

2021 ACL CDSME Grantees Database Training

Guidance and Updates for
Navigating the National CDSME
Database

PRESENTERS

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June 15, 2021



Agenda

1. Welcome from NCOA & ACL

2. Technical Assistance

3. About the Database

4. Data Collection Requirements

4. Getting Set- Up

5. Forms Management & Data Quality Assurance

6. Privacy and Security Basics

7. Overview of CHA Community 2.0 (live demo)

8. Adding Hosts, Implementation sites, and Workshops
(live demo)

9. Migrating Data from Vendors and Finding Help

10. Q& A

Speakers



Tia Crayton, Data Management and
Evaluation Specialist, Center for Healthy
Aging, NCOA

Sarath Reddy, Salesforce Developer, NCOA

Lesha Spencer-Brown, Administration for
Community Living/Administration on Aging

Welcome ACL CDSME Grantees!



Tia Crayton, MPH

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Data Collection Grant Requirements:

- Funding opportunity announcement notes that grantees must “Collect required program data...by way of ACL’s specific data collection forms.”
- Data should be reported within 30 days of program completion.
- Grantees should train local coordinators, workshop leaders, etc. on data collection practices and use of forms

Importance of Data Collection

- Evaluate grantee performance
- Determine program reach and participant demographics (i.e., ethnicity, age, gender)
- Report participant outcomes to determine the impact and value of the programs
 - Conduct research

NCOA's Center for Healthy Aging

Goal: Increase the quality and years of healthy life for older adults and adults with disabilities

Two national resource centers funded by the Administration for Community Living

- Chronic Disease Self-Management Education (CDSME)
- Falls Prevention

Other key areas: Behavioral health, physical activity, immunizations, oral health

Technical Assistance Activities



One-on-One Support

- Tailored technical assistance based on your needs



Networking & Peer Learning

- Work groups
 - Learning Collaboratives
- Listservs for professionals



Online Tools and Resources

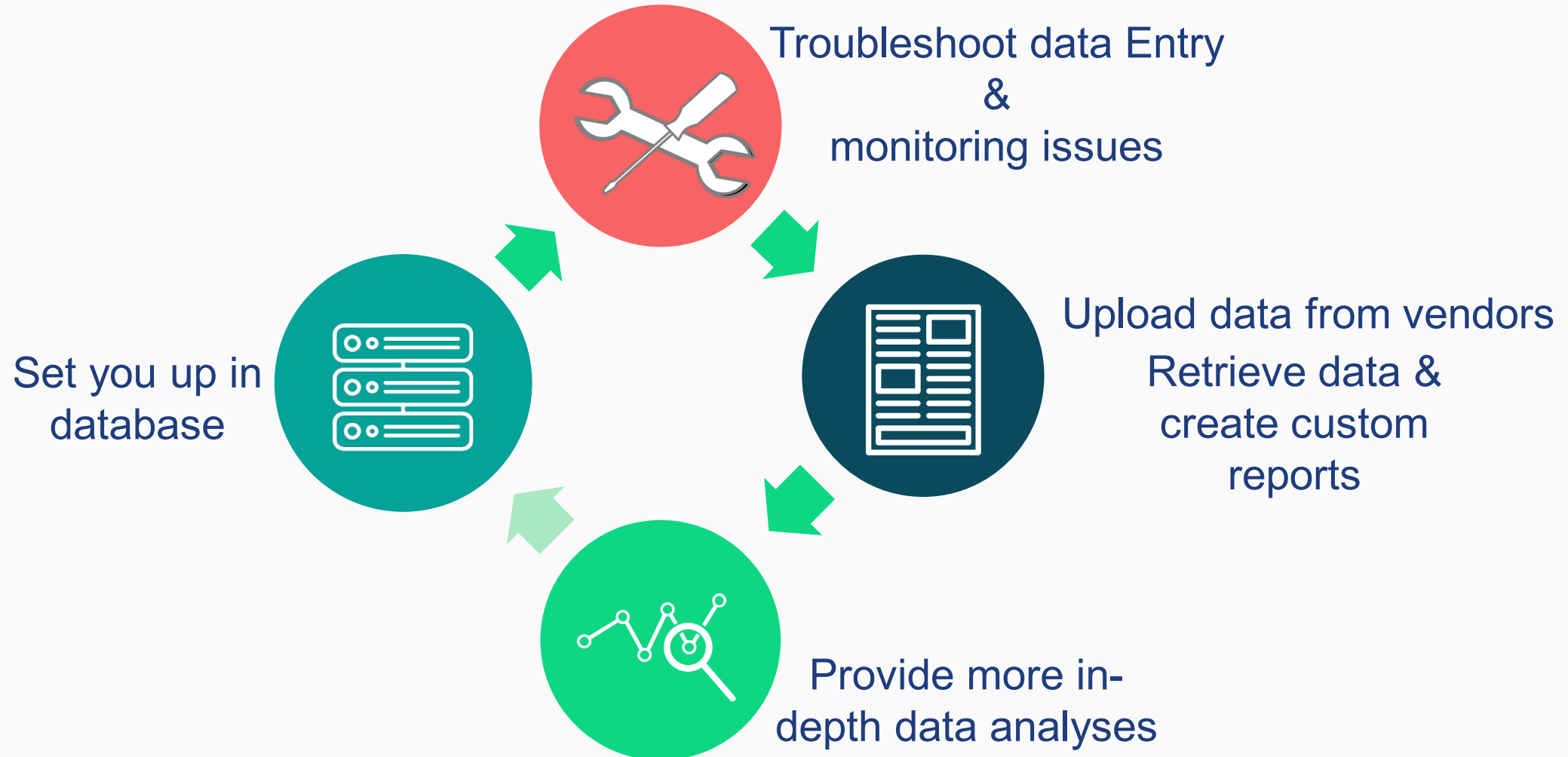
- Ongoing webinars
- Best practices from organizations across the country



