**Attachment 4a**

**Revised MIS Data Elements for NCCCP Awardees**

****

Screenshots

Comprehensive Cancer Control

DP17-1701

OMB Package #0920-0841



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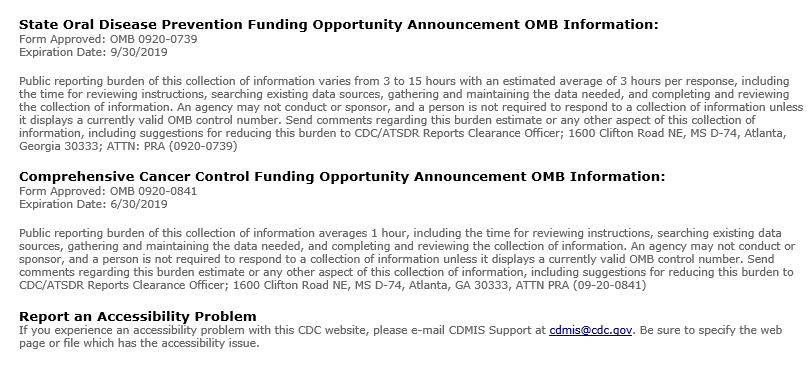
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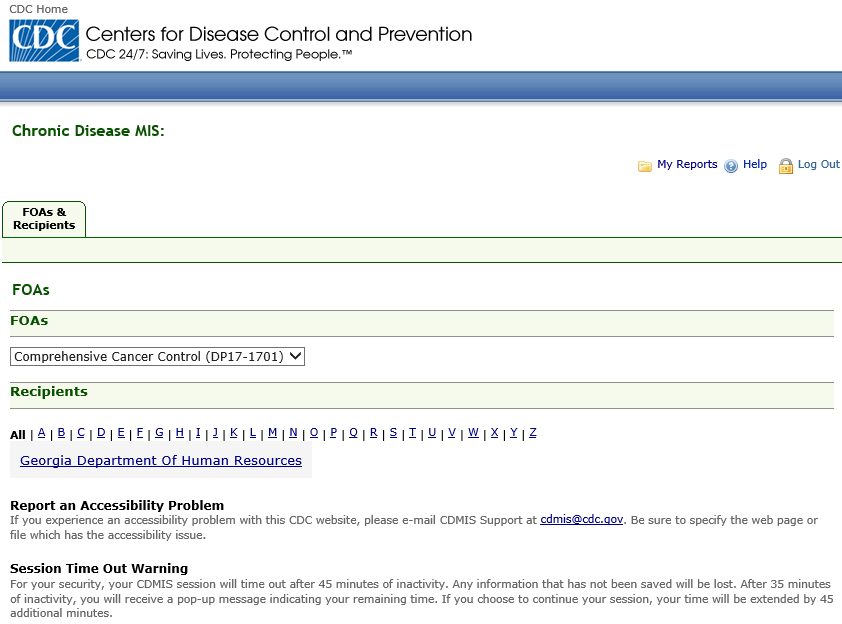
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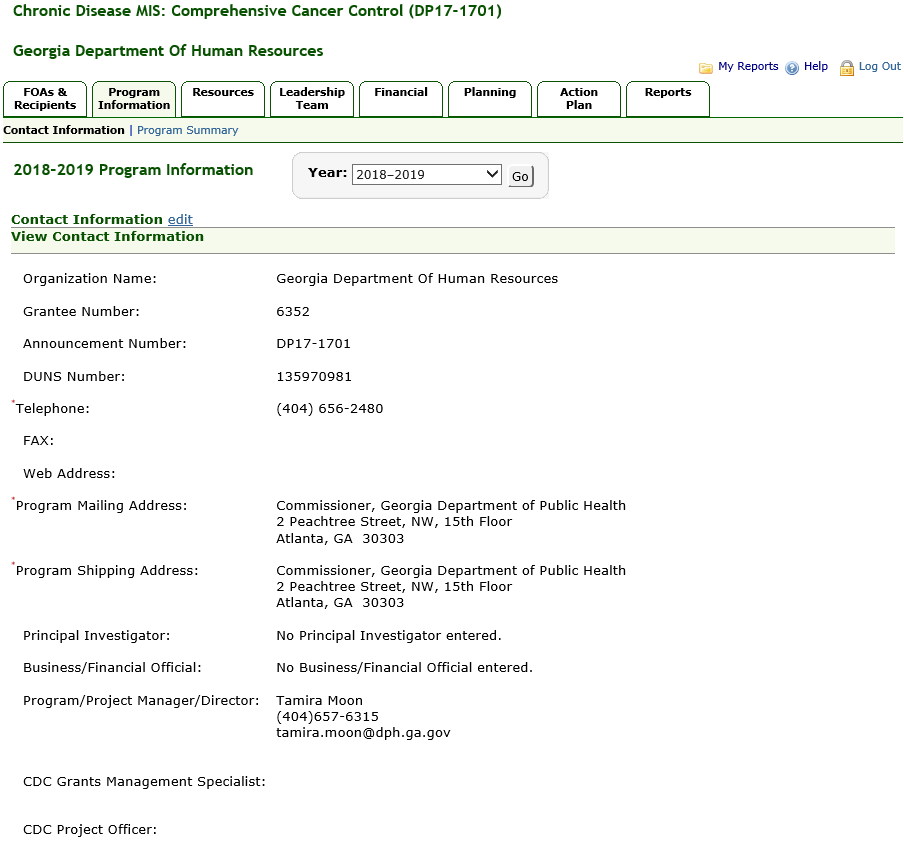


# FOAs & Recipients (Existing) OMB Package #0920-0841

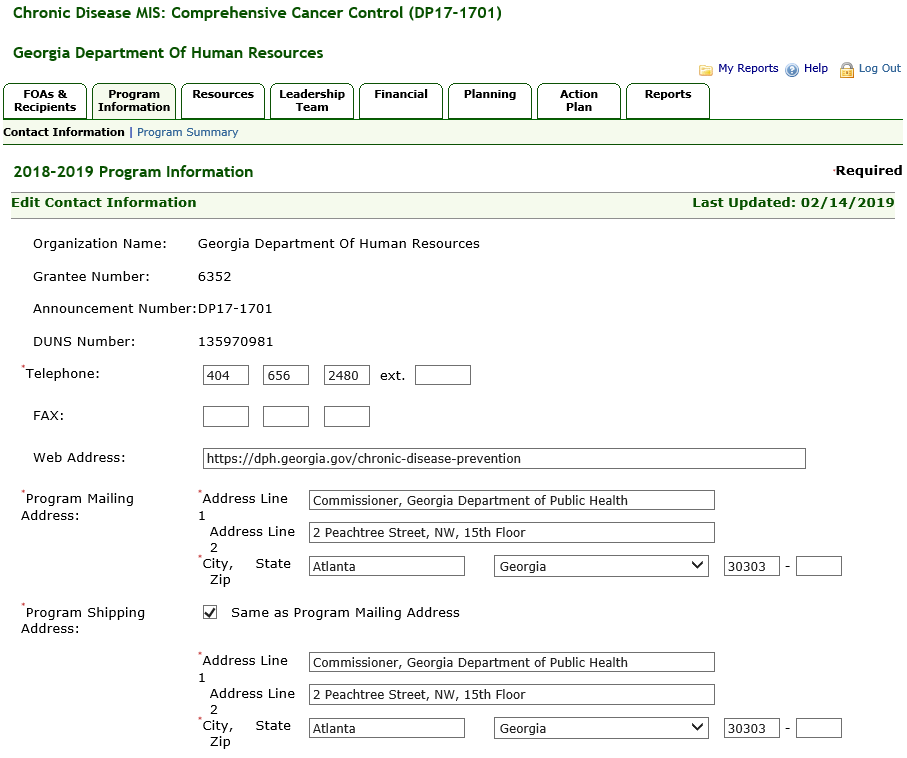


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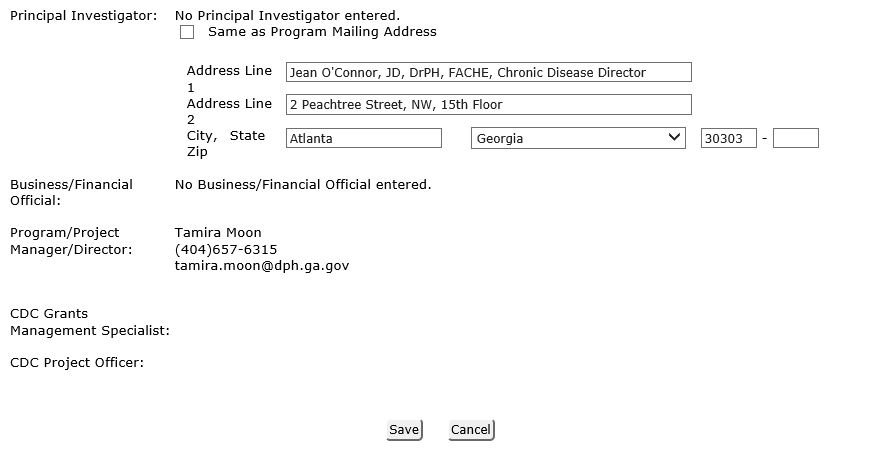
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## Edit Contact Information (Existing) OMB Package #0920-0841



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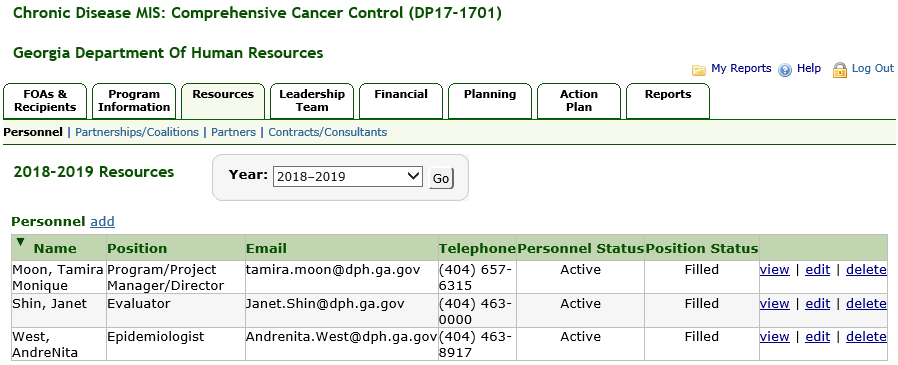


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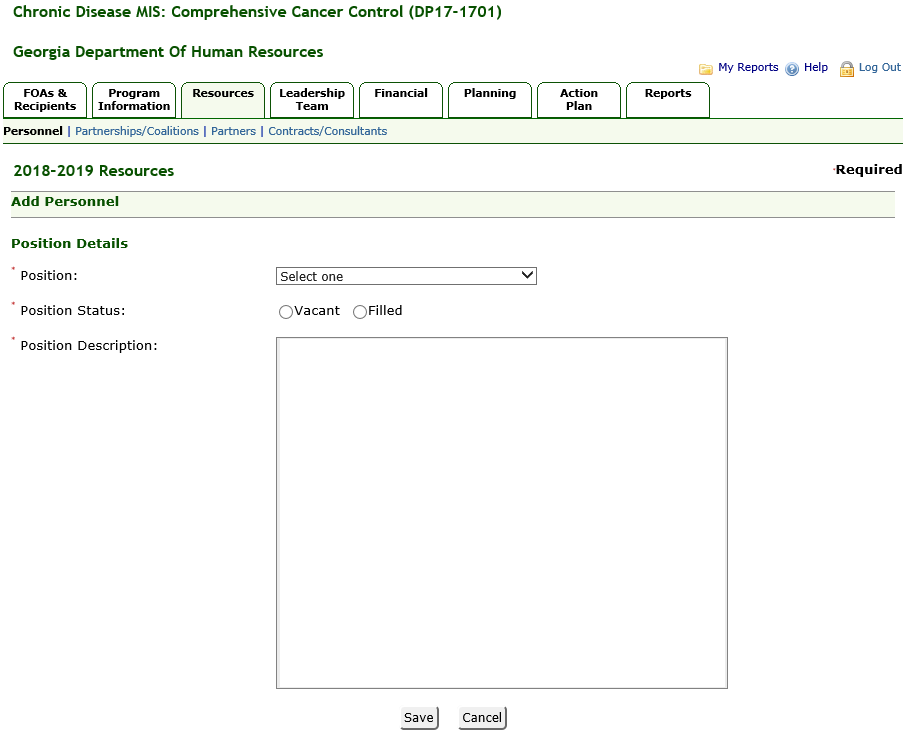


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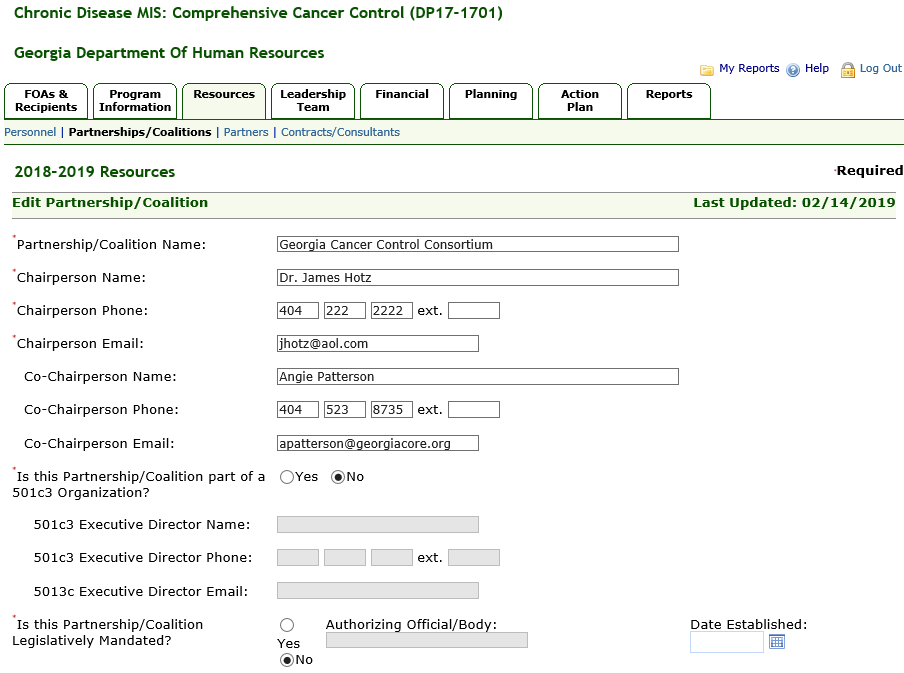
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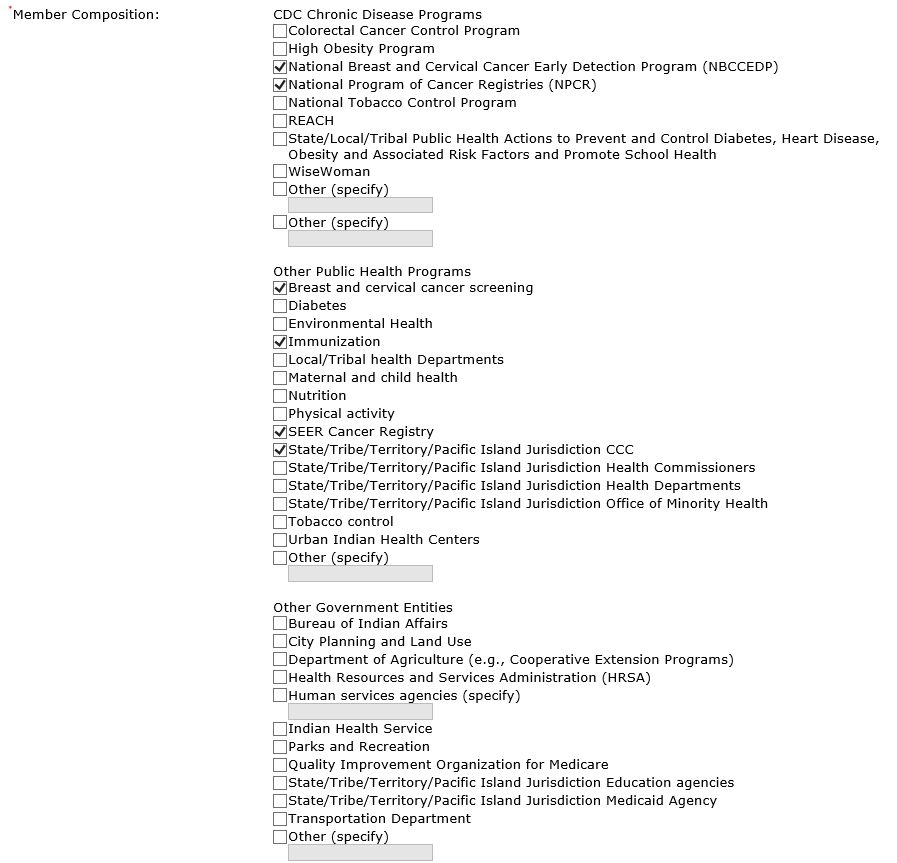
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## Add/Edit Partnership/Coalition (Existing) OMB Package #0920-0841



