



Final Performance Report

Version 1.0



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Introduction

The Reports section allows you to generate the Interim, Annual, and Final Performance Reports required by the CDC each budget period. Your Project Officer/Program Consultant will provide you with the exact date for submission of the reports.

Interim Report – Includes Action Plan progress for the first six months of the budget year, and the Action Plan for the upcoming budget year.

Annual Report – Includes progress for the entire budget year.

Final Performance Report – Includes information on the comparison of actual accomplishments to objectives established for the project period.

Information from various sections of CDMIS is used to generate the reports. CDMIS guides you through a series of steps required for creating the report. Before finalizing the report, you will have the option to create a draft version of the report for review. Any updates necessary once the draft report is generated should be made in CDMIS and a new draft copy of the report should be run. Once you are satisfied with the information contained in the draft report, you will have the option to finalize and print the report for submission to the CDC.

Accessing Reports in CDMIS:

To access a report, click the *Reports* tab. The system displays the Reports page.

The system will default to the correct report (Interim, Annual, or Final Performance) based on the current date. If the report you want to access is not displayed by default, click on its link.

Final Performance Report

The Final Performance Report contains information on the comparison of actual accomplishments to objectives established for the project period.

Creating a Final Performance Report

The Final Performance Report can be completed in the following four (4) steps:

- Step 1: Review Errors in Current Action Plan
- Step 2: Enter Report Narrative
- Step 3: Transfer Information (Disabled)
- Step 4: Update Report Status

The steps must be completed in order since the information needed in each step is dependent on information from the previous step. After the successful completion of the four steps, the report can then be submitted to CDC. Once a report is finalized for you to submit to CDC, the report can no longer be modified.



- The steps must be completed in order since the information needed in each step is dependent on information from the previous step.
- After the successful completion of the four steps, the report can then be submitted to CDC.
- The Final Performance Report is available for completion only when your FOA is in its final reporting year, the current funding year's Interim Report status is Finalized, and progress information has been entered for the second six months in your action plan.
- **Step 3: Transfer Information** is disabled and marked as "Not applicable" if your program is in its final reporting year and you have entered progress information only for the first six (6) months in your action plan
- Once a report is finalized for you to submit to CDC, the report can no longer be modified.

Step 1: Review Errors in Current Action Plan

Step 1 allows you to review the errors that are present in your current action plan, if any, and then correct them. If errors are present in your current action plan, the system will not allow you to advance to step 2 of the Final Performance Report process. You must review the errors and correct them before the system will enable the **Step 2: Enter Report Narrative** link and allow you to enter a narrative.

When completing Step 1, ensure that you have entered at least one:

- progress for each Annual Objective.
- activity for each Annual Objective.

To complete Step 1 of the Final Performance Report process:

1. Click the *Reports* tab.

Result: The system displays the *Final Performance Report* page
Chronic Disease MIS: Public Prevention Health Fund: REACH (DP12-1209)
Hidalgo Medical Services

The screenshot shows a navigation bar with tabs: System Admin, FOAs & Recipients, Technical Assistance, Program Information, Resources, Financial, Planning, Action Plan, and Community Information. Below the tabs is a breadcrumb trail: Interim Report | Final Performance Report. Underneath, there is a section for '2012-2013 Reports' with a dropdown menu set to 'Year: 2012-2013' and a 'Go' button.

Final Performance Report - DRAFT

Process	Status
Step 1: Review Errors in Current Action Plan	Incomplete
Step 2: Enter Report Narrative	Incomplete
Step 3: Transfer Information	Not applicable
Step 4: Update Report Status	DRAFT



Note

- Initially, the status of each step is set to *Incomplete*. As you finish a step, the status is automatically changed to *Complete*.
- Each step must be completed in the order shown. Subsequent steps are not accessible until the current step is complete.
- **Step 3: Transfer Information** is disabled and marked as *Not applicable* if your program is in its final reporting year and you have entered progress information only for the first six (6) months in your action plan.

