	End Date	Details
1	ACL CDSME 2023-26 ALTERNATE	ACL CDSME 2023-26 ALTERNATE	CDSME	5/1/2023	1/31/2026	ACL CDSME Participant Survey OMB Control No. 0985-0036 Exp. Date 01/31/2026. This is for programs with variabl...
2	ACL CDSME 2023-26 STANDARD 6-session	ACL CDSME 2023-26 STANDARD 6-session	CDSME	5/1/2023	1/31/2026	ACL CDSME Participant Survey for use in 2023 to 2026. OMB Control No. 0985-0036. Exp. Date 01/31/2026
3	ACL CDSME 2019-22 ALTERNATE WWE	ACL CDSME 2019-22 ALTERNATE WWE	CDSME	1/1/2019		ACL CDSME Participant Survey OMB Control No 0985-0036 Exp. Date 11/22/2022. This is for programs with variable...
4	ACL CDSME 2019-22 STANDARD 6-session	ACL CDSME 2019-22 STANDARD 6-session	CDSME	1/1/2019		ACL CDSME Participant Survey OMB Control No 0985-0036 Exp. Date 11/22/2022.
5	ACL CDSME 2019-22 ALTERNATE	ACL CDSME 2019-22 ALTERNATE	CDSME	1/1/2019		ACL CDSME Participant Survey OMB Control No 0985-0036 Exp. Date 11/22/2022. This is for programs with variable...
6	ACL Falls 2014-2021	ACL Falls 2014-2021	Falls Prev...	9/1/2014	12/31/20...	This Survey Template is for historic 2014-2018 AND 2018-2021 OMB forms for any attendance format. This is intend...
7	ACL Falls 2021-23 Total Attend with Home Practi...	ACL Falls 2021-23 Total Attend with Home Practi...	Falls Prev...	5/1/2019		This Survey Template is for STANDARD 2021-2023 OMB forms for use with programs that use Total Attendance field...
8	ACL Falls 2021-23 5-session STEADI	ACL Falls 2021-23 OMB 2021 5-session STEADI	Falls Prev...	5/1/2019		This Survey Template is for CUSTOM 2021-2023 OMB forms for use with programs that use 5 session checkboxes fo...
9	ACL Falls 2021-23 Total Attendance	ACL Falls 2021-23 Total Attendance	Falls Prev...	5/1/2019		This Survey Template is for STANDARD 2021-2023 OMB forms for use with programs that use Total Attendance field...
10	ACL Falls 2021-23 CAPABLE	ACL Falls 2021-23 CAPABLE	Falls Prev...	5/1/2019		This Survey Template is for STANDARD 2021-2023 OMB forms for use with CAPABLE programs (which uses RN, OT, ...
11	ACL Falls 2021-23 2-session	ACL Falls 2021-23 2-session	Falls Prev...	5/1/2021		This Survey Template is for STANDARD 2021-2023 OMB forms for use with programs that use 2 session checkboxes...
12	ACL Falls 2021-23 5-session	ACL Falls 2021-23 5-session	Falls Prev...	5/1/2021		This Survey Template is for STANDARD 2021-2023 OMB forms for use with programs that use 5 session checkboxes...
13	ACL Falls 2021-23 7-session	ACL Falls 2021-23 7-session	Falls Prev...	5/1/2021		This Survey Template is for STANDARD 2021-2023 OMB forms for use with programs that use 7 session checkboxes...
14	ACL Falls 2021-23 8-session	ACL Falls 2021-23 8-session	Falls Prev...	5/1/2021		This Survey Template is for STANDARD 2021-2023 OMB forms for use with programs that use 8 session checkboxes...

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 has initiated the review process to update the Falls prevention forms in October 2023. Grantees and partners will have an opportunity to comment on potential updates to the forms in the coming months. New forms are expected to go into effect in May of 2024. Those will be added to the list of Survey template options to HAPI-D when they become available.