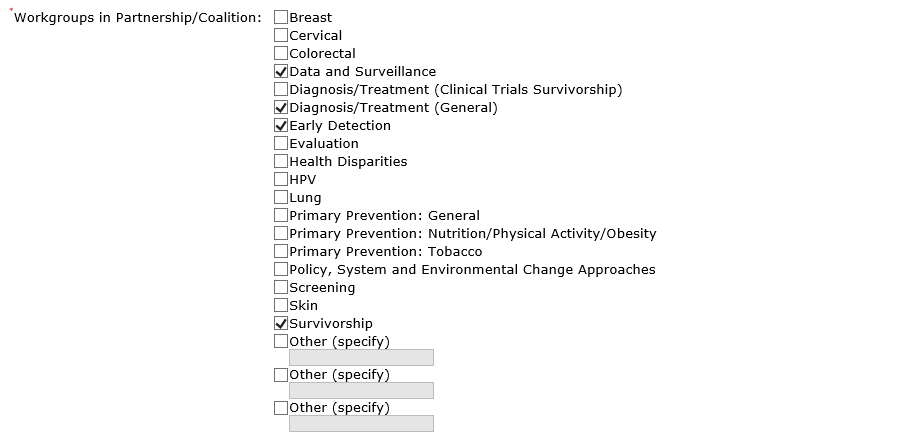
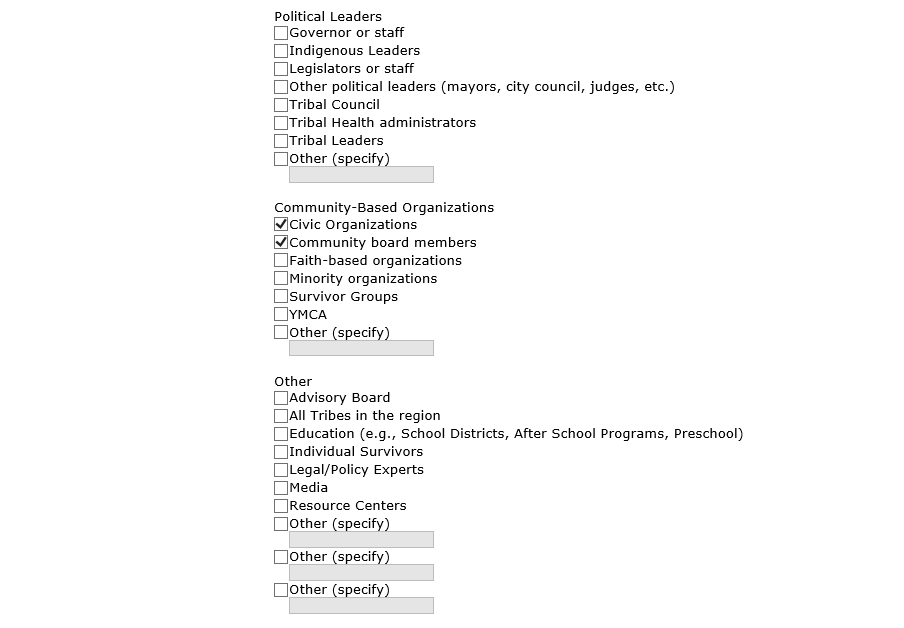
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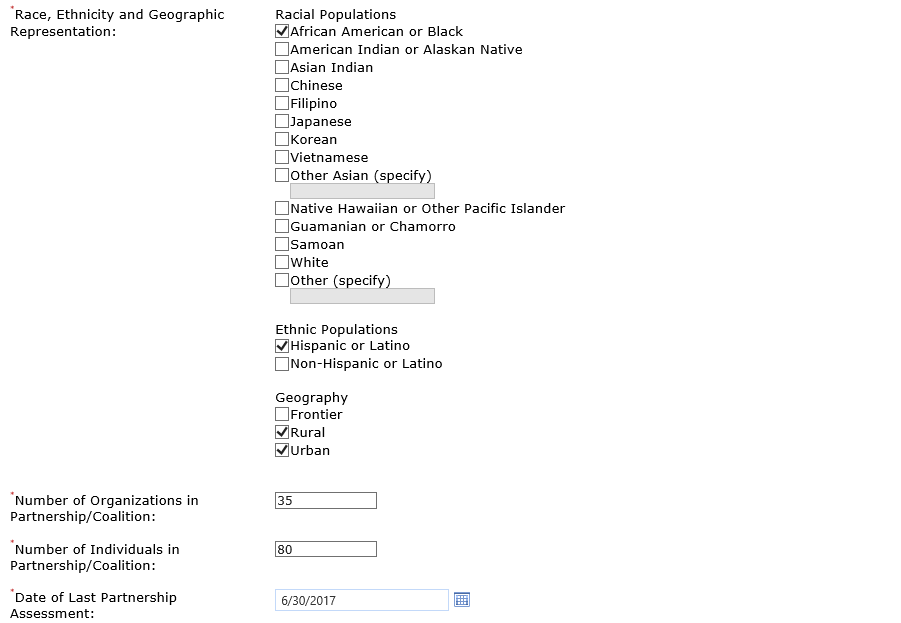
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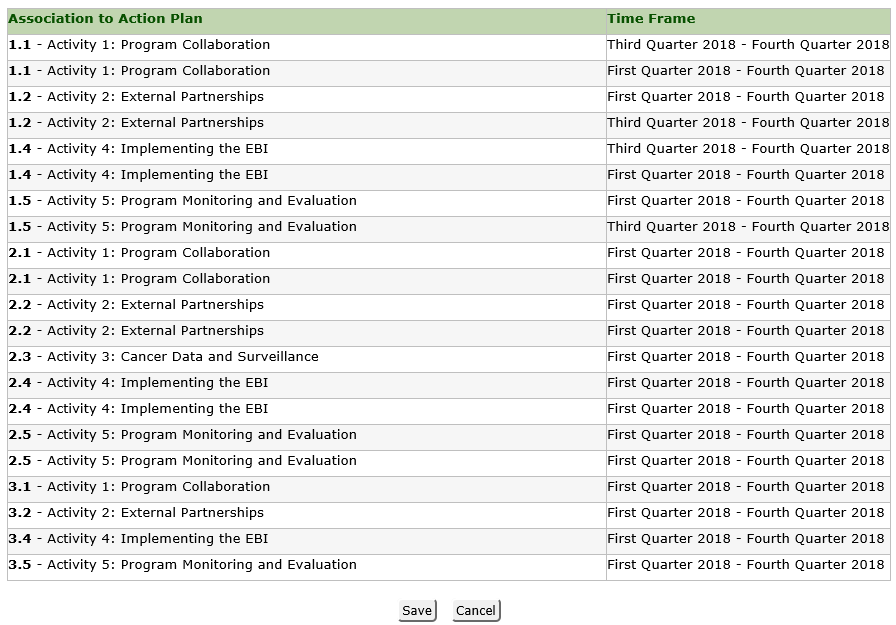
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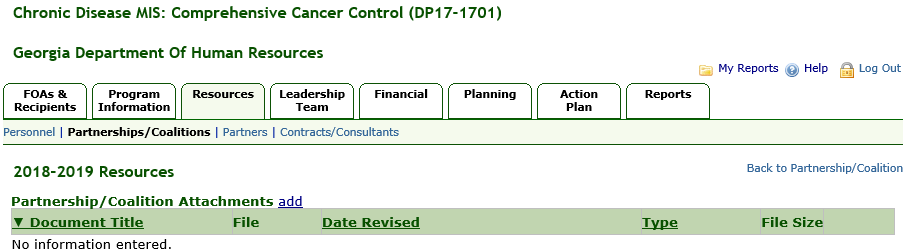
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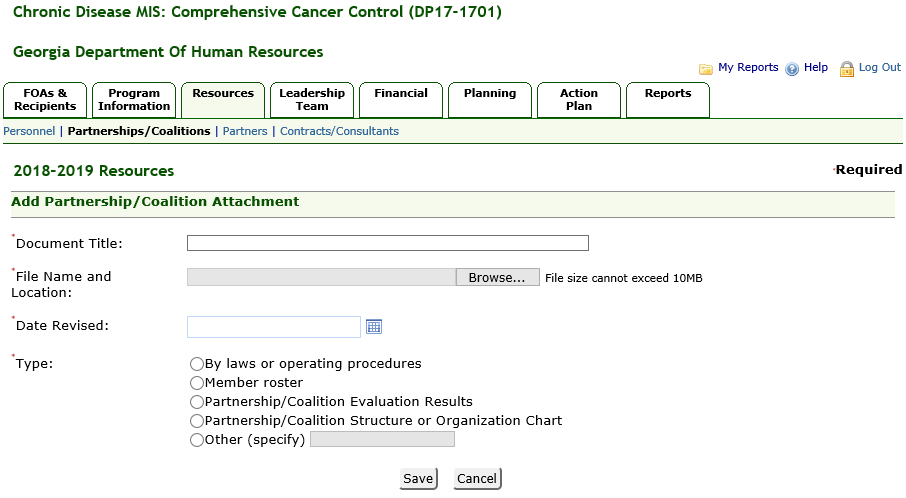
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## Partnership/Coalition Attachments (Existing) OMB Package #0920-0841



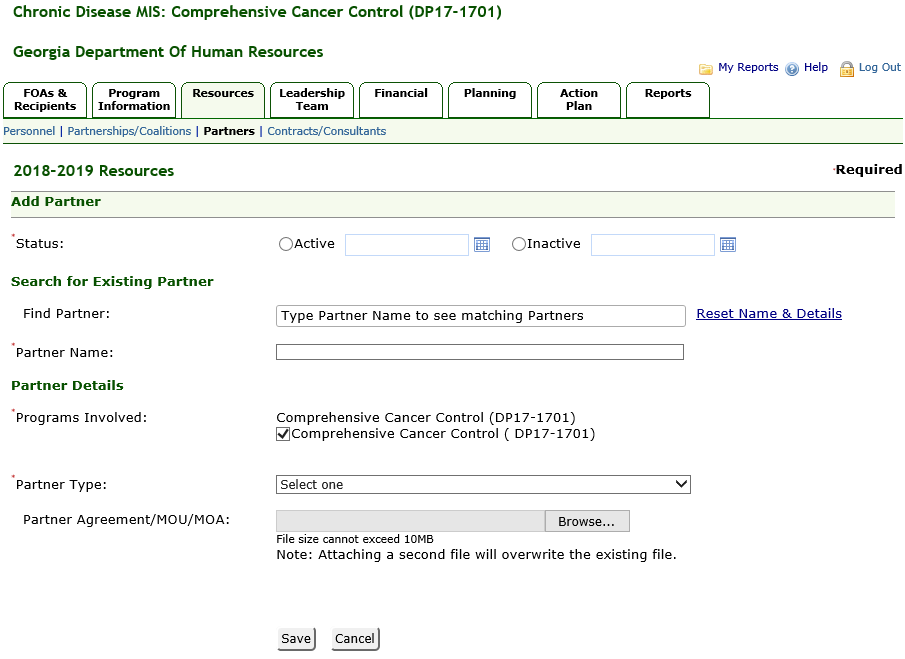
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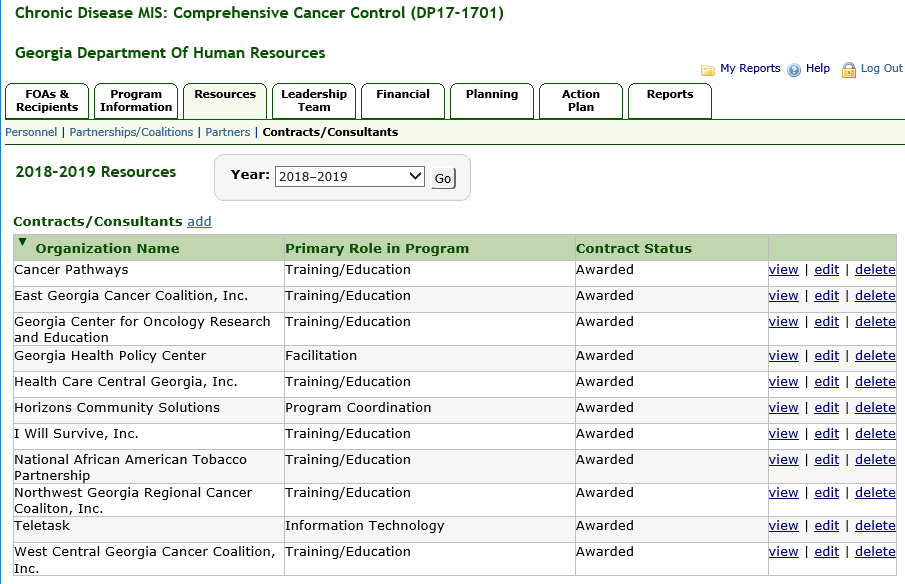
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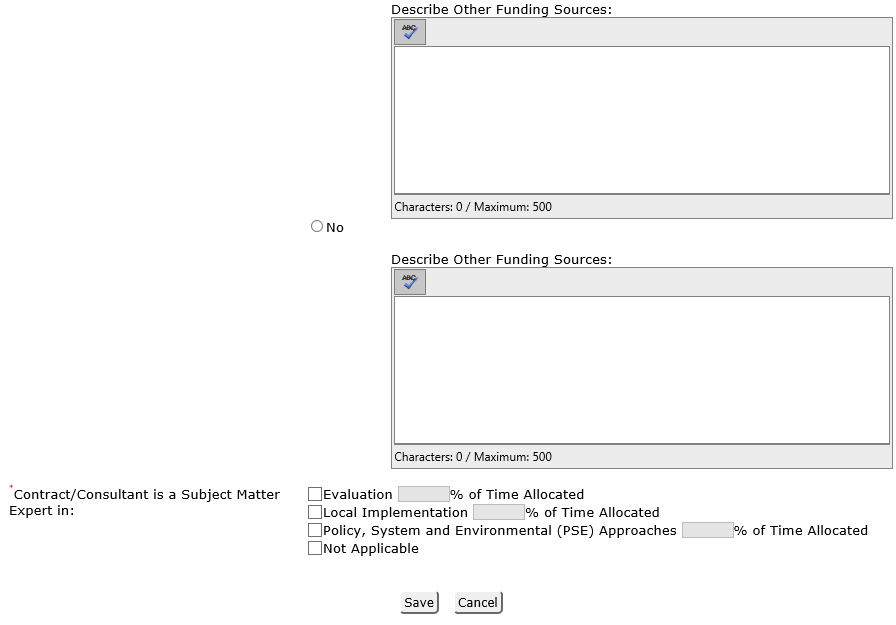
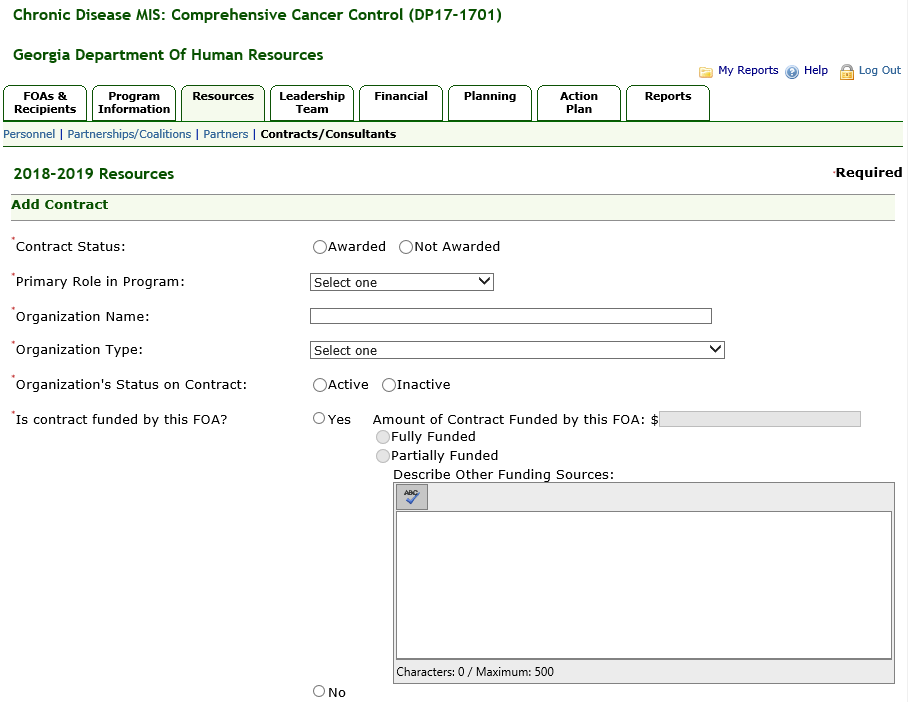
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## Contracts/Consultants (Existing) OMB Package #0920-0841

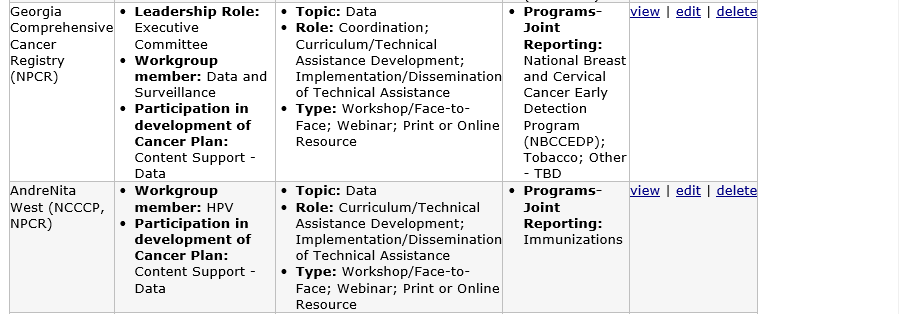
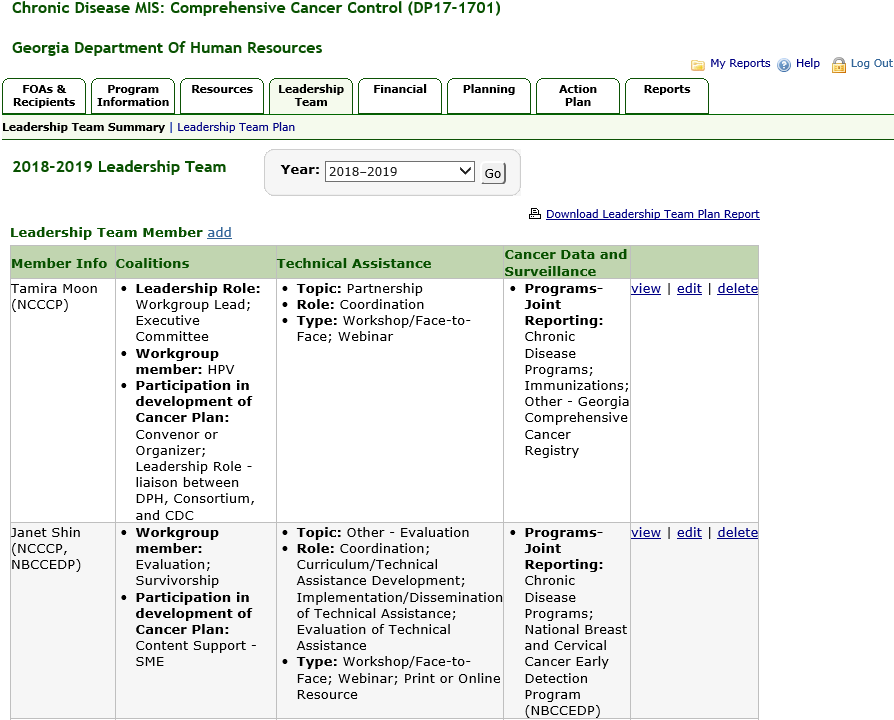


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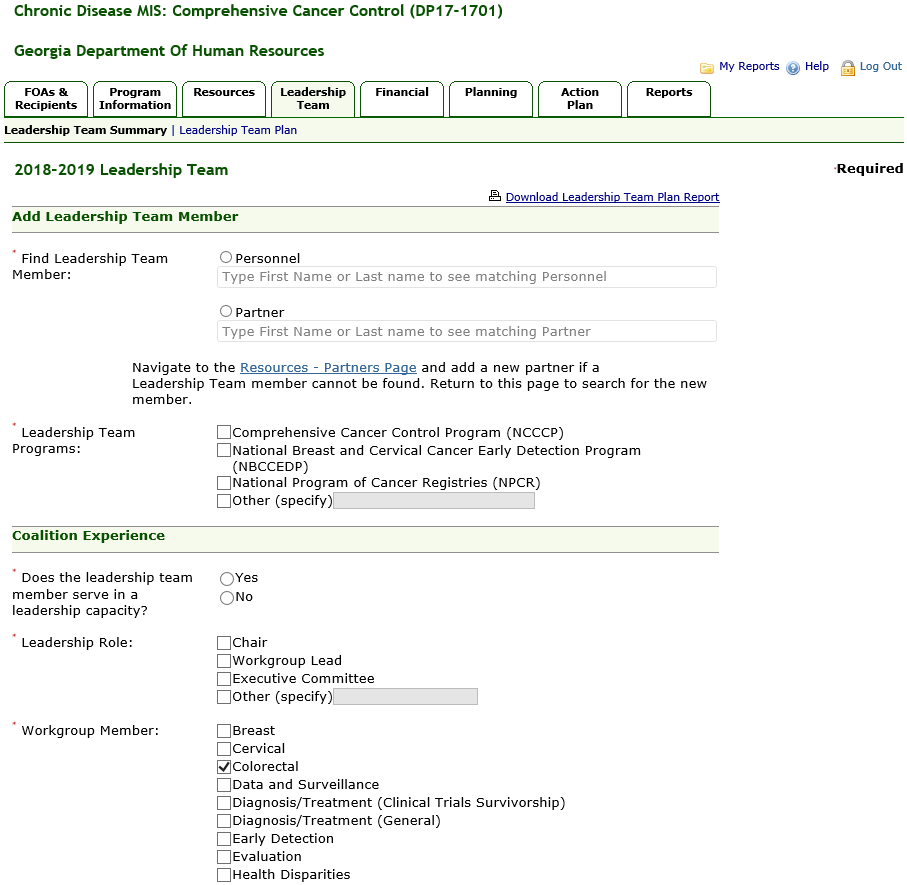