2. Click on the **Step 1: Review Errors in Current Action Plan** link, if enabled.

Result: The system displays the Step 1 of 4: Review Errors in Current Action Plan page. The system displays the errors in your action plan and displays a red icon in the affected row and column. The **Finish** button is also disabled if errors are present.

Interim Report | **Final Performance Report**

2012-2013 Reports

Final Performance Report - DRAFT Print this page

Step 1 of 4: Review Errors in Current Action Plan

Listed below are all objectives and activities to be included in the report. Please print this page, review and correct any invalid information. The following information is required:

- Each Project Period Objective must have at least one PROGRESS entered.
- Each Annual Objective must have at least one PROGRESS entered.
- Each Annual Objective must have at least one ACTIVITY entered.

Select the  icons below to add progress or activities. Once all corrections have been made, select **FINISH**.

Action Plan		
Objectives	Progress Entered?	Activity Entered?
PPO: 1.0 - Increase the number of Community infrastructure components supporting CDC's community health high-priority strategies and principles from 0 to 7 by September 2017.		N/A
AO: 1-test - Maintain the rate of testing from 77 to 77 by September 2013.		
AO: 1.1 - Increase the number of funded communities with the highest burdens of disease and health disparities among Hispanics/Latinos selected to implement high-impact, population-wide strategies from 0 to 10 by September 2014.		

 **Note**

-  Indicates required information has not been completed.
-  Indicates required information has been completed.

N/A indicates information is not required.

If you are not able to add all the required activities or progress, you can click the **Finish Later** button to save your changes and return to Step 1 later.

- Click the red icon displayed to view the error and correct it.
Result: The system displays the page for entering the missing information in a pop-up window.

Project Period Objective Progress *Required

Add Project Period Objective Progress

Related Project Period **01** - Increase the number of data sets and evaluations used to implement and evaluate programmatic and collaborative efforts from 0 to 4 by June 2017.

Objective:

*Progress Period:

*Objective's Target Met: Yes No Ongoing

*Current Measurement: Unknown at this time

*Describe Progress:

ABC▼

Characters: 0 / Maximum: 5000

*Facilitating Factors of Success:

ABC▼

4. Enter the missing information and save the entry.

Result: The system closes the page where the error occurred. Notice that the red icon has now been

replaced by a green icon indicating that the error has been corrected.

Interim Report | **Final Performance Report**

2012-2013 Reports

Final Performance Report - DRAFT

Step 1 of 4: Review Errors in Current Action Plan

Listed below are all objectives and activities to be included in the report. Please print this page, review and correct any invalid information. The following information is required:

- Each Project Period Objective must have at least one PROGRESS entered.
- Each Annual Objective must have at least one PROGRESS entered.
- Each Annual Objective must have at least one ACTIVITY entered.

Select the  icons below to add progress or activities. Once all corrections have been made, select **FINISH**.

Action Plan	Progress Entered?	Activity Entered?
Objectives		
PPO: 1.0 - Increase the number of Community infrastructure components supporting CDC's community health high-priority strategies and principles from 0 to 7 by September 2017.		N/A
AO: 1-test - Maintain the rate of testing from 77 to 77 by September 2013.		
AO: 1.1 - Increase the number of funded communities with the highest burdens of disease and health disparities among Hispanics/Latinos selected to implement high-impact, population-wide strategies from 0 to 10 by September 2014.		
AO: 1.2 - Increase the number of Summer meals locations that increase healthy food access for children from 1 to 2 by September 2014.		
PPO: 2.0 - Increase the number of people with access to physical activity opportunities from 250 to 1812 by September 2014.		N/A
AO: 2.1 - Increase the number of after-school programs that increase opportunities for physical activity from 0 to 1 by September 2014.		
AO: 2.2 - Increase the number of Public accessible parks from 1 to 2 by September 2014.		

When missing information is completed, the system replaces the red "!" icon with a green one.

 Print this page

5. Repeat steps 2 and 3 above for every red icon displayed.

Result: When all the errors have been corrected, the system enables the **Finish** button.

