CDMIS
CHRONIC DISEASE
Management Information System

Planning Module

Version 2.0

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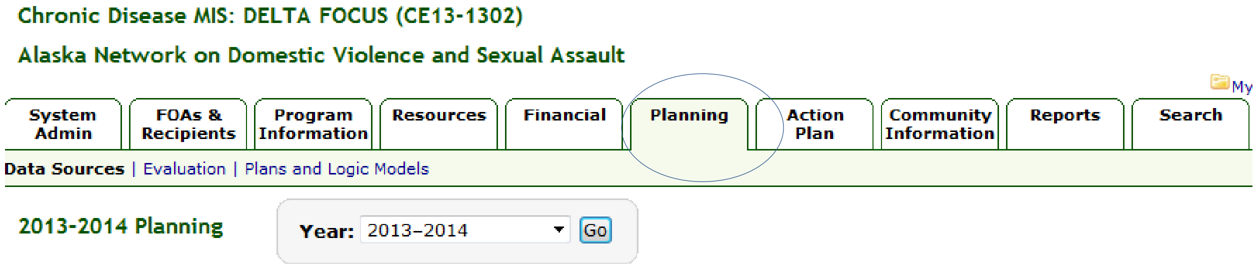
Contents

Introduction

The Planning tab contains sections that you can utilize to put together and maintain a comprehensive plan to attain your program's goals



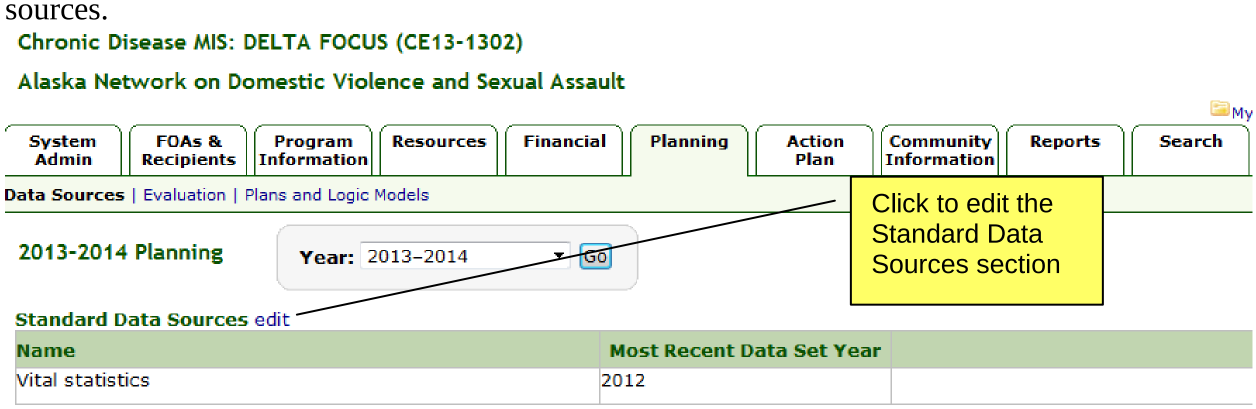
The Planning tab contains the following sections:

- **Data Sources** – maintains information about key personnel members who perform essential program functions.
- **Evaluation** – maintains information about the task force and workgroups in your program. Task Force/Workgroups are stakeholder organizations that are established to assist in the formulation of plans, guide project activities, and identify additional financial resources for this project.
  Plans and Logic Models - maintains information about the partnerships and coalitions in your program. Coalitions are groups of stakeholder organizations that are established to assist in the formulation of plans, guide project activities, and identify additional financial resources for this project.

Data Sources

The *Data Sources* section consists of the *Standard* and *Other Data Sources* subsections, which you can use to identify and maintain the sources of data used for planning, implementation, and evaluation in the program.

Standard data sources are commonly used across all states, while Other data sources are state or local data sources.

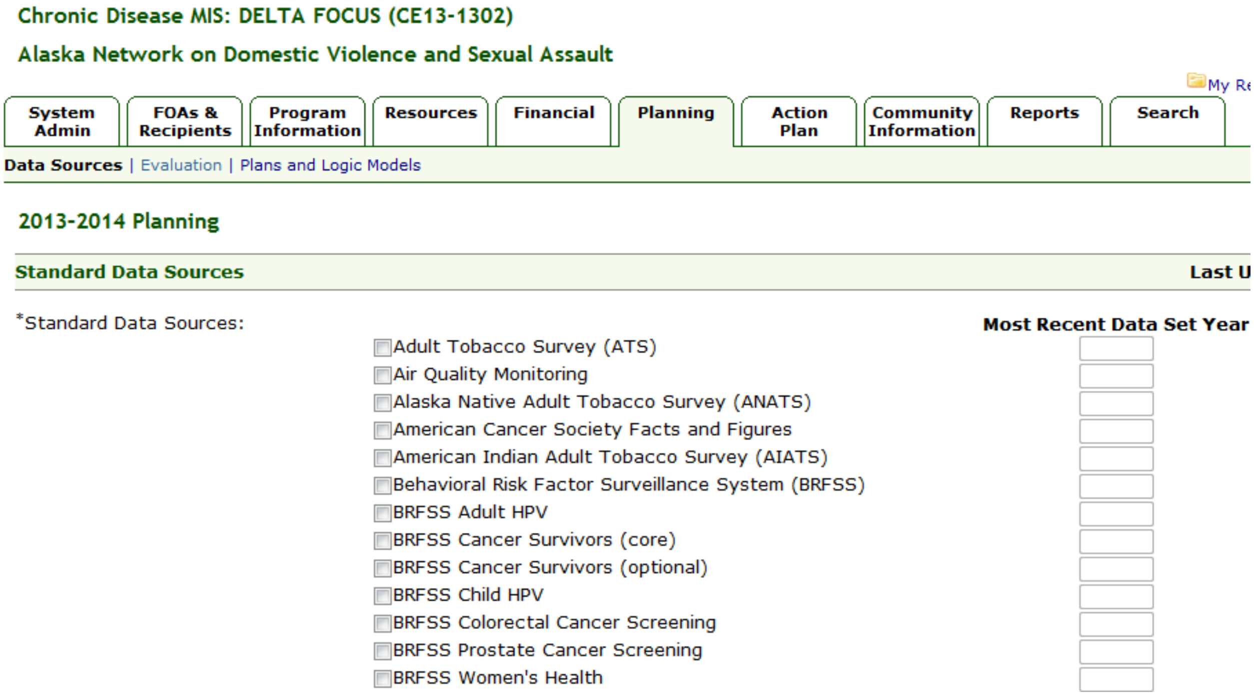


Editing standard data sources

Note

- Since only one Standard Data Source section exists, it cannot be deleted, only modified.

1. On the main *Data Sources* page, click the **edit** link.
   Result: The system displays the *Standard Data Sources* page.



2. Select all the data sources used in program planning, implementation, and evaluation. If the desired data source is not included in the list, select *Other*, and enter the data in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words
3. For each data source selected, enter the most recent year of data available for the data source in the Most Recent Data Set Year text box, for example, 2004. Year entered must be between 1990 and the current year.

