



# 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, without assistance.



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- 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 to be finalized only when your FOA is in its final reporting year and the current funding year's Interim Report status is Finalized or Past Due.
  - **Step 3: Transfer Information** is disabled and marked as "Not applicable" if your program is in its final reporting year and the current report is not finalized.
  - Once a report is finalized for you to submit to CDC, the report can no longer be modified, without assistance.
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### 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, and select the final year if not selected.  
**Result:** The system displays the *Final Performance Report* page by default when the Interim Report for the final year is finalized. Otherwise, the *Final Performance Report* can be selected with Step 1 available when the Interim Report is finalized or Past Due.

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

**Hidalgo Medical Services**

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

**Final Performance Report - DRAFT**

Process	Status
Step 1: <a href="#">Review Errors in Current Action Plan</a>	Incomplete
Step 2: Enter Report Narrative	Incomplete
Step 3: Transfer Information	Not applicable
Step 4: Update Report Status	DRAFT



- 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 the current report is not finalized.

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?
<b>PPO: 1.0</b> - 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
<b>AO: 1-test</b> - Maintain the rate of testing from 77 to 77 by September 2013.		
<b>AO: 1.1</b> - 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.		

Click the red "!" icon to enter missing information



**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.

3. 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.



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**.

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

Action Plan		
Objectives	Progress Entered?	Activity Entered?
<b>PPO: 1.0</b> - 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
<b>AO: 1-test</b> - Maintain the rate of testing from 77 to 77 by September 2013.	✔	✔
<b>AO: 1.1</b> - 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.	✔	✔

5. Repeat steps 3 and 4 above for every red icon displayed.

**Recommended:** As an alternative, go directly to the Action Plan/Community Action Plan and add the required progress for the objectives.

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

<b>AO: 1.2</b> - Increase the number of Summer meals locations that increase healthy food access for children from 1 to 2 by September 2014.	✔	✔
<b>PPO: 2.0</b> - Increase the number of people with access to physical activity opportunities from 250 to 1812 by September 2014.	✔	N/A
<b>AO: 2.1</b> - Increase the number of after-school programs that increase opportunities for physical activity from 0 to 1 by September 2014.	✔	✔
<b>AO: 2.2</b> - Increase the number of Public accessible parks from 1 to 2 by September 2014.	✔	✔

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



- 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 (Final Performance Report).

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**

<b>System Admin</b>	<b>FOAs &amp; Recipients</b>	<b>Technical Assistance</b>	<b>Program Information</b>	<b>Resources</b>	<b>Financial</b>	<b>Planning</b>	<b>Action Plan</b>
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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**

<b>Process</b>	<b>Status</b>
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.

- Each PPO must have at least one associated AO for Final Performance Report.  
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 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.
- If you complete step 1 and make changes to the current action plan (or community) which adds items that should be corrected, step 1 becomes *Incomplete*. You must visit the 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.
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## 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:

ABC

Characters: 0 / Maximum: 5000

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

ABC

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. In the *What lessons learned can you provide for advancing this type of program* field, enter appropriate text. The maximum characters allowed for this field is 5,000 characters or 1000 words.
5. In the *What were the number and types of sub-recipient organizations funded?* (NOTE: This question applies to REACH and CTG programs only. All other programs please enter, "Not

*applicable*") field, enter appropriate text. The maximum characters allowed for this field is 5,000 characters or 1000 words.

6. Complete primary and secondary contacts for your program with someone who will be available for at least six months after the end of the project period for follow-up as needed.
7. 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
Interim Report   <b>Final Performance Report</b>							

**2012-2013 Reports**

Year: 2012-2013

#### Final Performance Report - DRAFT

Process	Status
Step 1: <a href="#">Review Errors in Current Action Plan</a>	Complete
Step 2: <a href="#">Enter Report Narrative</a>	Complete
Step 3: <a href="#">Transfer Information</a>	Not applicable
Step 4: <a href="#">Update Report Status</a>	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 the current report is not finalized.

## 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**

<b>System Admin</b>	<b>FOAs &amp; Recipients</b>	<b>Technical Assistance</b>	<b>Program Information</b>	<b>Resources</b>	<b>Financial</b>	<b>Planning</b>
Interim Report   <b>Final Performance Report</b>						

**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.

- Click the **Save** button.

**Result:** The system displays a confirmation 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

Interim Report | **Final Performance Report**

**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"?

- Click **Yes**.

**Result:** The system displays the status message shown below.

Your report has been submitted for processing.

To check the status, click  [My Reports](#) located at the top right of your screen.



**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  <a href="#">My Reports</a> located at the top right of your screen.

- Click **My Reports**, Click **Clear this request**.

**Result:** The page is updated as Finalized.

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

**Hidalgo Medical Services**

<b>System Admin</b>	<b>FOAs &amp; Recipients</b>	<b>Technical Assistance</b>	<b>Program Information</b>	<b>Resources</b>	<b>Financial</b>	<b>Planning</b>	<b>Action Plan</b>	<b>Community Information</b>
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Interim Report | **Final Performance Report**

**2012-2013 Reports**

Year: 2012-2013

**Final Performance 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 05/05/2014

Finalized Report	
Finalized on: 05/05/2014	<a href="#">View and Print Report</a>

The system finalizes the report and also does the following:

- Marks current year Action Plan and Community Action Plan as view only.
- Disables all Final Performance Report Steps (for non-CDC users).
- Displays the Finalized Reports section. 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.

## 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**

- The **draft** Final Performance Report uses My Reports.
- 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 **finalized** Final Performance Report does not use My Reports.

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

Column/Field/Link	Description
<b>Report</b>	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.
<b>Submitted</b>	Indicates the date and time the request to run the report was submitted.
<b>Available Until</b>	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.
<b>[Status]</b>	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.
<b>Clear this Message</b>	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 <b>Clear this Message</b> link refreshes the page and makes the <b>View and Print Report</b> link available in the Reports tab.
<b>Clear this Request</b>	If reporting errors occur, click this link to cancel your report request.
<b>Close</b>	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 CDMIS 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 (**View and Print Report** link) and the newly submitted report (**Print Report** link) will be saved in the CDMIS.
  - If your report is finalized again, only the latest will be saved in the CDMIS (both report links).
-