# Leadership Team (New) OMB Package #0920-0841

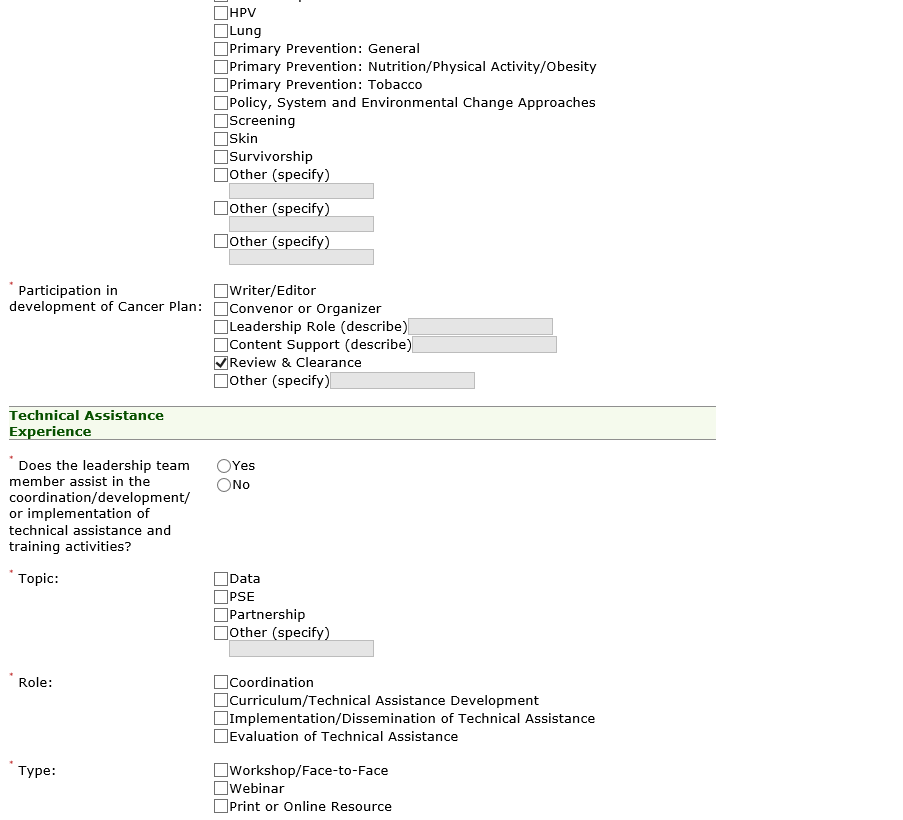
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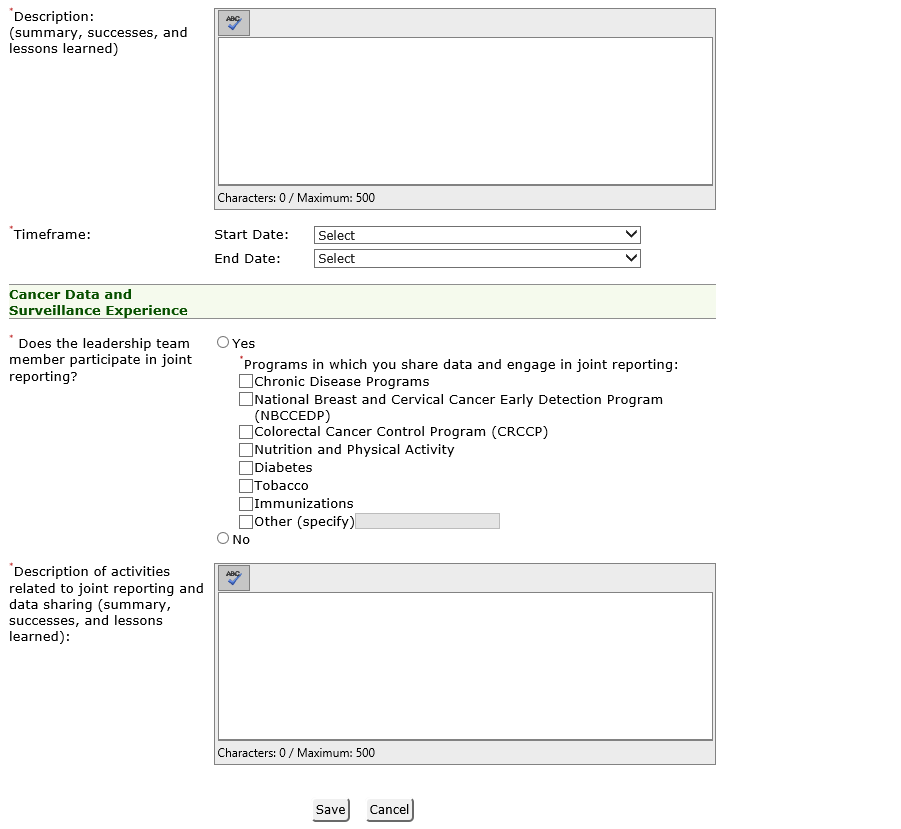
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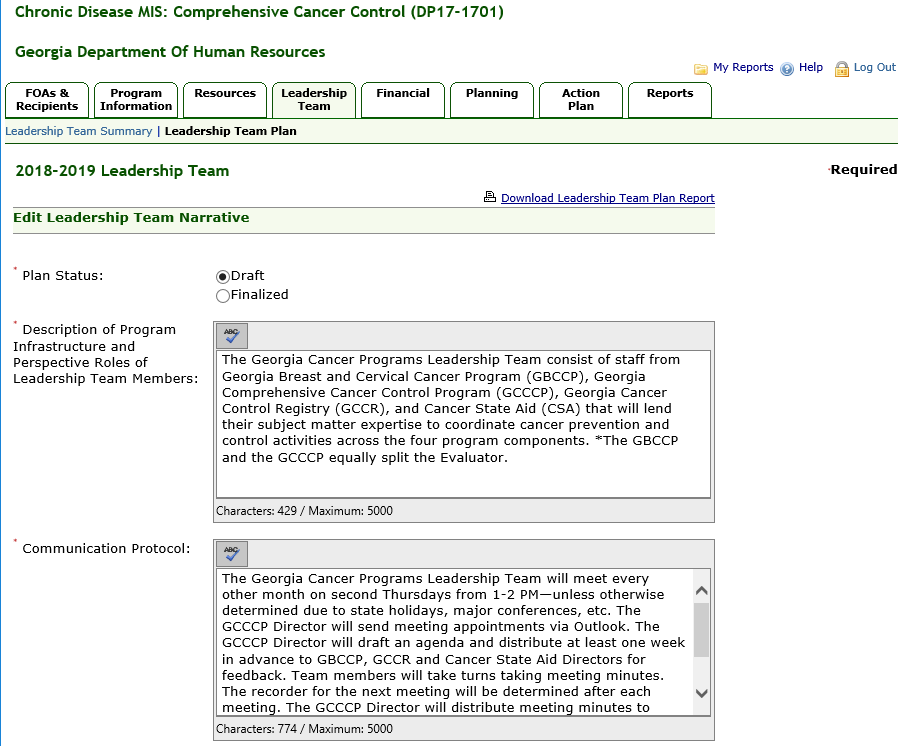
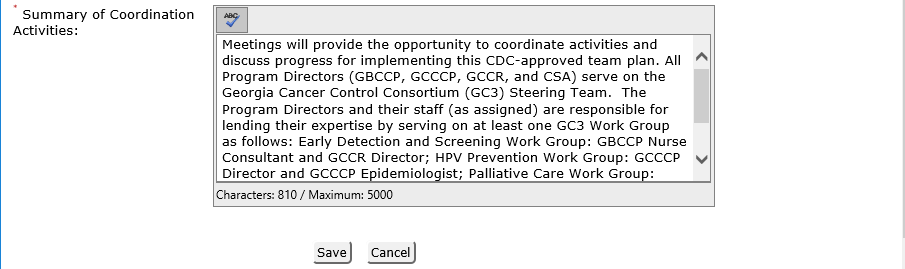
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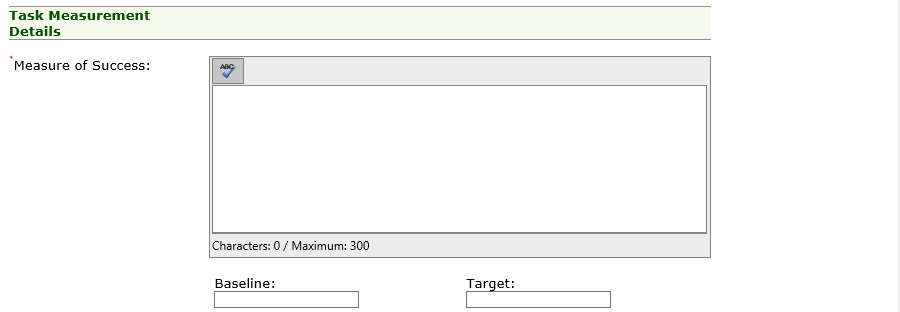
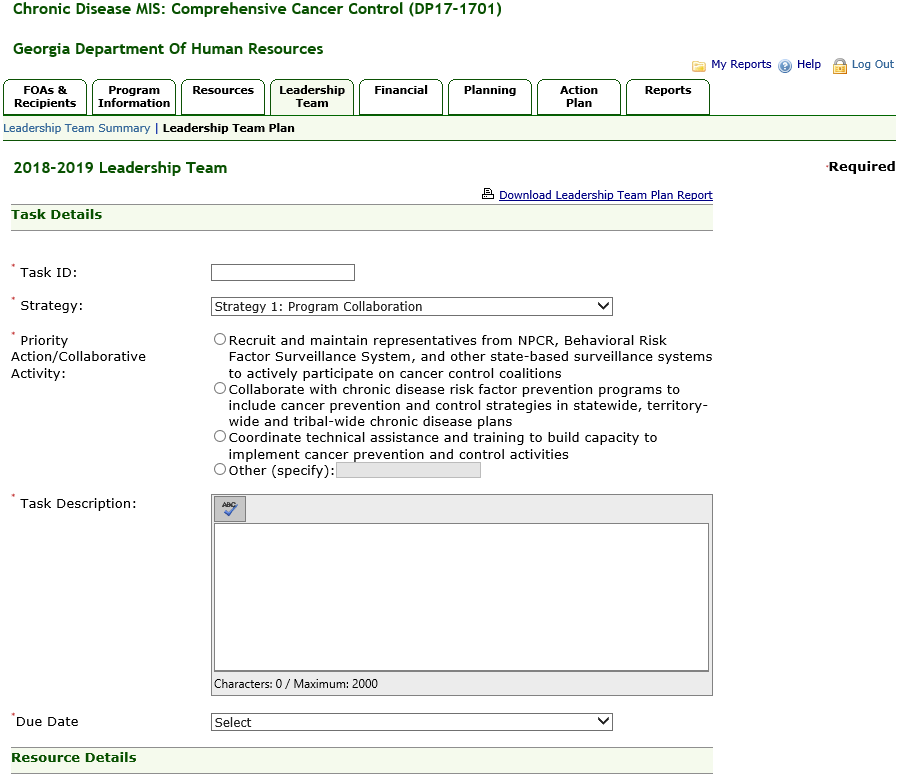
### Add Leadership Team, Continued – 2



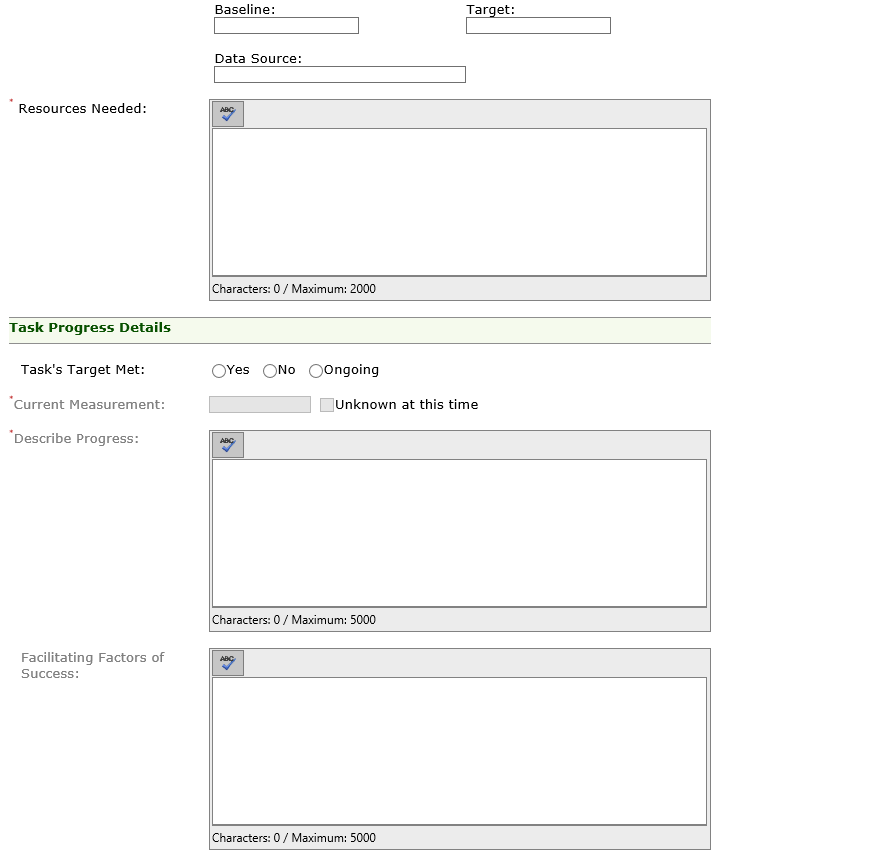
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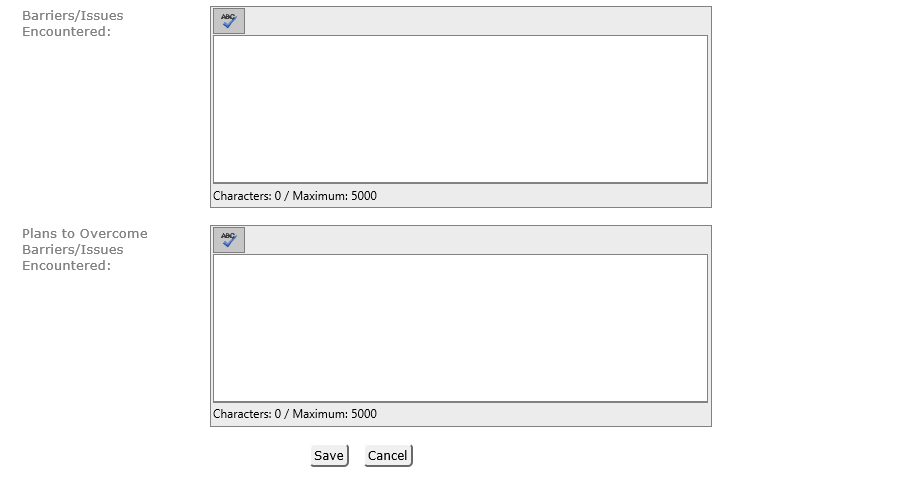
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### Add Task Details, Continued – 1

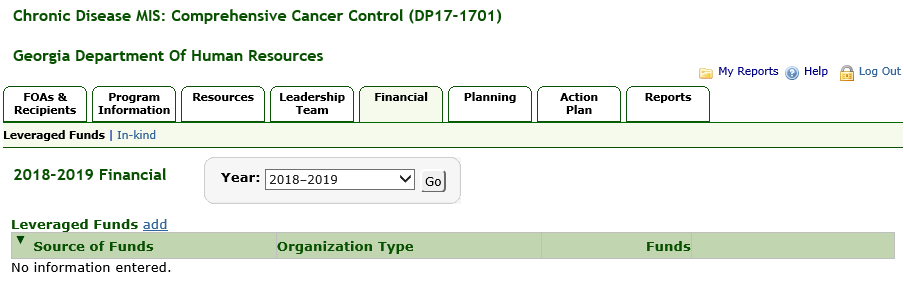


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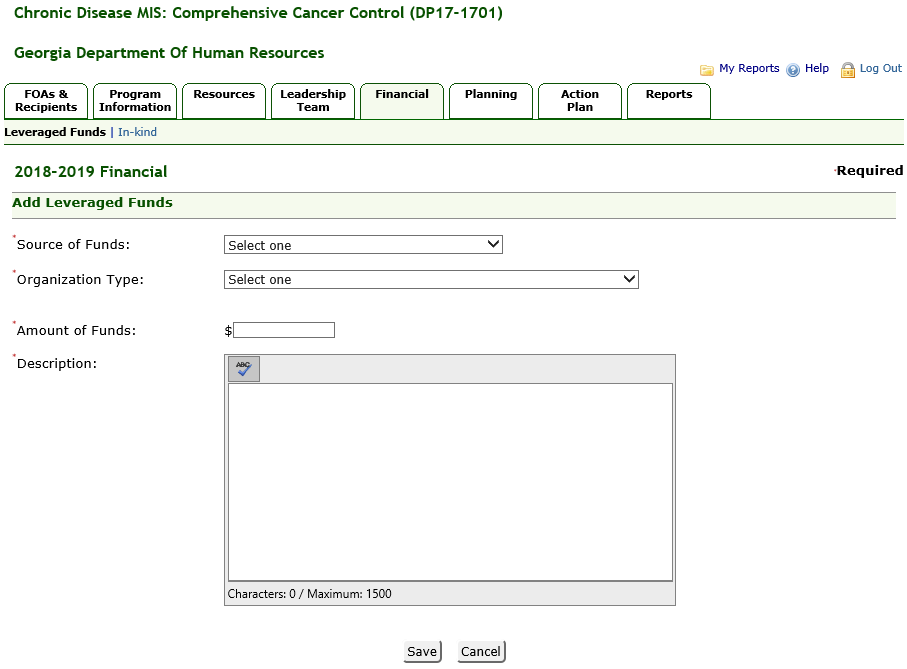


