



Reports User Guide (Community Information)

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Reports Tab

Introduction:

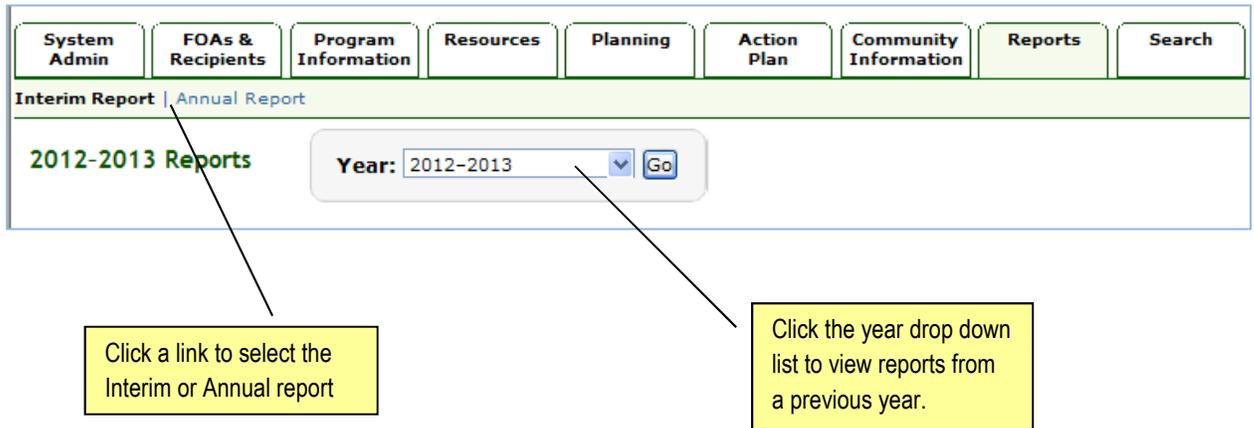
The Reports section allows you to generate the Interim and Annual Progress reports required by the CDC each budget period. Your Project Officer/Program Consultant will provide you with the exact date for submission of the reports.

- **Interim Progress Report** - includes Action Plan/Community Action Plan progress for the first six months of the budget year, and the Action Plan/Community Action Plan for the upcoming budget year.
- **Annual Report** - includes progress for the entire budget year.

Information from various sections of the MIS is used to generate the reports. The MIS guides you through a series of steps required for creating the report. At the end of this process, 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 the MIS and a new draft copy of the report should be run. Once you are satisfied with the information contained in the report, you will have the option to finalize and print the report for submission to the CDC.

Accessing Reports in the MIS:

- To access either report, click the Reports tab.
- The system will default to the correct report (Interim or Annual) based on the current date. If you need to access the other report, click on its link.
- To view reports from a previous year if available, select the year from the drop-down list and click the 'Go' button.



Interim Report Instructions:

The Interim Report contains the Action Plan/Community Action Plan for the current year, progress for each Annual Objective, and the Action Plan for the upcoming budget year.

To create the Interim Report:

- Navigate to the Reports tab. Depending on the reporting period, the Interim Report page will be displayed. If not, click on the Interim Report link.
 - The MIS will guide you through the five steps required to generate the Interim Report:
 - Step 1: Review Errors in Current Action Plan
 - Step 2: Enter Report Narrative
 - Step 3: Transfer Information
 - Step 4: Review Errors in the New Action Plan
 - Step 5: Update Report Status
 - Each step must be completed in the order shown. Subsequent steps are not accessible until the current step is complete.
 - Initially, the status of each step is set to 'Incomplete'. As you finish a step, the status is automatically changed to 'Complete.'
- To execute a step, click on its link.

The screenshot shows the 'Reports' tab selected in the navigation menu. Below the menu, there are links for 'Interim Report' and 'Annual Report'. A '2012-2013 Reports' section contains a 'Year' dropdown menu set to '2012-2013' and a 'Go' button. Below this is the 'Interim Report - DRAFT' section, which contains a table with two columns: 'Process' and 'Status'.

Process	Status
Step 1: Review Errors in Current Action Plan	Incomplete
Step 2: Enter Report Narrative	Incomplete
Step 3: Transfer Information	Incomplete
Step 4: Review Errors in New Action Plan	Incomplete
Step 5: Update Report Status	DRAFT

Click on the link to execute the step.

Step Status

Step 1: Review Errors in Current Action Plan

- In Step 1, the MIS reviews the current Action Plan/Community Action Plan to check that information required for generating the Interim Report has been entered. The following information is required for the Interim Report:
 - Each Annual Objective must have progress entered for first 6-months
 - At least one Activity must be entered for each Annual Objective
- The results of the system's Action Plan/Community Action Plan review are displayed:
 -  - Indicates information has been entered
 -  - Indicates information has not been entered
 - N/A - Indicates information is not required

Interim Report - DRAFT Print this page

Step 1 of 5: 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 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 - Increase the number of non-smokers from 5 to 10 by September 2017.	N/A	N/A
AO: 1.1 - Decrease the number of smokers from 10 to 5 by September 2013.		
AO: 1.2 - Increase the proportion of non-smokers to smokers from 0 to 10 by September 2013.		
AO: 1.3 - Maintain the number of non-smokers from 10 to 10 by September 2013.		

Community Action Plan		
Healthy Non-Smoking Community		
Objectives	Progress Entered?	Activity Entered?
Community: Healthy Non-Smoking Community	N/A	N/A
PPO: 1 - Increase the number of asdfasdf from 0 to 6 by September 2017.	N/A	N/A
AO: 1.1 - Decrease the percent of asdfsdf from 50% to 25% by September 2013.		
AO: 1.2 - Increase the proportion of asdsd from 5 to 25 by September 2013.		

Click the red '!' icon to enter missing information

To enter missing activities or progress:

- Click on the red '!' icon. The page required to enter the missing activity or progress will be displayed in a 'pop-up' window over the 'Step 1: Review Errors in Current Action' Plan page.

