Block Grant Management Information System

User Training Manual
(Annual Reports)

Version 4.4

Contents

Introduction

Overall Learning Objectives

The overall learning objectives for the BGMIS training manual are:

- Identify the purpose and benefits of BGMIS

- Log in to BGMIS

- Identify the components of BGMIS

- Identify the purpose and benefits of an annual report

- Create an annual report

- Identify the components of an annual report

- Add outcome information to your annual report

- Submit your annual report to CDC

- Run reports

The BGMIS Training Manual

This training manual contains six chapters that will be reviewed and used during the training session. Each chapter focuses on a specific section or topic and provides requirements, explanations, instructions, and exercises.

Please feel free to make additional copies of the manual and share with your colleagues.

Training manuals for other BGMIS modules, i.e. Work Plan and Success Stories are available on the Training Materials page. To access the Training Materials page, click the *Training* option on the BGMIS Home page.

BGMIS Purpose

BGMIS was developed to accomplish the following goals:

- To organize your work plan.

- To create your work plan and submit it to CDC.

- To create success stories.

- To review success stories.

- To create annual reports.

- To enter outcome information for your annual report.

BGMIS Users

BGMIS users consist of:

- PHHS Block Grant Coordinators
- State Program Managers
- Other PHHS Block Grant Personnel

- CDC Users

Permission/Access types

The following table describes the permissions or access types in BGMIS:

Permission	Description
Control Center	Has the ability to create new work plans, submit, and delete work plans. This access type is recommended only for Grant Coordinators.
Edit Budget	Has the ability to edit top level information, i.e. cover page, total budget, and statutory information. This access type is recommended only for Grant Coordinators and/or Financial Manager.
Edit Program	Has the ability to enter program information, national health objective, state health objective, and impact objectives.

BGMIS Help

The BGMIS Help is always available by clicking the Help link at the top right corner of each page. The Help consists of very useful information and step-by-step procedures to assist you in completing your tasks.

System Requirements

BGMIS works best on a Windows platform with Microsoft Internet Explorer 6.0 (or later), JavaScript enabled, screen resolutions of 1024x768 (or greater) and 256 colors (or better).

Important   Pop-up blockers should be turned off for this site to function properly.

Chapter 1: The Basics

The first step in using BGMIS is to access the system and log in using the login information assigned to you.

Learning Objectives

Upon the completion of this chapter, you will know how to:

- Log in to BGMIS using your user ID and password.
- Log out of BGMIS.

Log in to BGMIS Training Exercise

The Login module has been enhanced to conform to the new CDC Password Policy. The fields on the Login page have not changed; however, additional password requirements have been implemented on the Login page.

When creating a password, the following rules apply:

- Passwords are case sensitive.

- Passwords must contain at least 8 characters

- Passwords must be created using 3 of the following 4 criteria:

  o Uppercase letters.
  o Lowercase letters.
  o Numbers.
  o Punctuation symbols. Punctuation symbols allowed are @, #, $, |, {, }, ^
- Passwords may not contain your User ID or any part of your name

After **5** unsuccessful attempts to log in, your account will be temporarily locked for 15 minutes. You may try to log in again after 15 minutes. If you have forgotten your password, send an email to bgmis@cdc.gov and a new temporary password will be sent to you.

For security reasons, a period of **60** or more minutes of inactivity requires that you log in again

The rules are also included in the Login page below the User Name and Password fields.

Log In - Enter your User ID and Password

User ID: [_____]

Password: [_____]   Please click here if you have forgotten your User ID or Password.

[Log In]

Login Tips: Type the User ID and password assigned to you for this web site.
- For security reasons, a period of **60** or more minutes of inactivity requires that you log in again.
- After **5** unsuccessful attempts to log in, your account will be temporarily locked for 15 minutes.
- Tips for creating and maintaining Passwords:
  - Passwords are case sensitive.
  - Passwords must contain at least 8 characters.
  - Passwords must be created using 3 of the following criteria:
    - Uppercase letters.
    - Lowercase letters.
    - Numbers.
    - Punctuation symbols. Punctuation symbols allowed are @, #, $, |, {, }, ^
  - Passwords may not contain your User ID or any part of your name.

1. Type http://.nccd.cdc.gov/BGMIS into the address field in your browser. The system displays the BGMIS Log In page.

Log In - Enter your User ID and Password

User ID: [_____]

Password: [_____]   Please click here if you have forgotten your User ID or Password.

[Log In]

Login Tips: Type the User ID and password assigned to you for this web site.
- For security reasons, a period of **60** or more minutes of inactivity requires that you log in again.
- After **5** unsuccessful attempts to log in, your account will be temporarily locked for 15 minutes.
- Tips for creating and maintaining Passwords:
  - Passwords are case sensitive.
  - Passwords must contain at least 8 characters.
  - Passwords must be created using 3 of the following criteria:
    - Uppercase letters.
    - Lowercase letters.
    - Numbers.
    - Punctuation symbols. Punctuation symbols allowed are @, #, $, |, {, }, ^
  - Passwords may not contain your User ID or any part of your name.

2. Enter your user ID in the *User ID* field and your password in the *Password* field.

3. Click **Log In**. The system displays the BGMIS Home page.

- If logging into BGMIS for the very first time or logging in for the first time after your password was reset, the system displays a page that allows you to change your assigned password to a password of your choice.
- Unless you need screen reader, ensure that the Enable screen reader compatibility mode check box is not selected.

BGMIS Subsystems

The system currently has four active subsystems – Work Plan, Success Stories, Annual Reports and Compliance Review..

The Work Plan Subsystem

The Work Plan subsystem allows you to enter work plan information, i.e. program information, FTEs, health objectives, etc. After adding your work plan information, you can verify it, and then submit it to CDC.

The Success Stories Subsystem

The Success Stories subsystem allows you to add success stories related to achievements in your program and also review success stories that other grantees have submitted to CDC.

The Annual Report Subsystem

The Annual Report subsystem allows you to create an annual report, enter outcome information for your program in order to report progress regarding your health objectives, impact objectives, and activities, and submit the annual report to CDC.

The Compliance Review Subsystem

The Compliance Review module allows you to View the Compliance Review schedule details for your location and view the scheduled dates for other grantees. You can also download and upload Compliance Review-related documents and view the Recommendations letter after the completion of the Compliance Review visit.

Bulletins

The Bulletins section displays downloadable announcements that have been posted for your information.

BGMIS FAQs

The BGMIS FAQs link opens a PDF document containing frequently asked questions about BGMIS.

Logging off BGMIS

You can log off BGMIS by clicking the **Log Out** link at the top right side of the page.

If you are updating a page it is important that you save your data before logging out of BGMIS.

Chapter 2: Before you begin

Before you create your annual report, it is strongly recommended that you observe the following "Dos and Don'ts" of creating an annual report.