When all missing information is completed, the system enables the **Finish** button.



Note

- The **Finish** button is not enabled until all errors are corrected and the red icons have been replaced by green ones.
- If the PPO without Annual Objectives warning is displayed, the *Continue without Annual Objectives* check box is also displayed at the bottom of the **Step 1 of 4: Review Errors in Current Action Plan** page. The **Finish** button will not be enabled until the *Continue without Annual Objectives* check box is selected, or at least one AO is entered for the PPO.

6. Click the **Finish** button.

Result: The system changes Step 1's status to *Complete* and enables the link for **Step 2: Enter Report Narrative**.

Chronic Disease MIS: Public Prevention Health Fund: REACH (DP12-1209)

Hidalgo Medical Services

System Admin	FOAs & Recipients	Technical Assistance	Program Information	Resources	Financial	Planning	Action Plan
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Interim Report | **Final Performance Report**

2012-2013 Reports

Year:

After completing a step, the status changes to *Complete*.

Final Performance Report - DRAFT

Process	Status
Step 1: Review Errors in Current Action Plan	Complete
Step 2: Enter Report Narrative	Incomplete
Step 3: Transfer Information	Not applicable
Step 4: Update Report Status	DRAFT

After completing one step, the system enables the next step.

Missing Objectives Warning:

Some programs require at least one Annual Objective for each Project Period Objective (PPO) entered in the Action Plan. CDMIS checks for this condition and issues a warning message if it finds PPOs without Annual Objectives (AO). Each PPO missing an AO is highlighted, and a message with a check box to *Continue without annual objectives* is displayed at the end of the page.

- If your program requires at least one AO for each PPO, do not select the *Continue without Annual Objectives* check box. Instead, click the **Return to the Action Plan** link to go back to the Action Plan and enter an AO for the highlighted PPO. Please refer to your program guidance to determine if this applies to you. If your Program Guidance allows a PPO to be entered without an AO, click the check box to continue. The system then enables the **Finish** button and allows you to complete Step 1.
- If the PPO without AO warning is displayed, select the *Continue without Annual Objectives* check box, or enter at least one AO for the PPO, and the **Finish** button will be enabled.
- If you were not able to add all the required activities or progress, you can click the **Finish Later** button to save your changes and return to Step 1 later.
- Each PPO must have at least one associated AO.
- If you complete step 1 and make changes to the current action plan which adds items that should be corrected or enables an objective which was not previously available for transfer to be available, step 1 and all subsequent steps (except step 2) become *Incomplete*. The system saves all previous data; however, you must visit each step again and correct all resulting errors in order to mark the step as complete.



- Refer to your Program Guidance to determine if your program allows a PPO to be entered without an AO.

Annual Report - DRAFT

[Print this page](#)

Step 1 of 4: Review Errors in Current Action Plan

Listed below are all objectives and activities to be included in the report. Please print this page, review and correct any invalid information. The following information is required:

- Each Project Period Objective must have at least one PROGRESS entered.
- Each Annual Objective must have at least one PROGRESS entered.
- Each Annual Objective must have at least one ACTIVITY entered.

Select the  icons below to add progress or activities. Once all corrections have been made, select **FINISH**.

Objectives	Progress Entered?	Activity Entered?
PPO: 1A - Increase the percent of Tobacco free parks to 100% by September 2016.		N/A
AO: 1.0 - Decrease the number of complaints for restrictions needed to 10 by September 2012.		
PPO: 1B - Increase the percent of restaurants that are tobacco-free from 52% to 100% by September 2016.		N/A
AO: No Annual Objectives entered.		

One or more Project Period Objectives highlighted above are missing Annual Objectives. Please check the 'Continue' box below if you wish to continue without entering Annual Objectives, or Return to the Action Plan

Select this checkbox if you don't need to add Annual Objectives for the highlighted Project Period Objective

Continue without entering Annual Objectives



- If you complete step 1 and make changes to the current action plan which adds items that should be corrected or enables an objective which was not previously available for transfer to be available, step 1 and all subsequent steps (except step 2) become *Incomplete*. The system saves all previous data; however, you must visit each step again and correct all resulting errors in order to mark the step as complete.