Add Item in Action Plan

Annual Objective Activity *Required

Add Annual Objective Activity

Related Annual Objective: **1.1 - Decrease the number of smokers from 10 to 5 by September 2013.**

* Activity ID:

* Activity Title:

* Activity Description:

Characters: 0 / Maximum: 2000

* Lead Personnel Assigned:

* Key Contributing Partners: No partners assigned

Available Selected

Pop-up window to enter missing progress or activity

- Enter the required information and click 'Save.' The activity or progress entered will be saved in the current year's Action Plan.
- On the Review page, the red '!' icon will be replaced with the green '✓' icon.
- Missing Objectives Warning:
 - Some programs require at least one Annual Objective for each Project Period Objective (PPO) entered in the Action Plan. The MIS checks for this condition and issues a warning message if it finds PPOs without Annual Objectives. Each PPO missing an Annual

Objective 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 Annual Objective for each PPO, **do not** check 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 Annual Objective for the highlighted Project Period Objective. (Please refer to you program guidance to determine if this applies to you. If your Program guidance allows a PPO to be entered without an Annual Objective, click the checkbox to continue. The 'Finish' button will then be enabled, allowing you to complete Step 1.)

Missing Objectives Warning:

Community Action Plan		
Healthy Non-Smoking Community		
Objectives	Progress Entered?	Activity Entered?
Community: Healthy Non-Smoking Community	N/A	N/A
PPO: 1 - Increase the number of asdfasdf from 0 to 6 by September 2017.	N/A	N/A
AO: 1.1 - Decrease the percent of asdfasdf from 50% to 25% by September 2013.	ⓘ	ⓘ
AO: 1.2 - Increase the proportion of asdsd from 5 to 25 by September 2013.	ⓘ	✔
AO: 1.3 - Increase the number of blah from 0 to 1 by September 2013.	ⓘ	ⓘ
PPO: 2 - Maintain the rate of asdfsd from 1 to 1 by September 2017.	N/A	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 or Return to the Community Action Plan		
<input type="checkbox"/> Continue without entering Annual Objectives		
<input type="button" value="Finish"/> <input type="button" value="Finish later"/>		

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

- When all errors have been corrected, and all icons are green, the finish button will be enabled. If the PPO without Annual Objectives warning is displayed, the 'Finish' button will not be enabled until the 'Continue without Annual Objectives' box is checked, or at least one Annual Objective is entered for the PPO.

Action Plan		
Objectives	Progress Entered?	Activity Entered?
PPO: 1 - Increase the number of non-smokers from 5 to 10 by September 2017.	N/A	N/A
AO: 1.1 - Decrease the number of smokers from 10 to 5 by September 2013.	✓	✓
AO: 1.2 - Increase the proportion of non-smokers to smokers from 0 to 10 by September 2013.	✓	✓
AO: 1.3 - Maintain the number of non-smokers from 10 to 10 by September 2013.	✓	✓

Community Action Plan		
Healthy Non-Smoking Community		
Objectives	Progress Entered?	Activity Entered?
Community: Healthy Non-Smoking Community	N/A	N/A
PPO: 1 - Increase the number of asdfasdf from 0 to 6 by September 2017.	N/A	N/A
AO: 1.1 - Decrease the percent of asdfasdf from 50% to 25% by September 2013.	✓	✓
AO: 1.2 - Increase the proportion of asdsd from 5 to 25 by September 2013.	✓	✓
AO: 1.3 - Increase the number of blah from 0 to 1 by September 2013.	✓	✓

- Click the Finish button to complete Step 1. This will also enable Step 2.

2012-2013 Reports	
Year:	2012-2013 <input type="button" value="Go"/>
Annual Report - DRAFT	
Process	Status
Step 1: Review Errors in Current Action Plan	Complete
Step 2: Enter Report Narrative	Incomplete
Step 3: Transfer Information	Incomplete
Step 4: Update Report Status	DRAFT

- 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.

Step 2: Enter Narrative Report

To complete Step 2 of the Interim Report process:

1. Click on the 'Step 2: Enter Report Narrative' link. The system displays the Step 2 of 5: 'Enter Report Narrative' page.
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 for the first 6 months of the reporting year, including collaboration across other chronic disease programs. Maximum text is 5,000 characters or about 1,000 words. You may enter information directly in the text box, or cut and paste information from another application such as Microsoft Word.
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 first 6 months of the reporting year. Maximum text is 5,000 characters or about 1,000 words. You may enter information directly in the text box, or cut and paste information from another application such as Microsoft Word.
4. When finished entering information, click 'Save'. The system saves the narrative report, marks Step 2 as Complete, and enables the link for 'Step 3: Transfer Information'. (Note: the 'Save' button is disabled when the narrative field is blank and becomes enabled when text is entered.)

Note: You can update the narrative report in Step 2 as often as necessary up until the Interim Report is finalized in Step 5.

Interim Report - DRAFT

Step 2 of 5: Enter Report Narrative

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

During the first 6 months of the budget period, the program made the following significant accomplishments:

Characters: 0 / Maximum: 5000

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

During the first 6 months of the budget period, the program encountered the following significant challenges:

Characters: 0 / Maximum: 5000

Save Cancel

Enter narrative report information about your significant accomplishments. Maximum text is 5,000 characters, about 1,000 words.

Enter narrative report information about significant challenges. Maximum text is 5,000 characters, about 1,000 words.

When finished, click 'Save'.

Step 3: Transfer Information

Step 3 transfers information from one budget year to the next. Information in the following tabs will be transferred to the upcoming year:



- Tabs are displayed in the MIS according to the specific FOA associated with a user.

- **Program Information tab** - All Contact Information and Program Summary information.
- **Resources tab** - All active Personnel, Partners, and Contractors/Consultations; all 'Vacant' positions; the Partnership/Coalition, and the Leadership team.
- **Financial tab** - All information.
- **Planning Tab:** All information (Standard and Other Data Sources, Plans and Logic Models).
- **Action Plan** - All information *except PPO and AO progress*. Products will be transferred if the related Activity is transferred.
- **Community Information** - as applicable.
- All existing attachments in any section.