Do:

- Thoroughly review your work plan before creating an annual report.
- Ensure that your objectives are written correctly in the work plan using the SMART (Specific, Measurable, Achievable, Realistic, Time-Bound) format.
- Run reports after creating your work plan to ensure that your outcomes are displaying correctly in the annual report.

Don't:

- Update your work plan after creating your annual report.

If your objectives are not well written in your work plan, you might encounter some issues with the way the outcomes in the annual report will be displayed. If you create your annual report and then go back to make changes to your work plan after creating the annual report, the system will allows you to reconcile your Annual Report changes with your Work Plan changes.

If you have just reviewed your work plan and you want to make changes to the objectives in your work plan before creating your annual report:

1. Print the Impact Objective Summary report.
2. Review the report.
3. Create a new version of the approved work plan.
4. Make the necessary changes to your SMART objectives.
5. Submit the work plan for approval.
6. Once approved, create the annual report.

If you have already created an annual report without reviewing your work plan and you want to make changes to the objectives in your work plan:

1. Export the existing annual report to Word by running the *Annual Report* report.
2. Delete the annual report.
3. Make the necessary changes to your SMART objectives.
4. Submit the work plan for approval.
5. Once approved, create the annual report.

Refer to the Annual Report Summary section in the BGMIS Help for the step-by-step instructions for completing the tasks listed above.

Chapter 3: Creating an annual report

The Annual Report module in BGMIS allows you to create an annual report for your program. This module contains features that allow you to tell CDC how your program fared by answering the following questions:

- Did you start the program?
- Did you partially meet your goals?
- Did you meet your goals?
- Did you exceed your goals?
- Did you encounter any challenges?
- How did/will you tackle the challenges encountered?

When you create an annual report, the system copies over the necessary information from your approved work plan and allows you to create an annual report based on the approved work plan. You can then complete the annual report by entering outcome information for each health objective (HO), impact objective (IO), and activity in each program. After completing outcome information, you can submit your annual report to CDC.

Learning Objectives

Upon the completion of this chapter, you will:

- know the issues that may prevent you from creating an annual report.
- know how to create an annual report.
- know how to navigate the annual report using the navigation pane.

The system will not create a new annual report if:

- an approved work plan does not exist for the year you want to report on.
- an approved work plan does exist, however; you have not submitted the prior Advisory Committee meeting minutes.
- there is a discrepancy between the allocation table and your budget.

If any of these conditions exist, the system displays an error message. You must resolve all issues before the system will allow you to create an annual report.

Create an annual report

1. On the BGMIS main page, click the Annual Reports module.
   Result: The system displays the Annual Report Main page.

2. On the Annual Report Main page, click the **Annual Report List** link.
   Result: The system displays the Select Annual Report page.

> **Note** There will be no existing annual reports from which to select if you have not created one in the past.

3. Click the **Create New** button.
    Result: The system displays the Create New Annual Report page. This page allows you to confirm that you want to create a new annual report.

4. Click **OK**.
    Result: The system creates the annual report and gives it a status of In Progress. The system copies over the necessary information from your approved work plan.

5. Click **OK**.
   Result: The system displays the Annual Report Summary page.

Edit an annual report

1. Click the **Annual Report List** link on the Annual Report Main page to access the Annual Report List page.
   Result: The system displays a list of existing annual reports, in this case, just one.

2.   Under the Select column, select the check box on the same row as the annual report
     and click **OK**.
     Result: The system displays the selected annual report.

3. Edit the annual report as necessary.

Delete an annual report

   Only an annual report with a status of In Progress can be deleted.

1. Click the **Annual Report List** link on the Annual Report Main page to access the
    Annual Report List page.
    Result: The system displays a list of existing annual reports, in this case, just one.

2. Under the Select column, select the check box on the same row as the annual report and click **Delete**.
    Result: The system displays the Delete this Annual Report confirmation message.

3. Enter DELETE in the Confirmation textbox and click **OK**.
    Result: The system deletes the annual report.

Annual Report Status

Your annual report can have one of the following statuses:

- In Progress - Your annual report is being developed and has not yet been submitted to CDC.

- Submitted to CDC - Your annual report has been submitted to CDC.

- Under CDC Review - Your submitted annual report is being reviewed by CDC.

- Reviewed by CDC - Your annual report has been reviewed by CDC.
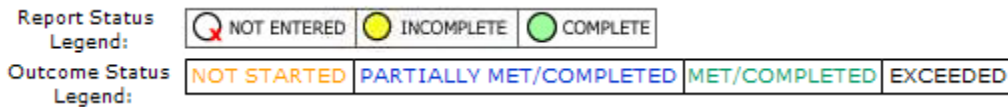

The Annual Report Summary Page

The Annual Report Summary page is divided into three main sections: the navigation pane, the Annual Report summary section, and the other tasks section.

The Annual Report Navigation Pane

The annual report navigation pane allows you to navigate through all the sections of your annual report and also gives you a visual representation of the status of the sections in your annual report by using different colors for the various statuses.
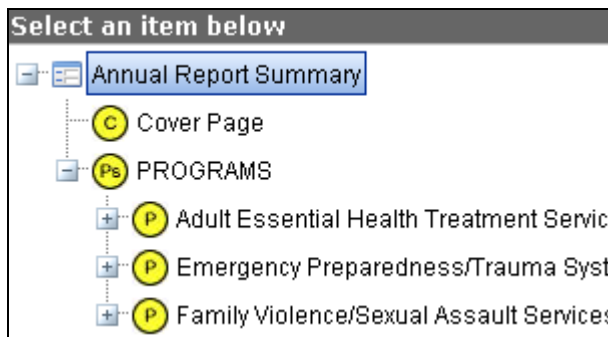
The legend above the navigation pane explains the colors used in the annual report. The top part of the legend explains the report status while the lower part explains the outcome status.

The Report Status tab

The Report Status tab is displayed by default when your annual report has a status of In Progress. This tab displays the annual report summary at a glance by giving you a count of completed and incomplete sections. For a newly created annual report, the Completed column will always be 0 (zero), indicating that no section has been completed. As you complete the sections in the annual report, the numbers are updated accordingly.