# Financial

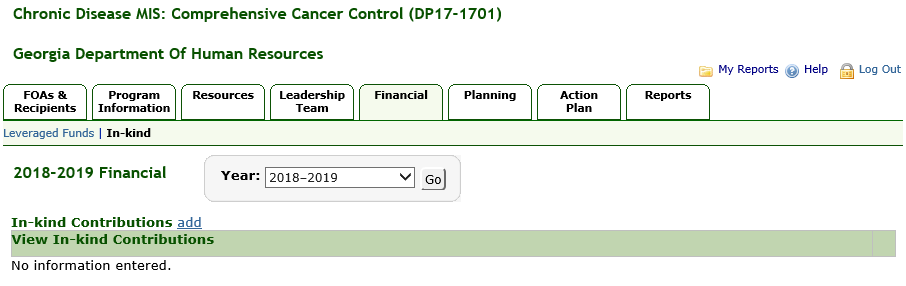
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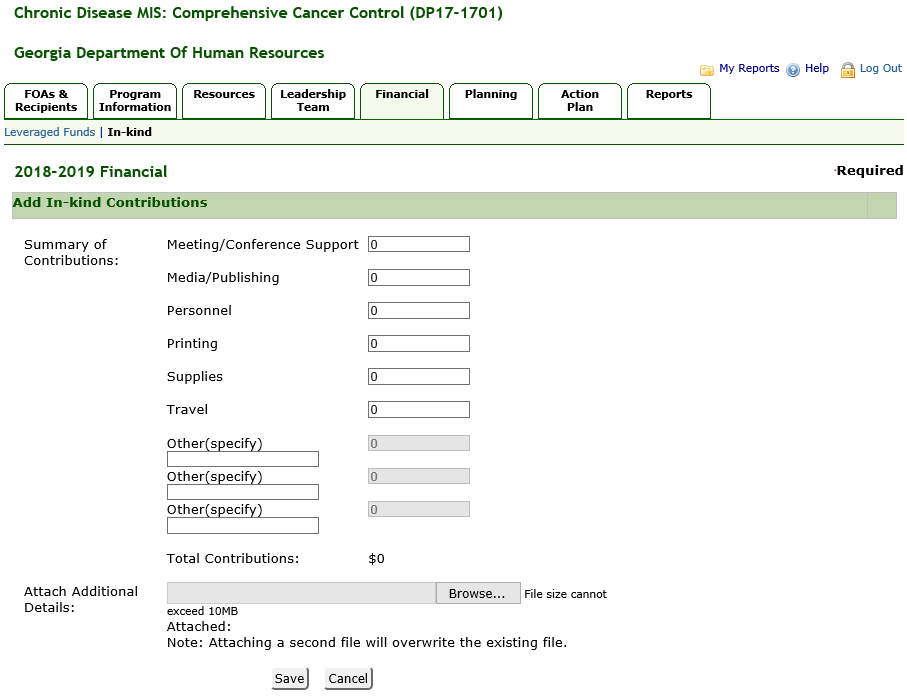
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## In-Kind Contributions (Existing) OMB Package #0920-0841

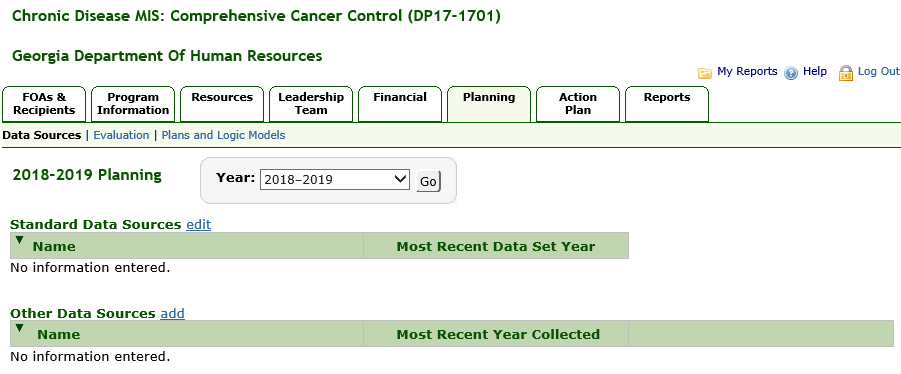


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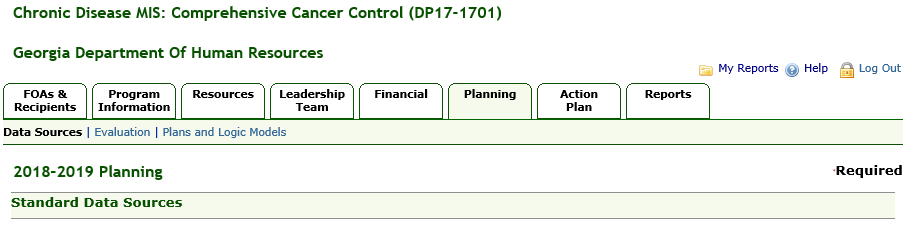


# Planning

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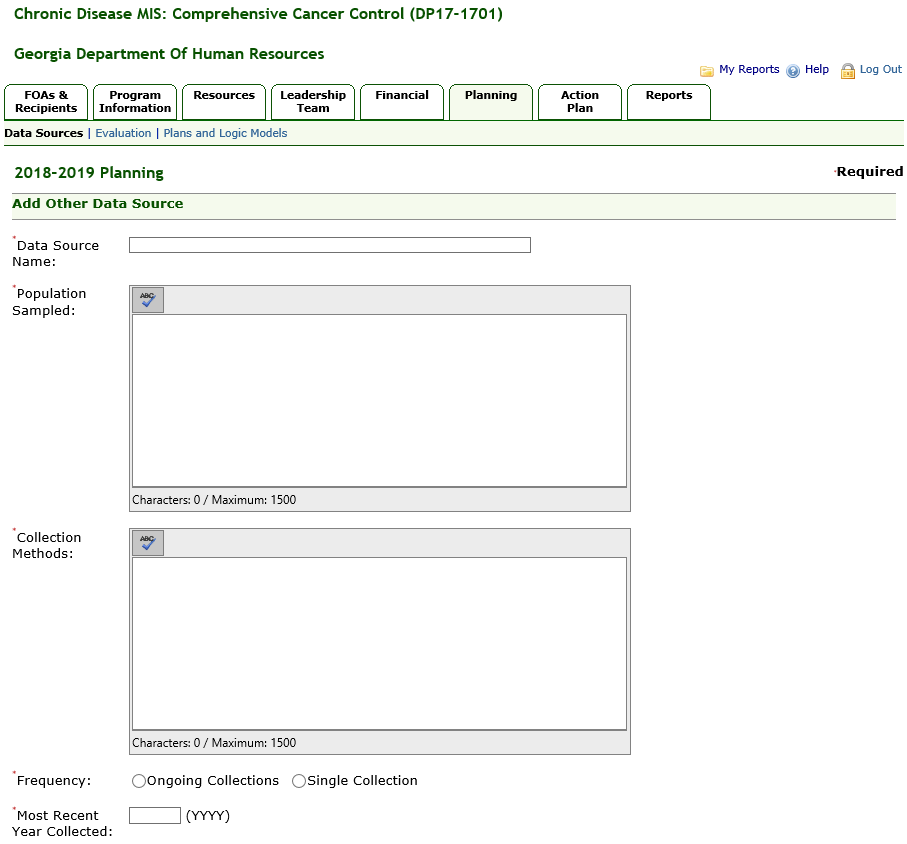
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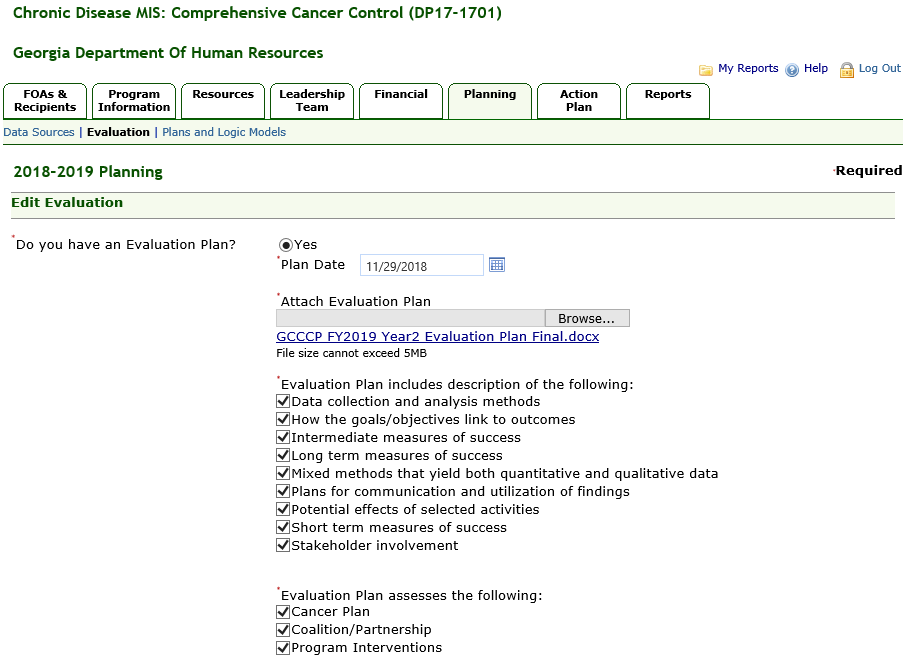
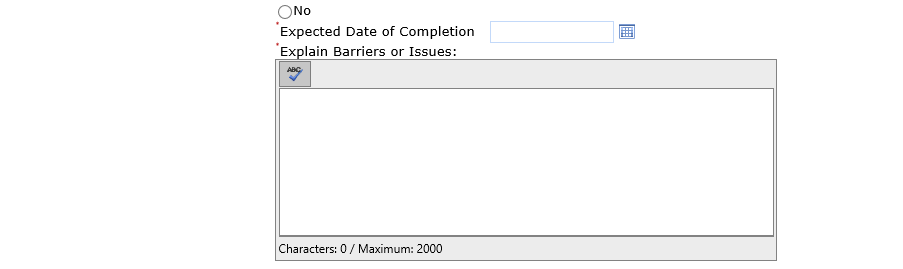
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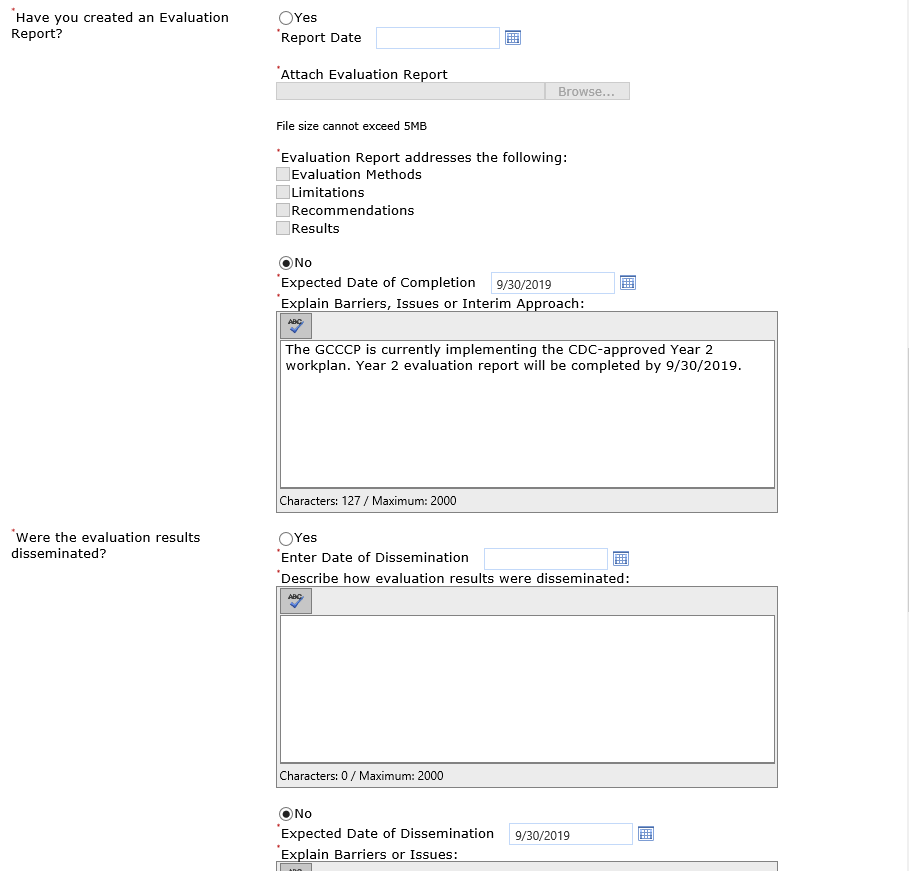
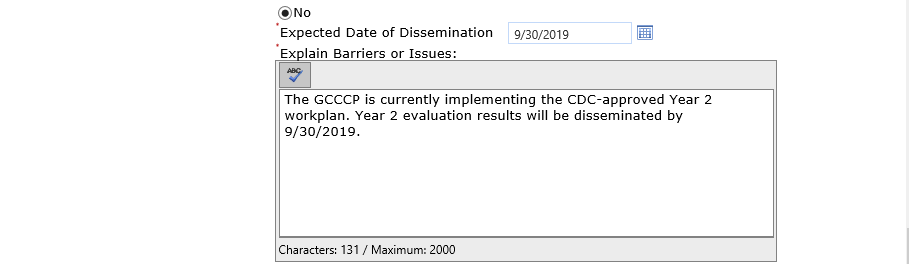
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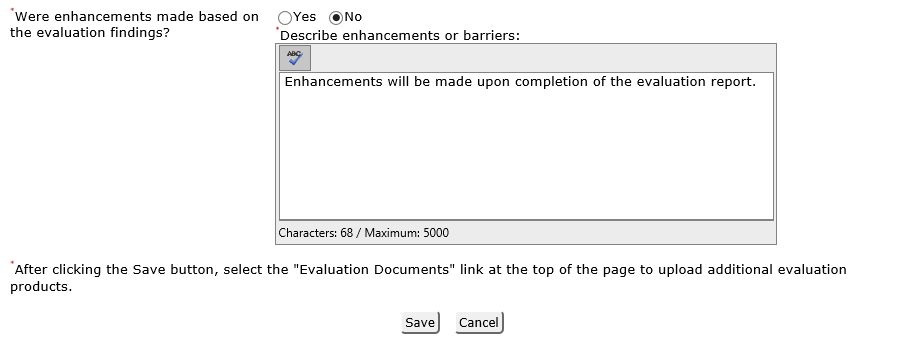
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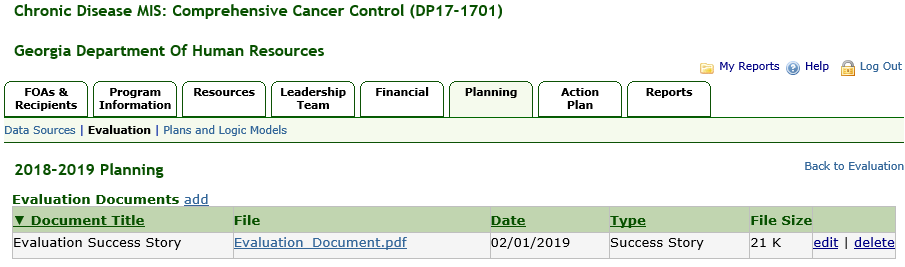
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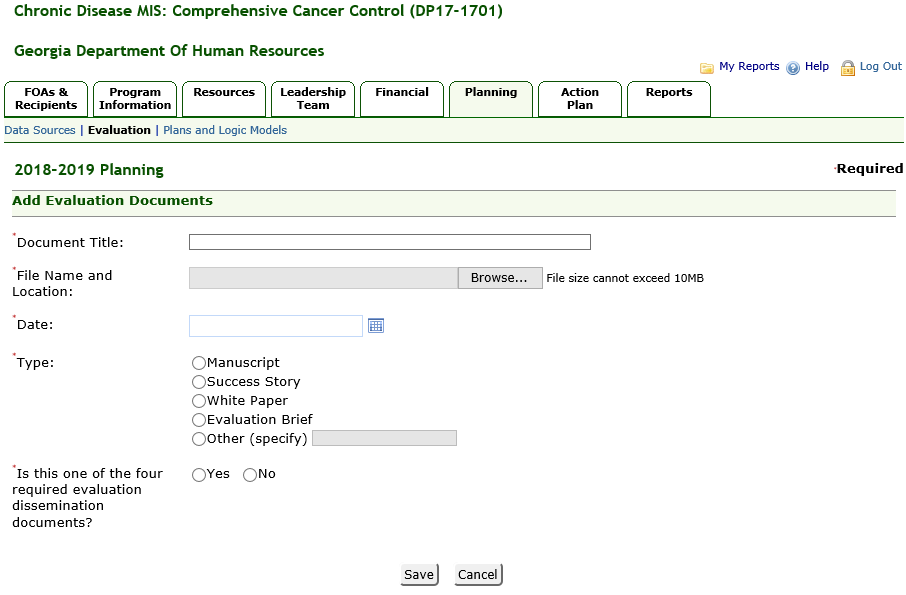
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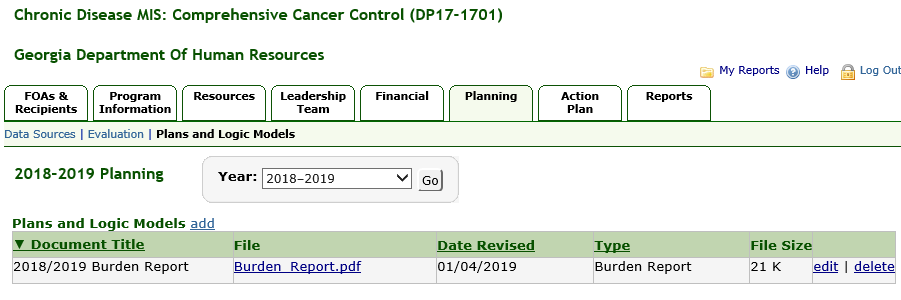
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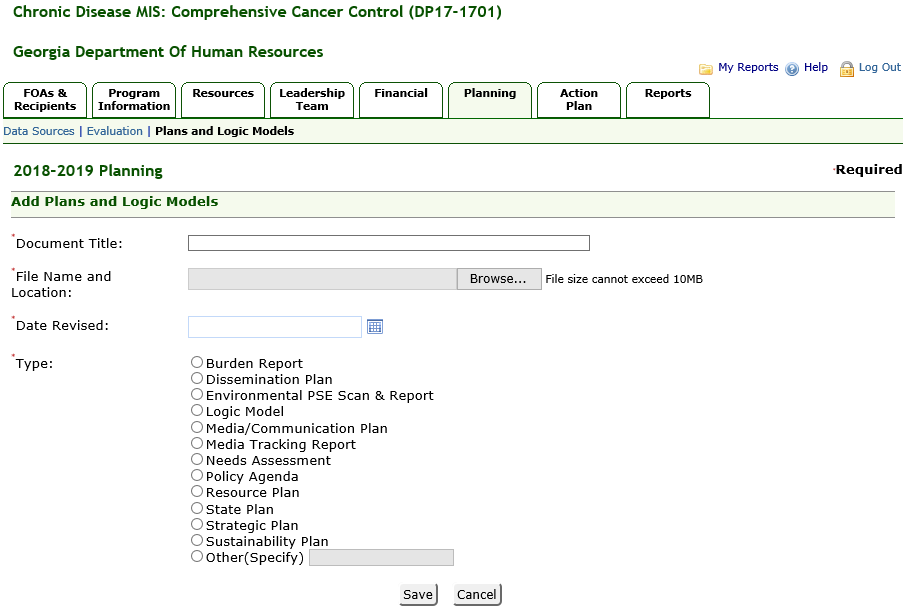
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## Plans and Logic Models (Existing) OMB Package #0920-0841