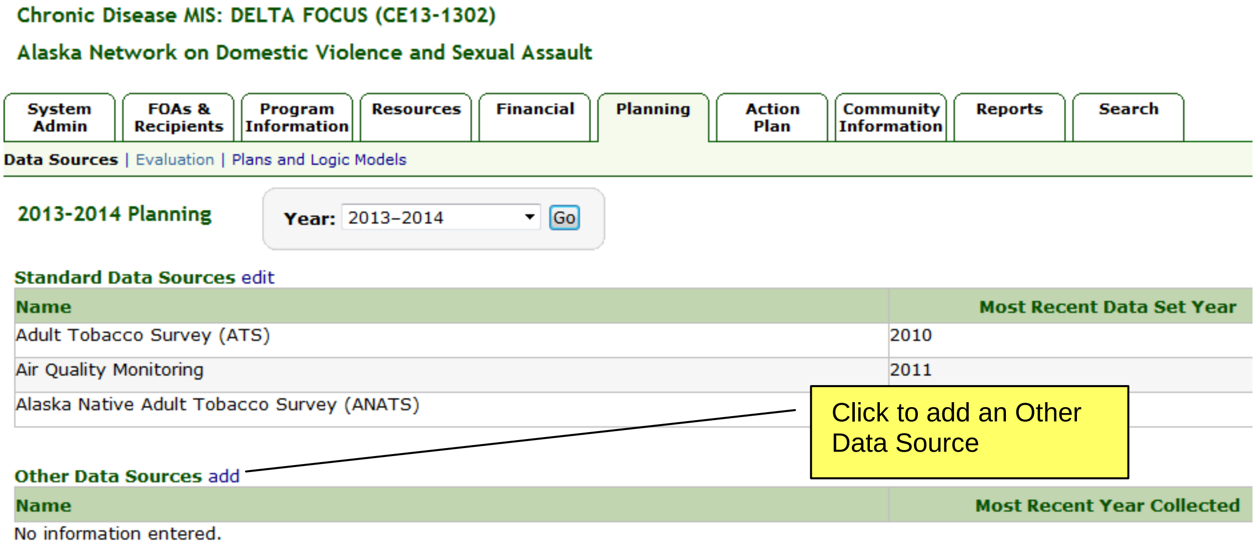
Note

- The Association to Action Plan section displays a list of all action plan 5 Year Outcome Objective and Annual Outcome Objective titles for the current budget year which use these data sources for measurement. You can click on the activity title to open the activity in a new window. If the data source is not associated to any 5 Year Outcome Objectives and Annual Outcome Objectives, the system displays the following text: “No objectives assigned.”

4. Click the **Save** button to save the information you entered.
   Result: The system saves the information and returns you to the main *Data Sources* page where it displays the newly added information. If any fields on the page are incomplete or invalid when you click **Save**, the system displays an error. Correct all invalid fields and click **Save** again.

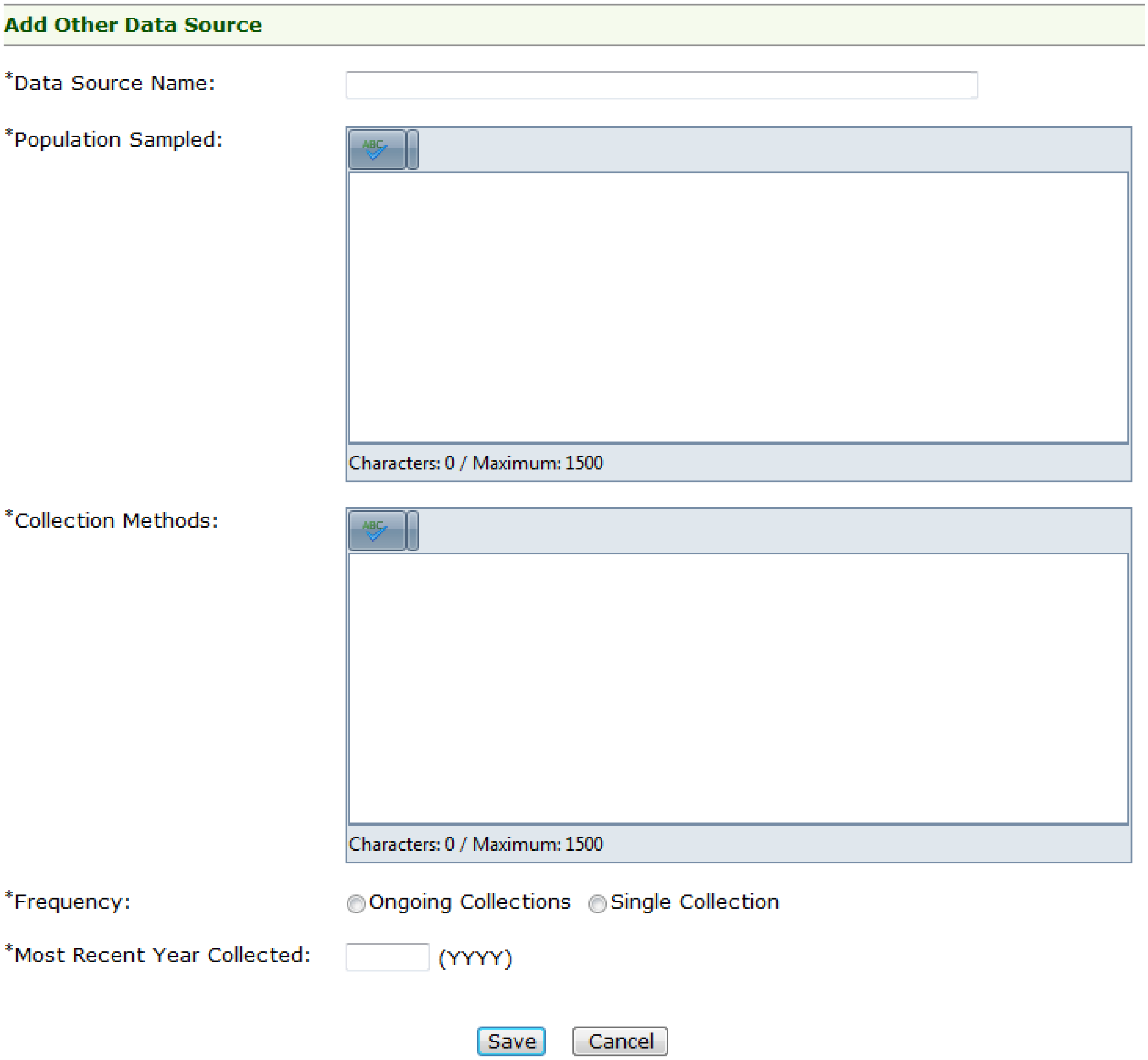
Other Data Sources

Use the Other Data Sources section to identify and maintain state or local data sources used for planning, implementation, and evaluation in the program.



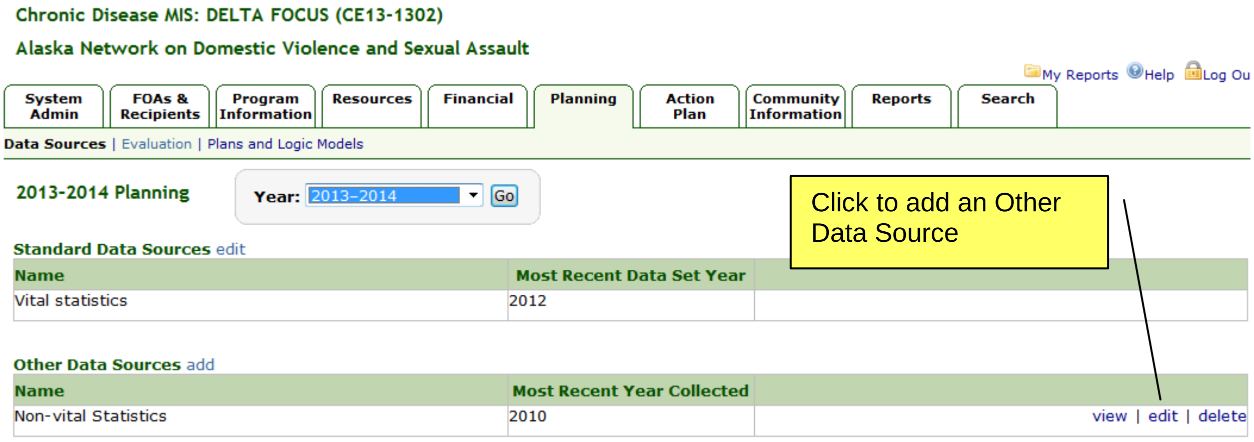
Adding other data sources

1. On the main *Data Sources* page in the *Other Data Sources* section, click the **add** link.
   Result: The system displays the *Standard Data Sources* page.