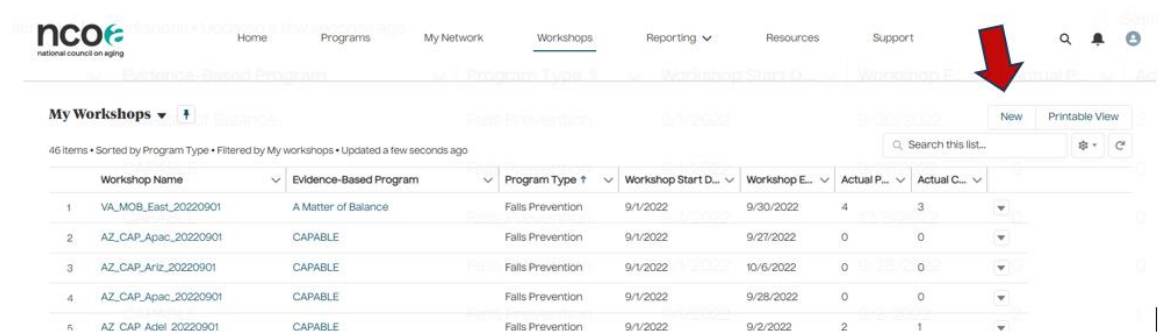
**Customizing Surveys:** The new database allows users to clone and modify surveys to suit their needs. Sometime in 2024, we will provide more training and enable some users with permission to modify or create their own surveys. In the meantime, please submit a Support Ticket if you wish to have questions 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

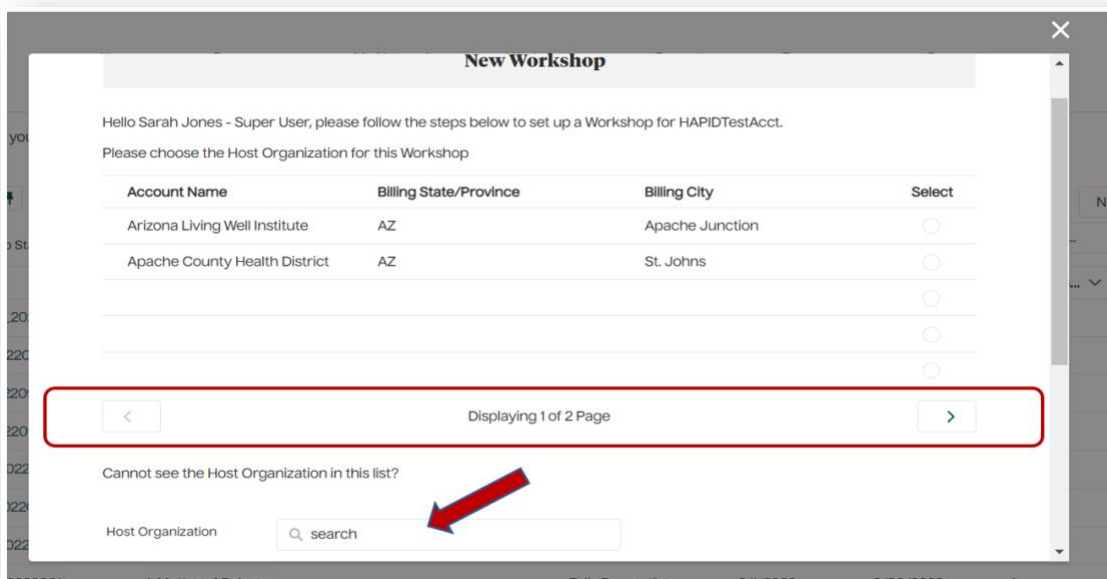
Create a workshop by going to the Workshop tab and selecting 'New.'



The screenshot shows the NCOE website's 'Workshops' page. The navigation bar includes 'Home', 'Programs', 'My Network', 'Workshops', 'Reporting', 'Resources', and 'Support'. A red arrow points to the 'New' button in the top right corner. Below the navigation bar, there is a search bar and a 'Printable View' button. 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. The table lists five workshops, including 'VA\_MOB\_East\_20220901' and 'AZ\_CAP\_Apac\_20220901'.