National Databases

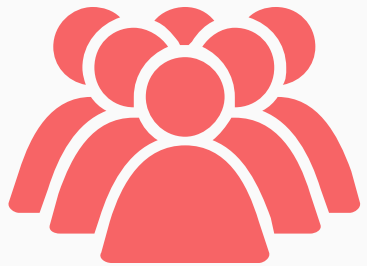
- Data collection & management
- CDSME & falls prevention

Technical Assistance – What can NCOA do for you?



CDSME National Database – By the #'s

431,808



**Program
Participants**

39,778



Workshops

284



**Database
Users**

152



**Active
Networks**

37



**Active
States in
Past Year**

Terminology

Program: An evidence-based CDSME program

Workshop: A class or group meeting through which a program is delivered to participants.

Session: A single meeting of a workshop, e.g., an hour-long class period or an encounter

Facilitators: The people who are trained to deliver the CDSME programs (also known as ‘program leaders’)

Participant: An individual who attends at least one session of a workshop

33 Programs in the CDSME Database

CDSME Programs

1. Arthritis Self-Management Program (ASMP)
2. Better Choices, Better Health
3. Building Better Caregivers
4. Cancer: Thriving and Surviving
5. Chronic Disease Self-Management Program (CDSMP)
6. Chronic Pain Self-Management Program (CPSMP)
7. Diabetes Self-Management Program (DSMP)
8. Positive Self-Management Program
9. Powerful Tools for Caregivers
10. Programa de Manejo Personal de la Artritis (Spanish ASMP)
11. Programa de Manejo Personal de la Diabetes
12. Tomando Control de su Salud (Spanish CDSMP)

Support Programs

1. HomeMeds
2. PEARLS
3. EnhanceWellness
4. Wellness Recovery Action Plan (WRAP)
5. EnhanceFitness
6. Active Living Every Day
7. Workplace Chronic Disease Self-Management (wCDSMP)
8. Fit and Strong!
9. Health Coaches for Hypertension Control
10. Screening, Brief Intervention, and Referral to Treatment (SBIRT)
11. Living Well in the Community
12. Tool kit for Active living with Chronic Conditions
13. Arthritis Foundation Aquatic Program (AFAP)
14. Healthy IDEAS
15. Arthritis Foundation Exercise Program
16. Mind Over Matter
17. Tool Kit for Active Living with Chronic Pain
18. Tool Kit for Active Living with Diabetes
19. Walk With Ease (in-person)
20. Walk With Ease (self-directed)
21. Camine Con Gusto (self-directed)

Salesforce vs Power BI

There are 2 components of the National CDSME Database:

Salesforce – (Data IN!):

For entering workshop data, with only basic views of data entered.

- View dashboard showing number of workshops, counties, host organizations, & participants.
- View & search individual profiles of hosts, sites, workshops, & participants to verify your entries.



Power BI – (Data OUT!):

For data visualization and reporting:

- Use filterable tables and charts to summarize reach and demographic data, see trends, and compare to national numbers.
- Examine site-level and program leader performance by completion rates & other factors.
- Export workshop-level and participant-level raw data spreadsheets.

Setting up an Account

FOR NEW ACCOUNTS ONLY:

Complete the [Grantee and Users Intake Form](#)

Email completed form to: tia.crayton@ncoa.org

Include username(s), organization/affiliation, grantee account, email address, and desired access.

Existing account holders can simply create a case to change/add users.

Salesforce Access Levels:

Grantee / Network Administrator – This person can add host organizations and implementation sites on behalf of their network. They can enter data, and view all workshops entered by all users.

Data Entry Only – This person can only enter workshop data, and view workshop data they have entered. They must contact a Grantee/Network Administrator in their network to add host and implementation sites.