- Project Period Objective (PPO) **Progress** and Annual Objective **Progress** cannot be transferred to the upcoming year. Progress must be entered on an annual basis, at least once for each PPO (during Annual Report), and twice for each Annual Objective (once per Interim and once per Annual).

To transfer information to the upcoming year:

- Click the link to execute 'Step 3: Transfer Information'
- The Action Plan items selected for transfer will be displayed. Click the '[View All for YYYY-YYYY](#)' link to see an expanded list of information that will be transferred from the Personnel, Partners, Contract/Consultant and Action Plan sections.
- You may uncheck Action Plan/Community Action Plan items selected for transfer if you do not want them transferred to the upcoming year. However, you must uncheck all associated Activities before you can uncheck an Annual Objective, and if you check an Annual Objective Activity, the Annual Objective will also become checked.

2012-2013 Action Plan | View All for 2012-2013

Objectives & Activities	Transfer	Date
PPO: 1 - Increase the number of infrastructure communications components supporting CTG activities from 0 to 10 by September 2016.	<input type="checkbox"/>	
AO: 1.1 - Increase the percent of the public exposed to messages about community needs and CTG planned efforts and achievements of adults 18+ in the 12 intensive counties from 1% to 15% by September 2013.	<input checked="" type="checkbox"/>	
ACT: 1.1.1 - Baseline public opinion polling	<input checked="" type="checkbox"/>	
ACT: 1.1.2 - Local Presentations	<input checked="" type="checkbox"/>	
ACT: 1.1.3 - CA Broadcasters Association	<input checked="" type="checkbox"/>	
ACT: 1.1.4 - Local media	<input checked="" type="checkbox"/>	
ACT: 1.1.5 - Community events	<input checked="" type="checkbox"/>	
ACT: 1.1.6 - Targeted communications and trainings	<input checked="" type="checkbox"/>	
ACT: 1.1.7 - Statewide CTG presentations/presence	<input checked="" type="checkbox"/>	
AO: 1.2 - Increase the number of partners exposed to messages about community needs and CTG planned efforts in the 12 intensive counties from 24 to 48 by September 2013.	<input checked="" type="checkbox"/>	10/11/2012
ACT: 1.2.1 - CDSMP webinar	<input checked="" type="checkbox"/>	
ACT: 1.2.2 - Logic Modeling webinar & TA	<input checked="" type="checkbox"/>	
ACT: 1.2.3 - MUH Webinar	<input checked="" type="checkbox"/>	

Click the green checkbox to prevent the activity or objective from being transferred to the upcoming year

Community Action Plan

Healthy Non Smoking Community

Objectives & Activities	Transfer	Date Transferred
Community: Healthy Non Smoking Community	<input checked="" type="checkbox"/>	03/07/2013
PPO: 1.0 - Increase the number of surveys from 2 to 10 by September 2017.	<input checked="" type="checkbox"/>	03/07/2013
AO: 1.1 - Decrease the number of smokers from 66 to 3 by September 2013.	<input checked="" type="checkbox"/>	03/07/2013
ACT: 1.1.a - Decrease the number of smokers	<input checked="" type="checkbox"/>	
ACT: 1.2.a - second activity	<input checked="" type="checkbox"/>	

- Click the **Transfer** button to have the selected items transferred to the upcoming budget year. The status of Step-3 will be changed to 'Complete' and Step-4 will be enabled.
- If you add new information to the current budget year Action Plan after executing the transfer step, the MIS will evaluate the changes made and reset the status of Step 1 to 'Incomplete' if necessary. If the status of Step 1 is changed to 'Incomplete', you will need to rerun Step before you can proceed to Step 4. (Note: the status of Step 2 will not be changed.)
- The 'Transfer' step may be run multiple times to transfer new information. Once an item has been transferred, it cannot be transferred again.
- If you edit an item in the current year after the transfer step, unless a change is made in the Action Plan, you will need to make the same edit in the upcoming year, if the change is needed in both years.
- If you are not ready to complete the transfer step, click the 'Cancel' button to return to the Interim Report main page.
- On completion of the transfer step, the new budget year will be created in the MIS.
- Both the current year and the upcoming year will remain open for data entry until the report is finalized in Step 5. Once the report is finalized, any updates will not appear in the report.



Please make sure that you have selected the correct year when entering data. If you inadvertently enter data in the upcoming year, you will need to delete it and re-enter it to the current year.

Click on the Year drop down list to access the new budget year.

Process	Status
Step 1: Review Errors in Current Action Plan	Incomplete

Step 4: Review Errors in New Action Plan

- In Step 4, the MIS reviews the upcoming year's Action Plan/Community Action Plan to check that information required for generating the Interim Report has been entered. The only requirement for the upcoming year for the Interim Report is:
 - Every Annual Objective must have at least one Annual Activity associated with it.
- Click the step name link to execute Step 4. The MIS reviews the new Action Plan and displays a report of any errors found.
- The results of the system's Action Plan review for the upcoming year are displayed:
 - Indicates information has been entered
 - Indicates information has not been entered
 - N/A - Indicates information is not required
- Click on the red '!' icon to display the 'Add Activity' page.

Interim Report - DRAFT [Print this page](#)

Step 4 of 5: Review Errors in New Action Plan

Print this page to review and correct any missing activities in your Action Plan. If you need to add additional Annual Objectives and/or Activities, please visit the Action Plan tab to do so, and then return to this screen to check your work. The following information is required:

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

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

Action Plan

Objectives	Activity Entered?
PPO: - Maintain the number of ACHIEVE national partnerships from 5 to 5 by September 2013.	N/A
AO: - Increase the number of communication opportunities with national partners from 2 to 3 by September 2014.	
PPO: - Maintain the number of communication tools and products from 3 to 3 by September 2013.	N/A
AO: - Increase the number of ACHIEVE communities with access to the website from 134 to 150 by September 2014.	
AO: - Increase the number of information sharing/communication mechanisms from 2 to 4 by September 2014.	