2. In the *Other Data Source Name* field, enter the name of the data source. Maximum text is 200 characters, 40 words.
3. In the *Population Sampled* field, describe the population sampled for this data source. Maximum text is 1500 characters, about 300 words. You can use the spell checker to check your entry. The character count also allows you to keep track of how much data you have entered and how many characters you have left.
4. In the *Collection Methods* field, enter a description of the methods used for collecting the data. You can use the spell checker to check your entry. The character count also allows you to keep track of how much data you have entered and how many characters you have left.
5. In the *Frequency* field, specify the frequency of data collection — Ongoing Collections or Single Collection.
6. In the *Most Recent Year Collected* field, enter the most recent year the data was collected. Enter the four-digit year in the text box, for example 2004. Year entered must be between 1990 and the current year.
7. Click the **Save** button to save the information you entered.
   Result: The system saves the information and returns you to the main *Data Sources* page where it displays

the newly added information. If any fields on the page are incomplete or invalid when you click **Save**, the system displays an error. Correct all invalid fields and click **Save** again.

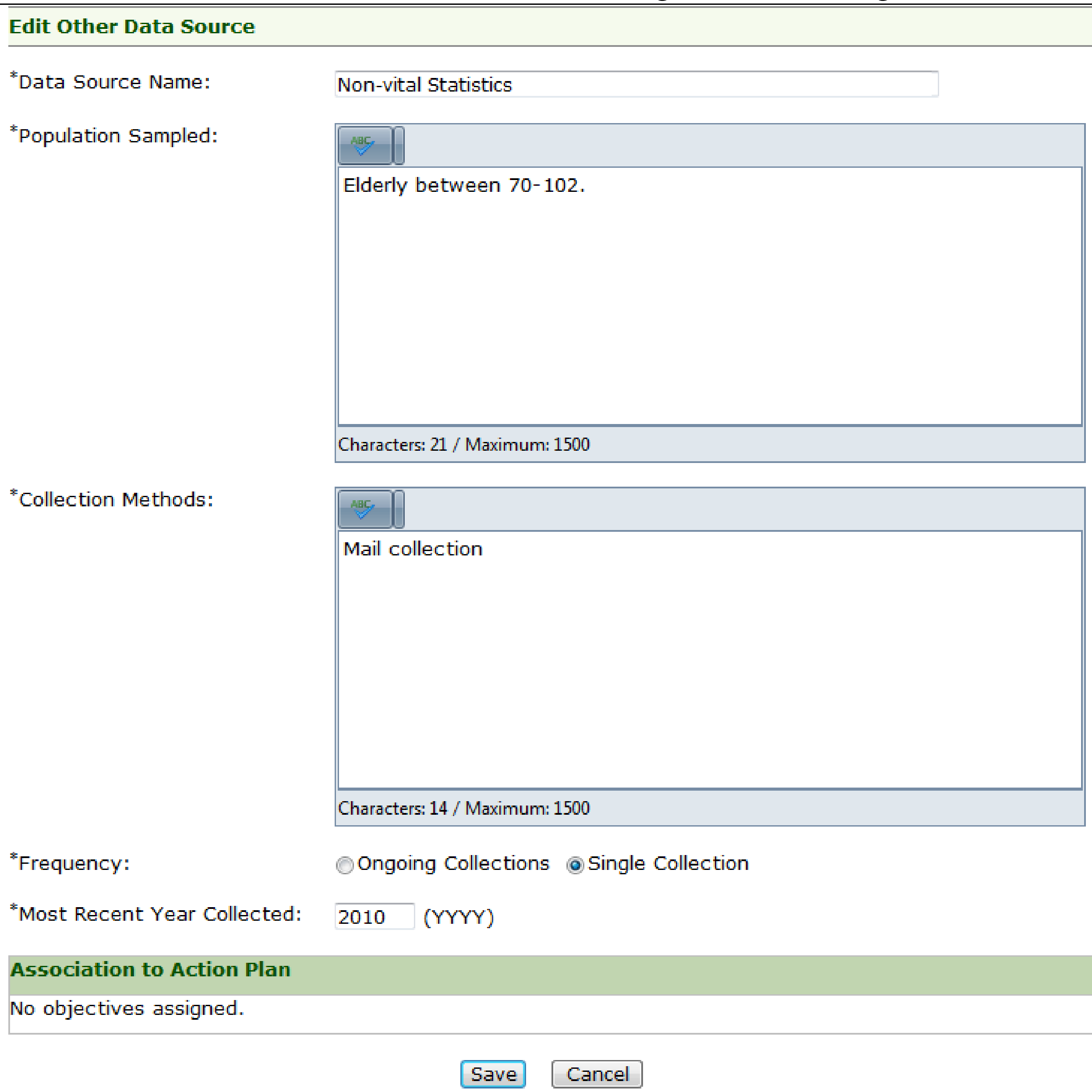


Editing Other Data Sources information

1. On the *Main Data Sources* page in the *Other Data Sources* section, click the **edit** link on the same row as the other data source that you want to edit.
   Result: The system displays the *Edit Other Data Source* page.

Note

- The page for entering initial information and modifying existing information for other data sources are identical. The only difference is that the Edit page displays the existing information for the other data source while the fields in the page for entering initial information are blank.

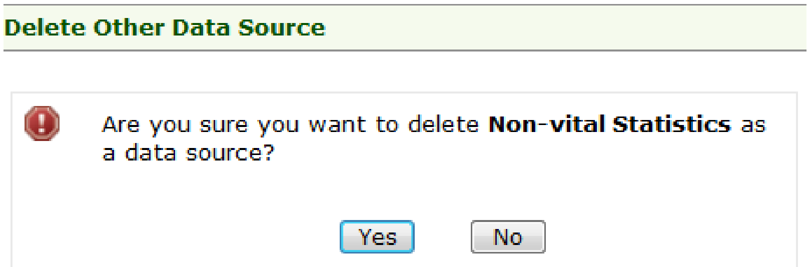


2. Modify the fields as necessary.
3. Click the **Save** button.
   Result: The system saves the information and returns you to the main *Data Sources* page where it displays the newly modified information. If any fields on the page are incomplete or invalid when you click **Save**, the system displays an error. Correct all invalid fields and click **Save** again.

Deleting an Other Data Source

1. On the *Main Data Sources* page in the Other Data Sources section, click the **delete** link on the same row as the other data source.

Result: The system displays a confirmation message.



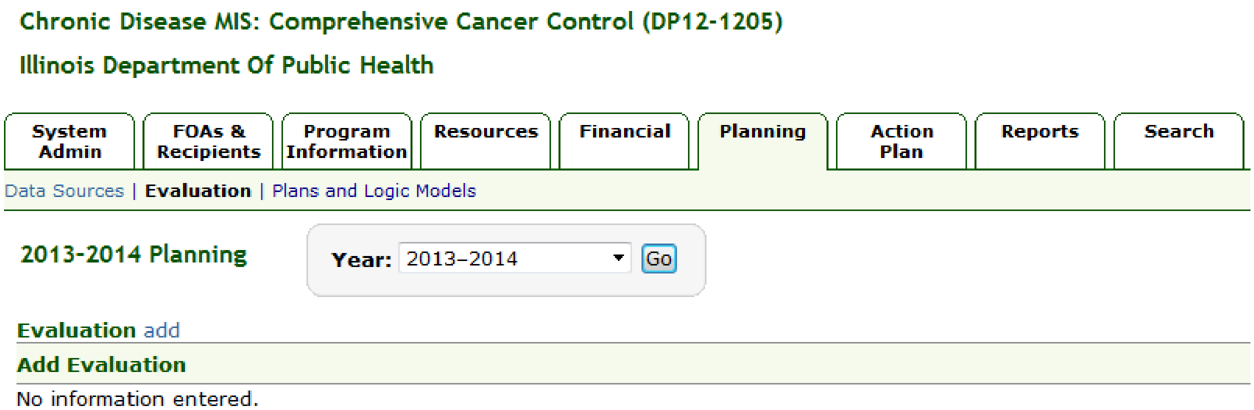
2. Click the **Yes** button to confirm your decision to delete the other data source.
   Result: The system deletes the other data source.