Data Collection Forms & Where to Find Them

Data Entry, Collection, and Management Resources

- **English:**
 - Attendance Log
 - Program Information Cover Sheet
 - Participant Information Survey
 - Group Leader Script
- **Spanish:**
 - Attendance Log
 - Program Information Cover Sheet
 - Participant Information Survey
 - Spanish Group Leader Script
- **And many other languages!:** Cantonese, Hmong, Korean, Lao, Mandarin, Portuguese, Somali, Tongan, Vietnamese

Modifying Forms – Do's and Don'ts


- **Tip sheet:**
<https://www.ncoa.org/article/do-s-and-don-ts-for-modifying-data-collection-forms>
- If modifications are made, e-mail to your ACL Project officer and NCOA Technical Assistance Liaison
- Consider participant survey burden when adding more items to the forms



TIP SHEET

Do's and Don'ts for Modifying CDSME Data Collection Forms

The following guidelines are designed to help Administration for Community Living (ACL) Chronic Disease Self-Management Education (CDSME) grantees understand what can and can't be changed on the required ACL data collection tools.



While all ACL CDSME grantees must collect certain required data elements, some grantees may opt to collect additional workshop and/or participant information. There are many gray areas, however, so the following guidance is not prescriptive. **We request that you submit any proposed revisions to your ACL Program Officer and NCOA Technical Assistance Liaison as soon as possible and before commencing data collection.**

ACL and the National CDSME Resource Center are committed to making the data collection process as manageable as possible for grantees. Please read through the following "Do's and Don'ts" before submitting your forms for review.

DO

- Submit any modified versions of the data collection tools to your ACL Program Officer and NCOA Technical Assistance Liaison for their review and approval before using them. Be sure to track and highlight any

- Continue collecting data from the previous data collection tools, if you found them to be important for your evaluation purposes. However, these should be entered in an independent database, as they will not be available for entry into the CDSME National Database after January 1, 2017.

DON'T

- Do not remove the OMB reference #, expiration date, or Paperwork Reduction Act statement from your forms.
- Do not change the wording of the required questions.
- Do not change the wording of any answer options for any required questions, and do not add any new answer options.
- Do not change the order in which the required questions are presented.
- Do not forget to send the "modified" data collection forms to your ACL Program Officer and NCOA

Participant ID # on Attendance Log & Participant Survey

- This is used to identify the participant across forms— for your use primarily.
- The new system reduces the risk of exposing personally identifiable information.
- Documented by the facilitator or staff using the designated fields on the participant information survey.

Admin Use Only: *Participant I.D.:* The facilitator or program staff should complete this part of the form and mark the sequential number of the participant to the name on the attendance form.

State abbreviation: __ __ (e.g., NY, VA, etc.)

First four letters of the site name: __ __ __ __

Start date of program: __ __ / __ __ / __ __ (e.g., 12/01/19)

Participant number: __ __ (e.g., 01, 02, 03, etc.)

Participant ID # on Attendance Log & Participant Survey

OMB Control No. 0985-0036
Exp. Date 11/22/2022

Program Name
Participant Information Survey

Admin Use Only: Participant I.D.: The facilitator or program staff should complete this part of the form and mark the sequential number of the participant to the name on the attendance form.

State abbreviation: ____ (e.g., NY, VA, etc.)

First four letters of the site name: ____

Start date of program: ____ / ____ / ____ (e.g., 12/01/19)

Participant number: ____ (e.g., 01, 02, 03, etc.)

1. Did your doctor or other health care provider suggest that you attend this program?
☐ Yes ☒ No

2. How old are you today? _____ years

3. Are you: ☐ Male or ☐ Female?

4. Are you of Hispanic, Latino, or Spanish origin? ☐ Yes ☒ No

5. What is your race? Mark all that apply.
☒ American Indian or Alaska Native
☐ Asian
☐ Black or African American
☐ Native Hawaiian or other Pacific Islander
☐ White

6. Are you deaf or do you have serious difficulty hearing? ☐ Yes ☒ No

7. Are you blind or do you have serious difficulty seeing, even when wearing glasses?
☐ Yes ☒ No

8. Do you live alone? ☐ Yes ☒ No

9. What is the highest grade or year of school you completed?
☐ Some elementary, middle, or high school
☐ High school graduate or GED
☐ Some college or technical school
☐ College 4 years or more

10. Have you ever served in the military? ☐ Yes ☒ No

PAPERWORK REDUCTION ACT STATEMENT
According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 0985-0036. The time required to complete this information collection is estimated to average 15 minutes per response, including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collection. If you have comments concerning the accuracy of the time estimate(s) or suggestions for improving this form, please write to: Administration for Community Living, 330 C Street SW, Washington, D.C. 20001, Attention: PRA Reports Clearance Officer.