Step 2: Enter Report Narrative

To complete Step 2 of the Final Performance Report process:

1. Click on the **Step 2: Enter Report Narrative** link.

Result: The system displays the *Step 2 of 4: Enter Report Narrative* page.

Chronic Disease MIS: Public Prevention Health Fund: REACH (DP12-1209)

Hidalgo Medical Services

System Admin	FOAs & Recipients	Technical Assistance	Program Information	Resources	Financial	Planning	Action Plan
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Interim Report | **Final Performance Report**

2012-2013 Reports

Final Performance Report - DRAFT

Step 2 of 4: Enter Report Narrative

*Please describe the most significant accomplishments during the reporting period:

Characters: 0 / Maximum: 5000

*Please describe the most significant challenges during the reporting period:

2. In the *Please describe the most significant accomplishments during the reporting period* field, enter a detailed description of the significant accomplishments made by your program during the reporting period. Be sure to include information such as collaboration across other chronic disease programs (such as leveraged resources). The maximum characters allowed for this field is 5,000 characters or 1000 words
3. In the *Please describe the most significant challenges during the reporting period* field, enter a detailed description of the significant challenges encountered by your program during the reporting period. The maximum characters allowed for this field is 5,000 characters or 1000 words
4. Click **Save**.

Result: The system saves the information entered, marks Step 2 as *Complete*, and enables the link for **Step 4: Update Report Status**.

Chronic Disease MIS: Public Prevention Health Fund: REACH (DP12-1209)

Hidalgo Medical Services

System Admin	FOAs & Recipients	Technical Assistance	Program Information	Resources	Financial	Planning	Action Plan
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[Interim Report](#) | **Final Performance Report**

2012-2013 Reports

Year:

Final Performance Report - DRAFT

Process	Status
Step 1: Review Errors in Current Action Plan	Complete
Step 2: Enter Report Narrative	Complete
Step 3: Transfer Information	Not applicable
Step 4: Update Report Status	DRAFT

**Note**

- Once the report narrative is saved, you can go back and edit the narrative up until you finalize the report in Step 4.
- The Transfer process is disabled and marked as *Not applicable* if your program is in its final reporting year and you have entered progress information only for the first six (6) months in your action plan

Step 4: Update Report Status

In step 4, you will finalize your Final Performance Report and submit it to CDC.

To complete Step 4 of the Final Performance Report process:

1. Click on the **Step 4: Update Report Status** link.

Result: The system displays the *Step 4: Update Report Status* page.

Chronic Disease MIS: Public Prevention Health Fund: REACH (DP12-1209)

Hidalgo Medical Services

System Admin	FOAs & Recipients	Technical Assistance	Program Information	Resources	Financial	Planning
Interim Report Final Performance Report						

2012-2013 Reports

Final Performance Report - DRAFT

Step 4 of 4: Update Report Status

*Report Status:

Draft

Finalized for submission to CDC



Save

Cancel

2. In the *Report Status* field, select the *Finalized for submission to CDC* option.
3. In the *Submission Date* field, enter the submission date in the format MM/DD/YYYY or click the calendar icon to select the date. This field is required.

4. Click the **Save** button.

Result: The system displays a confirmation page.