Important

- Once a data source is deleted it is no longer available in the system.
- Any Other Data Source deleted from this section will also be deleted from any assigned action plan activities for the current budget year.

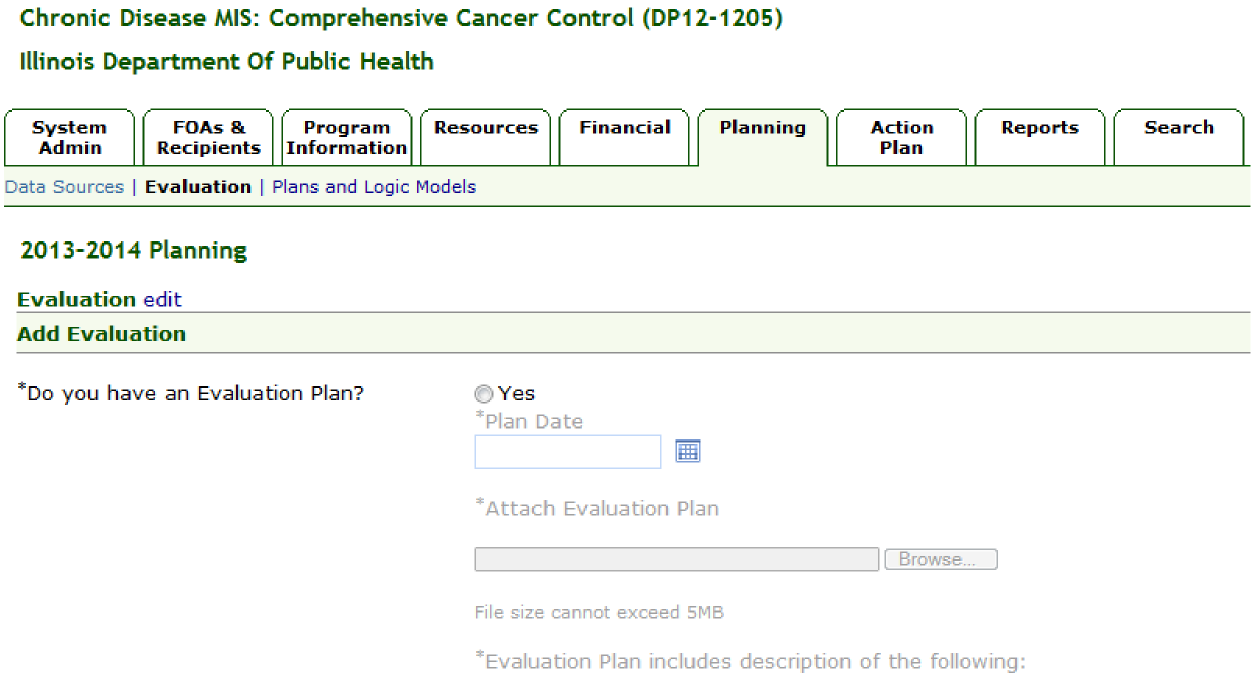
Evaluation

Use the *Evaluation* section to document and maintain the evaluation plan and report related to your FOA. Information on this page is not transferred to the upcoming year and must be entered on an annual basis. This section also allows you to attach your completed evaluation plan and report and other documentation, such as the 4 required evaluation dissemination documents.



Adding evaluation information

1. Click the **add** link on the *Evaluation* page.
   Result: The system displays the *Add Evaluation* page.



2. Complete the *Do you have an Evaluation Plan?* field and its sub-fields as follows:
   a. In the *Do you have an Evaluation Plan?* field, indicate by selecting *Yes* or *No* whether you do or do not have an evaluation plan
      Result: If you select *Yes*, the system enables additional fields for adding information and uploading an attachment.
   b. If **you do have an evaluation plan** and selected *Yes* in the "Do you have an Evaluation Plan?" field, enter the date that the evaluation plan was completed in the *Plan Date* text box in MM/DD/YYYY format or select a date from the calendar.
   c. If **you do have an evaluation plan** and selected *Yes* in the *Do you have an Evaluation Plan?* field, click **Browse** in the *Attach Evaluation Plan* section to navigate to the location where the document that you want to upload as an attachment is saved, and then select the document. To delete an attachment after uploading it, click the **delete** link and confirm the action.
   d. If **you do have an evaluation plan** and selected *Yes* in the *Do you have an Evaluation Plan?* field, in the *Evaluation Plan includes description of the following* field, select the options that describe the evaluation plan
   e. If **you do have an evaluation plan** and selected *Yes* in the *Do you have an Evaluation Plan?* field, in the *Evaluation Plan assesses the following* field, select the options that the evaluation plan assesses.
   f. If **you do not have an evaluation plan** and selected *No* in the *Do you have an Evaluation Plan?* field, in the *Expected Date of Completion (MM/DD/YYYY* field, enter the date that you expect the evaluation plan to be completed in MM/DD/YYYY format or select a date from the calendar.
   g. If **you do not have an evaluation plan** and selected *No* in the "Do you have an Evaluation Plan?" field, in the *Explain barriers or issues* field, explain the barriers or issues that are preventing you from creating an evaluation plan. Maximum text is 2000 characters, about 400 words.

3. Complete the *Have you created an Evaluation Report?* field and its sub-fields as follows:
    a. In the *Have you created an Evaluation Report?* field, indicate by selecting *Yes* or *No* whether you have or have not created an evaluation report.
    b. If **you have created an evaluation report** and selected *Yes* in the *Have you created an Evaluation Report?* field, in the *Attach Report* field, click **Browse** to navigate to the location where the document that you want to upload as an attachment is saved, and select the document. To delete an attachment after uploading it, click the **delete** link and confirm the action.
    c. If **you have created an evaluation report** and selected *Yes* in the *Have you created an Evaluation Report?* field, in the *Report Date* field, enter the date that the evaluation plan was completed in the text box in mm/dd/yyyy format or select a date from the calendar.
    d. If **you have created an evaluation report** and selected *Yes* in the *Have you created an Evaluation Report?* field, in the *Evaluation Report includes description of the following?* field, select the response options that the evaluation plan addresses.
    e. Complete the *Were the Evaluation Results Disseminated?* field and its sub-fields as follows:
        i. In the *Were the Evaluation Results Disseminated?* field, indicate by selecting *Yes* or *No* if the evaluation results contained in the evaluation report have been disseminated.
        ii. If you have created an evaluation report and **evaluation results have been disseminated**, enter the date that the results were disseminated in the *Enter Date (mm/dd/yyyy)* field in mm/dd/yyyy format.
        iii. If you have created an evaluation report and **evaluation results have been disseminated**, in the *Describe how evaluation results were disseminated* field, enter a description of how the results were disseminated. Maximum text is 2000 characters, about 500 words.
        iv. If the **evaluation results have not been disseminated**, in the *Expected date of dissemination* field, enter the date that you expect the evaluation results to be disseminated or select a date from the calendar.
        v. If the **evaluation results have not been disseminated**, in the *Explain barriers or issues* field, explain the barriers or issues that are preventing you from disseminating the results. Maximum text is 5000 characters, about 1000 words.
    f. If you **have not created an evaluation plan** and selected *No* in the *Have you created an Evaluation Report?* field, in the *Expected Date of Completion (MM/DD/YYYY)* field, enter the date that you expect the evaluation report to be completed in MM/DD/YYYY format or select a date from the calendar.
    g. If you **do not have an evaluation plan** and selected *No* in the *Have you created an Evaluation Report?* field, in the *Explain barriers or issues* field, explain the barriers or issues that are preventing you from creating an evaluation plan. Maximum text is 5000 characters, about 1000 words.
4. In the *Were enhancements made based on the evaluation findings?* field, indicate by selecting *Yes* or *No* if any enhancements were made to your program based on the evaluation findings.
5. If enhancements were made to your program based on the evaluation findings, in the *Describe enhancements made based on the evaluation findings* field, describe the enhancements in detail. Maximum text is 5000 characters, about 1000 words.
6. Click **Save** to save the Evaluation section.
   Result: The system saves the information and returns you to the *Evaluation* view page, where it displays the

newly added information and the attachment.