The Outcome Status tab

The Outcome Status tab is displayed by default when your annual report has a status other than In Progress. This tab displays a chart that is updated as you complete the outcome information for different sections in the annual report. The legend explaining the colors in the chart is displayed to the right of the chart. For a newly created annual report, all programs will have 100% red status, indicating information has not been entered for any program. As you complete the sections the numbers are updated.
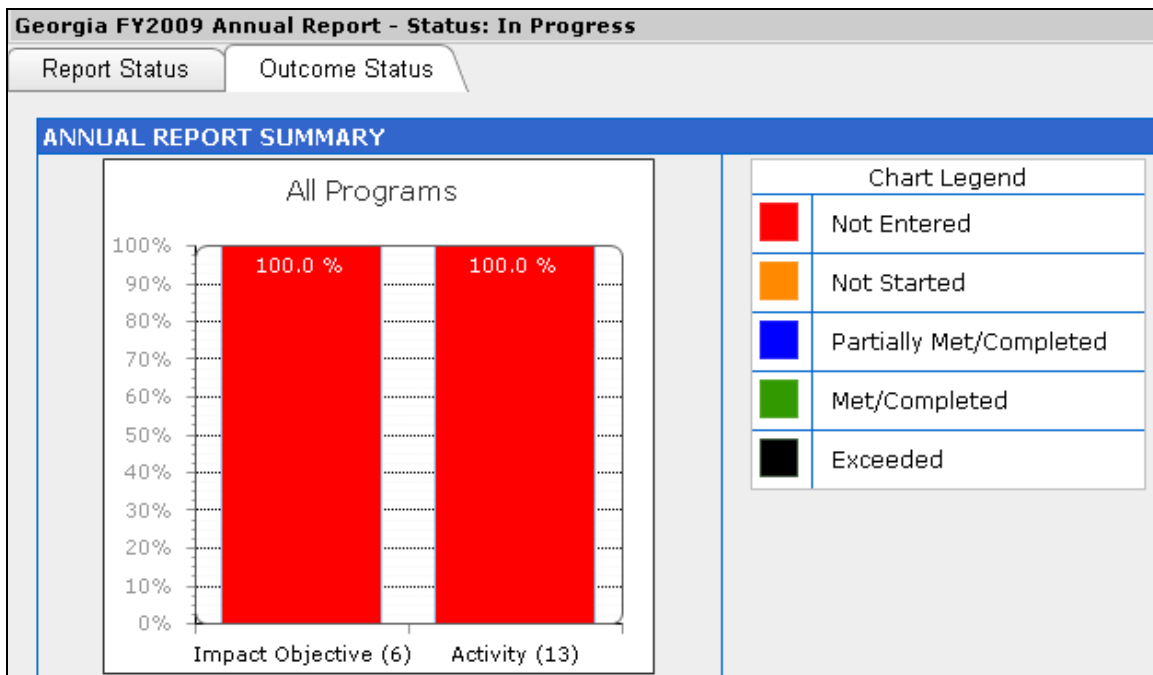
The Other Tasks Section

The other tasks section directly below the annual report summary section allows you to perform other tasks related to the annual report.

> **Note** After you have completed and submitted your annual report to CDC, this section also displays the **view annual report submission/review comments** link which you can click to view comments for the annual report.

Generate reports

Click this link to select and run the following available reports: Annual Report, IO and Activity Outcome Status by Program, and IO and Activity Outcome Status by HO.

Verify this annual report

Click this link to run a check on the annual report outcomes. The system displays a page that lists the items in your annual report and indicates if the item passed or failed. All items in your annual report must pass and display a status of "OK" before you can submit your annual report to CDC.

Verify then submit this annual report to CDC

Click this link to run a check on the annual report outcomes and then submit your annual report to CDC if it passes validation. All items in your annual report must pass and display a status of "OK" before you can submit your annual report to CDC.

Chapter 4: Entering outcome information

After reviewing your work plan and creating an annual report for your program, you can then begin to enter outcome information. The system copies over the necessary information from your approved work plan and allows you to enter outcome information for each program.

Learning Objectives

Upon the completion of this chapter, you will be able to:

- Verify the Block Grant Coordinator information for your program

- Complete health objective (HO) outcome information

- Complete impact objective (IO) outcome information

- Complete activity outcome information

Verify Block Grant Coordinator practice exercise

	•	The data provided in the practice exercise are sample data. Please populate the fields with your own state data.
Note

• Required fields on a page are marked with an asterisk (*).

• Text in bold red font indicates that you have not yet completed the required information for the section.

1. Click the Cover Page option in the Annual Report navigation pane.

   Result: The system displays the cover page information in the right display pane.

2. Click the **Edit** link.

   Result: The system displays the Edit Cover Page page.

! Important	If any information is incorrect, be sure to send a request to CDC to change it for you.

3. Review the information displayed on the page. If the information is correct, select The *Yes* option in the "Is the above Grantee contact information correct?" field. If the information is incorrectselect No.
    Result: The system changes the C next to the Cover Page option on the navigation pane from yellow to green, indicating that the section is completed.
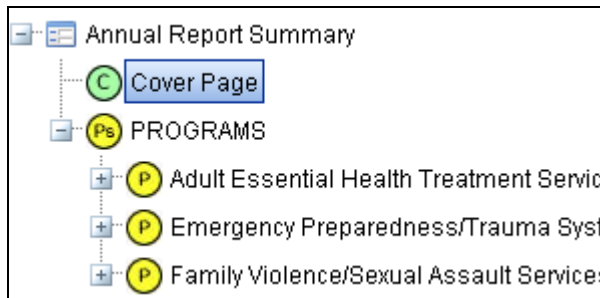
! Important	You must select *Yes* or *No* in the "Is the above Grantee contact information correct?" field in order to be able to submit the Annual Report upon completion.

Complete HO outcome information

- The data provided in the practice exercise are sample data. Please populate the fields with your own state data.
- Required fields on a page are marked with an asterisk (*).
- Text in bold red font indicates that you have not yet completed the required information for the section.

1. From the Annual Report navigation pane, click the program for which you want to add outcome information.
   Result: The system expands the program to display the program components, i.e. HO, ES, IO, and activity and also displays the program summary in the right display pane, including completion status.

The system displays information in three main sections. The upper section displays the completion status, the middle section displays some HO information transferred from the work plan, and the lower section allows you to enter outcome information for the selected HO.

2. From the annual report navigation pane, click the HO option for the selected program.

   Result: The system displays information for the selected HO in the right display pane.

3. Click the **Edit** link.
    Result: The system displays the Edit State Health Objective Outcome page.

4. Complete the fields on this page as follows:
    State Health Objective Status = Exceeded.
    State Health Objective Outcome = Between 8/2008 and 09/2009 reduced by 8% the
    number of coronary heart disease and stroke deaths in Georgia.
    Barriers/Challenges to Success = None.
    Strategies to Overcome Barriers/Challenges = N/A

5. Click **OK**.
    Result: The system displays the summary information in the right display pane,
    including the newly added information.

Georgia FY2009 Annual Report - Status: In Progress			

(P) Adult Essential Health Treatment Services >> (HO) **12-1 Coronary Heart Disease**

Report Status | Outcome Status

IO & Activity Completion Status for Health Objective: 12-1 Coronary Heart Disease			
	Completed	Incomplete	Total
Impact/Process Objective Outcome	0	3	3
Activity Outcome	0	7	7

Health Objective from Work Plan		
National Health Objective:	◉ View	12-1 Coronary Heart Disease
State Health Objective:	◉ View	Between 10/2008 and 09/2009, reduce by 5% the number of coronary heart disease and stroke deaths in Georgia.