Community Action Plan

Community for a Smoke-Free Society

Objectives	Activity Entered?
Community: Community for a Smoke-Free Society	N/A
PPO: 1.01 - Decrease the number of smokers from 6000 to 0 by September 2013.	N/A
AO: 1.02 - Decrease the number of smokers to 0 by September 2014.	

- As shown in Step 1, the 'Add Activity' page will be displayed in a pop-up window over the review page. Enter the required information and click the 'Save' button. The activity entered will be saved in the new year's Action Plan, and the red '!' icon on the review page will be replaced with a green '✓' icon.
- Click the Finish button to complete Step 4. This will also enable Step 5.
- 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 4 later. However, you won't be able to proceed to Step 5 until Step 4 is finished.

Step 5: Update Report Status

- In Step 5, you will finalize the Interim Report.
- Note:* Once information is transferred, any changes to the information in the current year will not be reflected in the upcoming year.
- At any time before you finalize the Interim Report, you can view a draft of the report by clicking on the 'Print Report' link on the Interim Report main page.

Interim Report - Finalized for submission to CDC	
Process	Status
Step 1: Review Errors in Current Action Plan	
Step 2: Enter Report Narrative	
Step 3: Transfer Information	
Step 4: Review Errors in New Action Plan	
Step 5: Update Report Status	Finalized for submission to CDC on 07/08/2013

Finalized Report	
Finalized on: 07/08/2013	View and Print Report

Link to view and print Annual Report

Finalizing the Interim Report

To finalize the Interim Report, you must complete Step 5:

1. Click on the 'Step 5: Update Report Status' link.
2. In the Report Status field, select the 'Finalized for submission to CDC' option.
3. Enter the submission date into the text box (in the format MM/DD/YYYY). You can also click the calendar icon to select a date. This field is required.
4. Click the 'Save' button.

Note: The 'Save' button only saves the selected 'Report Status', it does NOT finalize the report.

Interim Report | [Annual Report](#)

2012-2013 Reports

Interim Report - DRAFT

Step 5 of 5: Update Report Status

*Report Status:

Draft
 Finalized for submission to CDC

Select the option: 'Finalized for submission to CDC'.

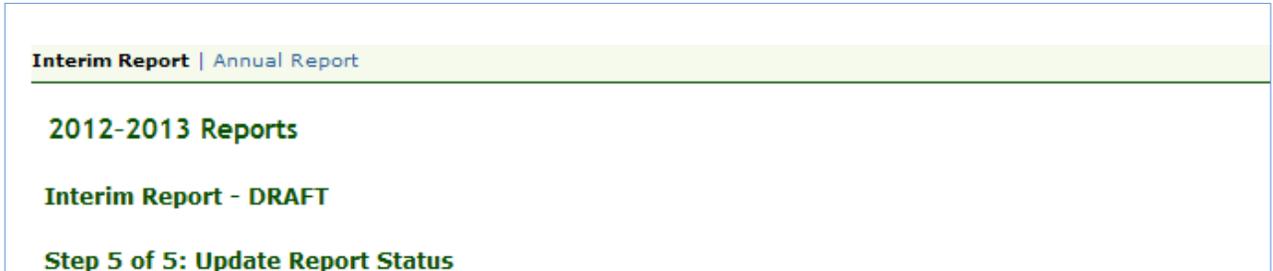
You must also enter the date finalized.

You can click on the calendar to select a date.

Click 'Save' when you are finished entering the date.

4. After you click the 'Save' button you will be prompted to confirm the change of the report status from 'Draft' to 'Finalized'.

- Click the 'Yes' button to complete the finalization process. The report status will be updated to 'Finalized' and the submission date will be entered. A link to view and print the finalized Interim Report will be displayed on the Interim Report main page.
- Click 'No' to cancel the report finalization and return to the Update Report Status page where the report status will change back to 'Draft'.



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

Click 'Yes' to complete Step 5 and finalize the report.

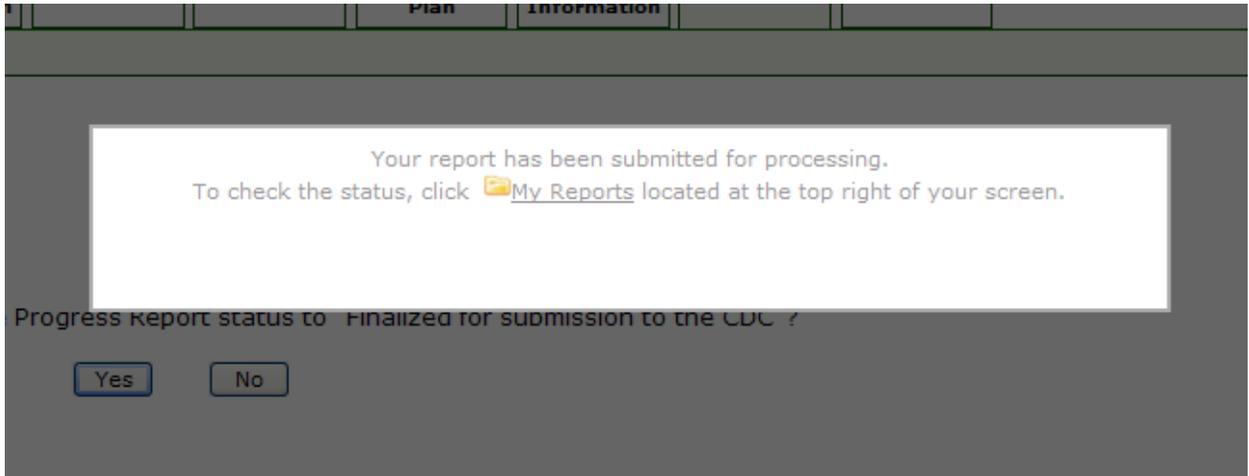
5. After you click 'Yes' on the confirmation message, the system saves the finalized status and the submission date. The system also does the following:

- Saves the finalized Interim report and creates a PDF file of the report.
- Allows you to view and print the PDF from the report Interim Report main page.
- Disables all the steps of Interim Report (for non-CDC users).
- Changes 'Progress' entries in the current year to 'view only' if the date of the entry is within the first six months of the reporting period.
- Creates a 'Previously Finalized Reports' section on the Interim Report main page, where you can see the finalized date and also view and print the report.
- Enables Step 1 of the Annual Report for the current budget year.