OMB Control No. 0985-0036
Exp. Date 11/22/2022

11. During the past year, did you provide regular care or assistance to a friend or family member who has a long-term health problem or disability? ☐ Yes ☒ No

12. In general, would you say that your health is:
☐ Excellent ☐ Very good ☐ Good ☐ Fair ☒ Poor

13. Has a health care provider ever told you that you have any of the following chronic conditions?

| | YES | NO | | YES | NO |
|--|-----|----|---|-----|----|
| Anxiety Disorder | | | Chronic Pain | | |
| High Cholesterol | | | Kidney Disease | | |
| Asthma/Emphysema/Other Chronic Breathing or Lung Problem | | | Osteoporosis (Low Bone Density) | | |
| Cancer or Cancer Survivor | | | Obesity | | |
| Hypertension (High Blood Pressure) | | | Schizophrenia or Other Psychotic Disorder | | |
| Depression | | | Stroke | | |
| Diabetes (High Blood Sugar) | | | Arthritis/Rheumatic Disease | | |
| Heart Disease | | | Other Chronic Condition | | |

14. Because of a physical, mental, or emotional condition, do you:
☐ Have serious difficulty concentrating, remembering, or making decisions?
☐ Yes ☒ No
☐ Have difficulty doing errands alone such as visiting a doctor's office or shopping?
☐ Yes ☒ No

15. Do you have serious difficulty walking or climbing stairs? ☐ Yes ☒ No

16. Do you have difficulty dressing or bathing? ☐ Yes ☒ No

17. How often do you feel lonely or isolated from those around you?
☐ Always ☐ Often ☐ Sometimes ☐ Rarely ☒ Never

PAPERWORK REDUCTION ACT STATEMENT
According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 0985-0036. The time required to complete this information collection is estimated to average 15 minutes per response, including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collection. If you have comments concerning the accuracy of the time estimate(s) or suggestions for improving this form, please write to: Administration for Community Living, 330 C Street SW, Washington, D.C. 20001, Attention: PRA Reports Clearance Officer.

Participant ID # on Attendance Log & Participant Survey

OMB Control No. 0985-0036
Exp. Date 11/22/2022

18. How sure are you that you can manage your condition so you can do the things you need and want to do?

Totally unsure 1 2 3 4 5 6 7 8 9 10 Totally sure

TO BE COMPLETED AT LAST PROGRAM SESSION

Admin Use Only:

Participant I.D.: The facilitator or program staff should complete this part of the form and mark the sequential number of the participant to the name on the attendance form.

State abbreviation: ____ (e.g., NY, VA, MA, etc.)

First four letters of the site name: ____

Start date of program: ____ / ____ / ____ (e.g., 12 01 19)

Participant number: ____ (e.g., 01, 02, 03, etc.)

1. In general, would you say that your health is:

☐ Excellent ☒ Very good ☐ Good ☐ Fair ☐ Poor

2. How sure are you that you can manage your condition so you can do the things you need and want to do?

Totally unsure 1 2 3 4 5 6 7 8 9 10 Totally sure

3. How often do you feel lonely or isolated from those around you?

☐ Always ☐ Often ☐ Sometimes ☐ Rarely ☒ Never

Optional Data Fields

Explore Optional Data Fields in the National CDSME Database

- Get context, history, and rationale for offering these items
- Proposing new optional fields – how are these requests vetted & considered
- Phrasing recommendations

Participant Level

- Health insurance
- Living arrangements
- Well-being
- Monthly household income
- Satisfaction (program, program leader, location, time)
- Referral source
- Alzheimer's/cognition

Workshop Level

- Funding source
- Workshop format (online, in-person/group, one-on-one, hybrid, or self-directed)
- COVID-19

Appendix A

Semi-Annual Report

AutoSave Off

Appendix-A-for-Semi-annual-report-TEMPLATE-with-SAMPLE-DATA-2021 (1) - Excel

FileHomeInsertPage LayoutFormulasDataReviewViewHelp

Paste

Clipboard

Calibri

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<https://vimeo.com/528863800>

Privacy and Data Security Practices

Privacy and Data Security Practices – NCOA CDSME and Falls Prevention EBP Database

Privacy Act of 1974 Public Law 93-579 (5 U.S.C.A. 552a):

- protects records that can be retrieved by personal identifiers, e.g. name, social security number, or other identifying number or symbol.

Your Responsibility?

- Train all staff, facilitators, and anyone handling, transferring data forms, in paper or electronic form.
- Disclose rights to participants (voluntary information on surveys, how their information is to be protected).
- Follow best practices for safely transmitting and sharing data with others (e.g. encryption, de-identifying data, & setting up Data Use Agreements).