### A. Selecting or Adding a Host Organization

You'll first be prompted to select the Host Organization and Implementation Site on the same pop-up screen. You can find the Host Organization by scrolling using the button left or right. You can also use any term to search for the Host Organization name in the open-text search field. If you still can't find it, you will be prompted to create a new Host Organization.



The screenshot shows the 'New Workshop' pop-up screen. The title is 'New Workshop'. The text reads: 'Hello Sarah Jones - Super User, please follow the steps below to set up a Workshop for HAPIDTestAcct. Please choose the Host Organization for this Workshop'. Below this is a table with columns: Account Name, Billing State/Province, Billing City, and Select. The table lists two organizations: 'Arizona Living Well Institute' and 'Apache County Health District'. Below the table is a pagination bar with a left arrow, 'Displaying 1 of 2 Page', and a right arrow. Below the pagination bar is a message: 'Cannot see the Host Organization in this list?'. Below this message is a search field labeled 'Host Organization' with a search icon and the text 'search'. A red arrow points to the search field.

## B. Selecting or Adding an Implementation Site

Once you have selected a Host Organization, the list of Implementation Sites associated with that Host Organization will populate beneath it. Select the Implementation Site you wish to add to your workshop.

You can find it by scrolling using the button left or right. You can also use any term to search for the Implementation Site in the open text search field. If you still can't find it, you will be prompted to create a new Implementation Site.

Please choose the Implementation Site for this Workshop

Implementation Site Name	Street	City	State	Select
Adelante Health Care C...	1705 W. Main Street	Mesa	AZ	<input type="radio"/>
Alma Meadows Mobile ...	535 S. Alma School Road	Mesa	AZ	<input type="radio"/>
Apache Junction Senio...	1035 N Idaho Rd	Apache Junction	AZ	<input type="radio"/>
Apache Junction Senio...	1035 N Idaho Rd	Apache Junction	AZ	<input type="radio"/>
Arizona Living Well Insti...	2066 W. Apache Trail, Suit...	Apache Junction	AZ	<input type="radio"/>

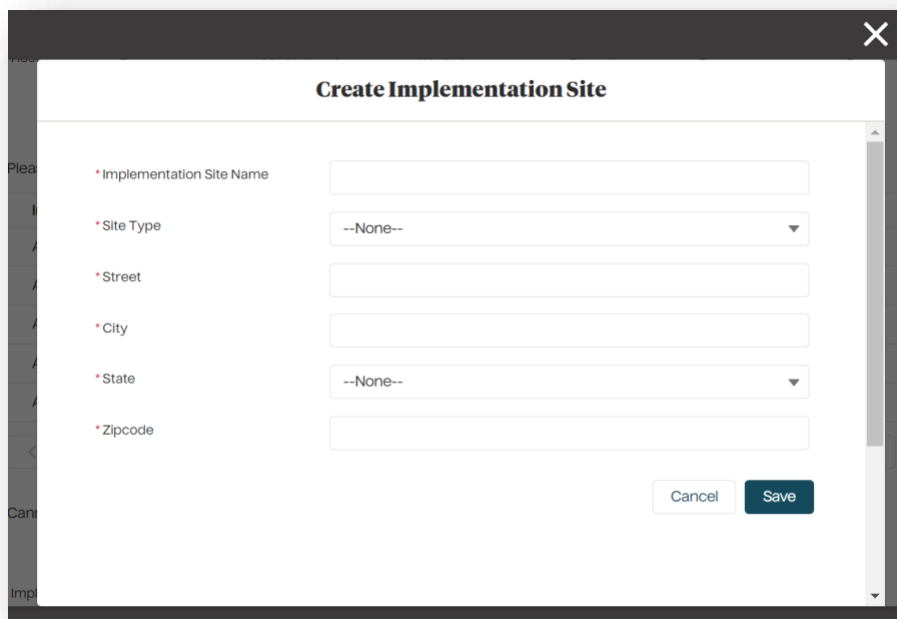
< Displaying 1 of 18 Page >

Cannot see the Implementation Site in this list?