Viewing and Printing a Report

To view and print the finalized Interim Report, follow the 2 steps below:

1. In the 'Previously Finalized Reports' section (located beneath the list of steps), click on the 'View and Print Report' link. The system displays pop-up window which shows the status of the report and how to access it..



2. Click the 'My Reports' link to open the report.

Interim Report | Annual Report

2012-2013 Reports Year: 2012-2013 Go

Interim 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: Review Errors in New Action Plan	
Step 5: 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.

Important Notes about Reports

- The MIS does **not** submit the Interim 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, and both reports will be displayed in the 'Previously Finalized Reports' section.



- **The MIS does not submit the report. You need to print and submit the Interim Report to CDC according to CDC and PGO guidance.**
- **Please contact your Project Officer or Program Consultant if you have finalized the report in error.**

Annual Report Instructions

In the 1st and 5th years of the FOA, the Annual Report section will be enabled regardless of the Interim report Status. In the 2nd through the 4th years, the Annual Report section will be disabled until the Interim Report is finalized.

To create the Annual Report:

- Navigate to the Reports tab and click on the Annual Reports link. The MIS will guide you through the 4 steps required to create the Annual Report:
 - Step 1: Review Errors in Current Action Plan
 - Step 2: Enter Narrative Report
 - Step 3: Transfer Information
 - Step 4: Update Report Status
- Each step must be completed in the order shown. Subsequent steps are not accessible until the current step is complete.
- Initially, the status of each step is set to 'Incomplete'. As you finish a step, the status is automatically changed to 'Complete.'
- To execute a step, click on its link.

Link to Annual Report

Interim Report | **Annual Report**

2012-2013 Reports

Year: 2012-2013

Annual Report - DRAFT

Process	Status
Step 1: Review Errors in Current Action Plan	Incomplete
Step 2: Enter Report Narrative	Incomplete
Step 3: Transfer Information	Incomplete
Step 4: Update Report Status	DRAFT

Click the step's link to execute the step

Step Status

Step 1: Review Errors in Current Action Plan

- In Step 1, the MIS reviews the current Action Plan to check that information required for generating the Annual Report has been entered. The following information is required for the Annual Report:
 - Progress must be entered for each Project Period Objective
 - Progress must be entered for each Annual Objective for the second 6-months of the reporting period
 - At least one Activity must be entered for each Annual Objective
- The results of the system's Action Plan review are displayed:

-  - Indicates information has been entered
-  - Indicates information has not been entered
- N/A - Indicates information is not required

- To enter missing information: click on the red '!' icon and the page for entering the missing activity or progress will be displayed in a 'pop-up' window over the 'Step 1: Review Errors in Current Action' Plan page.

Annual Report - DRAFT [Print this p](#)

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: - Maintain the number of ACHIEVE national partnerships from 5 to 5 by September 2013.		N/A
AO: - Increase the number of communication opportunities with national partners from 2 to 3 by September 2013.		
PPO: - Maintain the number of communication tools and products from 3 to 3 by September 2013.		N/A
AO: - Increase the number of ACHIEVE communities with access to the website from 134 to 150 by September 2013.		
AO: - Increase the number of information sharing/communication mechanisms from 2 to 4 by September 2013.		

Community Action Plan		
Community for a Smoke-Free Society		
Objectives	Progress	Activity
Community: Community for a Smoke-Free Society		
PPO: 1.01 - Decrease the number of smokers from 6000 to 0 by September 2013.		
AO: 1.02 - Decrease the number of smokers to 0 by September 2013.		

Click the red '!' icon to input missing information.

- Enter required information in the pop-up window and click 'Save.' The progress or activity entered will be saved in the current year's Action Plan.
- On the Review page, the red '!' icon will be replaced with a green '✓' icon.

Pop-up window to enter missing progress

Entire pop-up window

The screenshot shows a web-based form titled "Add Item in Action Plan" with a sub-header "Project Period Objective Progress" and a "*Required" indicator. The form is titled "Add Project Period Objective Progress" and contains the following fields:

- Related Project Period Objective:** 1B - Increase the percent of restaurants that are tobacco-free from 52% to 100% by September 2016.
- * Progress Period:** A dropdown menu with "Select one" selected.
- * Objective's Target Met:** Radio buttons for Yes, No, and Ongoing.
- * Current Measurement:** A text input field and a checkbox for "Unknown at this time".
- * Describe Progress:** A large text area with a character count of "Characters: 0 / Maximum: 5000".
- * Facilitating Factors of Success:** A large text area with a character count of "Characters: 0 / Maximum: 5000".
- * Barriers/Issues Encountered:** A large text area with a character count of "Characters: 0 / Maximum: 5000".
- * Plans to Overcome Barriers/Issues Encountered:** A large text area with a character count of "Characters: 0 / Maximum: 5000".
- Unanticipated Outcomes Resulting from the Objective:** A large text area with a character count of "Characters: 0 / Maximum: 5000".

At the bottom of the form are "Save" and "Cancel" buttons.

Click 'Save' after all information is entered.