Training Staff on Safeguarding Participants' Information

- **Hold In-person/online training:**
 - Review “Privacy and Data Security Practices – NCOA CDSME and Falls Prevention EBP Database” with all staff: [Privacy and Data Security Practices - NCOA CDSME and Falls Prevention](#)
 - **Collect Certificates of Completion from staff to verify completion of training** (NCOA or ACL does not require copies of these)
- **Collect Non-Disclosure Agreements** from all staff and keep those for at least 3 years:
 - Acknowledgement that participant information should not be shared with others and should be safeguarded appropriately
 - **English:** [Privacy and Data Security Practices - NCOA CDSME and Falls Prevention](#)
 - **Spanish:** [Privacy and Data Security Practices - NCOA CDSME and Falls Prevention](#)
 - **Use encryption technology** when sharing or transferring sensitive data: Use a S-FTP (Safe File Transfer Program), e.g. Movelt. Required for any grantee/user sending or receiving sensitive data.

Program Coordinator/Data Entry Roles – Data Security

To meet privacy and security standards:

- Store completed CDSME forms in a secure, locked cabinet when not in use
- Enter data into secure, password protected database, such as the CDSME database

What you can trash and when?

- You can **destroy** these forms immediately after entering data into the database:
 - Program Information Cover Sheet
 - Attendance Log
 - Participant Information Survey
 - Host and Implementation Site Organization Information
- Keep ELECTRONIC copies of data for at least 3 years past last report date associated with grant (e.g. grant period end date of 2/28/2017 should keep data at least through 2/27/2020). Once the data is entered into the respective national database, NCOA is responsible for maintaining that data for at least 3 years.

Forms Management & Quality Assurance

Data entry person:

- Review forms when received to be sure packet is complete -- that is, all expected forms are included, and **participant IDs match across all forms.**
- Follow up promptly with facilitators or site staff to clarify any issues.
- Enter forms into the database as soon as possible. Have a system for managing the flow of forms (e.g., a checklist).
- Look for unclear responses on the forms and have a consistent method to handle them.
- If you cannot get clarification, leave unclear responses blank.
- Missing attendance logs: Do not enter data from workshops with NO Attendance Log into the database

Leaders/coaches or site coordinators

- Keep the forms together for a given workshop from its start date to its end date
- Submit all forms together for a given workshop for data entry as soon as possible after completion of a workshop, and at least within 2 weeks of its end date

Forms Management & Quality Assurance

Facilitators:

1. Make a priority building in time, taking advantage of Session '0'
2. Assist participants - consider literacy and cognitive challenges, including LEP
3. Offer facilitators help
4. Review script during training, emphasize the value of feedback to future funding, programming etc. (English & Spanish)
5. Build excitement for data by sharing feedback with implementation sites/partners

Resource: [Tip Sheet: Maximizing Complete and Accurate Data \(ncoa.org\)](https://www.ncoa.org/resources/tip-sheet-maximizing-complete-and-accurate-data)

Landing Page

Live Demo



The screenshot shows the landing page for the National CDSME Database. At the top is a dark teal navigation bar with the NCOA logo and links for MY NETWORK, APPROVALS, WORKSHOPS, RESOURCES, REPORTS, and HELP. A bell icon for notifications is on the right. Below the navigation bar is a large hero section with a dark teal background on the left and a photo of four diverse people in a yoga pose on the right. The hero text reads: "National CDSME Database" and "Meeting the aging, disability, and public health network's data management and analysis needs since 2010." Below the hero section are three circular icons with labels: "Network" (a network diagram), "Workshops" (a person at a presentation), and "Reports" (a document icon). At the bottom, there are two sections: "Announcements" and "NCOA TWITTER FEED". The "Announcements" section features an "ALERT!" about newly approved CDSME data collection tools, dated 12/13/2019. The "NCOA TWITTER FEED" section shows a tweet from @NCOAging discussing the use of multiple interviewers and the #AgeAction hashtag.

ncoa
national council on aging

MY NETWORK APPROVALS WORKSHOPS RESOURCES REPORTS HELP

National CDSME Database

Meeting the aging, disability, and public health network's data management and analysis needs since 2010.

Network

Workshops

Reports

Announcements

ALERT! Everything You Need to Know About the Newly Approved CDSME Data Collection 12/13/2019

Whether you're an active Administration for Community Living (ACL) grantee or otherwise using the National CDSME Database to monitor and track your evidence-based program activity, please be advised that ACL has received approval from the Office of Management and Budget (OMB) to deploy the revised CDSME program data collection tools. Please share the new forms with your community partners as soon as possible. You can find answers to your burning questions about where to access the new forms.