Implementation Site

Next

If prompted to create an Implementation Site, you'll see the following pop-up screen:



The screenshot shows a pop-up window titled "Create Implementation Site" with a close button (X) in the top right corner. The form contains the following fields:

- \*Implementation Site Name: Text input field
- \*Site Type: Dropdown menu with "--None--" selected
- \*Street: Text input field
- \*City: Text input field
- \*State: Dropdown menu with "--None--" selected
- \*Zipcode: Text input field

At the bottom right of the form, there are two buttons: "Cancel" and "Save".

## 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 \(10 minutes\)](#)

### 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 Workshop Delivery approach. This is required for CDSME and optional for Falls Prevention. Once Falls Prevention forms are reviewed between Nov 2023 and April 2024, this field will likely become required for Falls Prevention grantees thereafter.
- Enter program fees, workshop language, where available.
- Add NOTES that will be visible to you and other team members.

On the next page in the workshop modal, you'll be asked to select your 1) Program Target and 2) Survey Template. Refer to other sections of this manual for more information on those.

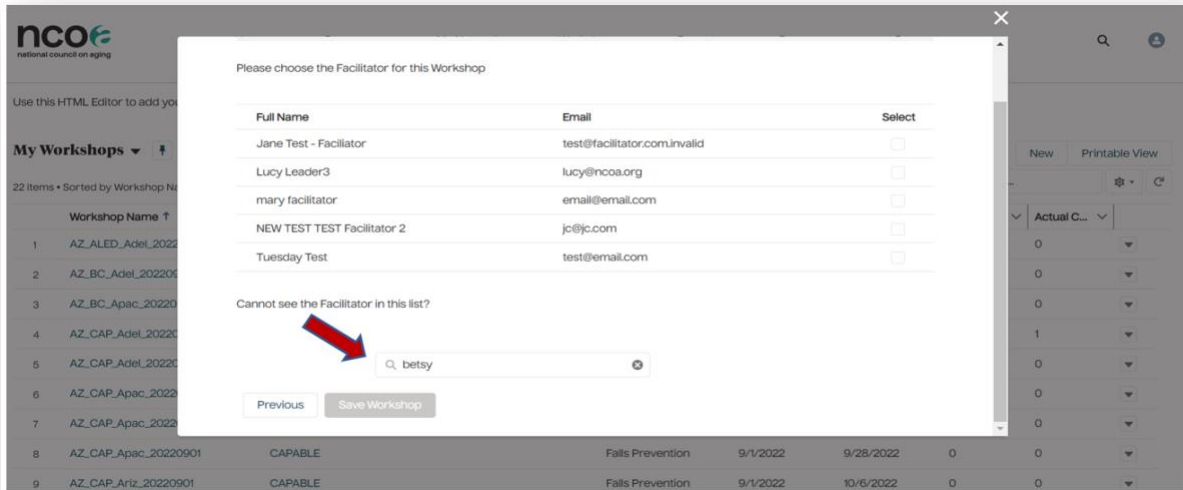
You won't be able to SAVE and entirely create your workshop until you've added these items above and selected a Facilitator.