Missing Objectives Warning:

- Some programs require at least one Annual Objective for each Project Period Objective (PPO) entered in the Action Plan. The MIS checks for this condition and issues a warning message if it finds PPOs without Annual Objectives. Each PPO missing an Annual Objective is highlighted and a message with a check box to 'Continue without annual objectives' is displayed at the bottom of the page.
- If your program requires at least one Annual Objective for each PPO, **do not** check 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 Annual Objective for the highlighted Project Period Objective. (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 Annual Objective, click the checkbox to continue.)

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 2015.		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](#)

Continue without entering Annual Objectives

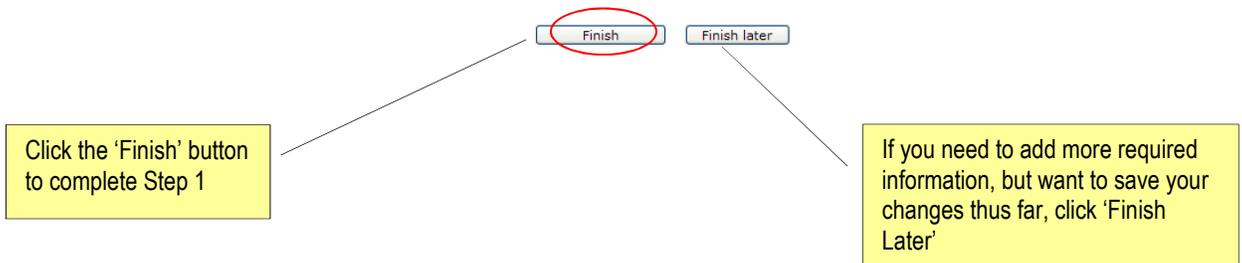
Check this box if you don't need to add Annual Objectives for the highlighted Project Period Objectives. This will enable the 'Finish' button.

- When all errors have been corrected and all icons are green, the 'Finish' button will be enabled. (If the PPO without Annual Objectives warning is displayed, the 'Finish' button will not be enabled until the 'Continue without Annual Objectives' box is checked or at least one Annual Objective is entered for the PPO.)
- Click the 'Finish' button to complete Step 1. This enables Step 2.

Annual Report - DRAFT	
Process	Status
Step 1: Review Errors in Current Action Plan	Complete
Step 2: Enter Report Narrative	Incomplete
Step 3: Transfer Information	Incomplete
Step 4: Update Report Status	DRAFT

- 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.

Action Plan		
Objectives	Progress Entered?	Activity Entered?
PPO: - Maintain the number of ACHIEVE national partnerships from 5 to 5 by September 2013.	✓	N/A
AO: - Increase the number of communication opportunities with national partners from 2 to 3 by September 2013.	✓	✓
PPO: - Maintain the number of communication tools and products from 3 to 3 by September 2013.	✓	N/A
AO: - Increase the number of ACHIEVE communities with access to the website from 134 to 150 by September 2013.	✓	✓
AO: - Increase the number of information sharing/communication mechanisms from 2 to 4 by September 2013.	✓	✓
Community Action Plan		
Community for a Smoke-Free Society		
Objectives	Progress Entered?	Activity Entered?
Community: Community for a Smoke-Free Society	N/A	N/A
PPO: 1.01 - Decrease the number of smokers from 6000 to 0 by September 2013.	✓	N/A
AO: 1.02 - Decrease the number of smokers to 0 by September 2013.	✓	✓



Step 2: Enter Narrative Report

To complete Step 2 of the Annual Report process:

1. Click on the 'Step 2: Enter Report Narrative' link. The system displays the 'Step 2 of 4: Enter Report Narrative' page.
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 for the second 6 months of the reporting year, including collaboration across other chronic disease programs. Maximum text is 5,000 characters or about 1,000 words. You may enter information directly in the text box, or cut and paste information from another application such as Microsoft Word.
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 second 6 months of the reporting year. Maximum text is 5,000 characters or about 1,000 words. You may enter information directly in the text box, or cut and paste information from another application such as Microsoft Word.
4. When finished entering information, click 'Save'. The system saves the narrative report, marks Step 2 as Complete, and enables the link for 'Step 3: Transfer Information'. (Note: the 'Save' button is disabled when the narrative field is blank and becomes enabled when text is entered.)

Note: You can update the narrative report in Step 2 as often as necessary up until the Annual Report is finalized in Step 5.

The screenshot shows a web form titled "Annual Report - DRAFT" and "Step 2 of 4: Enter Report Narrative". It contains two text entry fields. The first field is labeled "Please describe the most significant accomplishments during the reporting period:" and contains the text "During the second 6 months of the budget period, the program made the following significant accomplishments:". Below this field is a character count: "Characters: 0 / Maximum: 5000". The second field is labeled "Please describe the most significant challenges during the reporting period:" and contains the text "During the second 6 months of the budget period, the program encountered the following significant challenges:". At the bottom right of the form are "Save" and "Cancel" buttons. Three yellow callout boxes provide instructions: one points to the accomplishments field, one points to the challenges field, and one points to the Save button.

Annual Report - DRAFT

Step 2 of 4: Enter Report Narrative

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

During the second 6 months of the budget period, the program made the following significant accomplishments:

Characters: 0 / Maximum: 5000

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

During the second 6 months of the budget period, the program encountered the following significant challenges:

Enter narrative report information about your significant accomplishments. Maximum text is 5,000 characters, about 1,000 words.

Enter narrative report information about significant challenges. Maximum text is 5,000 characters, about 1,000 words.

When finished, click 'Save'.

Save Cancel

Step 3: Transfer Information

In Step 3 of the *Interim* Report process, the information from the current budget year was transferred to the upcoming year. The Annual Report transfer process checks for new information that might have been added since the Interim report was finalized, so that only new information will be transferred in this step.