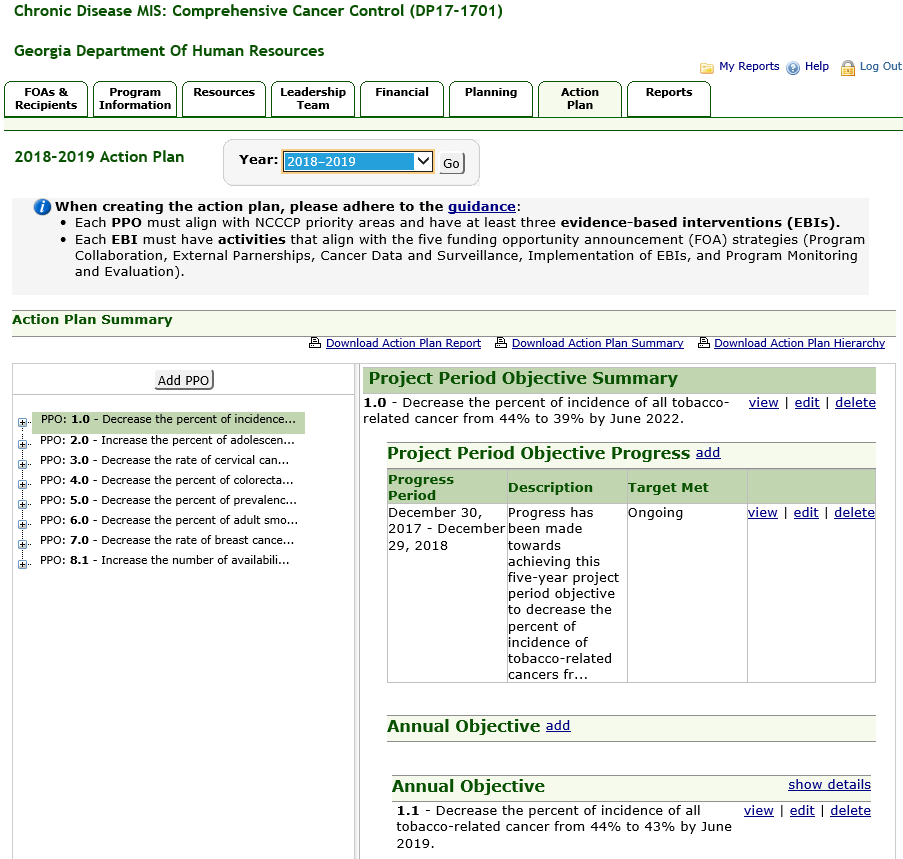


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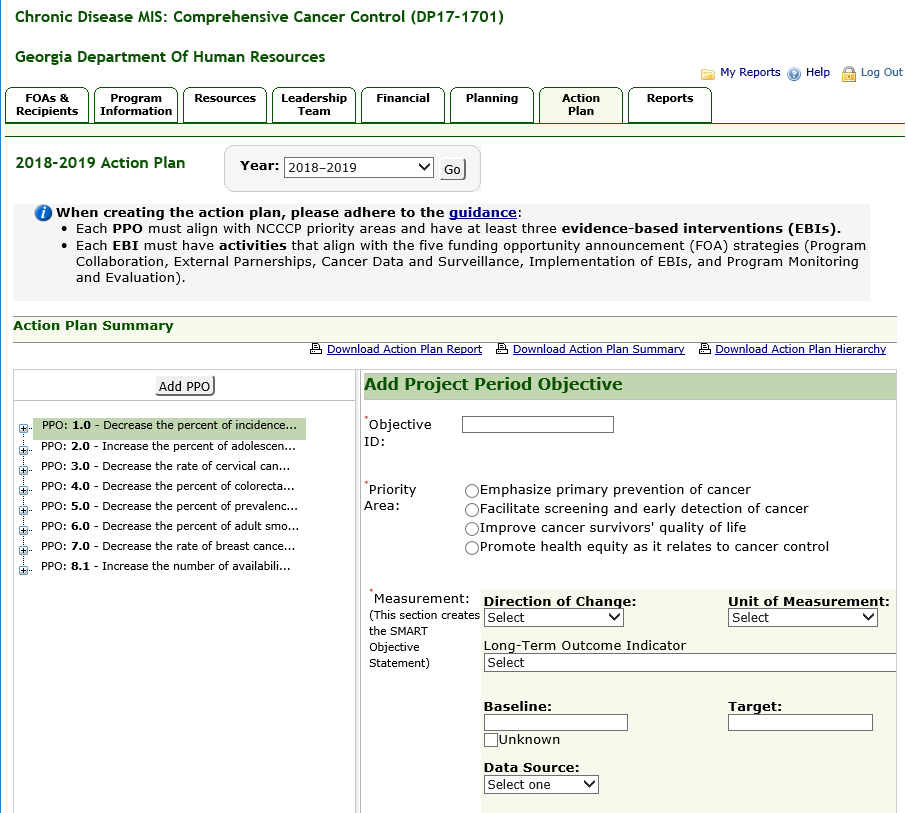


# Action Plan

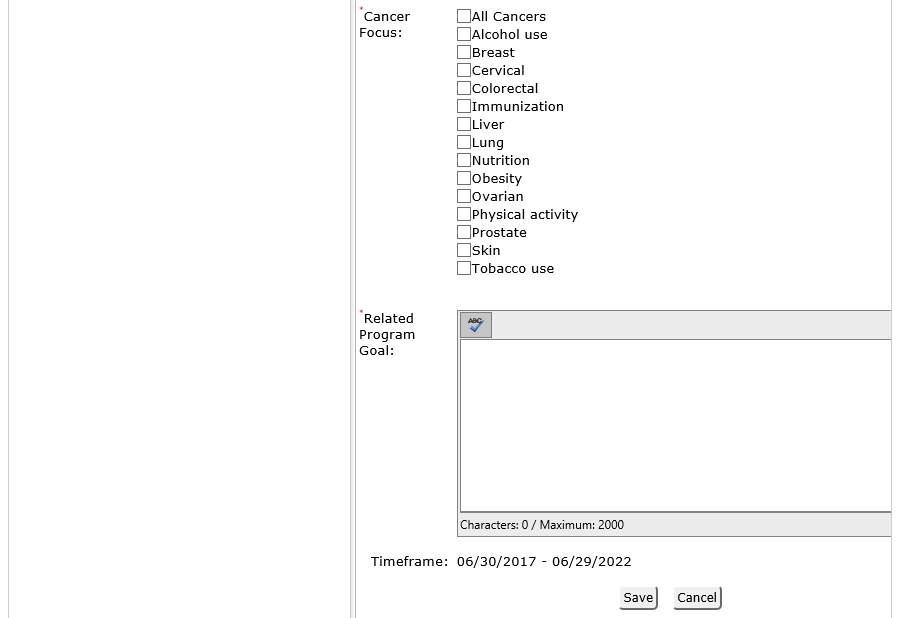
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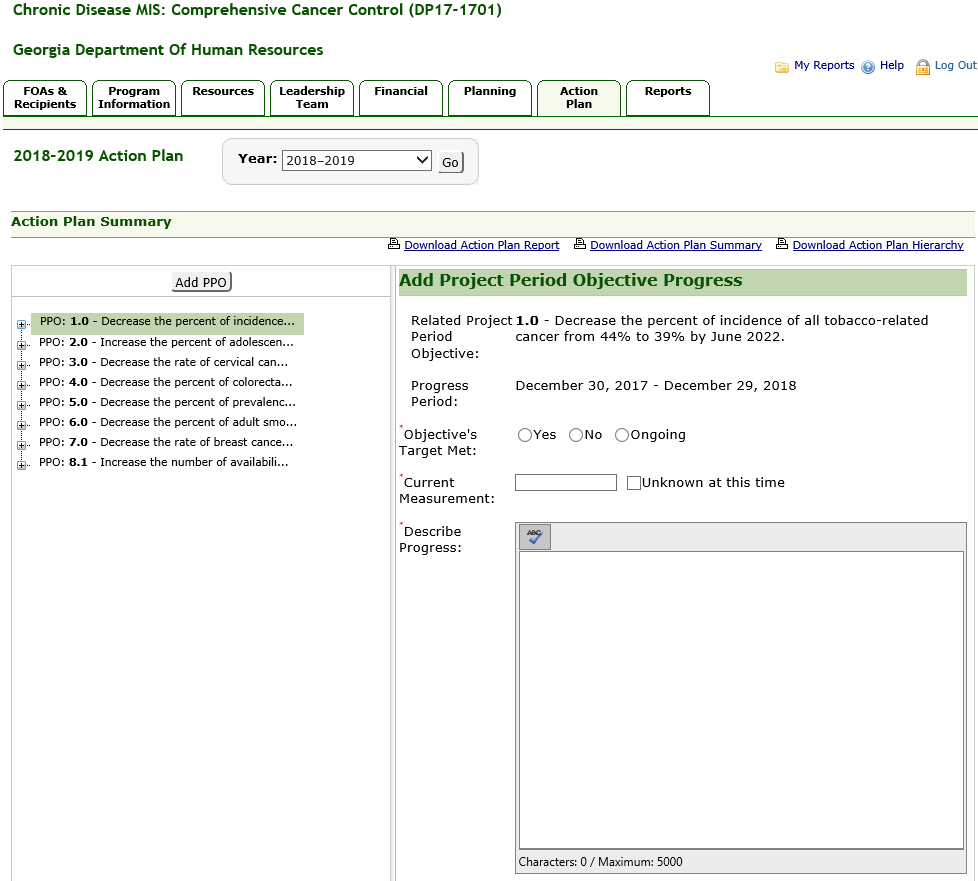
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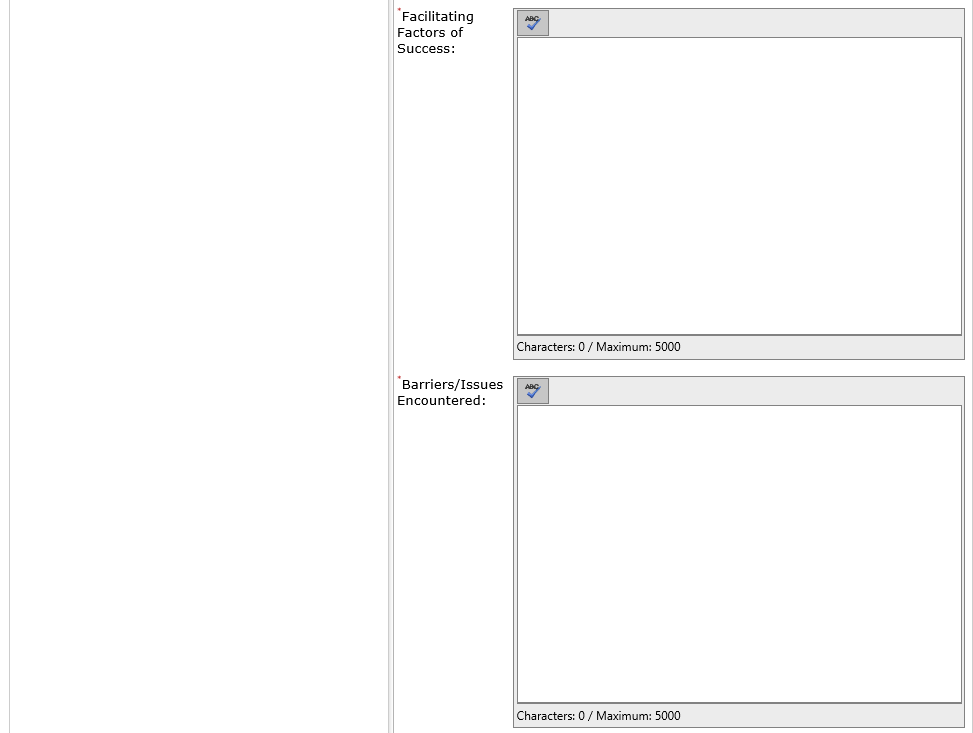
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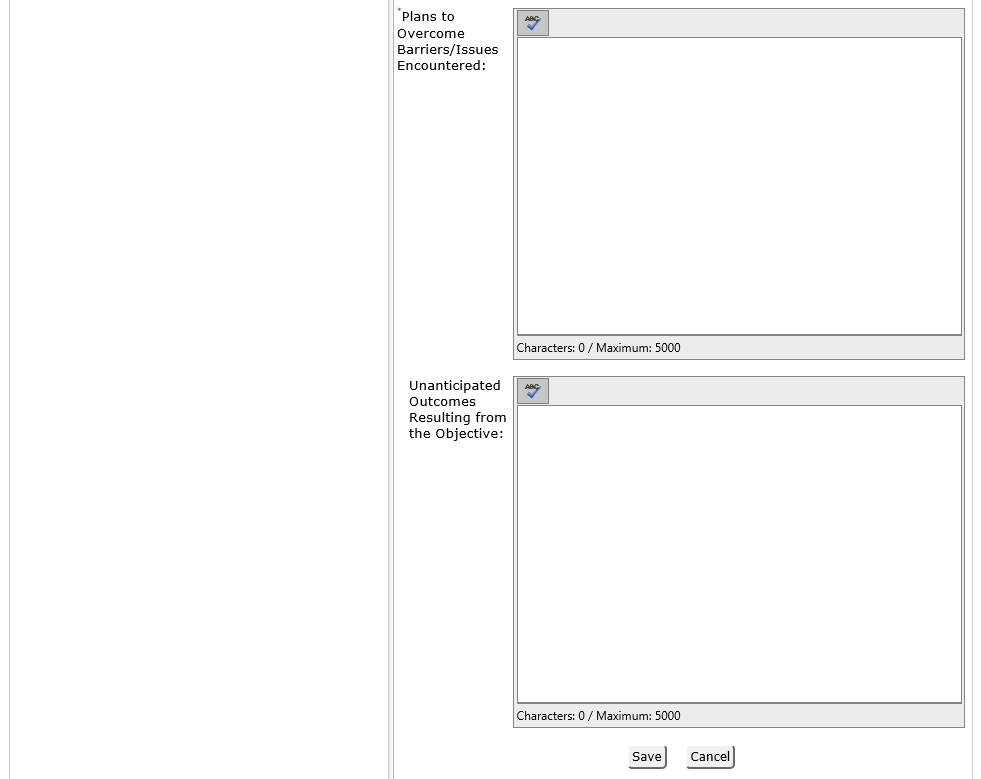
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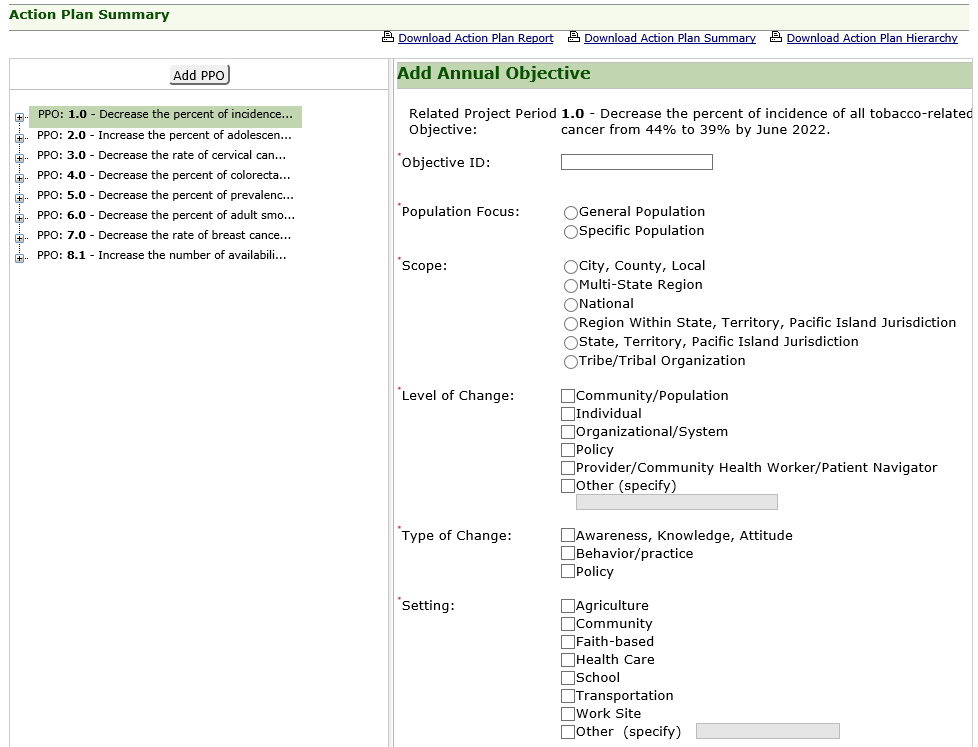
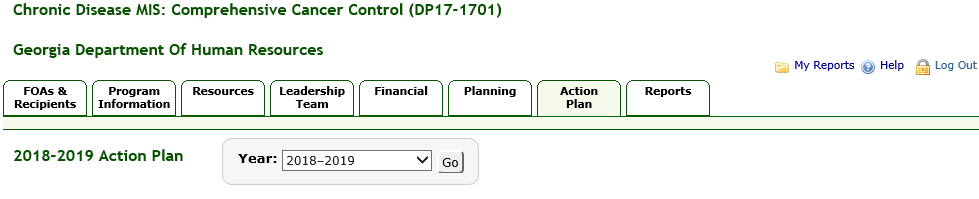
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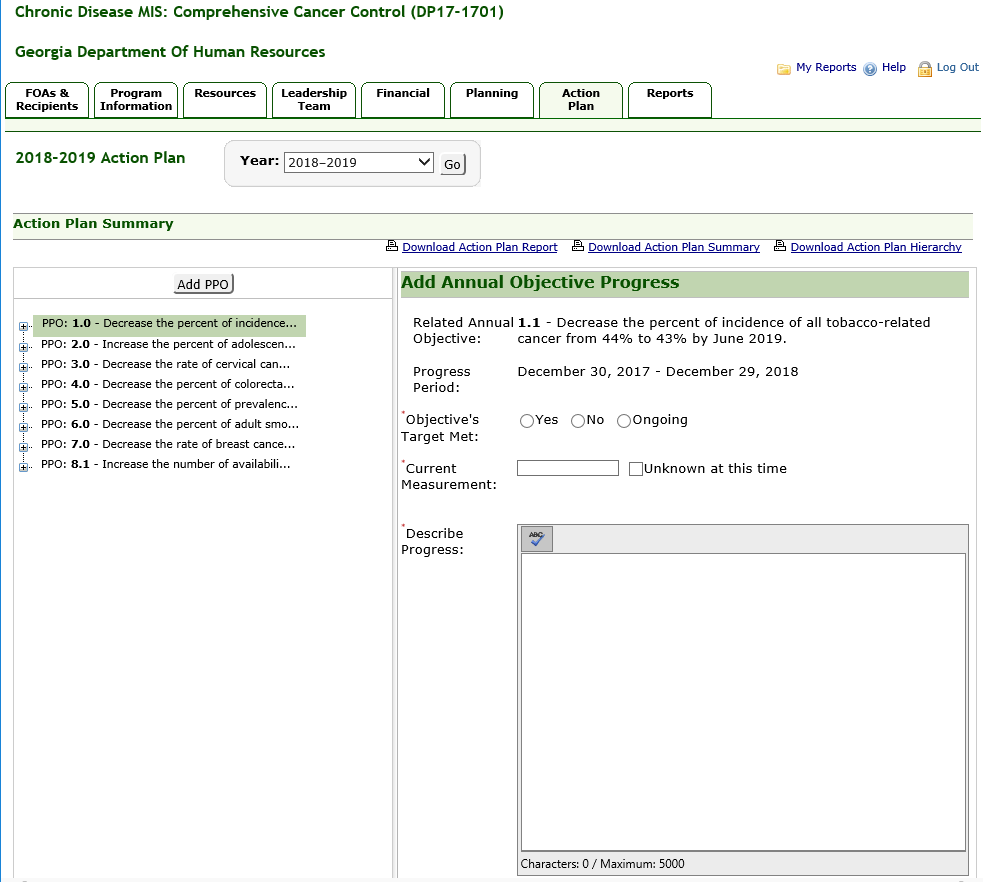
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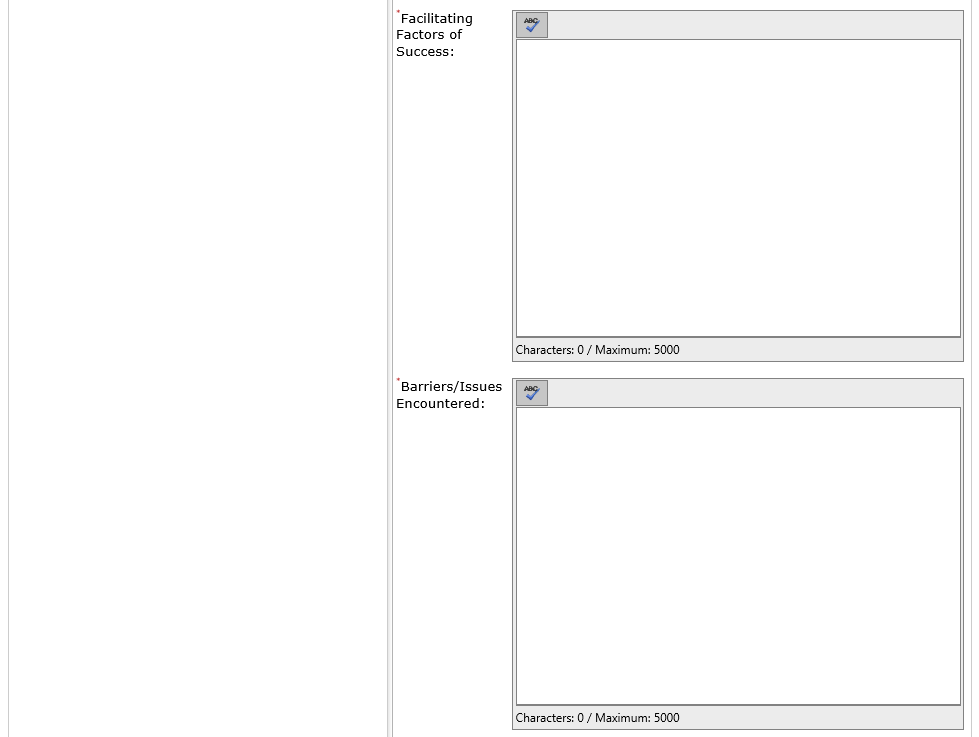
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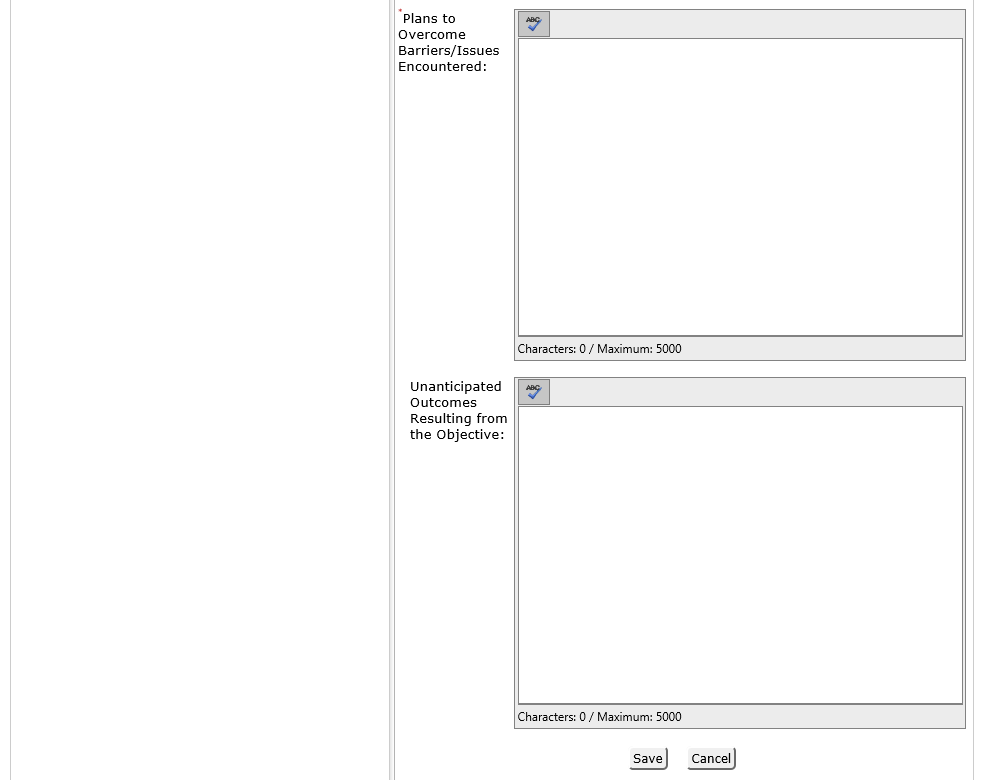
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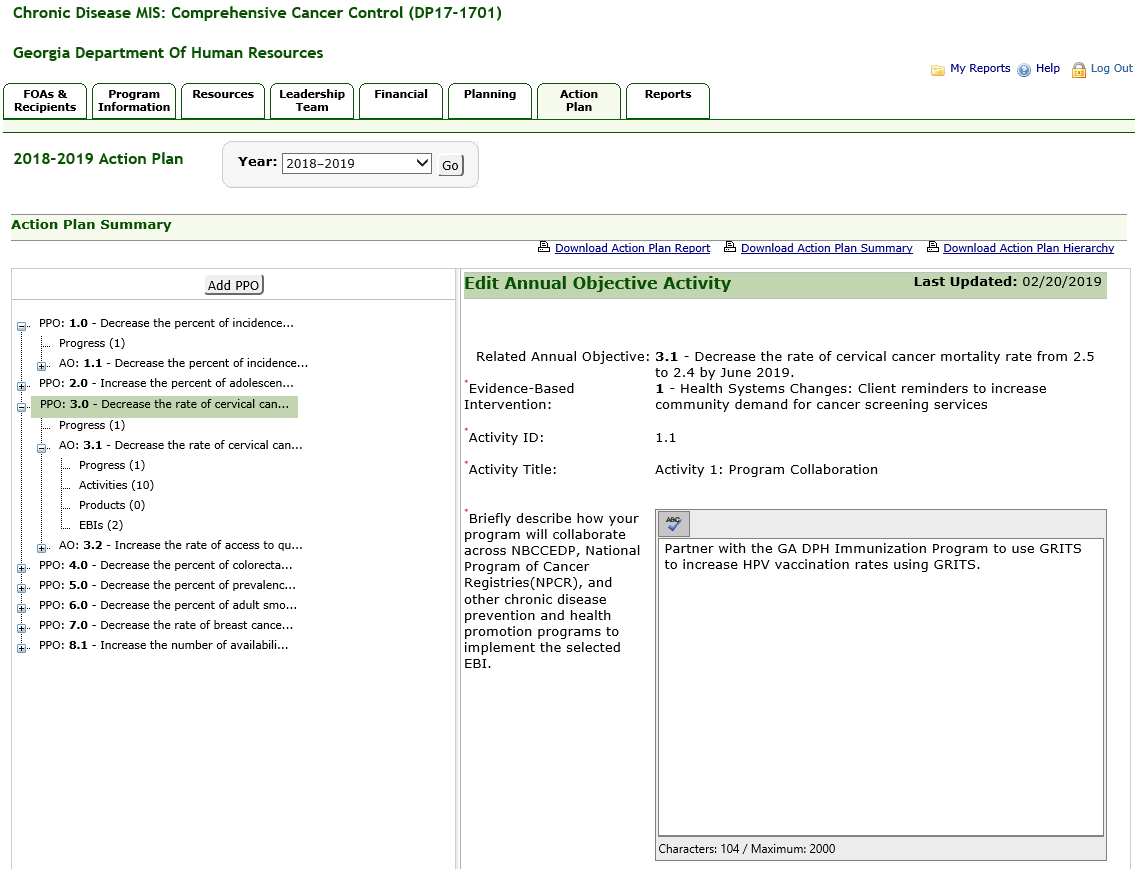
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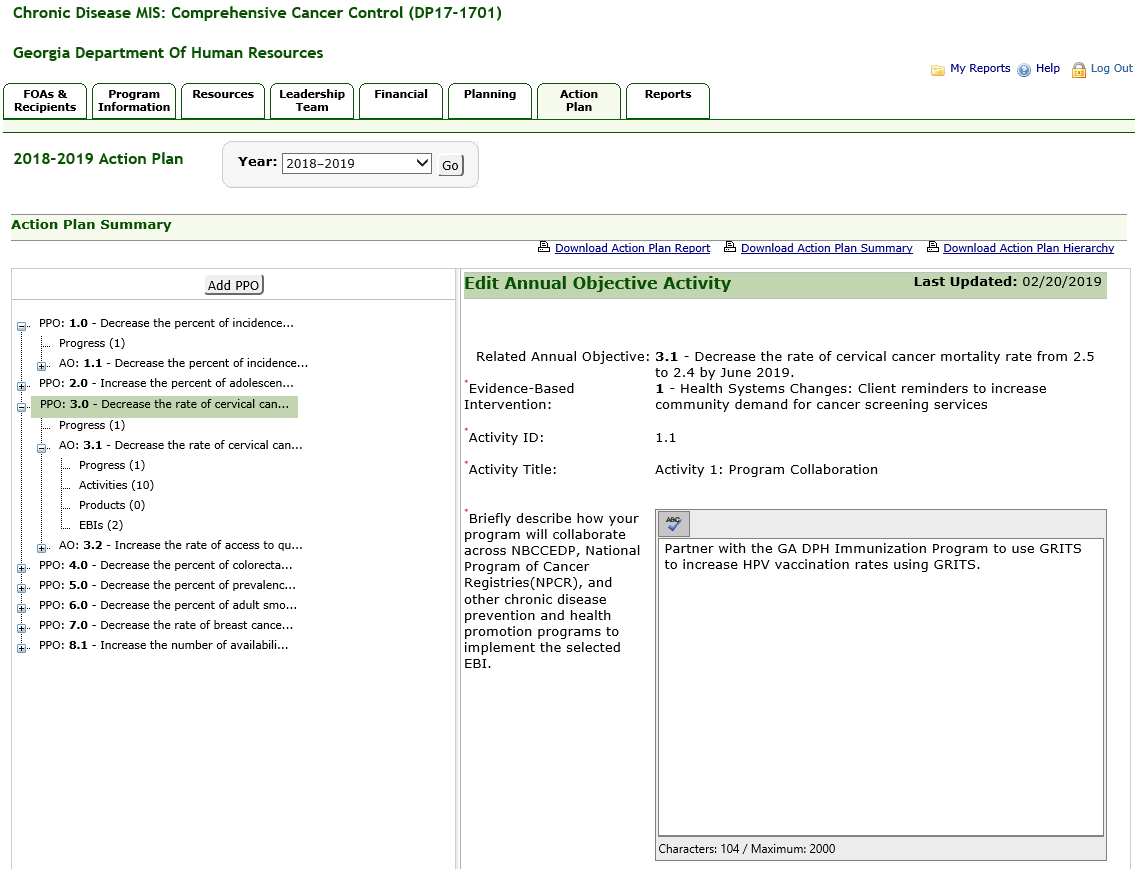
### Add Annual Objective Progress, Continued - 2