Chronic Disease MIS: Public Prevention Health Fund: REACH (DP12-1209)

Hidalgo Medical Services



2012-2013 Reports

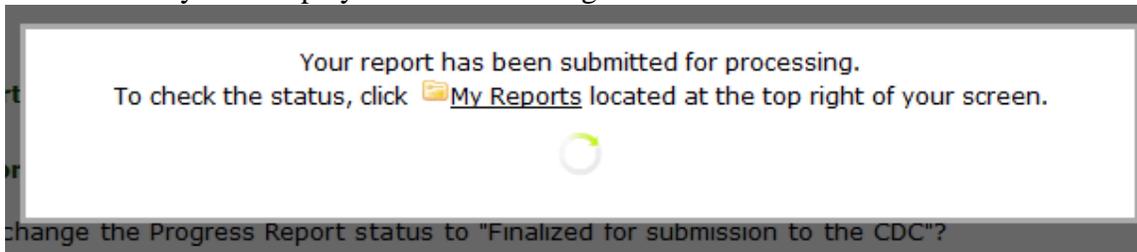
Final Performance Report - DRAFT

Step 4 of 4: Update Report Status

Are you sure you wish to change the Progress Report status to "Finalized for submission to the CDC"?

5. Click **Yes**.

Result: The system displays the status message shown below.



The system finalizes the report and also does the following:

- Marks progresses with a date in the first six months of the reporting period as view only.
- Disables all Final Performance Report Steps (for non-CDC users).
- Makes the Finalized Reports section available. The Finalized Reports section displays the date the report was finalized and a **View and Print Report** link that you can click to download and view the report in PDF format and print the report, if desired. The finalized report is always available for download using the **View and Print Report** link, and does not expire.

Chronic Disease MIS: Public Prevention Health Fund: REACH (DP12-1209)

Hidalgo Medical Services

System Admin
FOAs & Recipients
Technical Assistance
Program Information
Resources
Financial
Planning
Action Plan
Community Information

Interim Report | **Final Performance Report**

2012-2013 Reports

Year: 2012-2013

Final Performance Report - Submitted for processing

Process	Status
Step 1: Review Errors in Current Action Plan	
Step 2: Enter Report Narrative	
Step 3: Transfer Information	
Step 4: Update Report Status	Your report has been submitted for processing. To check the status, click  My Reports located at the top right of your screen.

Viewing and Printing a Report

After you select a report to run, you can click the **My Reports** link at the top right of the page to open a pop-up window and check the status of the report(s) being generated. While the report is being generated, you can continue working in the system and access other pages in the system without disrupting the progress of the report being generated.



Note

- If your program is in its final reporting year and you have entered progress information only for the first six (6) months in your action plan, the cover sheet for the report will not include a *Proposed Action Plan* section.
- The **My Reports** link is available for all tabs and reporting years.
- Reports are specific to the user, meaning you can view only the reports that you select to run.
- If you run the same report multiple times, the most recently generated report is displayed at the top of the list on the report pop-up page.
- A generated report is available for 18 hours from the submitted date and time, or until you click the **Download link** for the report.

The pop-up window displays the information for each report generated in the following columns:

Column/Field/Link	Description
Report	The name of the report. For Interim and Annual reports, this column also indicates if the report is in the draft state or finalized. Click on the report name to open the report or save the report to a location on your computer.
Submitted	Indicates the date and time the request to run the report was submitted.
Available Until	Indicates the date and time during which the request will be displayed in the pop-up window. After the displayed date and time, the report will no longer be available. To view the report after this date, you must run the report again.
[Status]	Indicates the status of the report, (e.g. processing) the report format (PDF), and the size. When the report is ready, this column displays a <i>Download</i> link, which you can click to view the report or download it to a location on your computer.
Clear this Message	When you've just generated a finalized Interim, Annual, or Final Performance Report, the system displays a message saying your report is available for download. Clicking the Clear this Message link refreshes the page and makes the View and Print Report link available in the Reports tab.
Clear this Request	If reporting errors occur, click this link to cancel your report request.
Close	Click this link to close the pop-up window.



Important

- The MIS does not automatically submit the report to CDC; you must manually submit the report according to CDC and PGO guidance.
- If your report is not finalized in the MIS by the report due date, the report will be locked down and marked as “Past Due”. If this occurs, you must contact your project officer to unlock the report for editing.
- If your report has been finalized by mistake, you must contact your project officer for assistance.

- If your report has been finalized and is then reverted to DRAFT status for any corrections, both the original and the newly submitted report will be saved in the MIS.