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

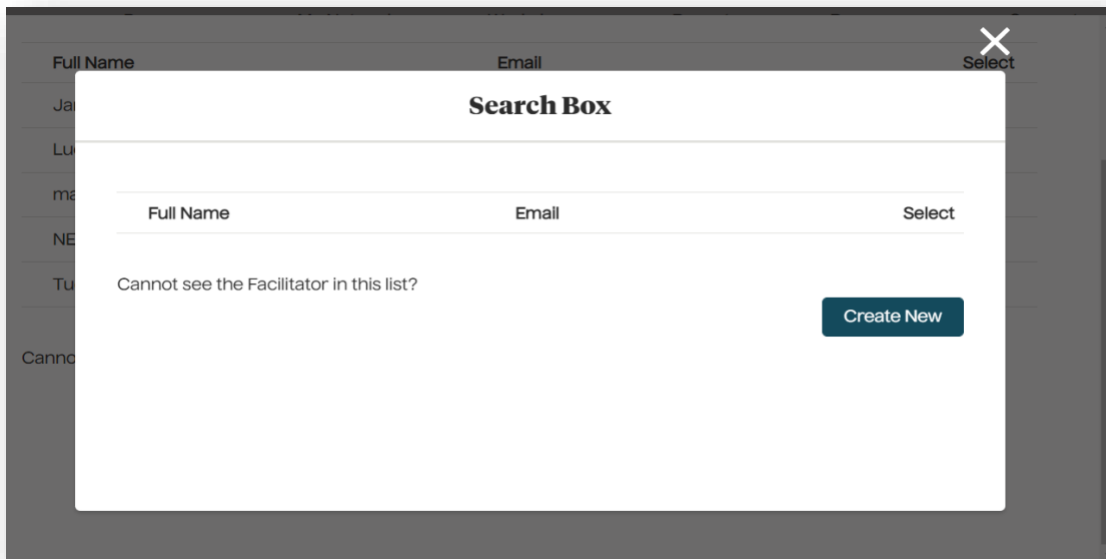
- [How to Create a Workshop \(14 minutes\)](#)
- [How to Edit a Workshop \(5 minutes\)](#)
- [How to Enter Walk With Ease Programs \(14 minutes\)](#)
- [How to Collect SMRC Toolkit Data and Enter into HAPI-D \(15 minutes\)](#)