State Health Objective Outcome for Annual Report	
	🔲 Edit ◉ View
Outcome:	Between 10/2008 and 09/2009, reduced by 8% the number of coronary heart disease and stroke deaths in...
Status:	Exceeded
Barriers/Challenges to Success:	None
Strategies To Overcome Barriers/Challenges :	N/A

Note

The system displays the status is in black font, indicating that the HO was exceeded as described in the Outcome Status Legend at the top of the page.

Complete IO outcome information

Note

- The data provided in the practice exercise are sample data. Please populate the fields with your own state data.
- Required fields on a page are marked with an asterisk (*).
- Text in bold red font indicates that you have not yet completed the required information for the section.

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1. From the Annual Report navigation pane, click the IO under the Essential Service (ES) option for which you want to add outcome information.
   Result: The system displays the IO summary in the right display pane.

The system displays information in two main sections. The upper section displays the Impact/Process Objective information transferred from the work plan, and the lower section allows you to enter outcome information for the selected IO. The Not Entered text in bold red font indicates that you have not yet entered outcome information for the IO.

2. Click the **Edit** link.

    Result: The system displays the Edit Impact/Process Objective Outcome page.

3. Complete the fields on this page as follows:
    State Health Objective Status = Partially Met
    Actual Result = 14
    Barriers/Challenges to Success = Lack of participation
    Strategies to Overcome Barriers/Challenges = Educate more people

4. Click **Preview New SMART Outcome**.
    Result: The system updates the SMART outcome displayed in the green area with
    the newly added information.
    For example, if the objective from work plan =

    Between 10/2009 and 09/2009, The Stroke and Heart Attack Prevention Program
    (SHAPP) will evaluate **18** health districts in Georgia. Between 10/2009 and 09/2009.

    Then the new SMART outcome will be =

The Stroke and Heart Attack Prevention Program (SHAPP) evaluated **14** health districts in Georgia

5. Click **OK**.
   Result: The system displays the summary information in the right display pane, including the newly added information.

Georgia FY2009 Annual Report - Status: In Progress

(P) Adult Essential Health Treatment Services >> (HO) 12-1 Coronary Heart Disease>> (ES) 1. Monitor health status>> (IO) 1. **Identify the burden of CVD in Georgia**

▶ **Click the edit button to enter information.**

Impact/Process Objective from Work Plan

👁 View

Title:	Identify the burden of CVD in Georgia
Objective:	Between 10/2008 and 09/2009, The Stroke and Heart Attack Prevention Program (SHAPP) will evaluate **18** health districts in Georgia.

Impact/Process Objective Outcome for Annual Report

☰ Edit 👁 View

SMART Outcome:	Between 10/2008 and 09/2009, The Stroke and Heart Attack Prevention Program (SHAPP) evaluated **14** health districts in Georgia.
Status:	Partially Met
Barriers/Challenges to Success:	Lack of participation
Strategies To Overcome Barriers/Challenges:	Educate more people

Note

- The status is in blue font, indicating that the IO was partially met as described in the Outcome Status Legend at the top of the page.

- If you selected Not Started in the Status field, the system populates the Actual Result field with N/A.

- In order to achieve an accurate SMART outcome, you can edit your actual result and click the **Preview SMART Outcome** button as many times as necessary.

6. In the Annual Report navigation pane, click the HO link and click the Outcome Status tab.
   Result: The system displays the updated chart.
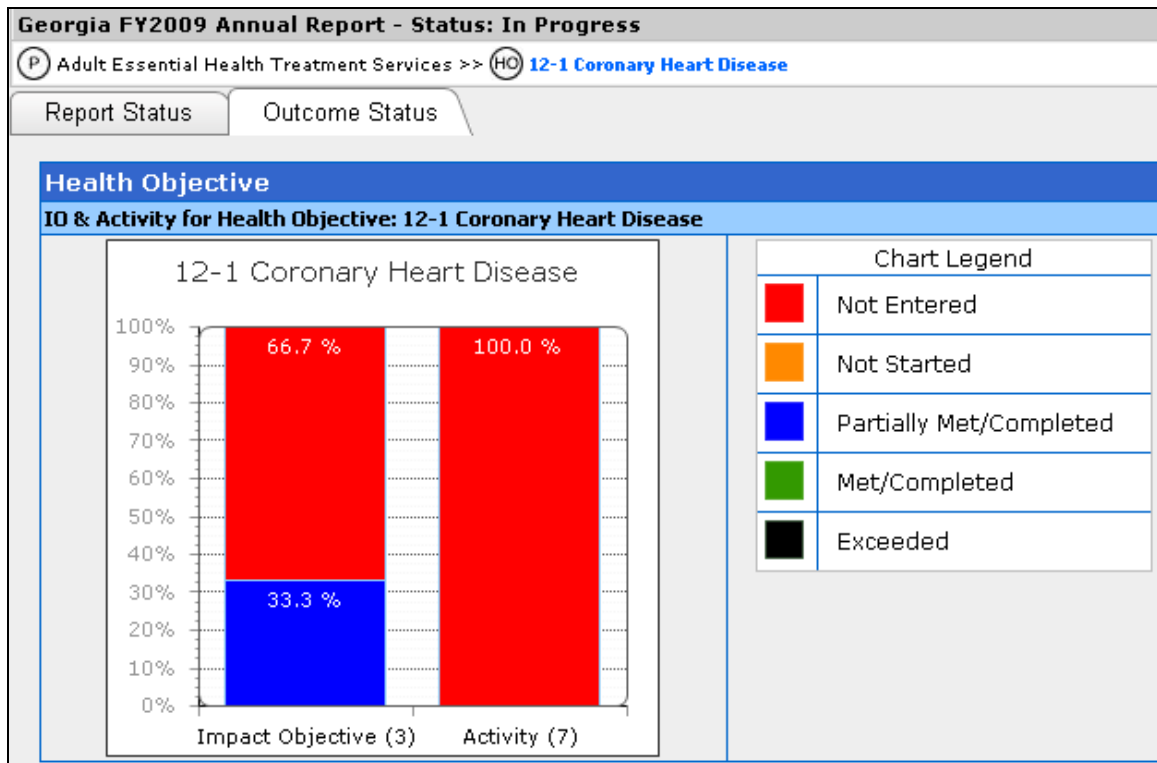
- The status is in blue font, indicating that the IO was partially met as described in the Outcome Status Legend at the top of the page.

- If you selected Not Started in the Status field, the system populates the Actual Result field with N/A.

- In order to achieve an accurate SMART outcome, you can edit your actual result and click the **Preview SMART Outcome** button as many times as necessary.

Complete activity outcome information

- The data provided in the practice exercise are sample data. Please populate the fields with your own state data.
- Required fields on a page are marked with an asterisk (*).
- Text in bold red font indicates that you have not yet completed the required information for the section.

1. From the Annual Report navigation pane, click the activity under the IO option for which you want to add outcome information.
   Result: The system displays the summary information for the activity in the right display pane.