- Click the link to execute Step 3.
- The Action Plan/Community Action Plan items selected for transfer will be displayed. Click the [‘View All for YYYY-YYYY’](#) link to see an expanded list of information that will be transferred from the Personnel, Partners, Contract/Consultant and Action Plan sections.
- Items that were transferred during the Interim Report Process, will be marked as checked in the ‘Transfer’ column and display the previously transferred date. These items will not be transferred again.
- Click the ‘Transfer’ button to have the selected items transferred to the upcoming budget year. The status of Step-3 will be changed to ‘Complete’ and Step-4 will be enabled. You may uncheck Action Plan items selected for transfer if you do not want them transferred to the upcoming year.
 - If you add new information to the Action Plan/Community Action Plan after executing the Transfer step, the MIS will reset Step 1 to ‘Incomplete’, however, the status of Step 2 will remain ‘Complete’. You will need to rerun both Step 1 and ‘Transfer’ again before proceeding to Step 4.
 - To complete the transfer Step, click the ‘Transfer’ button at the bottom of the page.
 - If you are *not* ready to complete the transfer step, click the ‘Cancel’ button to return to the Annual Report main page.
- You may uncheck Action Plan/Community Action Plan items selected for transfer if you do not want them transferred to the upcoming year. However, you must uncheck all associated Activities before you can uncheck an Annual Objective, and if you check an Annual Objective Activity, the Annual Objective will also become checked.

2012-2013 Action Plan | View All for 2012-2013

Objectives & Activities	Transfer	Date Transferred
PPO: 1 - Increase the number of infrastructure communications components supporting CTG activities from 0 to 10 by September 2016.	<input checked="" type="checkbox"/>	10/11/2013
AO: 1.1 - Increase the percent of the public exposed to messages about community needs and CTG planned efforts and achievements of adults 18+ in the 12 intensive counties from 1% to 15% by September 2013.	<input checked="" type="checkbox"/>	10/11/2013
ACT: 1.1.1 - Baseline public opinion polling	<input checked="" type="checkbox"/>	
ACT: 1.1.2 - Local Presentations	<input checked="" type="checkbox"/>	
ACT: 1.1.3 - CA Broadcasters Association	<input checked="" type="checkbox"/>	
ACT: 1.1.4 - Local media	<input checked="" type="checkbox"/>	
ACT: 1.1.5 - Community events	<input checked="" type="checkbox"/>	
ACT: 1.1.6 - Targeted communications and trainings	<input checked="" type="checkbox"/>	
ACT: 1.1.7 - Statewide CTG presentations/presence	<input checked="" type="checkbox"/>	
AO: 1.2 - Increase the number of partners exposed to messages about community needs and CTG planned efforts in the 12 intensive counties from 24 to 48 by September 2013.	<input checked="" type="checkbox"/>	10/11/2013
ACT: 1.2.1 - CDSMP webinar	<input checked="" type="checkbox"/>	
ACT: 1.2.2 - Logic Modeling webinar & TA	<input checked="" type="checkbox"/>	
ACT: 1.2.3 - MUH Webinar	<input checked="" type="checkbox"/>	

Click the green checkbox to prevent the activity or objective from being transferred to the upcoming year

Community Action Plan

Healthy Non Smoking Community

Objectives & Activities	Transfer	Date Transferred
Community: Healthy Non Smoking Community	<input checked="" type="checkbox"/>	03/07/2013
PPO: 1.0 - Increase the number of surveys from 2 to 10 by September 2017.	<input checked="" type="checkbox"/>	03/07/2013
AO: 1.1 - Decrease the number of smokers from 66 to 3 by September 2013.	<input checked="" type="checkbox"/>	03/07/2013
ACT: 1.1.a - Decrease the number of smokers	<input checked="" type="checkbox"/>	
ACT: 1.2.a - second activity	<input checked="" type="checkbox"/>	

ACT: Alison DB test	<input checked="" type="checkbox"/>	11/05/2010
ACT: DB TEST	<input checked="" type="checkbox"/>	11/05/2010
ACT: Dee's Second DB Test	<input checked="" type="checkbox"/>	11/05/2010
ACT: denise	<input checked="" type="checkbox"/>	11/05/2010
AO: Increase the percent of methods to 20% by June 2011.	<input checked="" type="checkbox"/>	11/05/2010
ACT: Dee test DB	<input checked="" type="checkbox"/>	11/05/2010
ACT: test act 1	<input checked="" type="checkbox"/>	11/05/2010
PPO: Increase the percent of women 30-40 years old with a baseline mamogram from 20% to 25% by Jun	<input checked="" type="checkbox"/>	11/05/2010

Click the Transfer button at the bottom of the page to transfer the information.

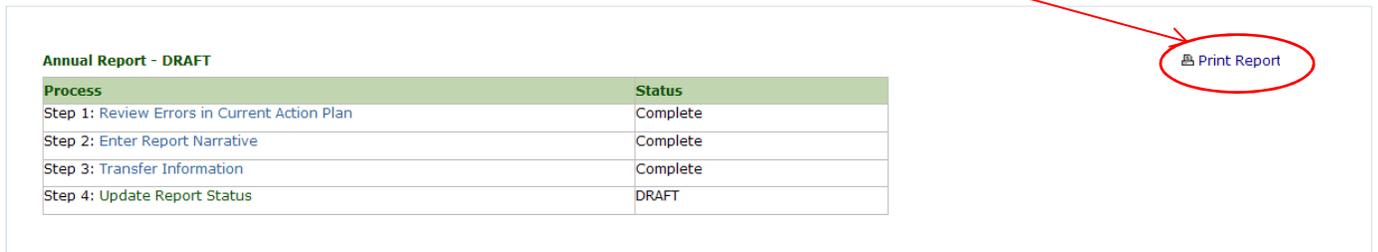
Transfer Cancel



Project Period Objective (PPO) **Progress** and Annual Objective **Progress** cannot be transferred to the upcoming year. Progress must be entered on an annual basis; entered at least once for each PPO, and entered twice for each Annual Objective.