NCOA TWITTER FEED

National Council on Aging
@NCOAging

Many employers now use several people during the interview and application review process so they get multiple reactions to an prospective employee. @oates_jane says this is a good thing because it diversifies the feedback and invites more robust discussion. #AgeAction

The Basic Layout and Navigation



Network Details

Grantee/Network Group

CHA Community, Testing

Address

2600 Crystal Drive
Arlington, VA 22202

Host Organizations

6

Implementation Sites

11

Workshops

210

Participants Enrolled

2861

Participants Completed

1789



Host Organizations

+ Create New

Search By

-- None --

Search



Search

Reset Filters

| NAME | CITY | COUNTY | STATE | SITE TYPE | LAST WORKSHOP |
|--------------|-------------|-----------------|----------|--------------------------|---------------|
| AAA Region 7 | Arlington | Arlington | Virginia | Area Agency on Aging | |
| AAA Region 1 | Dulles | Loudoun | Virginia | Area Agency on Aging | 2021-04-01 |
| AAA Region 5 | Alexandria | Alexandria City | Virginia | Health care organization | 2021-04-01 |
| AAA Region 2 | Manassas | Prince William | Virginia | Area Agency on Aging | 2020-11-01 |
| AAA Region 3 | Centerville | Fairfax | Virginia | Area Agency on Aging | 2020-02-03 |
| AAA Region 4 | Arlington | Arlington | Virginia | Area Agency on Aging | 2019-08-01 |

6 Host Organizations Found • Page 1 of 1



Implementation Sites

+ Create New

Search By

-- None --

Search



Search

Reset Filters

| NAME | CITY | COUNTY | STATE | HOST ORGANIZATION | SITE TYPE | LAST WORKSHOP |
|------------------------------|-------------|----------------|----------|-------------------|--------------------------|---------------|
| Northeast Senior Center | Dulles | Loudoun | Virginia | AAA Region 1 | Senior center | 2021-04-01 |
| NCOA Senior Center | Arlington | Arlington | Virginia | AAA Region 5 | Other | 2021-04-01 |
| Eastside Clinic | Manassas | Prince William | Virginia | AAA Region 2 | Health care organization | 2020-11-01 |
| Eastside Community Center | Arlington | Arlington | Virginia | AAA Region 3 | Other Community Center | 2020-02-03 |
| Aged Senior Center | Arlington | Arlington | Virginia | AAA Region 4 | Senior center | 2019-08-01 |
| Southwest Senior Center | Dulles | Loudoun | Virginia | AAA Region 1 | Senior center | 2019-07-02 |
| Northend Community Center | Centerville | Fairfax | Virginia | AAA Region 3 | Other Community Center | 2019-04-30 |
| Northwest YMCA | Arlington | Arlington | Virginia | AAA Region 4 | Health care organization | 2019-04-17 |
| West County Community Center | Centerville | Fairfax | Virginia | AAA Region 3 | Other Community Center | 2017-10-02 |
| Central Area Medical Center | Manassas | Prince William | Virginia | AAA Region 2 | Health care organization | 2017-10-02 |

11 Implementation Sites Found • Page 1 of 2

Terminology

Implementation Sites:

- The physical locations where programs are delivered

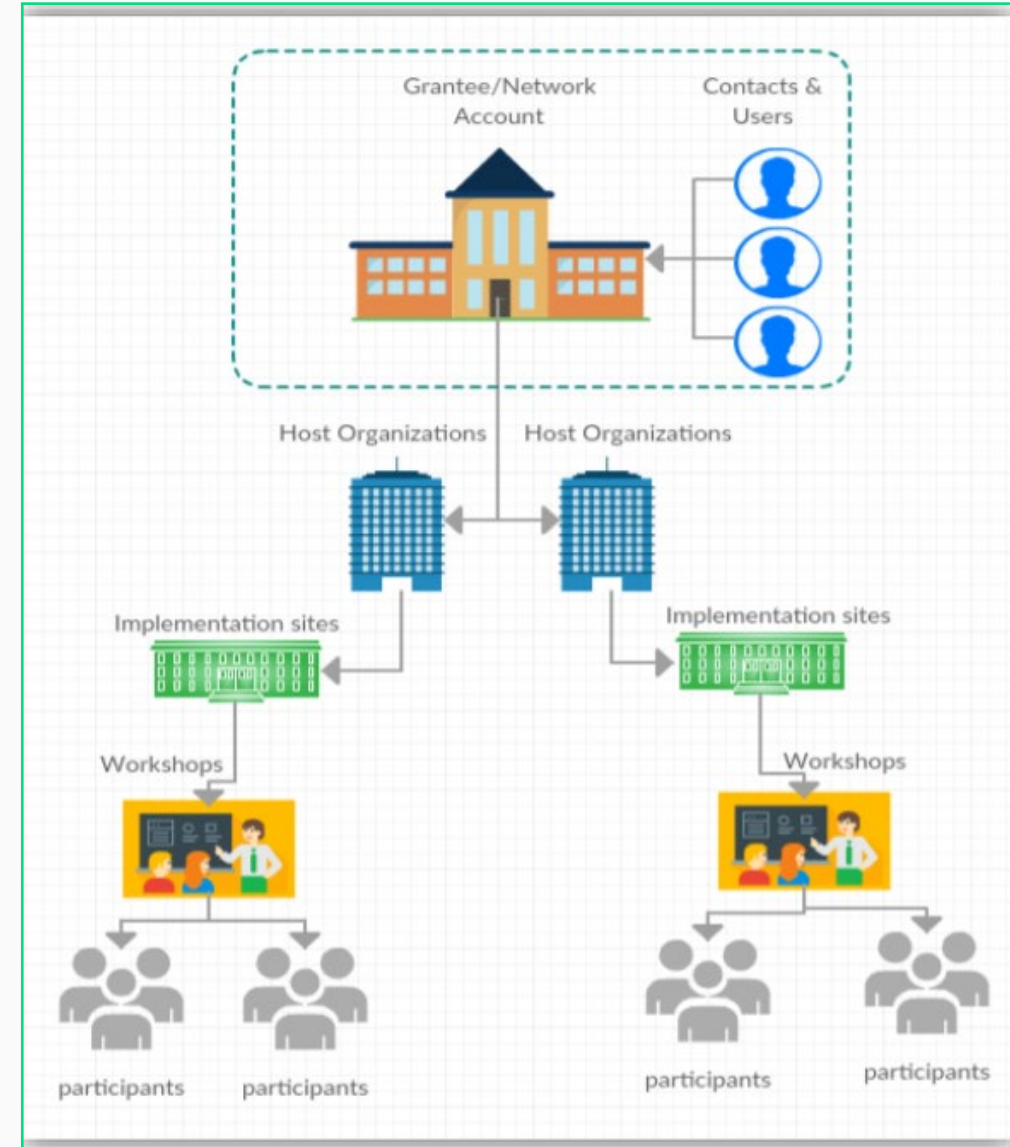
Host Organizations:

- The organizations that sponsor workshops, hold the license for a programs (e.g. CDSMP, DSMP), train or employ facilitators, and arrange for the use of implementation sites

Guide to Adding Host Organizations and Implementation Sites


Instructions for Adding Host Organizations and Implementation Sites


LIVE DEMO



Adding Workshops & Participants to National CDSME Database

LIVE DEMO


[MY NETWORK](#)
[APPROVALS](#)
[WORKSHOPS](#)
[RESOURCES](#)
[REPORTS](#)
[HELP](#)


CDSME WORKSHOPS
NEW WORKSHOP

Information

* Implementation Site

Funding Source

--None--
ACL CDSME Grant
Older Americans Act (Title III-D, Title III-E, etc.)
Centers for Disease Control and Prevention
Other Federal Funding
Medicaid / Medicaid Waiver
Medicare/Medicare Advantage

Hold Ctrl to select multiple Options

Session 0

--None--

* Workshop Type
--None--

Workshop Type Other


Workshop Language
--None--

Workshop Language Other

Fee

Workshop Format
--None--

Network Admin Notes


COVID-19 Impact

This workshop was Impacted by COVID-19

--None--

How was the workshop Impacted by COVID-19?

--None--

This Workshop was Implemented virtually

--None--

If YES, workshop Implemented virtually, what technology was used? Select all that apply (Optional)

--None--
Facebook live
Zoom
One Click
Other

Hold Ctrl to select multiple Options

Power BI Reporting Support

Getting Started in the CDSME Database
(ncoa.org)

**Getting to Know Your Power BI
Dashboards
USER GUIDE**

National CDSME Database

(Rev 10/15/2019)

Finding Help

THE BEST WAY! Create a case within the CHA Community using these instructions:

1. Log in to your Center for Healthy Aging (CHA) Community account
 2. Click on **HELP** on the top menu bar, then click on **Contact Customer Support** to open the **Contact Customer Support Form**
 3. Describe your request in the space provided & add subject line
 4. Select “Case Type” in drop down (e.g. help adding participant)
 5. Upload file to share screenshots
 5. Click SUBMIT - a Case # is generated; and email sent to you
 6. Track status of your case under ‘HELP’ (My Cases)
- **Review** Frequently Asked Questions- CDSME Data Management and Analyses (ncoa.org)

Creating a Help Desk Ticket

LIVE DEMO



The screenshot shows the homepage of the National CDSME Database. The header features the nco logo (national council on aging) and a navigation menu with links: MY NETWORK, APPROVALS, WORKSHOPS, RESOURCES, REPORTS, and HELP. A search bar is located on the right side of the header. The main content area has a dark blue background with the title "National CDSME Database" and a subtitle: "Meeting the aging, disability, and public health network's data management and analysis needs since 2010." To the right of the text is a photograph of four diverse people practicing yoga outdoors. Below the main content area, there are three circular icons representing different features: "Network" (a globe with nodes), "Workshops" (a person presenting to a group), and "Reports" (a document with a checklist).

nco
national council on aging

MY NETWORK APPROVALS WORKSHOPS RESOURCES REPORTS HELP

National CDSME Database

Meeting the aging, disability, and public health network's data management and analysis needs since 2010.