The system displays information in two main sections. The upper section displays the activity information transferred from the work plan, and the lower section allows you to enter outcome information for the selected activity.

2. Click the **Edit** link.
   Result: The system displays the Edit Activity Outcome page.

3. Complete the fields on this page as follows:
   Status = Completed
   Actual Result = Between 10/1/2008 to 9/30/2009, conducted BRFSS activities
   specifically to include cardiovascular health, heart attack, stroke and hypertension
   management modules.
   Barriers/Challenges to Success = None
   Strategies to Overcome Barriers/Challenges = N/A

4. Click **OK**.
   Result: The system displays the activity summary in the right display pane, including
   the newly added information.

Georgia FY2009 Annual Report - Status: In Progress

(P) Adult Essential Health Treatment Services >> (HO) 12-1 Coronary Heart Disease>> (ES) 1. Monitor health status>> (IO) 1. Identify the burden of CVD in Georgia>> (A) **1. Conduct BRFSS activities**

▶ **Click the edit button to enter information.**

Activity from Work Plan

◉ View

Title:	Conduct BRFSS activities
Description:	Between 10/1/2008 to 9/30/2009: conduct BRFSS activities specifically to include cardiovascular health, heart attack, stroke and hypertension management modules

Activity Outcome for Annual Report

▤ Edit ◉ View

Outcome:	Between 10/1/2008 to 9/30/2009, conducted BRFSS activities specifically to include cardiovascular health, heart attack, stroke and hypertension management modules
Status:	Completed
Barriers/Challenges to Success:	None
Strategies To Overcome Barriers/Challenges:	N/A

Note

- The status of the activity is in green font, indicating that the activity was completed as described in the Outcome Status Legend at the top of the page.
- After completing the activity outcome information, the system changes the circles next to the **a** in the Annual Report navigation pane from yellow to green to indicate that the activity has been completed.
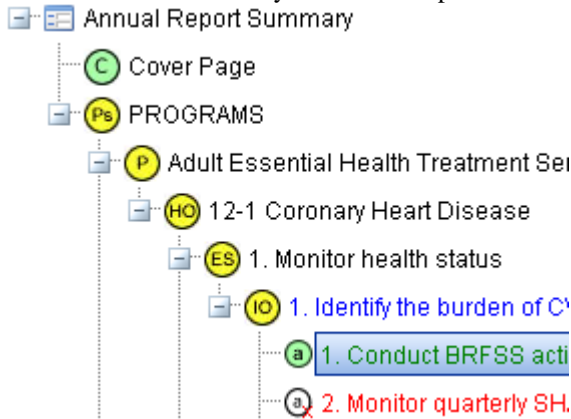
5. In the Annual Result navigation pane, click the Program link for the current program and click the Outcome Status tab.
   Result: The system displays the updated chart.
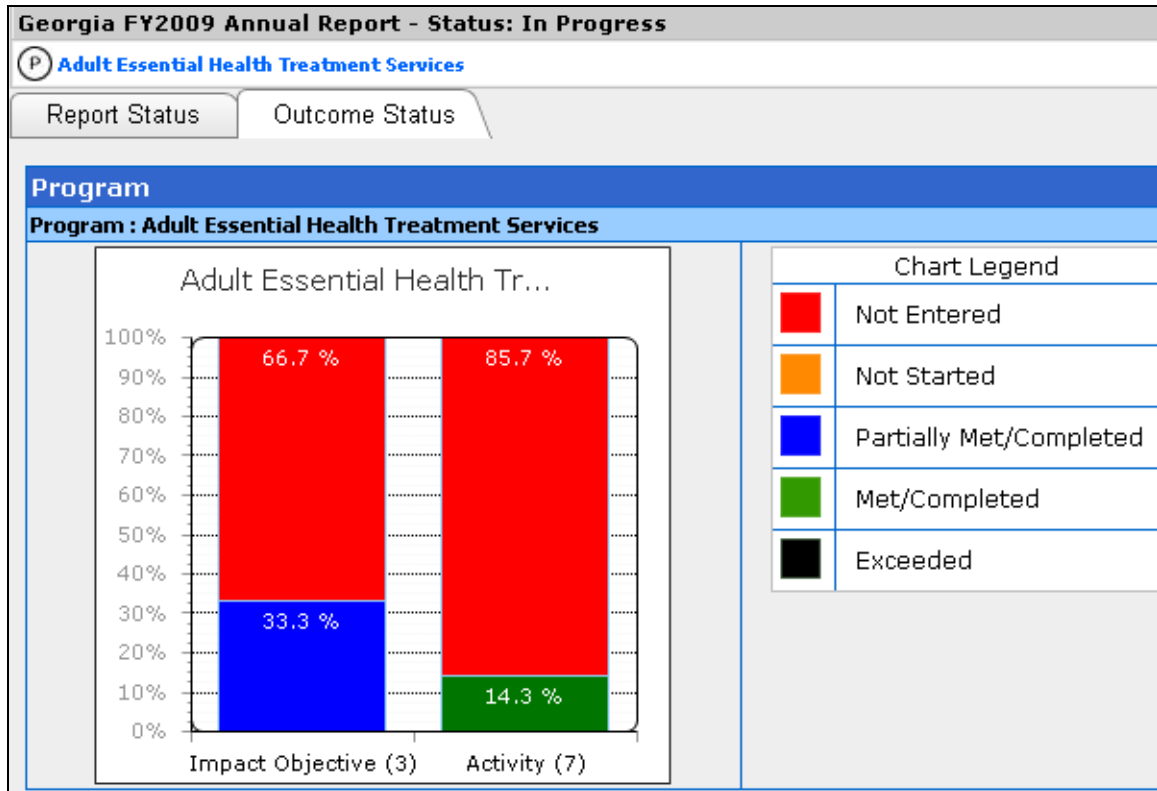
Complete and verify all outcome information

1. Complete the following procedures for each program in the annual report navigation pane.
   Complete HO outcome information
   Complete IO outcome information
   Complete activity outcome information

   Result: After completing the last activity, all the circles next to each option in the navigation pane change from yellow to green to indicate that the option has been

completed
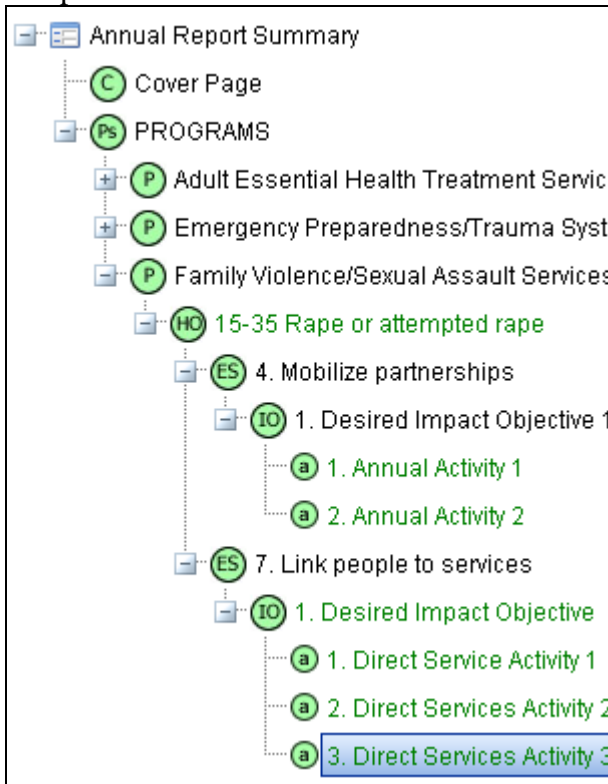
2. Click the main Programs option and click the Report Status tab.
    Result: The system displays the report status.