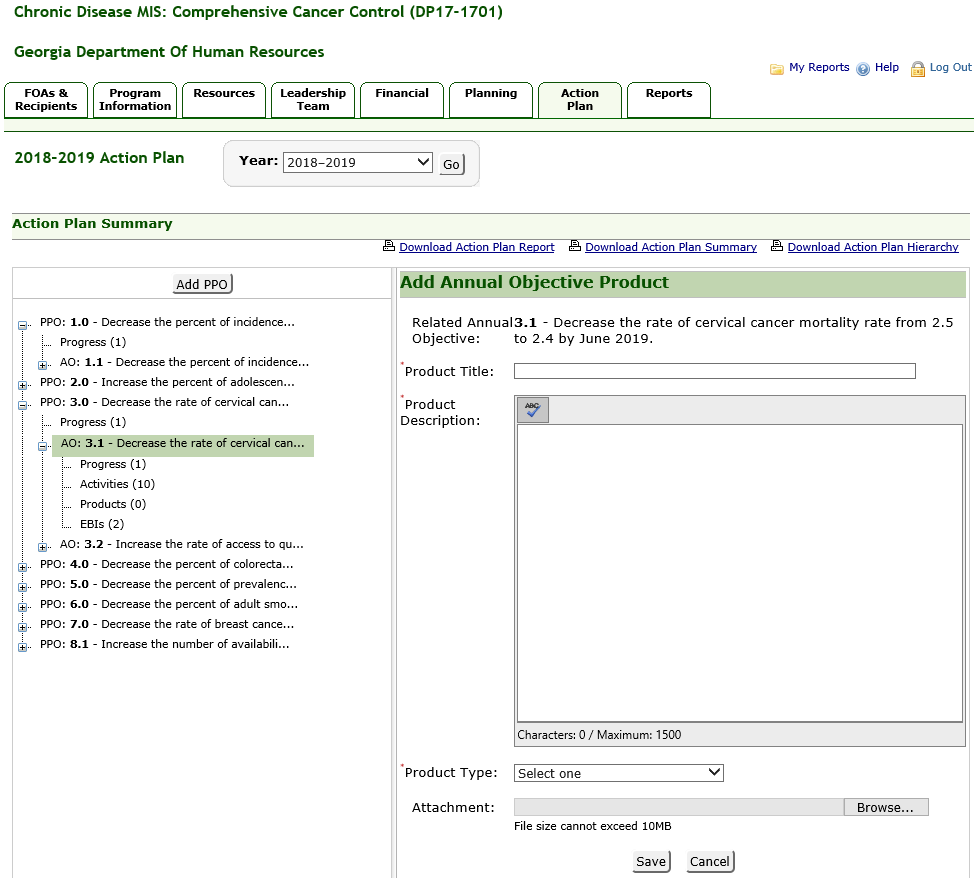
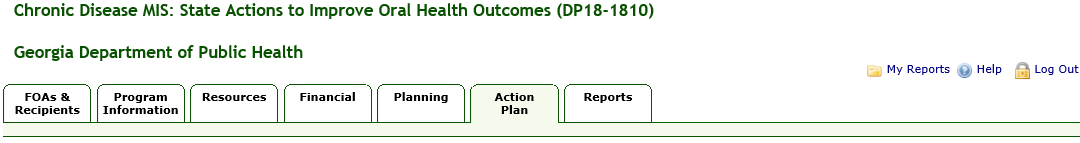
## Edit Annual Objective Activity (Existing) OMB Package #0920-0841



### Edit Annual Objective Activity, Continued



## Add Annual Objective Product (Existing) OMB Package #0920-0841





Annual Performance Report

Release 7.6



CDMIS User Training Manual – Annual Performance Report Contents

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Introduction

# Introduction

The Reports section allows you to generate the Annual Performance Report, which provides a high-level view of the yearly progress the recipient is making towards meeting outcomes and performance measures.

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.

# Annual Performance Report

The Annual Performance Report serves as the continuation application. For new FOAs, this report replaces the Interim and Annual Progress Reports. This report provides a high-level view of the yearly progress the recipient is making towards meeting outcomes and performance measures.

## Creating an Annual Performance Report

CDMIS guides you through the following five (5) steps required to generate the Annual Performance Report:

* Step 1: Review Errors in Current Action Plan
* Step 2: Enter Report Narrative
* Step 3: Transfer Information
* Step 4: Review Errors in the New Action Plan
* Step 5: Update Report Status
* Each step must be completed in the order shown. Subsequent steps are not accessible until the current step is complete.



* Once a report is finalized for you to submit to CDC, the report can no longer be modified.
* The next year’s Annual Performance Report is available only after the current year’s report is finalized.

## Step 1: Review Errors in Current Action Plan

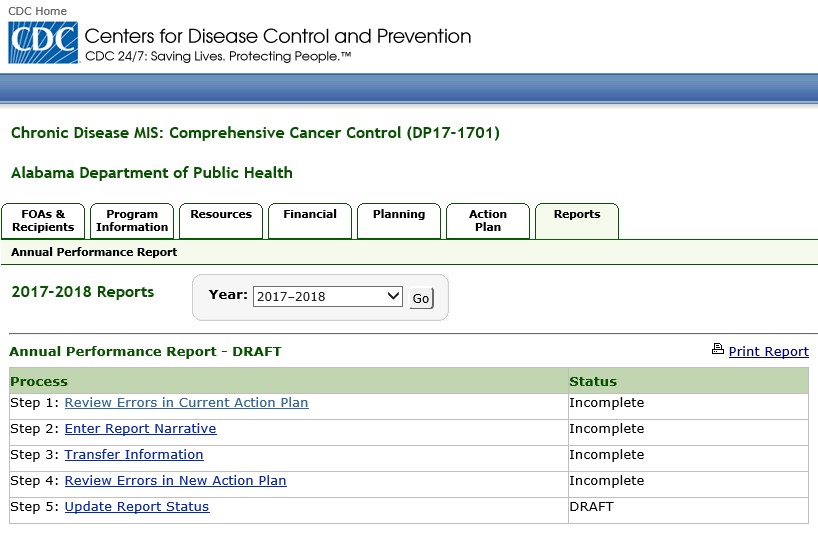
In **Step 1: Review Errors in Current Action Plan**, CDMIS reviews the current Action Plan to check that information required for generating the Annual Performance Report has been entered. The following information is required for the Annual Performance Report:

* Each AO must have progress entered for the first 6-months.
* Each PPO must align with NCCCP priority areas and have at least three evidence-based interventions (EBIs).
* Each EBI must have activities that align with the five funding opportunity announcement (FOA) strategies (Program Collaboration, External Partnerships, Cancer Data and Surveillance, Implementation of EBIs, and Program Monitoring and Evaluation.).