Note

- After saving the information, you can select the *Evaluation Documents* link at the top of the page and upload additional evaluation products.

What do I do differently for my FOA when entering Evaluation?

Click on your FOA to find out.
Delta FOCUS (CE13-1302) |

Adding Evaluation information: Delta FOCUS (CE13-1302)

1. Complete the *Do you have your Evaluability Assessment Procedure for your strategies*? field and its sub-fields as follows:
    a. In the *Do you have your Evaluability Assessment Procedure for your strategies*? field, indicate by selecting *Yes* or *No* whether you do or do not have an Evaluability Assessment Procedure for the strategies.
    b. If **you do have** an Evaluability Assessment Procedure for the strategies and selected *Yes* in the *Do you have your Evaluability Assessment Procedure for your strategies?* field, enter the date that the Evaluability Assessment Procedure was completed in the *Enter Date* text box in MM/DD/YYYY format or select a date from the calendar.
    c. If **you do have** an Evaluability Assessment Procedure for the strategies and selected *Yes* in the *Do you have your Evaluability Assessment Procedure for your strategies?* field, click **Browse** in the *Attach Evaluability Assessment Procedure* field to navigate to the location where the document that you want to upload as an attachment is saved, and then select the document.
    d. If **you do have** an Evaluability Assessment Procedure for the strategies and selected *Yes* in the *Do you have your Evaluability Assessment Procedure for your strategies?* field, in the *Evaluability Assessment Procedure includes learning about the following core elements about the program* field, select all the core element(s) that are included in the learning section of the document.
    e. If **you do have** an Evaluability Assessment Procedure for the strategies and selected *Yes* in the *Do you have your Evaluability Assessment Procedure for your strategies?* field, in the *Evaluability Assessment Procedure Includes the Following Data Collection Methods* field, select the data collection methods that are included in the Evaluability Assessment Procedure. If the desired data collection method is not listed in the list, select *Other* and enter the data collection method in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words.
    f. If **you do not have** an Evaluability Assessment Procedure for the strategies and selected *No* in the *Do you have your Evaluability Assessment Procedure for your strategies?* field, in the *Expected Date of Completion (MM/DD/YYYY)* field, enter the date that you expect the Evaluability Assessment Procedure to be completed or select a date from the calendar.
    g. If **you do not have** an Evaluability Assessment Procedure for the strategies and selected *No* in the *Do you have your Evaluability Assessment Procedure for your strategies?* field, in the *What is your progress to date on conducting an Evaluability Assessment for your strategies?* field, describe in detail the progress you have made towards conducting Evaluability Assessment for your strategies. Maximum text is 2000 characters, about 400 words.
2. Complete the *Do you have the findings/summary report from your Evaluability Assessment of your strategies?* field and its sub-fields as follows:

   a. In the *Do you have the findings/summary report from your Evaluability Assessment of your strategies?* field, indicate by selecting *Yes* or *No* whether you do or do not have the findings/summary report from your Evaluability Assessment of your strategies.
   b. If **you do have** the findings/summary report from your Evaluability Assessment of your strategies and selected *Yes* in the *Do you have the findings/summary report from your Evaluability Assessment of your strategies?* field, enter the date that the findings/summary report from your Evaluability Assessment of your strategies was completed in the *Enter Date* text box in MM/DD/YYYY format or select a date from the calendar.
   c. If **you do have** the findings/summary report from your Evaluability Assessment of your strategies and selected *Yes* in the *Do you have the findings/summary report from your Evaluability Assessment of your strategies?* field, in the *Attach Evaluability Assessment findings/summary report* field, click **Browse** to navigate to the location where the document that you want to upload as an attachment is saved, and then select the document.
   d. If **you do have** the findings/summary report from your Evaluability Assessment of your strategies and selected *Yes* in the D*o you have the findings/summary report from your Evaluability Assessment of your strategies?* field, in the *Evaluability Assessment findings/summary includes the following core elements* field, select the core elements that are included in the Evaluability Assessment findings/summary.
   e. If **you do not have** the findings/summary report from your Evaluability Assessment of your strategies and selected *No* in the *Do you have the findings/summary report from your Evaluability Assessment of your strategies?* field, in the *Expected Date of Completion (MM/DD/YYYY)* field, enter the date that you expect the findings/summary report from your Evaluability Assessment of your strategies to be completed or select a date from the calendar.
   f. If **you do not** have the findings/summary report from your Evaluability Assessment of your strategies and selected *No* in the *Do you have the findings/summary report from your Evaluability Assessment of your strategies?* field, in the *What is your progress to date on developing the findings/summary report from the Evaluability Assessment of your strategies?* field, describe in detail the progress you have made towards completing the findings/summary report from your Evaluability Assessment of your strategies.
3. Complete the *Were the Evaluation Findings utilized?* field and its sub-fields as follows:
   a. In the *Were the Evaluation Findings utilized?* field, indicate by selecting *Yes* or *No* whether the evaluation findings were utilized in any way.
   b. If your **evaluation findings were utilized** and you selected *Yes* in the *Were the Evaluation Findings utilized?* field, in the *Program Improvement* field, describe in detail how the evaluation findings were utilized for program improvement. Maximum text is 2000 characters, about 400 words.
   c. If **your evaluation findings were utilized** and you selected *Yes* in the *Were the Evaluation Findings utilized?* field, in the *Dissemination to partners and stakeholders* field, describe in detail how the evaluation findings were utilized in dissemination to partners and stakeholders. Maximum text is 2000 characters, about 400 words.
   d. If **your evaluation findings were utilized** and you selected *Yes* in the *Were the Evaluation Findings utilized?* field, in the *Leverage additional funding support* field, describe in detail how the evaluation findings were utilized in leveraging additional funding support. Maximum text is 2000 characters, about 400 words.
   e. If **your evaluation findings were utilized** and you selected *Yes* in the *Were the Evaluation Findings utilized?* field, in the *Other uses of the Evaluation Findings* field, describe in detail the other ways in which you utilized the evaluation findings. Maximum text is 2000 characters, about 400 words.

f. If **your evaluation findings were not utilized** and you selected *No* in the *Were the Evaluation Findings utilized?* field, in the *Expected Date* field, enter the date that you expect the evaluation findings to be utilized in MM/DD/YYYY format or select a date from the calendar.

g. If **your evaluation findings were not utilized** and you selected *No* in the *Were the Evaluation Findings utilized?* field, in the *Describe the progress to date on your activities to utilize evaluation findings* field, describe in detail the progress you have made to date on activities to utilize evaluation findings. Maximum text is 2000 characters, about 400 words.

Editing evaluation information

1. On the *View Evaluation* page, click the **edit** link.
   Result: The system displays the *Edit Evaluation* page.

Note

- The page for entering initial information and modifying existing evaluation information s are identical. The only difference is that the Edit page displays the existing evaluation information while the fields in the page for entering initial information are blank.