 The Incomplete section now displays a 0 (zero) indicating that all the outcome
information for the programs in the annual report has been completed.

3. Click the Outcome Status tab.
    Result: The system displays the chart.
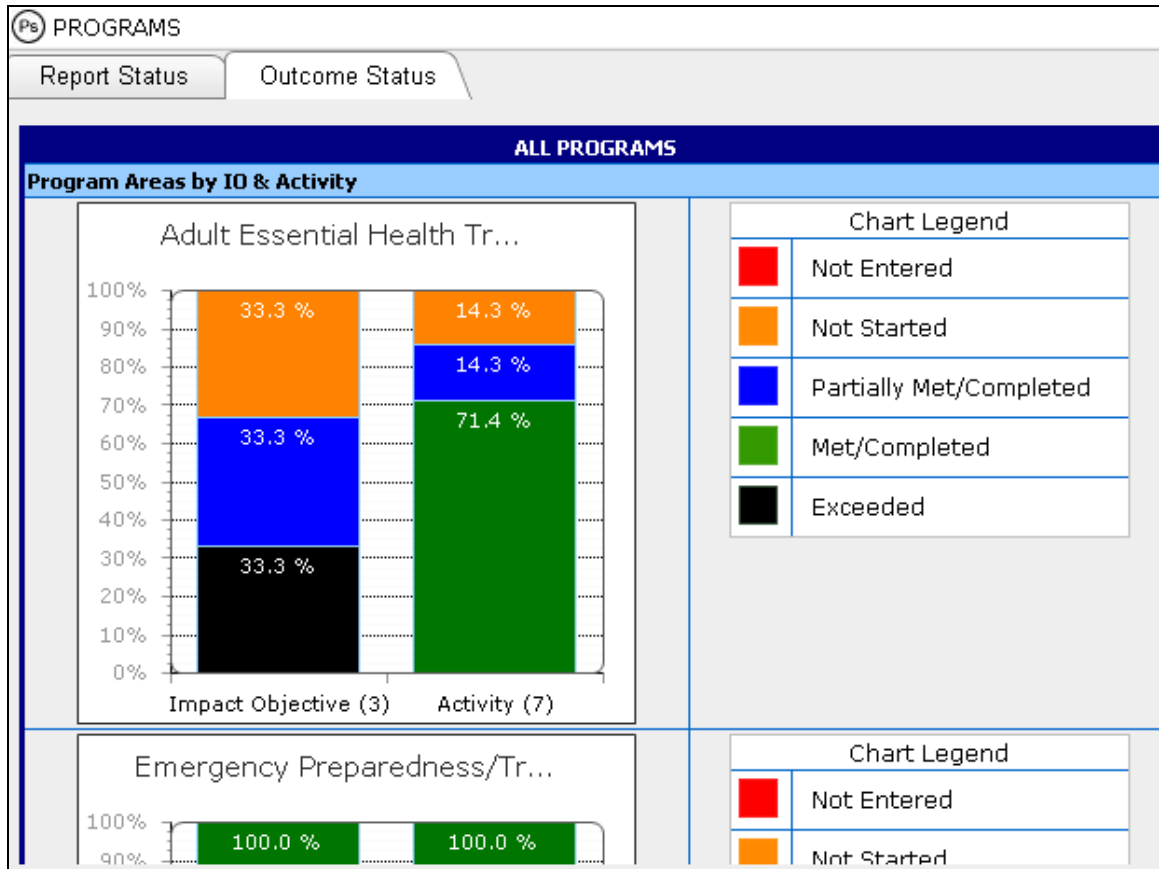
The chart reflects all the information in the annual report. You are now ready to submit your annual report to CDC.

Chapter 5: Verifying and submitting your annual report

After verifying Block Grant Coordinator information and entering all necessary outcome information, you are now ready to verify your annual report and submit it to CDC.

Learning Objectives

Upon the completion of this chapter, you will be able to:

- Verify your annual report

- Submit your annual report to CDC

Verify annual report practice exercise

> **Note**
> - The data provided in the practice exercise are sample data. Please populate the fields with your own state data.
> - Required fields on a page are marked with an asterisk (*).
> - Before beginning this exercise, make sure that you have at least two documents in Word or PDF format saved on your computer to upload to the system.

1. Click the **verify then submit annual report to CDC** link to check that all outcomes have been entered. The **verify then submit annual report to CDC** link is always available at the top right side of the page
   Result: The system displays a page that lists the items in your annual report and indicates if the item passed or failed.

Verify and Submit Annual Report

Georgia FY2009 Annual Report - Status: In Progress

Confirmation:
All items verified OK. Click the Submit button to submit your Annual Report to CDC.

Verification Item	Status
1. Block Grant Coordinator information for the Cover Page has been reviewed	OK
2. Outcome entered for each Health Objective	
3. Outcome entered for each Impact Objective	OK
4. Outcome entered for each Activity	OK

Submit   Cancel

> ![Important] All items in your annual report must pass and display a status of "OK" before you can submit your annual report to CDC. If any of the items fail, correct any errors and then verify the annual report again.

2. Click the **Submit** button.

    Result: The system displays the Submit Verified Annual Report to CDC page.

    Submit Verified Annual Report to CDC

    Georgia FY2009 Annual Report - Status: In Progress

    * Required fie

    Submit the annual report to CDC for review:
    Georgia FY2009 Annual Report - Status: In Progress

    * Enter Comments to CDC Reviewer:

    Are you sure you wish to submit this annual report to CDC? No additional changes will be allowed post-submission. If yes, type the word SUBMIT in the confirmation box.

    * Confirmation: [ ]

    [OK] [Cancel]

3. Complete the fields as follows:
    Enter Comments to CDC Reviewer text box = This annual report is complete.
    Confirmation = SUBMIT

4. Click **OK**.

    Result: The system displays a confirmation page.

    Annual Report Submission Successful

    Georgia FY2009 Annual Report - Status: Submitted to CDC

    An email has been sent to CDC to notify them of your submission. You will receive an email confirmation at the address listed in your user profile.