## V. Creating a Facilitator

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

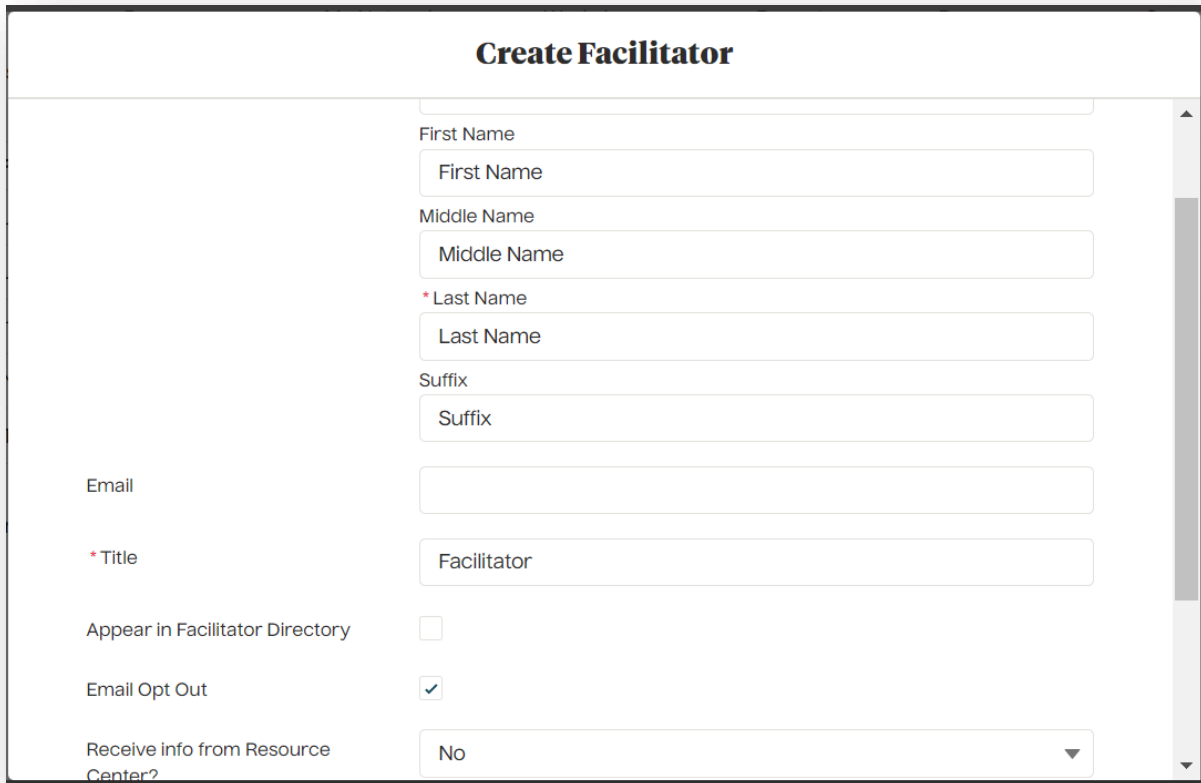


If the search doesn't turn up the Facilitator you were looking for, you'll be prompted to Create a New Facilitator. Hit '**Create New**' to create and add the New Facilitator.



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

NCOA is aware that several workshop types do not require a Facilitator. We are working toward a solution, to be rolled out in the coming weeks, that will allow users to bypass this requirement. In the meantime, you can enter the name of the Host Organization or Implementation Site's onsite coordinator or another representative.



The screenshot shows a web form titled "Create Facilitator". The form contains the following fields and options:

- First Name: Text input field with "First Name" as a placeholder.
- Middle Name: Text input field with "Middle Name" as a placeholder.
- \* Last Name: Text input field with "Last Name" as a placeholder.
- Suffix: Text input field with "Suffix" as a placeholder.
- Email: Text input field.
- \* Title: Text input field with "Facilitator" as a placeholder.
- Appear in Facilitator Directory: A checkbox that is currently unchecked.
- Email Opt Out: A checkbox that is currently checked.
- Receive info from Resource Center?: A dropdown menu with "No" selected.

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 with a prior account and workshop activity 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 they are entered, they will be available for selection in future workshops.

**Why the limitation?** Facilitator information was captured as 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 could not be done for CDSME Facilitators.

**See it!** Check out this brief video on where to find your Facilitator information.  
[The Many Places to Find Your Facilitator Data in HAPI-D \(8 minutes\)](#)

## VI. Adding Participants to Workshops

Select a workshop you have created to add participants.

**First**, go to the Workshops tab at the top of the page or select the Workshop icon from the home page.

**Second**, click the 'New' button on the top right of the My Workshops list.

Workshop Name	Evidence-Based Program	Program Type	Workshop Start	Workshop End	Actual P...	Actual C...
1 AZ_CDSMP_Adel_20220905	Chronic Disease Self-Management Program (CDSMP)	CDSME	9/5/2022	10/3/2022		
2 AZ_CAP_Adel_20220904	CAPABLE	Falls Prevention	9/4/2022	9/10/2022	0	0
3 AZ_SO_Alma_20220902	Stepping On	Falls Prevention	9/2/2022	9/3/2022	1	1
4 AZ_SO_Apac_20220902	Stepping On	Falls Prevention	9/2/2022	9/3/2022	2	1

This will open a pop-up screen, 'Create Workshop Participant,' where you can begin adding participant survey data, one after another. The survey questions visible to you should correspond to the Survey Template you selected when setting up your Program Targets.

Workshop - VA\_BCBH\_East\_20230730

Survey Template - ACL CDSME 2023-26 STANDARD 6-session

1 Pre Survey

Participant Name/ID

Dr./Care Provider Suggested Program

Age

Do you live alone?

Hispanic

2 Pre Survey: What is your race? Mark all that apply.

**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. Reports

1. To access Reports, go to **Home → Reports → Reports**
2. Click on Report Folders.
3. Select your desired folder:
  - a. **CDSME Reports:** Contains participant-level report, workshop-level report, performance report, participant vs completer by workshop type, and semi-annual report for CDSME programs.
  - b. **Dashboard Reports:** Contains all the individual reports that feed the dashboards. This is less useful, but each of these reports feeds a single “tile” (chart/graphic) on one of the dashboards. We collect these in this folder to keep them contained to make it easier for you to find the other CDSME and Falls prevention reports.
  - c. **Facilitator Reports:** This has two reports that show the unique Facilitators in your network and total # of workshops they’ve delivered, and another version of this report with more detail that includes Facilitator’s activity, such as what workshops they’ve delivered and when.
  - d. **Falls Prevention Reports:** Contains participant-level report, workshop-level report, performance report, participant vs completer by workshop type, and semi-annual report for Falls prevention programs.
4. Filter the first column by Report name or search by report name in the search field.
5. While you can apply some basic filters on individual reports, any changes you make will be removed and the report will reset to the default version. This is done so that all users across the database are not affected by any changes you may make during your session.