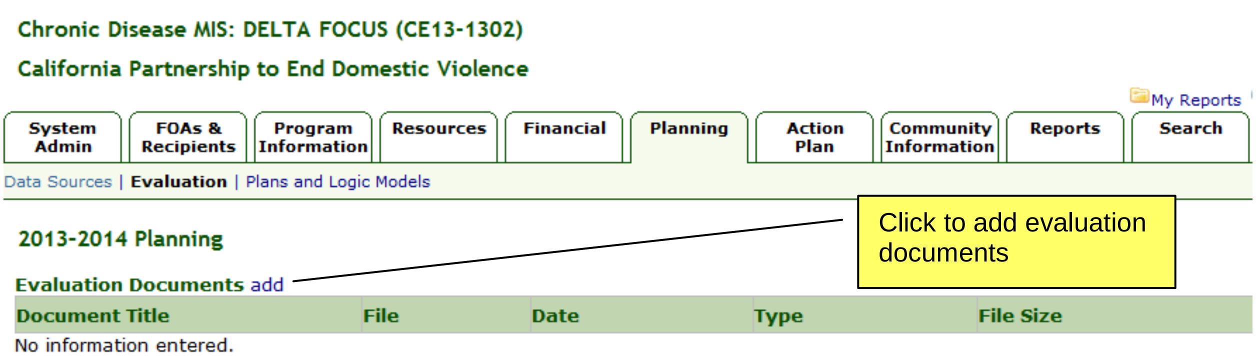
2. Modify the fields as necessary.
3. Click the **Save** button to save the information. The system saves the information and returns you to the *View Evaluation* page. If any fields on the page are incomplete or invalid when you click **Save**, the system displays an error. Correct all invalid fields and click **Save** again.

Evaluation documents

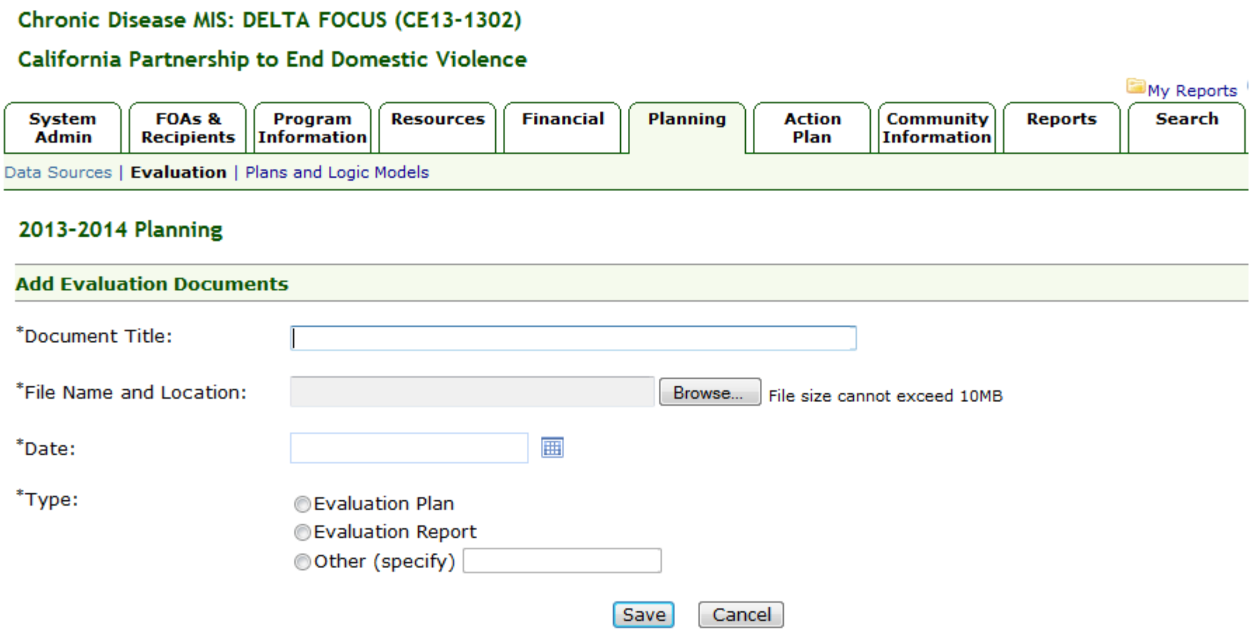
Use the Evaluation Documents section to attach additional documents to the Evaluation, access existing documents, or delete documents.

Attaching an evaluation document

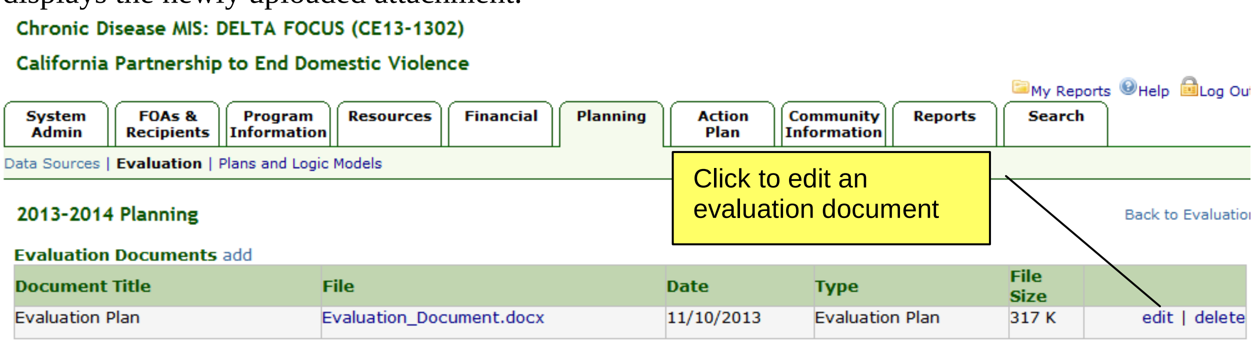
1. Click the **evaluation documents** link on the *View Evaluation* page.
   Result: The system displays the *Evaluation documents* page.



2. Click the **add** link.
   Result: The system displays the *Add Evaluation Documents* page.

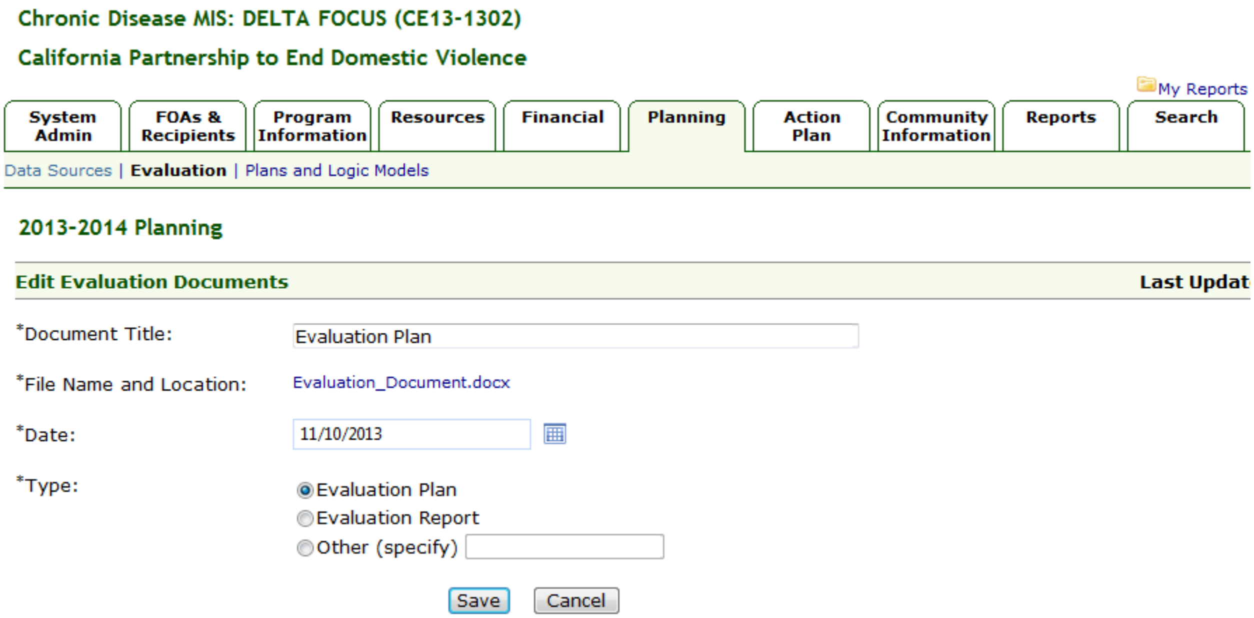


3. In the *Document Title* field, enter the document title for the attachment that you want to upload. Maximum text is 100 characters, about 20 words.
4. In the File Name and Location field, click **Browse** to navigate to the location where the document is saved and select the document.
5. In the Date, enter the day, month, and year the document was last revised in mm/dd/yyyy format, or select a date from the calendar.
6. In the Type field, select the type of document that you want to upload. If the desired type is not listed, select *Other* and enter the type of document in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words.
7. Click **Save** to attach the document.
   Result: The system saves the information and returns you to the *Evaluation Documents* page, where it displays the newly uploaded attachment.