    [OK]

> ![Note] After submitting your annual report to CDC, the system:
>
> - changes the status of the annual report to "Submitted"
> - sends you a copy of the confirmation E-mail sent to the CDC reviewer.
>
> When CDC reviews your annual report, the system changes the status of your annual report to "Reviewed by CDC."

5. Click **OK**.
   Result: The system displays the annual report summary information on the Outcome Status tab.
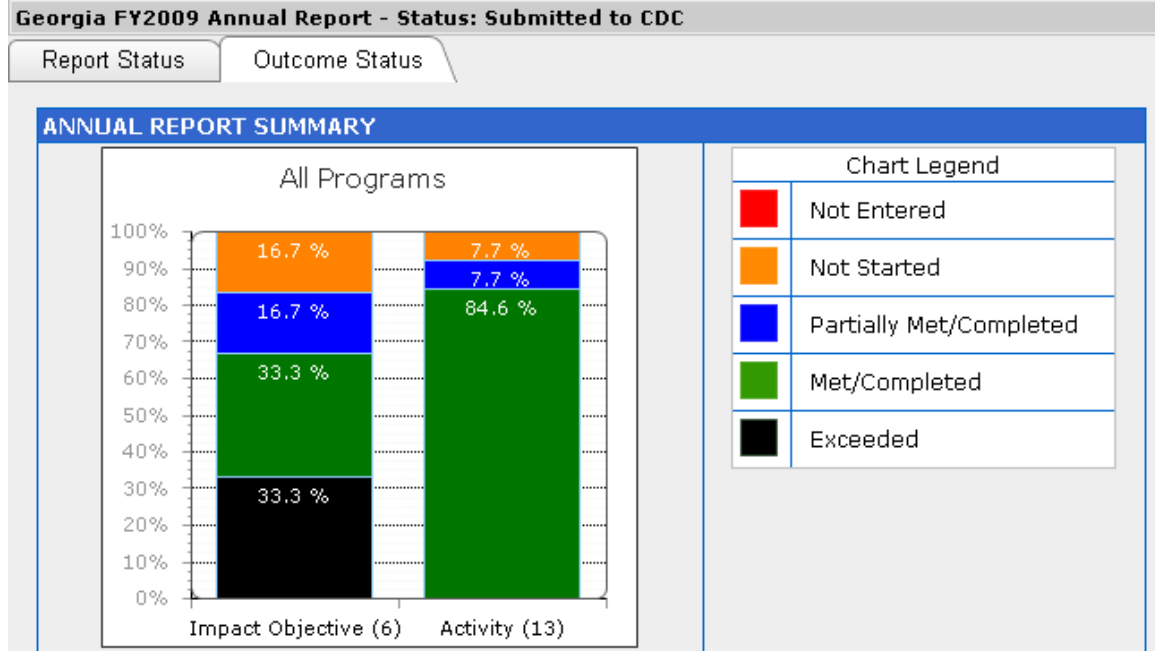

After submitting your annual report to CDC, the system:

- changes the status of the annual report to "Submitted"
- sends you a copy of the confirmation E-mail sent to the CDC reviewer.

When CDC reviews your annual report, the system changes the status of your annual report to "Reviewed by CDC."

Chapter 6: Reports

BGMIS allows you to run three types of reports: standard reports, program reports, and annual reports. A standard report pulls data from all the programs in the work plan, a program report generates a report for a specific program in the work plan, and an annual report pulls data from the annual report.

The following standard reports are available in BGMIS:

- **Work Plan Report:** Generates the complete Block Grant Work Plan, including the Executive Summary, Statutory, Budget and Program/HO information, and Program/HO Profiles. Sections of the report can be printed by selecting a range of page numbers to print.
- **Budget Report:** Generates the Executive Summary, Statutory, and Budget sections of the Block Grant Work Plan.
- **Program/HO Report:** Lists the Programs and HOs in the Work Plan with budget and FTE figures. The report (with additional fields) can be exported to Excel.
- **Profile Report:** Generates all of the Program/HO Profiles for the Work Plan
- **Impact Objective Summary Report:** Prints the Impact Objective Description and the Impact Objective Outcome Template for the Annual Report.

The following annual reports are available in BGMIS:
- **Annual Report:** Prints the entire Block Grant Annual Report, including the Executive Summary, the Program Titles and Strategies, the HO National and State Objectives and progress on the Impact Objectives and Activities.
- **IO and Activity Outcome Status by Program:** Prints the Impact/Process Objectives and Activity Outcome totals by Outcome Status by Program.
- **IO and Activity Outcome Status by HO:** Prints the Impact/Process Objectives and Activity Outcome totals by Outcome Status by HO within Program.

Learning Objectives

Upon the completion of this chapter, you will be able to:

- Run the Impact Objective Summary report

- Run the annual reports

- Save a report in PDF or Microsoft Word format

Run reports practice exercise
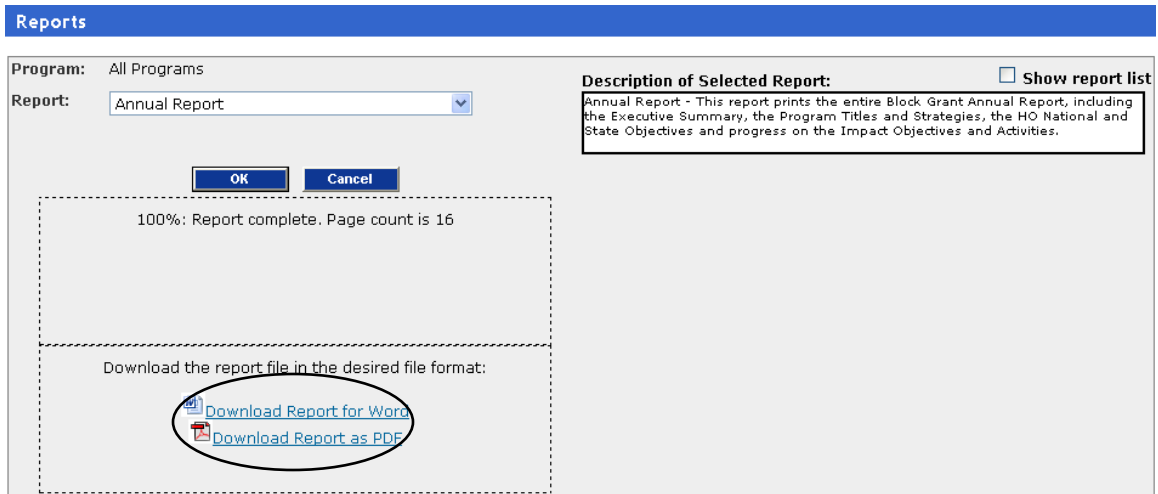
Run an annual report