**To complete Step 1 of the Annual Performance Report process:**

1. Click the *Reports* tab.

**Result:** The system displays the *Annual Performance Report* page.



•

Initially, the status of each step is set to

*Incomplete*

. As you finish a step, the status is

automatically changed to

*Complete*

.

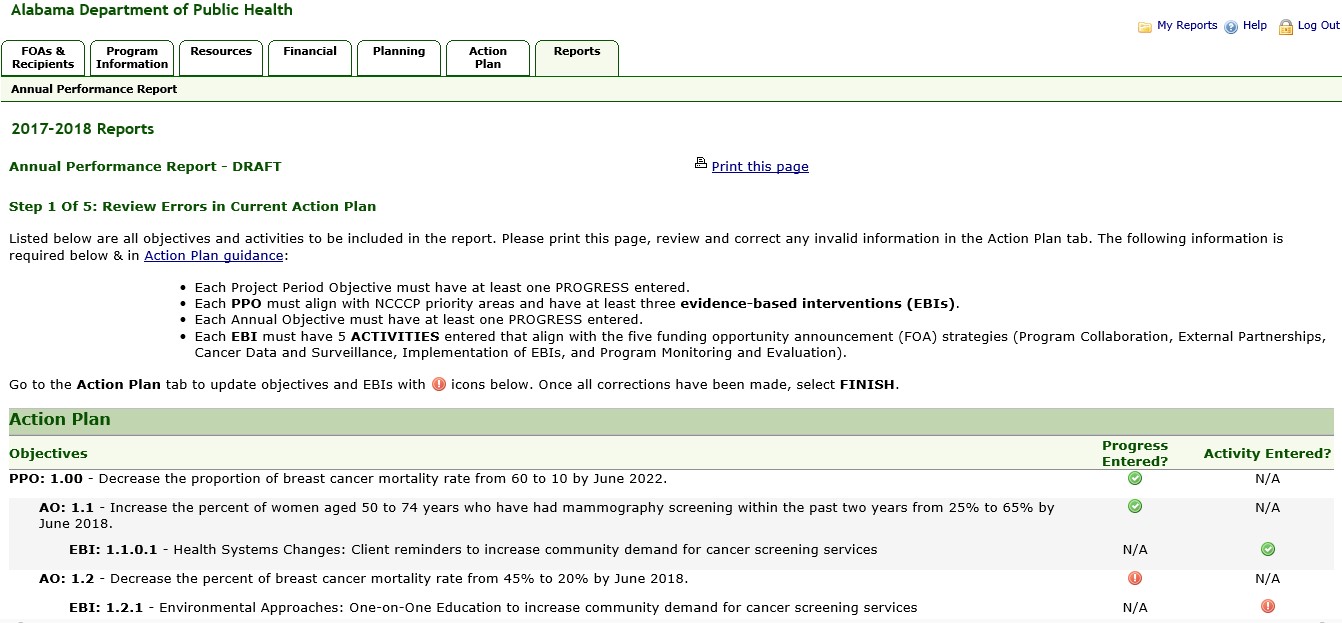
•

Each step must be completed in the order shown. Subsequent steps are not accessible until the

current step is complete.

1. Click on the **Review Errors in Current Action Plan** link.

**Result:** The system displays the *Step 1 of 5: Review Errors in Current Action Plan* page.



Click the red

“

!

”

icon to

enter missing information

* + Indicates required information has not been completed. Click on the icon to display a pop-up



window and complete the required information.

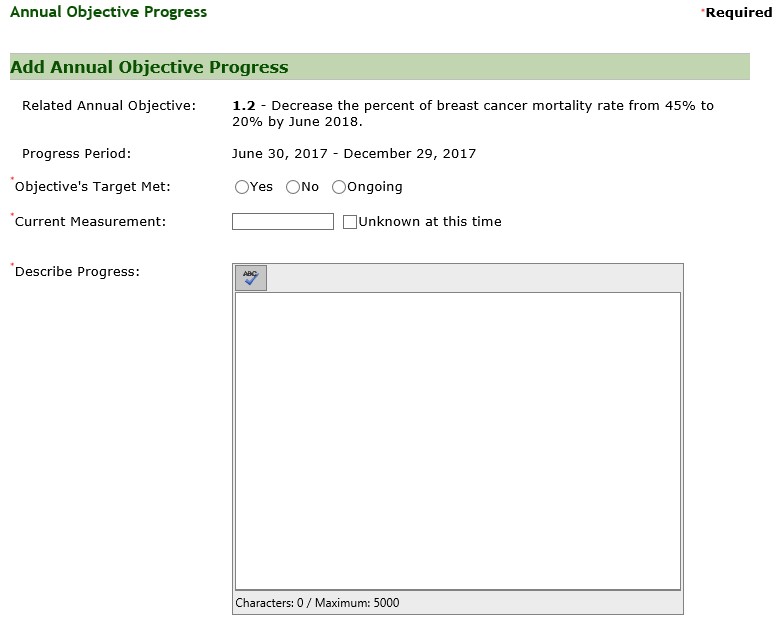
* + Indicates required information has been completed. No other action is needed and no pop-up window is displayed.
  + N/A indicates information is not required.
  + If you are not able to add all the required activities or progress, you can click the **Finish Later** button to save your changes and return to Step 1 later.

1. Click on a red “!” icon.

**Result:** The system displays a pop-up window for entering the missing activity or progress.

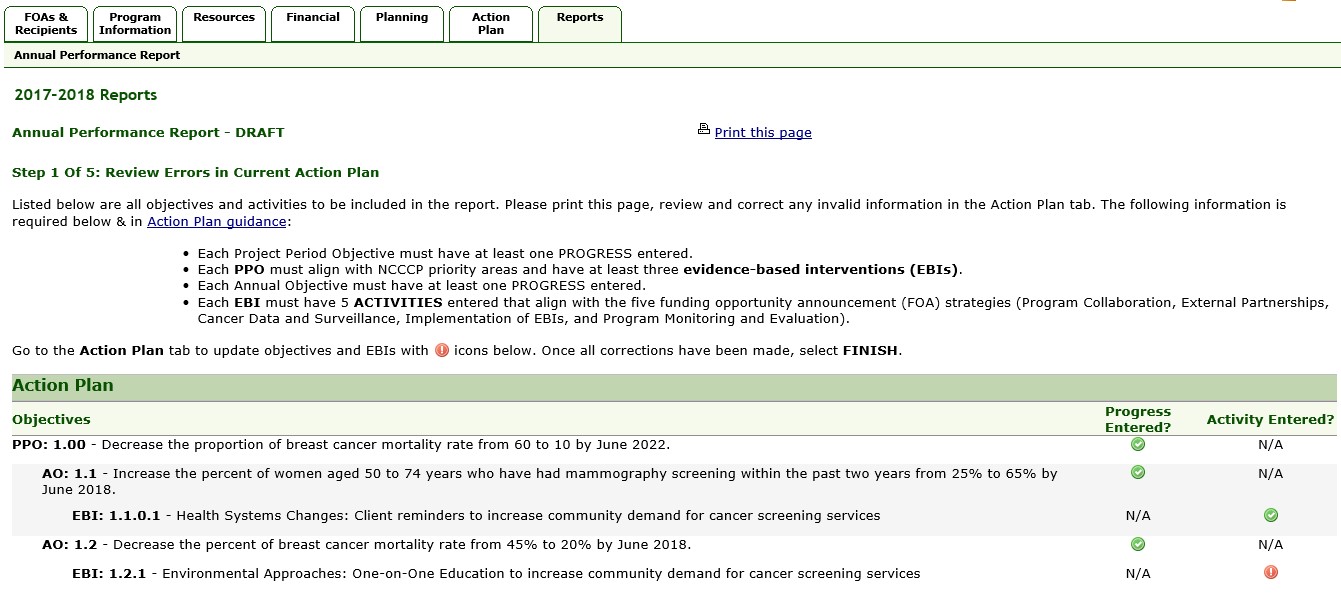


This icon displays for EBI errors, but the icon is disabled and not clickable.



1. Enter the required information and click **Save**.

**Result**: The system saves the activity or progress in the current year’s Action Plan and replaces the associated red icon with a green icon.



When missing info

rmation

is completed, the system

replaces the red “

!

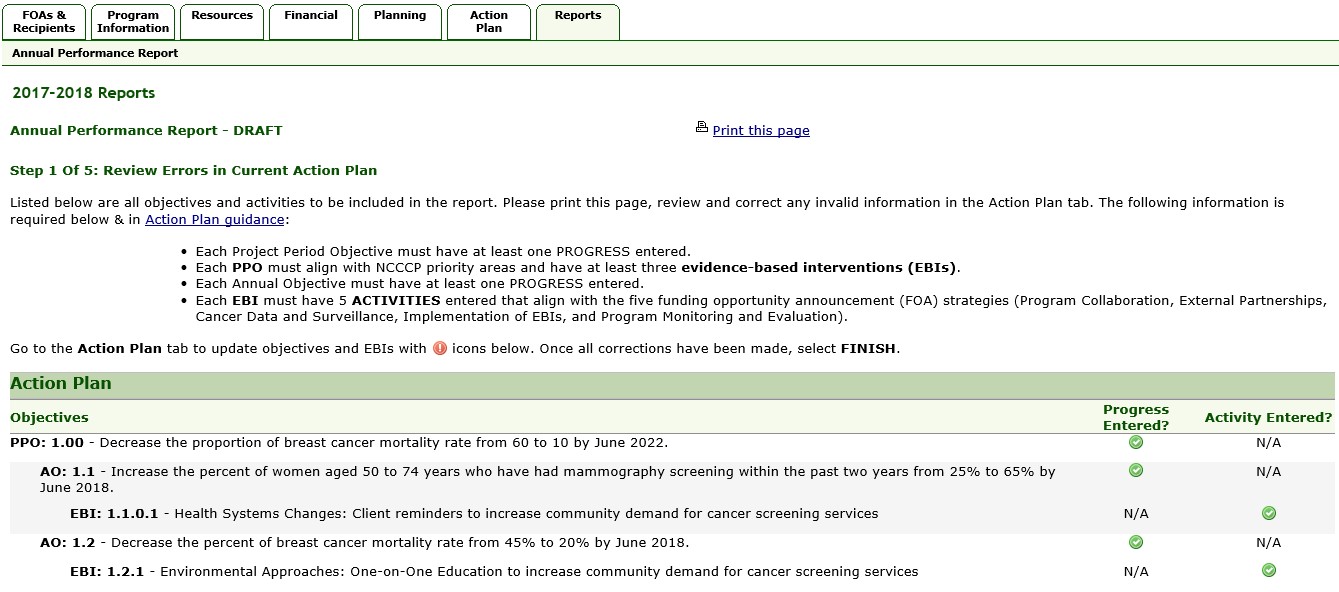
”

icon

with a green one.

1. Repeat step 4 for all the red “!” icons displayed.

**Result**: The system replaces all the red icons with green ones and enables the **Finish** button.



When all missing

information is completed,

the system enables the

Finish button.

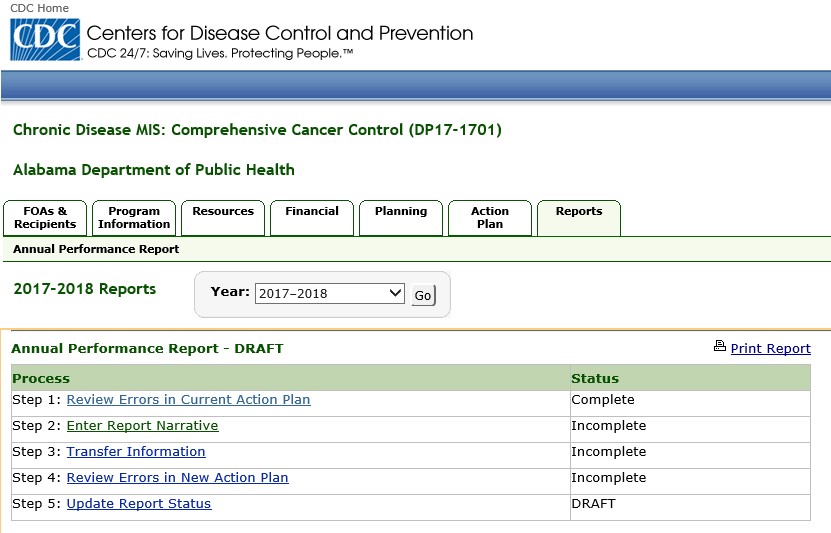
* + The **Finish** button is not enabled until all errors are corrected and the red icons have been replaced by green ones.



* + 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 5: 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.

1. Click the **Finish** button.

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



After completing a step, the

status changes to

Complete

.

## Missing Objectives Warning:

Some programs require at least one AO 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 AOs. Each PPO missing an AO is highlighted, and a message with a check box to *Continue without annual objectives* is displayed at the end of the page.

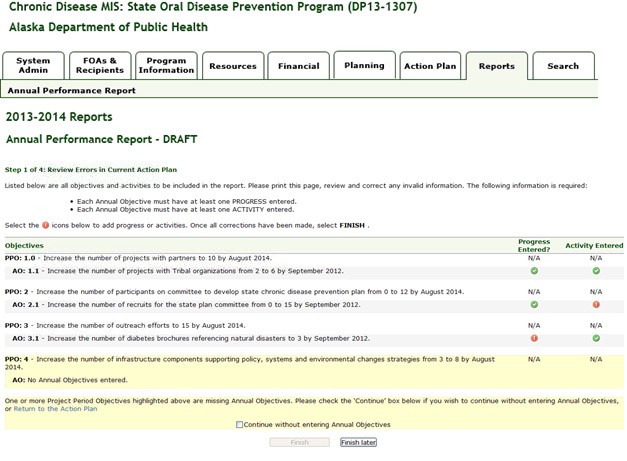
If your program requires at least one AO for each PPO, **do not** check the *Continue without Annual Objectives* check box. Instead, click the **Return to the Action Plan** link to go back to the Action Plan and enter an AO for the highlighted PPO. Please refer to you Program Guidance to determine if this applies to you. If your Program Guidance allows a PPO to be entered without an AO, click the check box to continue. The **Finish** button will then be enabled, allowing you to complete Step 1.



•

Refer to your Program Guidance to determine if your program allows a PPO to be entered

without an AO.



Click this checkbox

if you don’t

need

to add

Annual Objectives for the highlighted Project

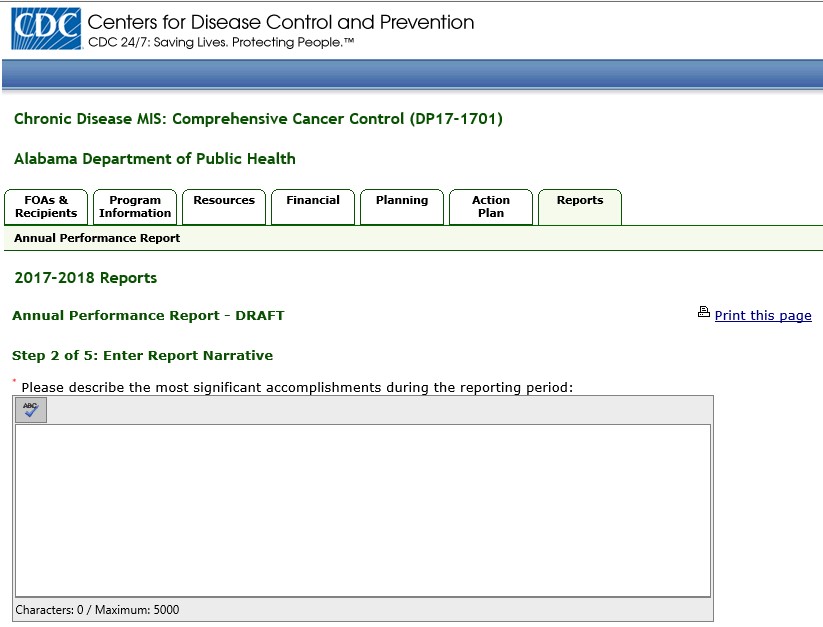
Period Objective

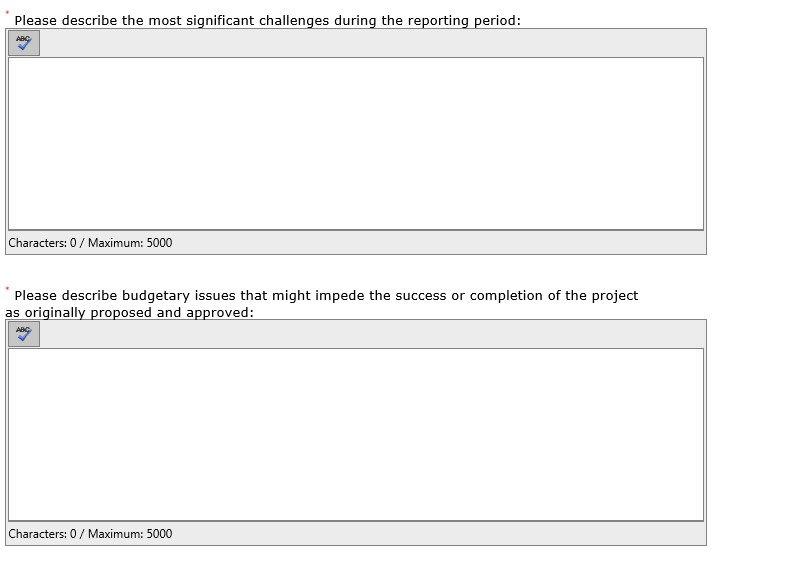
## Step 2: Enter Report Narrative

**To complete Step 2 of the Annual Performance Report process:**

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

**Result:** The system displays the *Step 2 of 5: Enter Report Narrative* page.





•

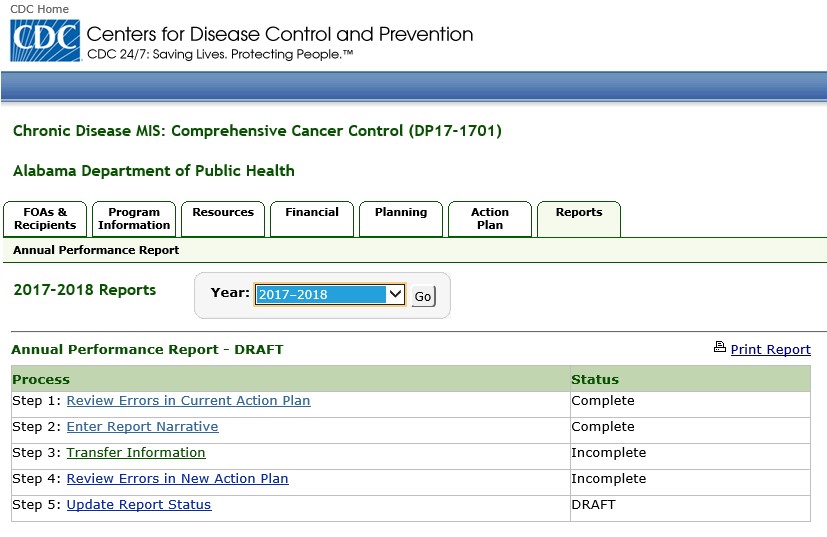
The

**Save**

button is not enabled until the fields are completed.