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

**See it!** Check out these tutorials on how to find, use, and filter the most common Reports.

[How Reports are Organized in HAPI-D \(6 minutes\)](#)

[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 \(9 minutes\)](#)

## B. Dashboards

HAPI-D 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 3 filters.

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)

Dashboards  
All Dashboards  
10 items

Q Search all dashboards... [Filter Icon]

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.

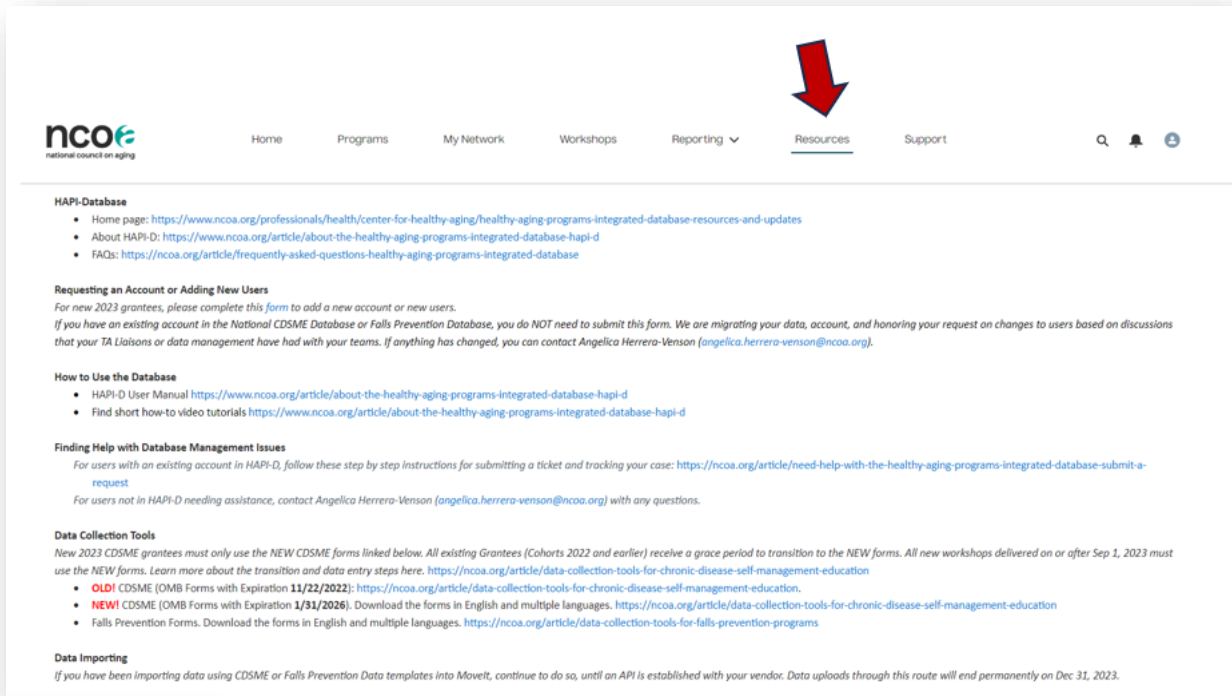
[How to Find, Navigate, and Use Dashboards - General \(7 minutes\)](#)

[How to Use and Navigate Falls Prevention Dashboards \(5 minutes\)](#)

[How to Use CDSME Dashboards Including Optional Fields \(15 minutes\)](#)

## VIII. 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](#).



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, including sections for HAPI-Database, Requesting an Account or Adding New Users, How to Use the Database, Finding Help with Database Management Issues, Data Collection Tools, and Data Importing.