1. On the Annual Report Summary page, click the **generate reports** link in the other tasks section.
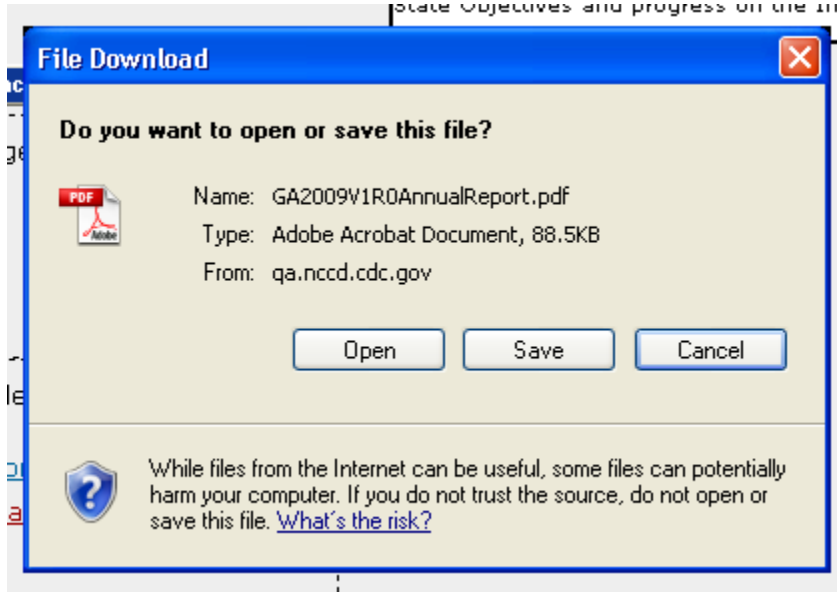   **Result:** The system displays the program summary in the right display pane.
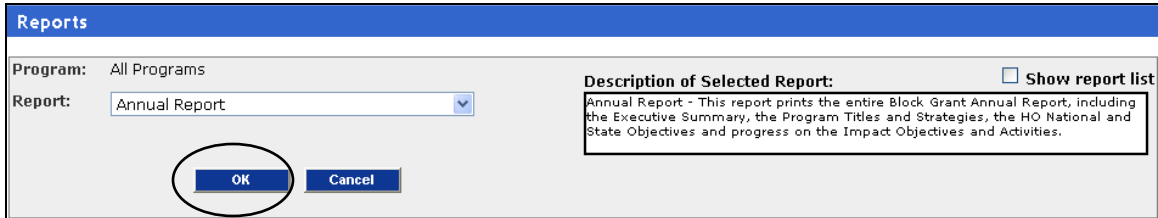
2. Select the report you want to run from the Report drop-down list and click **OK**.
    Result: The system generates the selected report.

3. Click the link for the desired format, Word or PDF.
    Result: The system displays a download pop-up window.

4. Click **Open** to view the report or **Save** to download the report to your computer.

Note	Repeat the same steps as indicated above for generating other annual reports.

Run the Impact Objective Summary report

1. Click the BGMIS Home tab, access the Work Plan module, and access the Work Plan list.
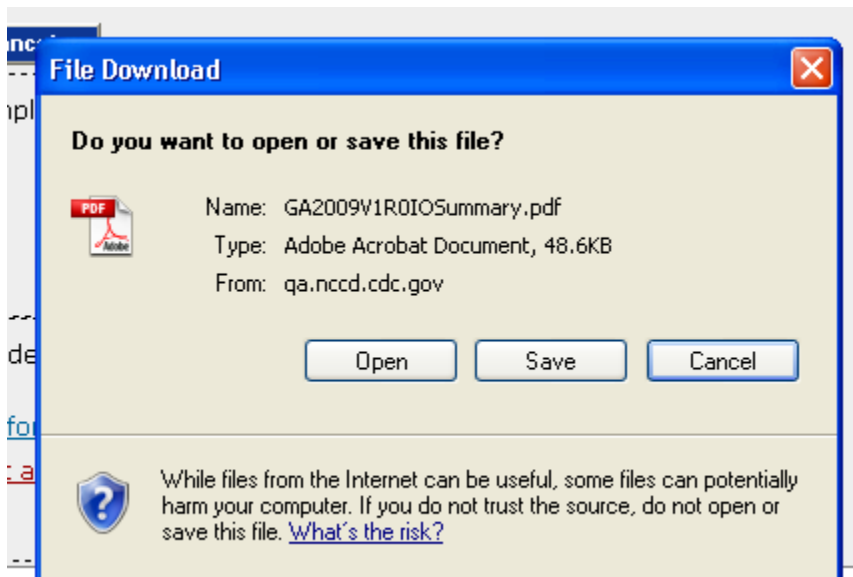   **Result:** The system displays the Select Work Plan page.

2. Select the work plan for which you want to run the report and click **OK**.
    Result: The system displays the Work Plan summary page.

3. Click the **generate reports** link in the other tasks section.
    Result: The system displays the Reports page.

4. Select Impact Objective Summary Report from the Report drop-down list and click
    OK.
    Result: The system generates the selected report.
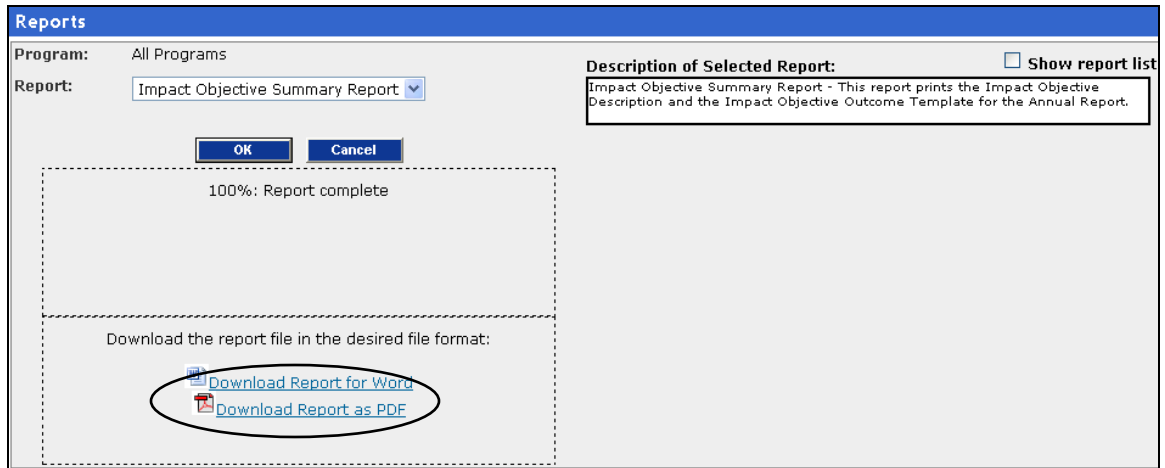
5. Click the link for the desired format, Word or PDF.
    Result: The system displays a download pop-up window.

6. Click **Open** to view the report or **Save** to download the report to your computer.