2021 ACL CDSME Grantees Database Training

Guidance and Updates for Navigating the National CDSME Database

PRESENTERS

Tia Crayton, Lesha Spencer-Brown & Sarath Reddy

June 15, 2021
Agenda

1. Welcome from NCOA & ACL

2. Technical Assistance

3. About the Database

4. Data Collection Requirements

5. Getting Set-Up

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

5. Forms Management & Data Quality Assurance
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!

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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?

- Set you up in database
- Troubleshoot data entry & monitoring issues
- Upload data from vendors
  Retrieve data & create custom reports
- Provide more in-depth data analyses
CDSME National Database – By the #’s

- Program Participants: 431,808
- Workshops: 39,778
- Database Users: 284
- Active Networks: 152
- Active States in Past Year: 37
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
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


• 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
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.)
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?  O Yes  O No

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

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

<table>
<thead>
<tr>
<th>Condition</th>
<th>Yes</th>
<th>No</th>
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</thead>
<tbody>
<tr>
<td>Anxiety Disorder</td>
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<td>Heart Disease</td>
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<td>Asthma</td>
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<td>Osteoporosis (Low Bone Density)</td>
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<td>Cancer or Cancer Survivor</td>
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<td>Hypertension (High Blood Pressure)</td>
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<td>Stroke</td>
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<td>Diabetes (High Blood Sugar)</td>
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<td>Arthritis Rheumatoid Disease</td>
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<tr>
<td>Other Chronic Conditions</td>
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</tbody>
</table>

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

15. Do you have difficulty walking or climbing stairs?  O Yes  O No

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

17. How often do you feel lonely or isolated from those around you?
   - O Always  O Often  O Sometimes  O Rarely  O Never
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 ID:** 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:** ___ ___ ___ ___ (e.g., SMC)

**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

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
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<th>H</th>
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<tr>
<td><strong>SAMPLE DATA</strong></td>
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<td><strong>Appendix A - Semi-Annual Report</strong></td>
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<td>Cohort Year: 2018</td>
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<td>Performance Period: 7/1/2018 to 6/30/2019</td>
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<td>Retrieved from National CERMS Database on 7/17/2019</td>
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<td><strong>PROGRESS TOWARD GRANT GOAL: 69.5%</strong></td>
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<td><strong>TOTAL COMPLETED: 3,042</strong></td>
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<td><strong>TARGETED GOAL: 1,400</strong></td>
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<thead>
<tr>
<th><strong>SAMPLE DATA</strong></th>
<th><strong>Previous Period</strong></th>
<th><strong>TNM Period Only</strong></th>
<th><strong>Cumulative Total</strong></th>
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<tbody>
<tr>
<td></td>
<td>7/1/2018 to 12/31/2018</td>
<td>1/1/2019 to 6/30/2019</td>
<td>7/1/2018 to 6/30/2019</td>
</tr>
<tr>
<td><strong>Enrollees</strong></td>
<td><strong>Completed</strong></td>
<td><strong>Completion %</strong></td>
<td><strong>Enrollees</strong></td>
</tr>
<tr>
<td>30</td>
<td>22</td>
<td>73%</td>
<td>18</td>
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<td>50</td>
<td>45</td>
<td>70%</td>
<td>130</td>
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<td>60</td>
<td>56</td>
<td>93%</td>
<td>122</td>
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<tr>
<td>300</td>
<td>280</td>
<td>93%</td>
<td>891</td>
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<td>8</td>
<td>5</td>
<td>63%</td>
<td>13</td>
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<tr>
<td>250</td>
<td>210</td>
<td>84%</td>
<td>350</td>
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<tr>
<td>600</td>
<td>510</td>
<td>85%</td>
<td>940</td>
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<tr>
<td><strong>Subtotal</strong></td>
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<td>243</td>
<td>215</td>
<td>88%</td>
<td>430</td>
</tr>
<tr>
<td>30</td>
<td>20</td>
<td>67%</td>
<td>50</td>
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<tr>
<td>100</td>
<td>80</td>
<td>80%</td>
<td>200</td>
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<tr>
<td><strong>Supporting Programs (add programs as needed)</strong></td>
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<tr>
<td><strong>TOTAL towards goal: 152 (EMRC completed); 146 (Supporting Programs enrolled) = 68%</strong></td>
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<tr>
<td><strong>TOTAL towards goal: 678 (EMRC completed); 154 (Supporting Programs enrolled) = 69.4%</strong></td>
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</table>

Note: For all reporting periods, previous period is the start of the grant through the last reporting period.

https://vimeo.com/528863800
Privacy and Data Security Practices

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

• 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. MoveIt. 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://ncoa.org)
Landing Page

National CDSME Database
Meeting the aging, disability, and public health network’s data management and analysis needs since 2010.

Live Demo

Network
Workshops
Reports

Announcements

ALERT! Everything You Need to Know About the Newly Approved CDSME Data Collection 12/31/2019

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 program partners as soon as possible. You can find answers to your frequently asked questions about the new forms here.
The Basic Layout and Navigation
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
Power BI Reporting Support

Getting Started in the CDSME Database (ncoa.org)

Getting to Know Your Power BI Dashboards
USER GUIDE
National CDSME Database
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
6. Click SUBMIT - a Case # is generated; and email sent to you
7. 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
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)

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
Next Steps

a. New users, by July 1, submit your [Grantee and Users Intake Form](mailto:tia.crayton@ncoa.org) 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?