**ncoa**  
national council on aging

Home Programs My Network Workshops Reporting ▾ Resources Support

**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.

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](mailto: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](mailto: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 **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>

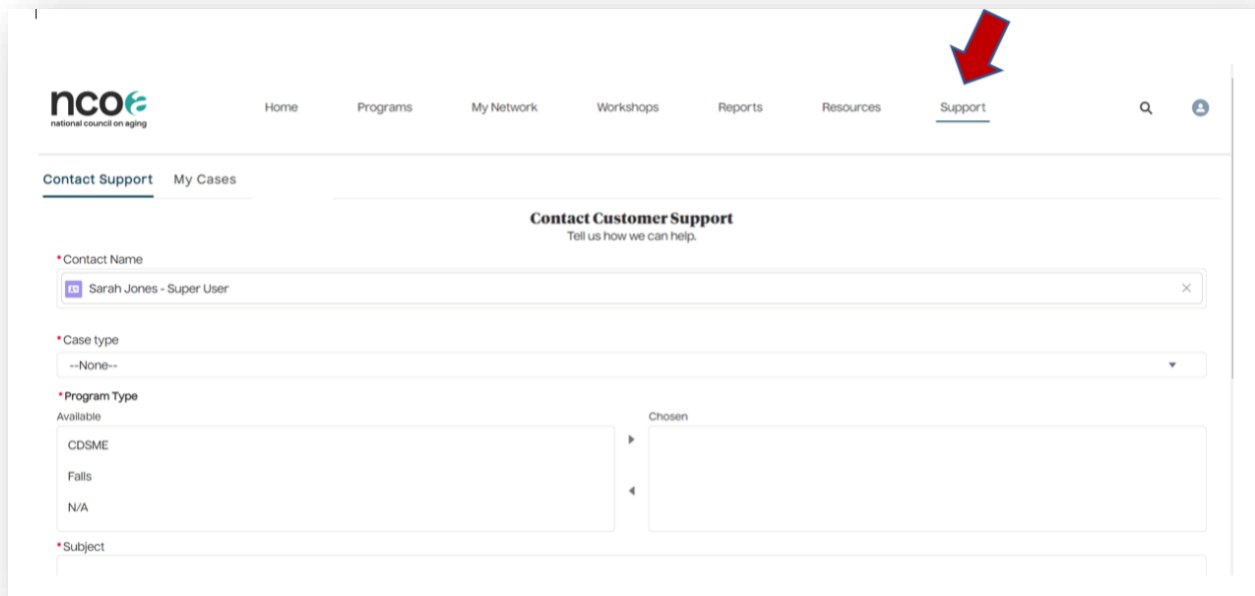
**Data Importing**

If you have been importing data using CDSME or Falls Prevention Data templates into Moveit, continue to do so, until an API is established with your vendor. Data uploads through this route will end permanently on Dec 31, 2023.

## IX. Submitting a Support Ticket

Under the **Support** menu, you can submit your request for help to resolve any database-related issue.

- Identify the Case Type to help describe the nature of the problem.
- Select the related program category (Falls, CDSME, or N/A).
- Enter a subject and attach a file or document.
- Track the status of your cases under 'Cases.'



The screenshot shows the NCOE (National Council on Aging) website's support form. The navigation bar includes Home, Programs, My Network, Workshops, Reports, Resources, and Support (highlighted with a red arrow). Below the navigation bar, there are tabs for 'Contact Support' and 'My Cases'. The main heading is 'Contact Customer Support' with the subtext 'Tell us how we can help.' The form fields include: 'Contact Name' (text input with 'Sarah Jones - Super User'), 'Case type' (dropdown menu with '--None--'), 'Program Type' (two columns: 'Available' with 'CDSME', 'Falls', 'N/A' and 'Chosen' which is empty), and 'Subject' (text input).

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