1. In the *Please describe the most significant accomplishments during the reporting period* field, enter a detailed description of the significant accomplishments made during the reporting period. The maximum characters allowed for this field is 5,000 characters or 1000 words.
2. In the *Please describe the most significant challenges during the reporting period* field, enter a detailed description of the significant challenges encountered during the reporting period. The maximum characters allowed for this field is 5,000 characters or 1000 words.
3. In the *Please describe budgetary issues that might impede the success or completion of the project as originally proposed and approved* field, describe budgetary issues that might impede the success or completion of the project as originally proposed and approved. The maximum characters allowed for this field is 5,000 characters or 1000 words
4. Click the **Save** button.

**Result**: The system saves the narrative report, marks Step 2 as *Complete*, and enables the link for **Step 3: Transfer Information**.



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



## Step 3: Transfer Information

The transfer process allows information to be transferred from one budget year to the next. The process avoids re-entry of information by helping to build the Action Plan for the next year. Information transferred will be included in the next year’s Annual Performance Report. Once the transfer process is started, it is recommended that it be completed. If the process is cancelled, information will not be saved and the process will have to be restarted. Once the transfer is complete, information transferred into the upcoming year cannot be re-transferred. The corresponding check boxes for items recommended for transfer will automatically be selected. You may de-select any item that is recommended for transfer or select any items that were not recommended.

* Once information is transferred, any changes to the information in the current year will not be reflected in the upcoming year.



* If you complete Step 3 and then make changes to the Action Plan that affect the transfer process, which add items that should be recommended for transfer, then Step 3 will return a status of *Incomplete*. The system saves all previous data; however, you must visit the Section 3 again to mark it as complete.

[[1]](#footnote-1) The system automatically copies some sections, e.g. Program Information, Program Summary, Community Information, etc. from the current year into the upcoming funding year.

Information in the following tabs will be transferred to the upcoming year.

[[2]](#footnote-2) **Program Information tab** – All Contact Information and Program Summary information.



[[3]](#footnote-3) **Resources tab** – All active Personnel, Partners, and Contractors/Consultants; all ‘Vacant’ positions; the Partnership/Coalition, and the Leadership team.

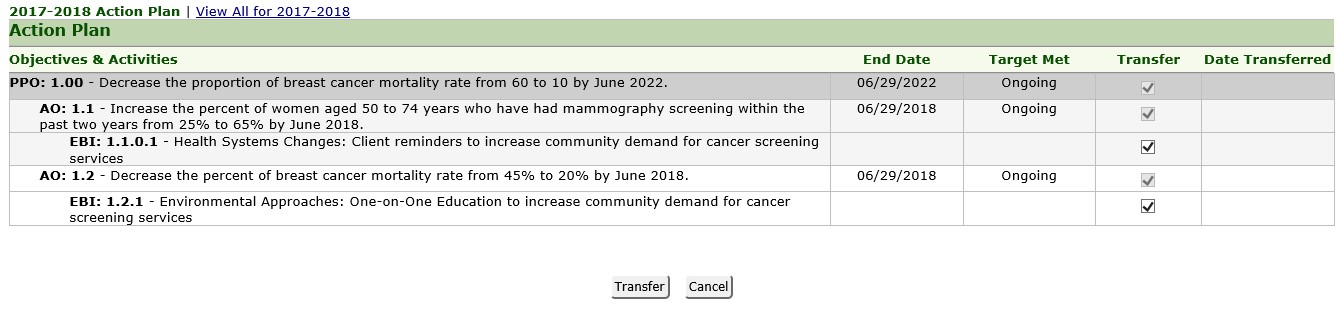
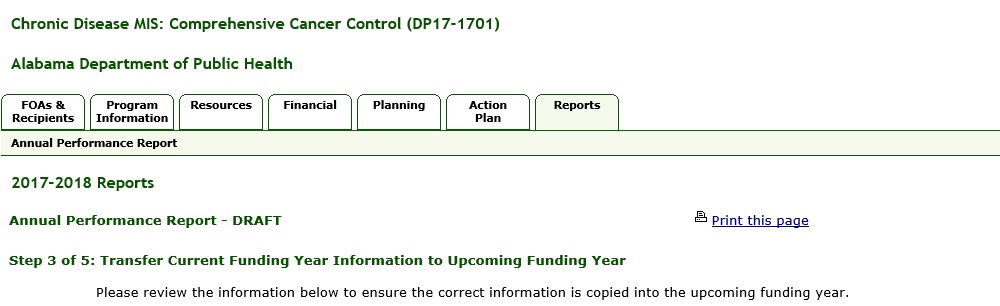
[[4]](#footnote-4) **Financial tab** – All information.

* **Planning Tab:** – All information (Standard and Other Data Sources, Plans and Logic Models).

**To complete Step 3 of the Annual Performance Report process:**

1. Click on the **Step 3: Transfer information** link.

**Result:** The system displays the *Step 3 of 5: Transfer Current Funding Year Information to Upcoming Funding Year* page.



Deselect

the check box that corresponds to

the objectives and activities that should not

be transferred.

* + You can click the **View All for YYYY-YYYY** link to view all the sections that have been transferred. Click the **YYYY-YYYY Action Plan** link to return to the original view.



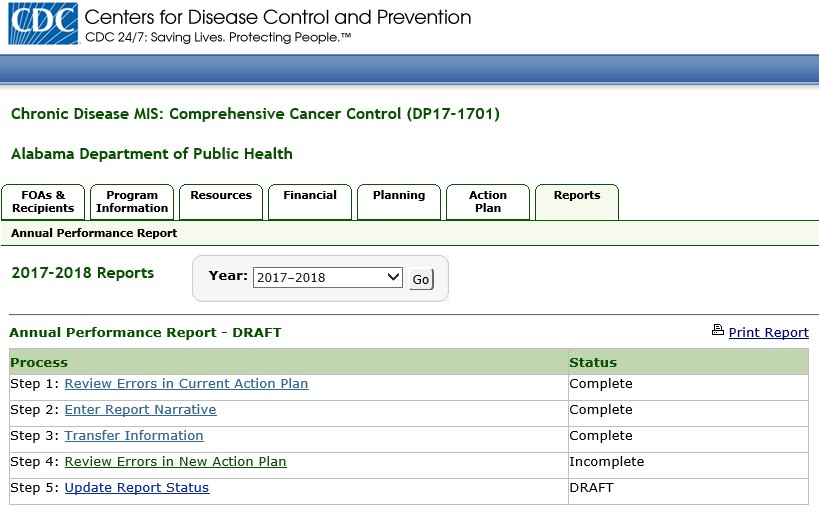
1. In the Objectives and Activities section, deselect the check boxes corresponding to the objectives and activities that you do not want to transfer in the *Transfer* column. The system defaults to all items being selected for transfer. Be sure to review each objective and activity before clicking the **Transfer** button at the bottom of the page. After an item is transferred, the system will not store the date of the transfer on the page. Transferred items cannot be transferred a second time.

* + If an item has already been transferred, the system disables the check box for the item.
  + If you select an AO for transfer, then the associated PPO is automatically selected for transfer.
  + If you select an activity for transfer, then the associated AO is also automatically selected for transfer.



1. Click the **Transfer** button.

**Result:** The system transfers all selected information to the next budget year and marks Step 3 as *Complete***.**



* + - Tabs are displayed in the CDMIS according to the specific FOA associated with a user.
    - Project Period Objective (PPO) Progress and Annual Objective Progress **cannot** be transferred to the upcoming year. Progress must be entered on an annual basis; entered at least once for each PPO, and entered twice for each Annual Objective.



## Step 4: Review Errors in New Action Plan

Step 4 allows you to review the errors that are present in the new action plan for the upcoming budget year. If errors are present in your new action plan, Step 4 will be marked as *Incomplete*. You must review the errors and correct them before the system will enable the **Step 5: Update Report Status** link and allow you to complete the Annual Performance Report process.



•

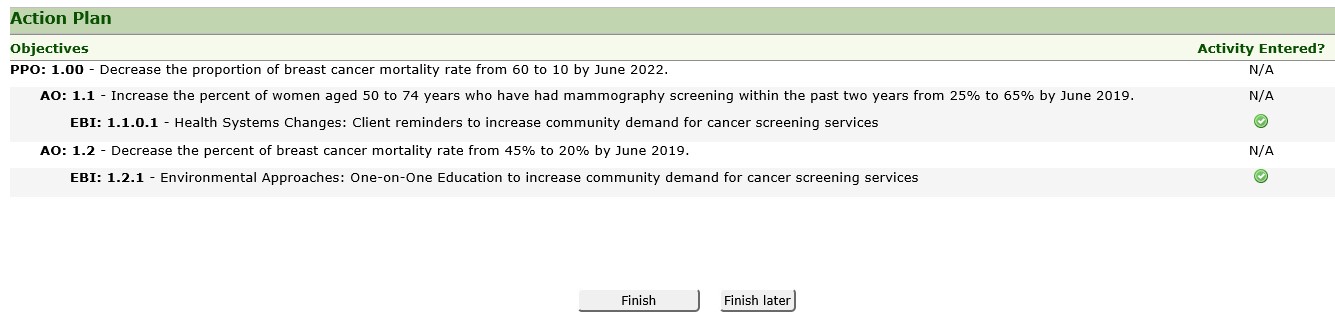
When completing Step 4, ensure that you have entered at least one activity for each Annual

Objective.

**To complete Step 4 of the Annual Report process:**

1. Click on the **Step 4: Review Errors in New Action Plan** link.

**Result:** The system displays the *Step 4: Review Errors in New Action Plan* page. The system displays the errors in your action plan, if any, and displays a red icon in the affected row and column. The **Finish** button is also disabled if errors are present. If there are no errors, all the icons are green and the **Finish** button is enabled.



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.



•



Indicates required information has not been completed.

•



Indicates required information has been completed.

•

N/A indicates information is not required.

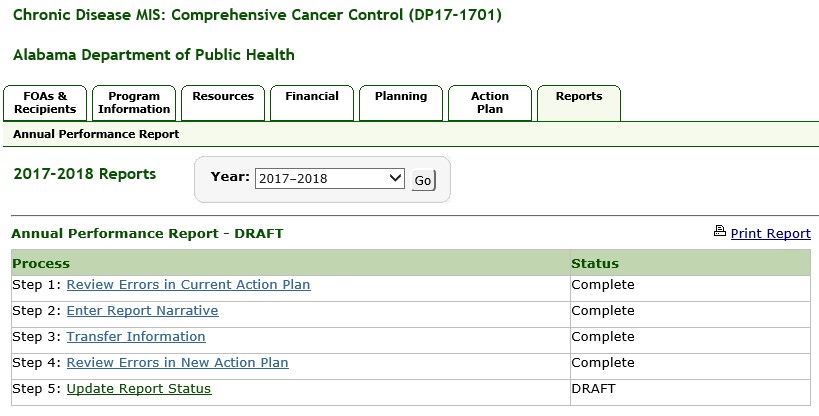
•

1. If there are errors, click the red icon displayed to view the error and correct them.

**Result:** The system saves the activity in the year’s Action Plan and replaces the associated red icon with a green icon indicating that the error has been corrected.

1. Click the **Finish** button.

**Result:** The system changes Step 4's status to *Complete*.



•

If you complete step 4 and make changes to the current action plan which adds items that should

be corrected or enables an objective which was not previously available for transfer to be

available, step 1 and all subsequent steps become

*Incomplete*

(except step 2). The system saves all

previous data, however; you must visit each step again and correct all resulting errors in order to

mark the section as complete.

## Missing Objectives Warning:

Some programs require at least one Annual Objective (AO) 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 AOs. Each PPO missing an AO is highlighted, and a message with a check box to *Continue without annual objectives* is displayed at the end of the page.

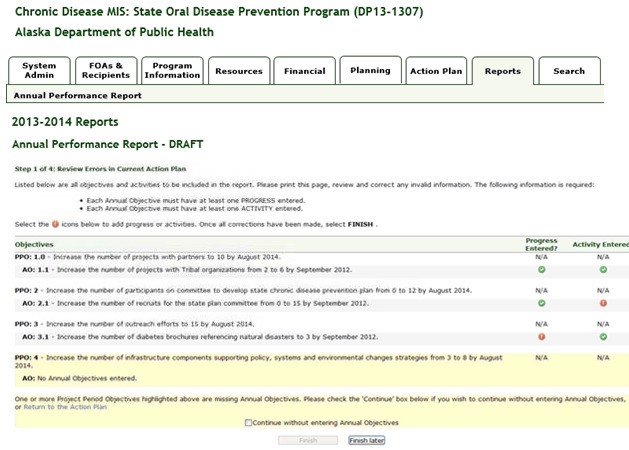
If your program requires at least one AO for each PPO, **do not** check the *Continue without Annual Objectives* check box. Instead, click the **Return to the Action Plan** link to go back to the Action Plan and enter an AO for the highlighted PPO. Please refer to you Program Guidance to determine if this applies to you. If your Program Guidance allows a PPO to be entered without an Annual Objective, click the check box to continue. The **Finish** button will then be enabled, allowing you to complete Step 1.



•

Refer to your Program Guidance to determine if your program allows a PPO to be entered

without an AO.



Click this checkbox

if

an Annual Objective is

not required for the highlighted Project Period

Objective.

## Step 5: Update Report Status

In Step 5, you will finalize your Annual Performance Report.



•

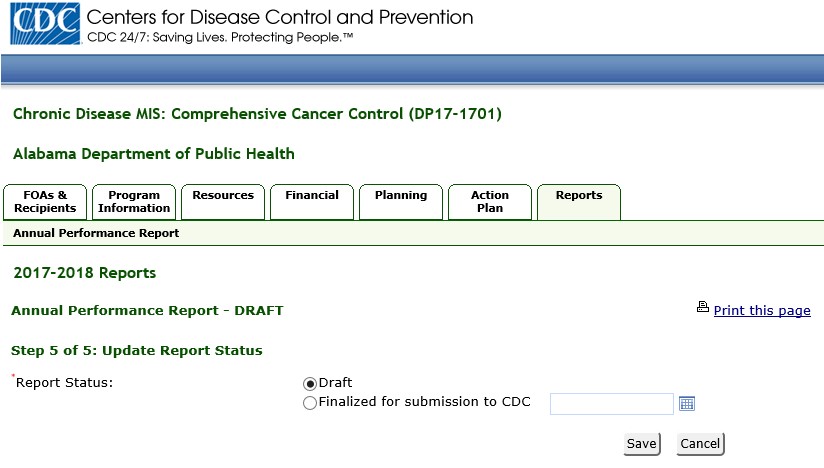
Once information is transferred, any changes to the information in the current year will not be

reflected in the upcoming year.

**To complete Step 5 of the Annual Performance Report process:**

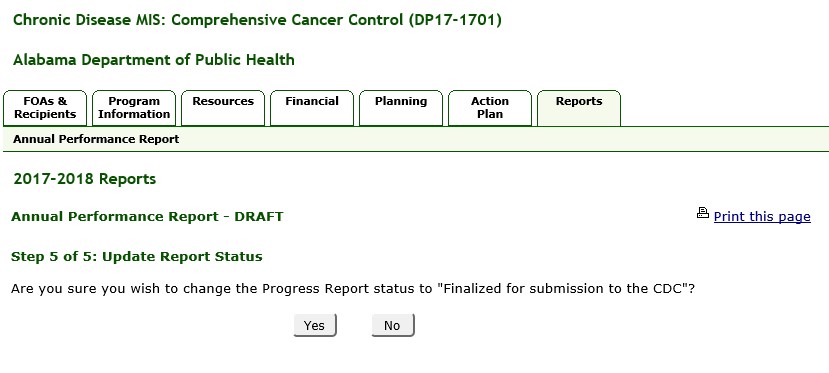
1. Click on the **Step 5: Update Report Status** link.

**Result:** The system displays the *Step 5 of 5: Update Report Status* page.



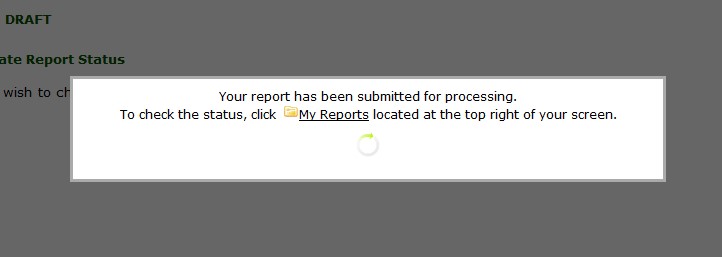
1. In the *Report Status* field, select the *Finalized for submission to CDC* option.
2. Enter the submission date into the text box in the format MM/DD/YYYY. You can also click the calendar icon to select a date.
3. Click the **Save** button.

**Result:** The system displays a confirmation page.



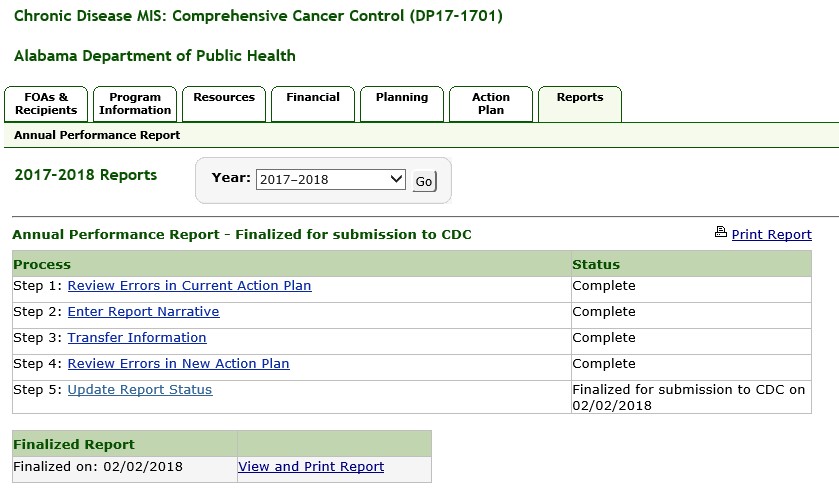
1. Click **Yes**.

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



The system finalizes the report and also does the following:

* + Saves the finalized Annual Performance Report.
  + Disables all Annual Performance Report Steps.
  + Makes the *Finalized Reports* section available and creates a PDF Report file. 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.



1. **Action Plan** –All information, including EBIs, *except PPO and AO progress*. Products will be transferred if the related Activity is transferred. [↑](#footnote-ref-1)
2. All existing **attachments** in any section.

   [↑](#footnote-ref-2)
3. Tabs are displayed in CDMIS according to the specific FOA associated with a user. [↑](#footnote-ref-3)
4. PPO **Progress** and AO **Progress** cannot be transferred to the upcoming year. Progress must be entered on an annual basis.

   [↑](#footnote-ref-4)