Network Workshops Reports

Data Migration from Vendors

- **Fastest, most efficient, and cheapest is to get dedicated staff to directly enter data into the national database.**
- **When to work with a vendor to import into national database?**
 - You already work with a vendor to collect data on EBPs or other services, and you want to avoid double data entry.
 - You need major customization and fields; but check with us first.
 - You need a very large # of user accounts; but check with us first.
 - You need regular, timely custom reports; but check with us first.
- Vendors working on EBP data management don't usually offer data entry

Data Migration from Vendors

- Data migration is done at least quarterly, or as agreed upon with grantee
- Grueling, cumbersome process for all sides
 - Requires formatting your data to strict specifications
 - Undergoes quality check for errors, duplicates, missing keys, etc.
 - Some back-n-forth education, retooling & revisions are often required
 - May lead to delays
- Established a nightly auto-sync with a high-volume vendor (talk to us)
- Consider important deadlines
 - Monthly reports to ACL (done on last day)
 - Semi-annual report deadlines
 - Get data in at least 3 weeks before semi-annual report deadline.

Guide to Importing Data Into the National CDSME Database (& Template)



GUIDE TO IMPORTING DATA INTO THE NATIONAL CHRONIC DISEASE SELF-MANAGEMENT EDUCATION (CDSME) DATABASE

The National CDSME Database is housed at and managed by the National Council on Aging’s Center for Healthy Aging. The database can receive data from active Administration for Community Living (ACL) Prevention and Public Health Fund (PPHF) CDSME grantees, former grantees, or any other organization that wants to track data for their evidence-based health promotion programs. The database presently tracks data on the CDSME, and self-management support programs listed below. If you would like to track data for an additional program, please contact Tia Crayton at tia.crayton@ncoa.org to discuss the options. We welcome the growth of the database!

Table 1. Program Types and Corresponding Field Forms in Database

| Formatting-Template-to-Import-Data-into-National-CDSME-Database-Revised-o... Angelica Herrera-Venson | | | | | | | | | |
|--|---|--|---|---|---|-----------|--------|------------------------|----------|
| File Home Insert Page Layout Formulas Data Review View Tell me what you want to do | | | | | | | | | |
| H38 | | | | | | | | | |
| | A | B | C | D | E | F | G | H | |
| | CDSME Workshop ID (NCOA) | Vendor Workshop ID | CDSME Participant ID (NCOA) | Vendor Participant ID | Participant ID as shown in Participant Survey | Age Today | Sex | Ethnicity | American |
| 1 | PABERK_082911 | ##### | PABERK_082911_03 | ##### | JUPO52 | 68 | Male | Not Hispanic or Latino | |
| 2 | | | | | SIMA54 | 66 | Female | Hispanic or Latino | |
| 3 | | | | | | | | | |
| 4 | This ID is generated by CDSME National Database and unique to each workshop. | This is the vendor's own #, and should serve as the key / linkage between the participant and the corresponding workshop they attended on the Participant tab. | This ID is generated by CDSME National Database and unique to each participant. It typically consists of a state ref, host name, and end data of workshop, followed by a serial # (_01, _02) for each participant in that workshop. Your success file will have these filled for your reference. In some cases, this ID# is 15 digits, starting with lowercase 'a'. | This is the vendor's own reference # for the participant and record tracking. | This ID is provided by the participant at the time they are completing surveys. It consists of the First 2 letters of participant's first name, 2 letters of last name, and (Only 6 Characters allowed) last 2 digits of year of birth. Sites can also use any other 6 character # that is useful for tracking participants at your organization. | | | | |
| 5 | Typically consists of a state ref, host name, and end data of workshop. Your success file will have these filled for your reference. In some cases, this ID# is 15 digits, starting with lowercase 'a'. | | | | | | | | |
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This participant template is for data from STANDARD programs listed below:

The Self-Management Resource Center's Suite of Programs (Standard)

- Arthritis Self-Management Program
- Better Choices, Better Health

Host Organizations Implementation Sites Workshops Standard-Participants Alternate - Participant

Next Steps

- a. New users, by July 1, submit your [Grantee and Users Intake Form](#) to Tia Crayton (tia.crayton@ncoa.org). Existing users- create a case to request changes.
- b. Review the recommended bookmarked materials and contact Tia (cc Project Officer) with any questions.

Important Resources to Bookmark

- [National CDSME Database](#)
- [Getting Started in the National CDSME Database](#)
- [Data Collection Tools for Chronic Disease Self-Management Education](#)
- [Frequently Asked Questions- CDSME Data Management and Analyses](#)
- [Do's and Don'ts for Modifying Data Collection Forms](#)
- [Submit a request for help](#)

CDSME Database Office Hours

**3rd Thursday of Each Month beginning July 14th at
1 pm EST.**

Offers an opportunity to address any questions or concerns regarding access to the database, importing files, and assistance with navigating the database.

Registration link will be sent out on **Friday June 18th**



Thank you for participating!



Any Questions?