Step 4: Update Report Status

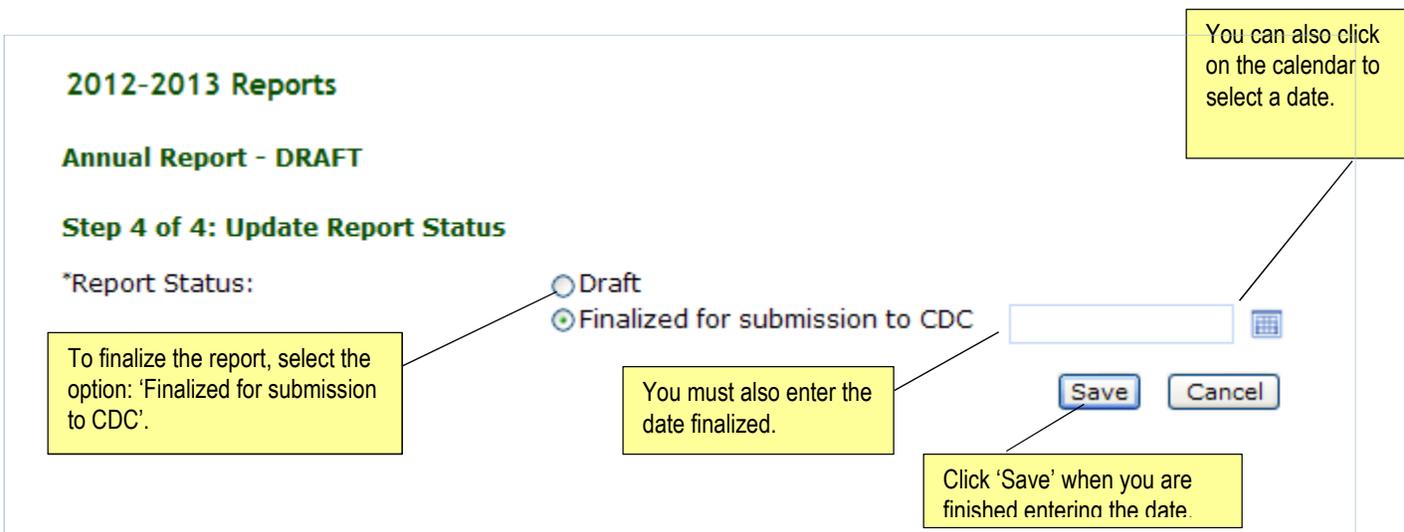
- Step 4 allows you to finalize the Annual Report.
- Click on the link to execute Step 4. The 'Step 4 of 4: Update Report Status' page will be displayed.
- Before you finalize the Annual Report, the report status will automatically display 'Draft.' You can view a draft of the report at any time by clicking on the 'Print Report' link at the top right of the report main page.



Finalizing the Annual Report

To finalize the Annual Report, you must complete Step 4 of the Annual Report process:

1. Click on the Step 4 link.
2. In the Report Status field, select the 'Finalized for submission to CDC' option.
3. Enter the submission date into the text box in the format MM/DD/YYYY. (You can also click the calendar icon to select a date.) This field is required.
4. Click the 'Save' button. (*Note:* The 'Save' button only saves the selected 'Report Status', it does NOT finalize the report.)



5. After you click the 'Save' button you will be prompted to confirm changing the report status from 'Draft' to 'Finalized'.
 - Click the **'Yes'** button to complete the finalization process. The report status will be updated to 'Finalized' and the submission date will be entered. A link to view and print the finalized Annual Report will be displayed on the report main page.
 - Click **'No'** to cancel the report finalization and return to the 'Update Report Status' page where the report status will change back to 'Draft'.

2012-2013 Reports

Annual 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"?

Click 'Yes' to finalize the report and complete Step 4

6. After you click 'Yes' on the confirmation message, the system saves the finalized status and the submission date you entered. The system also does the following:
 - Saves the Annual Report and creates a PDF file of the report.
 - Allows you to view and print the PDF from the Annual Report main page.
 - Disables all steps of Annual Report (for non-CDC users).
 - Changes all information in the current year to "view only," (i.e., *Add*, *Edit*, and *Delete* links are no longer available in the current year).
 - Creates a 'Previously Finalized Reports' section on the Annual Report main page, where you can see the finalized date and also view and print the report.
 - Enables Step 1 of the Interim Report for the upcoming budget year.
 - *Note:* for those FOA's that require that each Project Period Objective have at least one associated Annual Objective, if a Project Period Objective does not have an Annual Objective, the system will not save the report.



Note

- The MIS does **not** submit the Annual Report. You need to print and submit the Annual Report to CDC according to CDC and PGO guidance.
- Please contact your Project Officer or Program Consultant if you have finalized the report in error.

Viewing and Printing a Report

To view and print a finalized Annual Report, follow the steps below:

1. If you have just generated the finalized report, check the report status by clicking My Reports at the top right of the Reports page. When the report is ready, click “Clear this request” in the My Reports pop-up window to refresh the Reports page.
2. In the ‘Finalized Reports’ section (located beneath the list of steps), click the ‘View and Print Report’ link. The system displays a standard File Download window.
3. Click ‘Open’ to open the report, or click ‘Save’ to save the report to a location on your computer. (You can also save the report after you open it by clicking ‘File’ and then ‘Save as’ on the PDF.)

2012-2013 Reports

Year: 2012-2013

Annual Report - Finalized for submission to CDC

Process	Status
Step 1: Review Errors in Current Action Plan	
Step 2: Enter Report Narrative	
Step 3: Transfer Information	
Step 4: Update Report Status	Finalized for submission to CDC on 07/08/2013

Finalized Report

Finalized on: 07/08/2013

[View and Print Report](#)

Link to view and print Annual Report

Important Notes about the Reports

- The MIS does not submit the Annual 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, and both reports will be displayed in the ‘Previously Finalized Reports’ section.



- Remember to Print and Manually Submit the Annual Report to CDC according to CDC and PGO guidance.
- Please contact your Project Officer or Program Consultant if you have finalized the Annual Report in error.
- Finalizing the Annual Report will close out the current budget year. You may view the information for the closed year in the MIS, but will not be able to change any data.