Editing evaluation document information

1. On the *Evaluation Documents* page, click the **edit** link on the same row as the document you want to edit.
   Result: The system displays the *Edit Evaluation Document* page



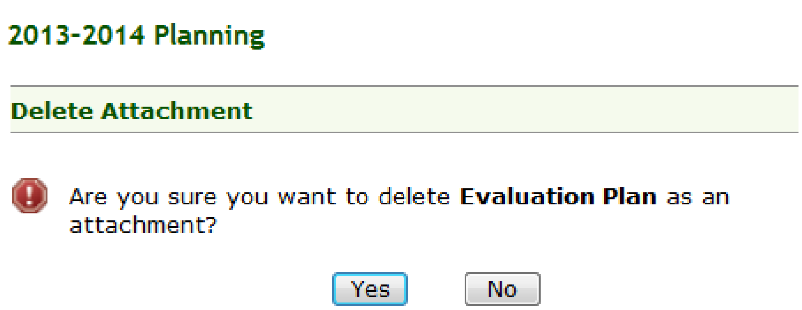
Note

- The pages for entering initial information and modifying existing attachment information are identical. The only difference is that the Edit page displays the existing information while the fields in the page for entering initial information are blank.
- This page only allows you to update attachment information. If changes to the actual attached file are made, you must upload the new version of the file as a new attachment or delete the attachment and attach it again
- You can click on the document name to open the attachment and view the document.

2. Modify the fields as necessary and click the **Save** button to save the information.
   Result: The system saves the information and returns you to the *Evaluation Documents* page, where it displays the newly updated information. If any fields on the page are incomplete or invalid when you click **Save**, the system displays an error. Correct all invalid fields and click **Save** again.

Deleting an evaluation document

1. On the *Evaluation Documents* page, click the **delete** link on the same row as the document you want to delete.
   Result: The system displays a message asking you to confirm the deletion.



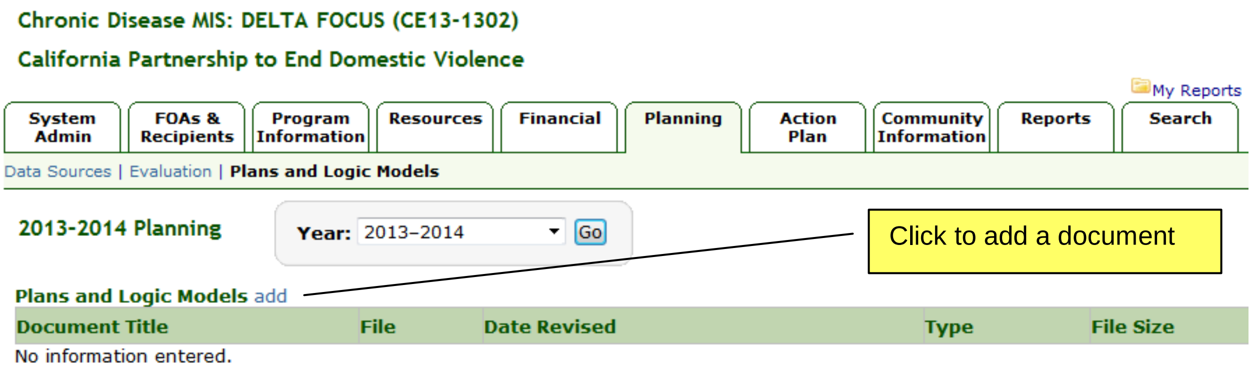
2. Click **Yes** to confirm the deletion.
   Result: The system deletes the attachment and returns you to the *Evaluation Documents* page.

Note

- Once an evaluation document is deleted, it is no longer available in the system.

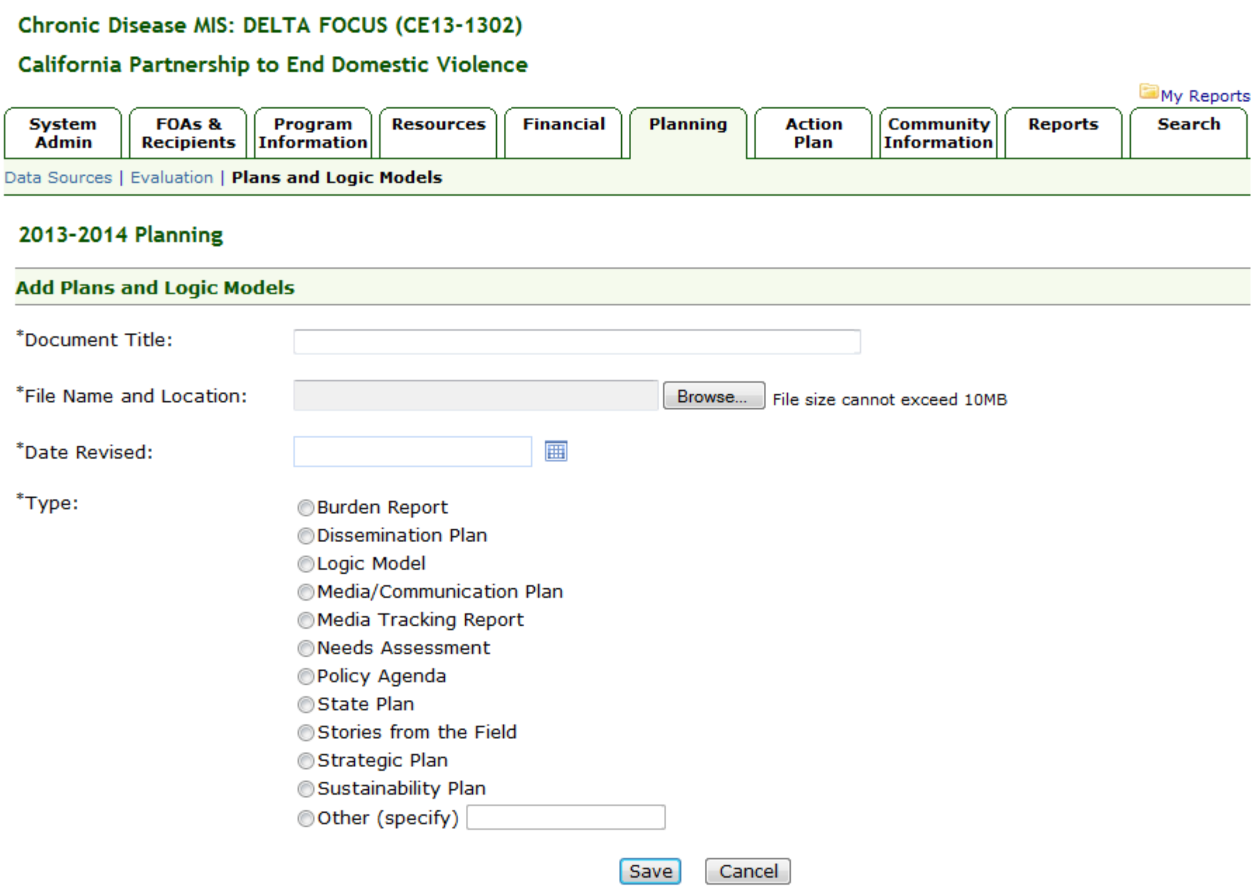
Plans and Logic Models

Use the Plans and Logic Models section to attach documents and access existing attachments in the section.



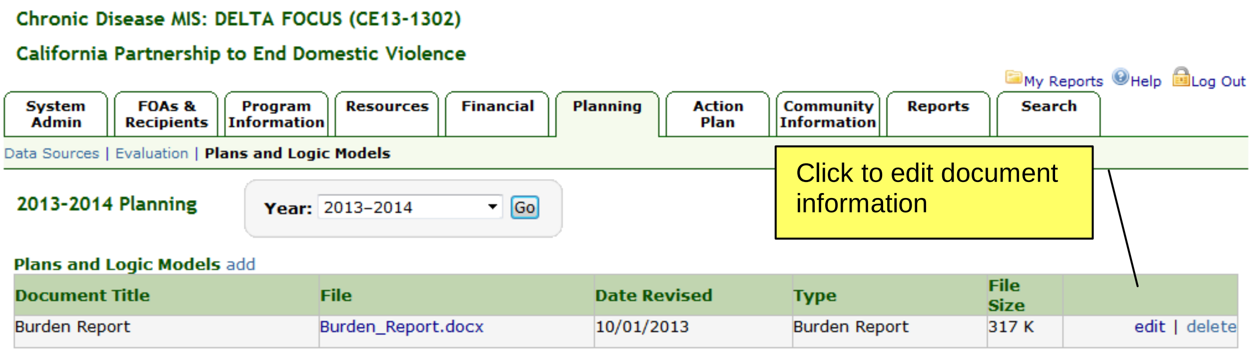
Attaching a plan and logic model

1. Click the **add** link on the *Plans and Logic Models* main page.
   Result: The system displays the *Add Plans and Logic Models* page.



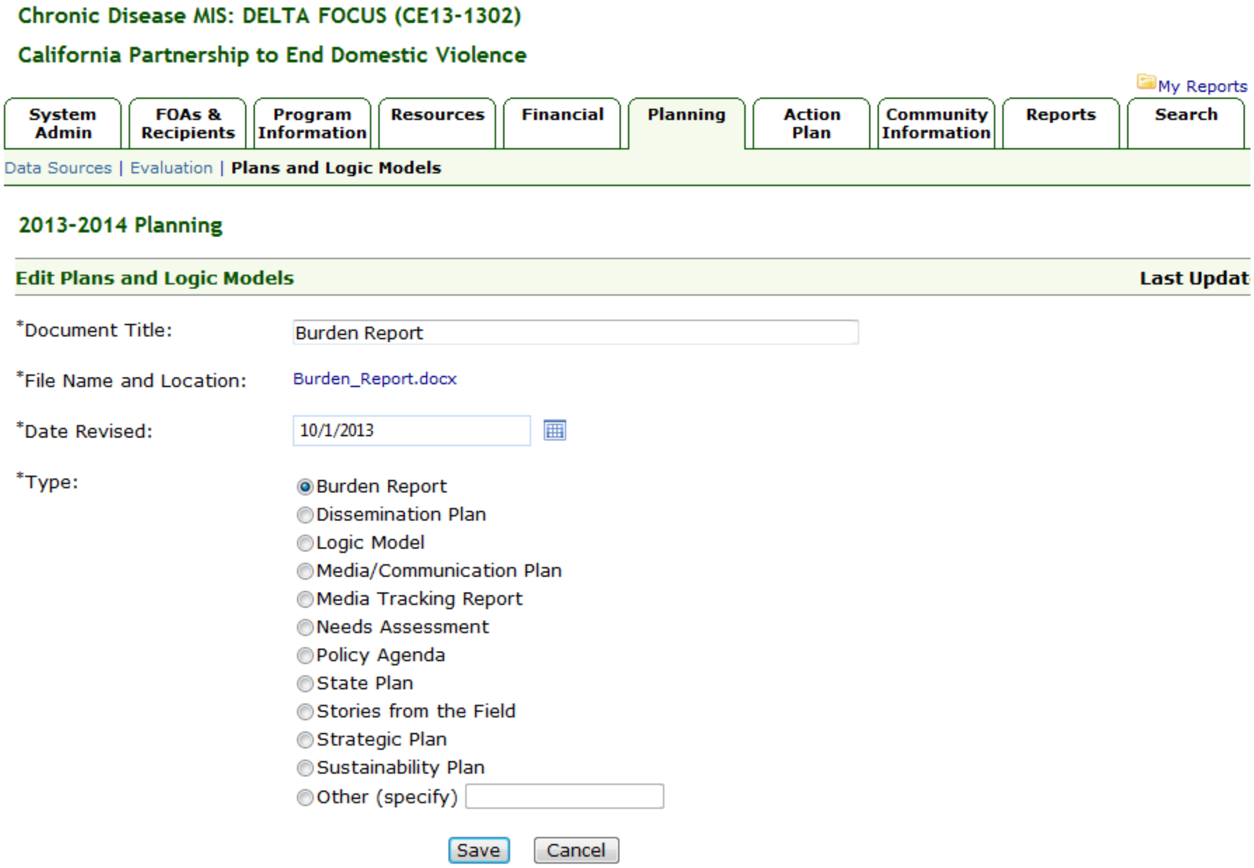
2. In the *Document Title* field, enter the document title for the attachment that you want to upload. Maximum text is 100 characters, about 20 words.

3. In the File Name and Location field, click **Browse** to navigate to the location where the document is saved and select the document.
4. In the Date, enter the day, month, and year the document was last revised in mm/dd/yyyy format, or select a date from the calendar.
5. In the Type field, select the type of document that you want to upload. If the desired type is not listed, select *Other* and enter the type of document in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words.
6. Click **Save** to attach the document.
   Result: The system saves the information and returns you to the *Plans and Logic Models* page, where it displays the newly uploaded attachment.



Editing plans and logic models information

1. On the *Plans and Logic Models* page, click the **edit** link on the same row as the document you want to edit.
   Result: The system displays the *Edit Plans and Logic Models* page



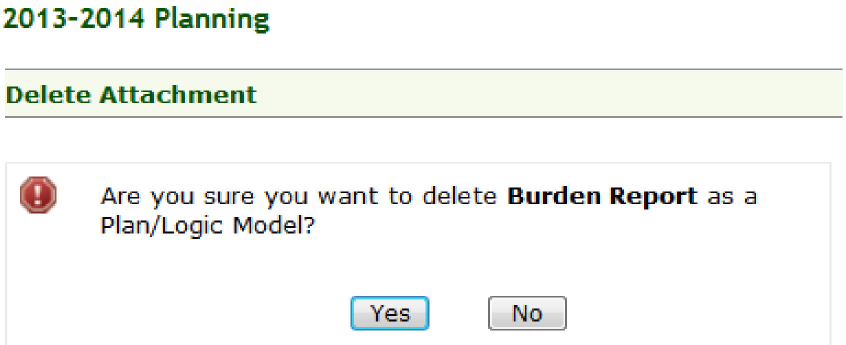
Note

- The pages for entering initial information and modifying existing attachment information are identical. The only difference is that the Edit page displays the existing information while the fields in the page for entering initial information are blank.
- This page only allows you to update attachment information. If changes to the actual attached file are made, you must upload the new version of the file as a new attachment or delete the attachment and attach it again
- You can click on the document name to open the attachment and view the document.

2. Modify the fields as necessary and click the **Save** button to save the information.
   Result: The system saves the information and returns you to the *Plans and Logic Models* page, where it displays the newly updated information. If any fields on the page are incomplete or invalid when you click **Save**, the system displays an error. Correct all invalid fields and click **Save** again.

Deleting a plans and logic models document

1. On the *Plans and Logic Models* page, click the **delete** link on the same row as the document you want to delete.
   Result: The system displays a message asking you to confirm the deletion.



2. Click **Yes** to confirm the deletion.
   Result: The system deletes the attachment and returns you to the *Plans and Logic Models* page.

Note

- Once the Plans and Logic Model document is deleted, it is no longer available in the system.